

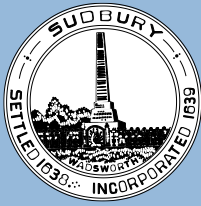
SUDBURY BOARD OF SELECTMEN  
TUESDAY MARCH 22, 2016  
7:30 PM, TOWN HALL - LOWER LEVEL

Item #	Time	Action	Item
	7:30 PM		CALL TO ORDER
			Opening remarks by Chairman
			Reports from Town Manager
			Selectmen Announcements
			Citizens' comments on items not on agenda
<b>TIMED ITEMS</b>			
1.	7:45 PM		Presentation by National Development on the Avalon Bay development's fiscal impact to Sudbury
<b>MISCELLANEOUS</b>			
2.			Discussion of the rationale behind the two Annual Town Election ballot questions. Police Chief Scott Nix and resident Ralph Tyler invited.
3.		<i>VOTE</i>	Consider and possibly take positions on articles before 2016 Annual Town Meeting. Withdraw articles from the warrant, if necessary.
4.		<i>VOTE</i>	Discussion and vote whether to approve 2016 Housing Production Plan. Attending will be Jody Kablack, Director of Planning and Community Development, and Housing Trust representatives.
5.			Discussion and possibly vote whether to authorize the Town Manager to execute the contract for Stormwater peer review services for the Meadow Walk Sudbury application (National Development/Raytheon redevelopment) from Horsley Witten Group dated March 9, 2016 in the amount of \$14,000 (estimated).
6.		<i>VOTE</i>	Vote to proceed with an Archaeological Sensitivity Assessment as generally described in the attached Scope of Services from Public Archaeology Laboratory dated Feb. 25, 2016, conditioned on the consent of the developer or property owner to conduct a site visit/walkover survey as described in Task 3 of the proposal, or else elimination of said Task 3, and to authorize the Town Manager to negotiate the final contract, pending the identification of a funding source.
7.		<i>VOTE</i>	Vote to call a Special Town Meeting within Annual Town Meeting for Tuesday, May 3, 2016, at 7:30 p.m in the Lincoln-Sudbury

*These agenda items are those reasonably anticipated by the Chair which may be discussed at the meeting. Not all items listed may in fact be discussed and other items not listed may also be brought up for discussion to the extent permitted by law.*

<b>Item #</b>	<b>Time</b>	<b>Action</b>	<b>Item</b>
			Regional High School Auditorium, and to open the Warrant commencing March 23, 2016, and to close the Warrant for Special Town Meeting at 5:00 p.m., Friday, April 1, 2016.
8.		<i>VOTE</i>	Discussion and possible vote on a proposed amendment to the FY16 budget for Lincoln-Sudbury Regional High School. Bella Wong to attend.
9.		<i>VOTE</i>	Move to declare the Loring Parsonage, 288 Old Sudbury Road, Sudbury, MA, available for disposition by means of a 30-yr. lease restricted to a qualified Massachusetts non-profit, 501(c)(3) entity for use and operation of the building as a Sudbury history center and museum, said lease being for the express purpose of providing a museum to display artifacts, materials and programs appropriate to the study of American history, and in particular the history of New England and Sudbury, including Native American history; further, the lessee is required to undertake the funding of the design, structural stabilization and renovation of the building, said renovation to include any change in footprint approved by the Town; and further that the Town may provide at its discretion, funding toward such work; and further, to approve the terms of the lease as set forth in the draft Request for Proposal.
10.			Citizens' Comments continuation (if needed)
11.			Discuss upcoming agenda items
<b>CONSENT CALENDAR</b>			
12.		<i>VOTE</i>	Vote to approve the regular session minutes of March 8, 2016.
13.		<i>VOTE / SIGN</i>	As the Licensing Authority for the Town of Sudbury, vote to renew a billiards table license for the American Legion Sudbury Post #191, Inc., Phillip M. McKenzie, Manager, 676 Boston Post Road, said license to expire on May 1, 2017.
14.		<i>VOTE</i>	Vote to enter into the Town record and congratulate Nicholas Weston St. George of Troop 60, to be recognized at a Court of Honor on Sunday, April 3, 2016, 5:00 p.m., at Congregation Beth El, 105 Hudson Road, for having achieved the high honor of Eagle Scout.

*These agenda items are those reasonably anticipated by the Chair which may be discussed at the meeting. Not all items listed may in fact be discussed and other items not listed may also be brought up for discussion to the extent permitted by law.*



SUDBURY BOARD OF SELECTMEN  
Tuesday, March 22, 2016

**TIMED ITEM**

**1: National Development presentation**

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Presentation by National Development on the Avalon Bay development's fiscal impact to Sudbury

Recommendations/Suggested Motion/Vote: Presentation by National Development on the Avalon Bay development's fiscal impact to Sudbury

Background Information:

Financial impact expected:see attached

Approximate agenda time requested: 15 minutes

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Melissa Murphy-Rodrigues	Pending
Barbara Saint Andre	Pending
Patricia A. Brown	Pending
Board of Selectmen	Pending

03/22/2016 7:30 PM

# meadow walk sudbury avalon sudbury

## FISCAL IMPACT ANALYSIS

Prepared for National Development and AvalonBay Communities




March 22, 2016

\\vhb\proj\Waf-48\13125.00\graphics\FIGURES\Proposed Plan\ndf p2 03/04/16




  
**AVALON MEADOW WALK**  
 SUDBURY SUDBURY  
 526 and 528 Boston Post Road Redevelopment


 Figure 4  
 Proposed Conditions Site Plan

3/4/2016

Attachment 1.a: RKG\_Meadow Walk Sudbury\_Avalon Sudbury FIA Short Version\_Rev3

# raytheon site redevelopment

- **Mixed uses**

## Commercial

- 80,000 sq. ft.

## Assisted living

- 48 units (54 beds)

## Age-restricted housing

- 60 units

## Mixed-income apartments

- 250 units

- **Benefits**

- Service costs vary among land uses in the project, resulting in significant local revenue enhancement.
- Meets variety of local needs, including grocery store, dining options, and variety of housing.
- In a typical 40B, town cannot base permit decision on cost of community services. Here, the mix of uses defrays housing costs, resulting in excess revenue for the Town.

# fiscal impact defined

- Will a proposed development pay for itself?
  - Property tax, excise taxes
  - Other recurring General Fund revenue
- How much will it cost to serve the project?
  - Municipal services (e.g., police/fire, library)
  - Schools
- Will total revenues exceed or fall short of total costs?

# fiscal impact: conclusions

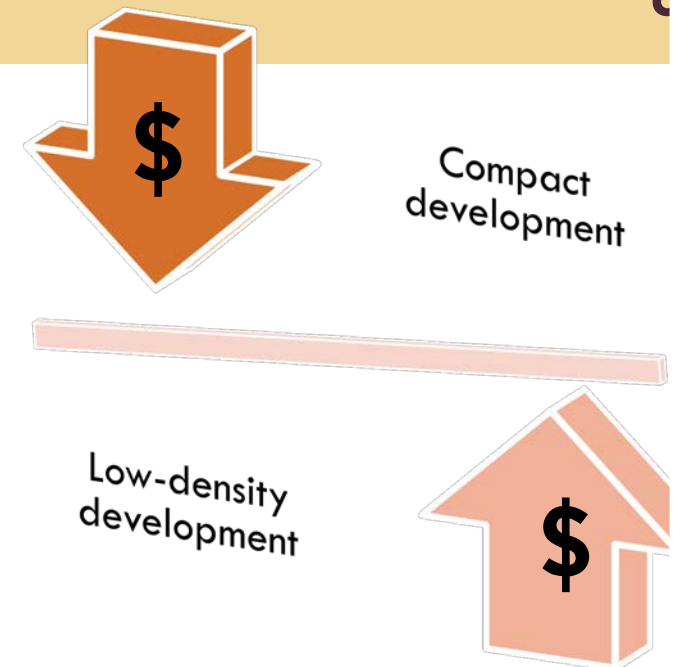
- Meadow Walk Sudbury/Avalon Sudbury at buildout:
  - Total recurring local revenues: \$1,712,900
  - Total cost of services: \$1,031,500
  - Net revenue: \$681,400
  - Cost-revenue ratio: 0.60\*
  - For every \$1 of revenue generated by Meadow Walk Sudbury, the Town will spend 60 cents on services for residents and businesses in the development.

In the Boston Metro area, revenue ratios for mixed-use development range between 0.55 and 0.85, depending on location and retail mix.



# issues

- Context
- Existing development pattern
- Size & composition of commercial tax base
- Quality/prestige of schools
- Site
- Community's existing spending policies & priorities



# incremental cost

- New cost of services
  - How will spending change?
  - Cost estimates must account for **efficiency factors**
  - Services with the most direct, day-to-day public contact are more sensitive to population growth than services operating “in the background”
  - Large development more likely to affect public safety or schools than administration/finance functions
  - Average cost of community services per capita is not the same as incremental cost of new population, household, or school enrollment growth

# efficiency factors

## Marginal Cost Adjustment Factors

Service Category	FY16 Budget	Apartments	Age-			Commercial
			Assisted Living	Restricted Condos		
General Government	\$2,719,850	0.100	0.100	0.100	0.200	
Public Safety	\$7,218,029	0.750	1.050	0.750	0.750	
Public Works	\$5,152,060	0.050	0.000	0.050	0.000	
Health & Human Services	\$659,188	0.300	0.500	0.200	0.300	
Culture & Recreation	\$1,233,397	0.300	0.100	0.500	0.500	
Benefits	\$4,566,368	0.015	0.025	0.020	0.100	
Other	\$62,402	0.000	0.000	0.000	0.000	
<b>Municipal Total*</b>	<b>\$22,136,265</b>					

\*Excluding inter-fund transfers

# nonresidential uses

- Proportional valuation model is used to estimate service costs for nonresidential land uses
- First step in any fiscal impact analysis
- Assumptions:
  - Municipal costs increase with the intensity of land use
  - Change in real property values: surrogate for change in land use intensity
  - A land use's share of total assessed value is an indicator of its share of municipal service costs

# residential uses

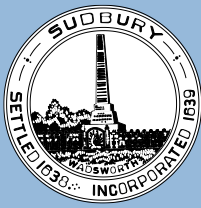
- Demographic assumptions

Project Component	Units	Population Multiplier	School Student Multiplier
Assisted Living	48	1.10	0.00
Age-Restricted Condominiums	60	1.27	0.00
Apartments			
1-BR	124	1.22	0.04
2-BR	101	2.41	0.32
3-BR	<u>25</u>	3.48	1.14
Total	250		

# summary by component

11

Project Component	Annual Total Revenue	Annual Cost of Services	Annual Net Revenue	Revenue Ratio
Commercial	\$311,400	\$62,300	\$249,100	0.200
Assisted Living	\$136,700	\$60,900	\$75,800	0.446
Age-Restricted Condominiums	\$441,500	\$56,700	\$384,800	0.128
Apartments	<u>\$823,300</u>	<u>\$851,600</u>	<u>-\$28,300</u>	1.034
<b>Total</b>	<b>\$1,712,900</b>	<b>\$1,031,500</b>	<b>\$681,400</b>	<b>0.602</b>



SUDBURY BOARD OF SELECTMEN  
Tuesday, March 22, 2016

**MISCELLANEOUS (UNTIMED)**

**2: Ballot question discussion**

REQUESTOR SECTION

Date of request:

Requestor: Selectman Woodard

Formal Title: Discussion of the rationale behind the two Annual Town Election ballot questions. Police Chief Scott Nix and resident Ralph Tyler invited.

Recommendations/Suggested Motion/Vote: Discussion of the rationale behind the two Annual Town Election ballot questions. Police Chief Scott Nix and resident Ralph Tyler invited.

Background Information:  
Text of ballot questions attached

Financial impact expected:n/a

Approximate agenda time requested: 10 minutes

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Melissa Murphy-Rodrigues	Pending
Barbara Saint Andre	Pending
Patricia A. Brown	Pending
Board of Selectmen	Pending

03/22/2016 7:30 PM

### Ballot Question No. 1

"Shall an act passed by the general court in the year 2016, entitled 'An Act extending a certain property tax exemption for seniors in the town of Sudbury', be accepted?"

Yes\_\_\_\_\_ No\_\_\_\_\_

**SUMMARY:** The 2015 Annual Town Meeting voted to petition the state legislature to extend the town's means tested property tax exemption for senior citizens. The means tested senior tax exemption was first enacted under Chapter 169 of the Acts of 2012 (the Act) for a three year period, and reduces property taxes for certain low and moderate income seniors. The Legislature enacted Chapter 10 of the Acts of 2016, which extends the means tested senior tax exemption for another three years, and allows town meeting to vote on further extensions.

While preserving the current state wide exemptions received by senior citizens, those seniors whose income qualifies them for the Circuit Breaker exemption and who make application under this program are eligible to receive an additional property tax exemption, capped at 50%, if they meet specific criteria and are approved by the Board of Assessors. The criteria include 10-year Sudbury residency, age 65 and above with any joint applicant to be age 60 and above, and the value of the home no greater than the average Sudbury home plus 10%.

Funds for this program are derived from a burden shift within the residential tax levy. The total of all exemptions granted under this Act are set by the Board of Selectmen in a range of ½% to 1% percent of the fiscal years total residential tax levy.

This ballot question would accept Chapter 10 of the Acts of 2016, which amends Chapter 169 of the Acts of 2012 (the Act) by extending the senior means test exemption for an additional three years, and by providing that the Sudbury town meeting shall vote in 2018, and every three years thereafter if the Act has not expired, whether to extend the Act for an additional three year period.

A "yes" vote on this question will accept Chapter 10 of the Acts of 2016, extending the means tested senior tax exemption for three years and allowing future extensions by town meeting vote; a "no" vote would reject Chapter 10 of the Acts of 2016 and terminate the means tested senior tax exemption.

**ARGUMENT FOR PASSAGE:** For the past three years Sudbury has provided relief to qualified low & moderate income older resident applicants limiting their property taxes to 10% of income. Each year, providing exemptions to all qualified applicants was accomplished by a tax burden shift of less than ½% (a \$50 increase for a \$10,000 property tax bill).

Extending the means tested senior exemption will continue to enable eligible low & moderate income seniors to stay in their homes despite the burden of rising property taxes and limited incomes. The 50% maximum property tax exemption means beneficiaries still fully pay their share of town services. Helping seniors stay in Sudbury helps reduce future tax increases for everyone because when senior families leave, younger families invariably move in, adding to our school costs.

This program has enjoyed wide support. At the 2012 Special Election, 70% of voters approved the pilot program. The Board of Selectmen sponsored the 2015 town meeting article to petition the legislature to permanently extend the senior exemption. It was unanimously supported by the Finance committee and passed with more than 90% of town meeting votes.

Your "Yes" vote is to extend the means tested senior exemption program indefinitely subject to town meeting reauthorization in 2018 and every three years thereafter.



ARGUMENT IN OPPOSITION: Chapter 10 of the Acts of 2016 would extend the means tested senior property tax exemption. This program reduces property taxes for certain low and moderate income seniors, however, when these property tax owners are granted an exemption, it means that the amount exempted is shifted to the remaining tax payers.

**Ballot Question No 2**

"Shall the Town's acceptance of Chapter 31 of the General Laws (Civil Service law) be revoked for all positions in the Police Department?"

Yes\_\_\_\_\_ No\_\_\_\_\_

SUMMARY: The members of the Police Department are currently subject to the state Civil Service law, General Laws Chapter 31, which governs matters such as original appointments, promotions, and termination from employment. In 1954, the town at the annual town election voted to place the police department under the Civil Service statute. The voters are now being asked whether to revoke that 1954 vote.

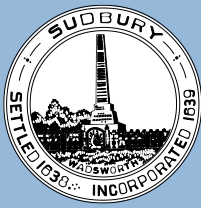
This ballot question would revoke the town’s acceptance of General Laws Chapter 31, the state Civil Service statute, for all positions in the Police Department.

A “yes” vote on this question will revoke the town’s acceptance of General Laws Chapter 31 for all positions in the Police Department; a “no” vote would retain the town’s acceptance of General Laws Chapter 31 for positions in the Police Department.

ARGUMENT FOR PASSAGE: Civil Service is an antiquated system that drastically restricts hiring parameters based on state wide needs; not the specific needs of Sudbury. Sudbury entered in to Civil Service in 1954 with the primary purpose being to deter unjust hiring practices, improper discipline methods and/or political interference. As time progressed many other mechanisms are now in place to prevent such occurrences. Transitioning to a non-civil service department will allow for a larger, more talented pool of candidates to find the best for Sudbury. The hiring parameters can be tailored to the needs of Sudbury. The majority of support services previously provided by Civil Service have become the Town’s responsibility given the substantial reduction in Civil Service employees. Many area departments were or have become non-civil service; these include Lincoln, Concord, Acton, Maynard, Stow, Weston, Wellesley, Carlisle among others. Other area departments pursuing the possibility of leaving are Wayland, Natick and Framingham. The Chief of Police and all police personnel unanimously support leaving Civil Service. This change will greatly enhance the ability of the police department to attract the proper candidates for employment with the department.

ARGUMENT IN OPPOSITION: The state Civil Service laws were enacted to promote fairness and impartiality in hiring, promotions, job termination, and other employment decisions. Revoking acceptance of Civil Service for positions in the police department means that the Civil Service requirements and procedures will no longer apply to the police department.

Attachment2.a: ATE Warrant\_ballot\_questions (1723 : Ballot question discussion)



SUDBURY BOARD OF SELECTMEN  
Tuesday, March 22, 2016

**MISCELLANEOUS (UNTIMED)**

**3: Deadline to withdraw any BOS articles or take positions**

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Consider and possibly take positions on articles before 2016 Annual Town Meeting. Withdraw articles from the warrant, if necessary.

Recommendations/Suggested Motion/Vote: Consider and possibly take positions on articles before 2016 Annual Town Meeting. Withdraw articles from the warrant, if necessary.

Background Information:

Financial impact expected:

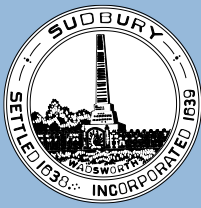
Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Melissa Murphy-Rodrigues	Pending
Barbara Saint Andre	Pending
Patricia A. Brown	Pending
Board of Selectmen	Pending

03/22/2016 7:30 PM



SUDBURY BOARD OF SELECTMEN  
Tuesday, March 22, 2016

**MISCELLANEOUS (UNTIMED)**  
**4: Housing Production Plan approval**

REQUESTOR SECTION

Date of request:

Requestor: Jody Kablack

Formal Title: Discussion and vote whether to approve 2016 Housing Production Plan. Attending will be Jody Kablack, Director of Planning and Community Development, and Housing Trust representatives.

Recommendations/Suggested Motion/Vote: Discussion and vote whether to approve 2016 Housing Production Plan. Attending will be Jody Kablack, Director of Planning and Community Development, and Housing Trust representatives.

Background Information:

See attached draft plan. The Board of Selectmen supported the effort to update the plan at their 2/2/2016 meeting. Discussion on 2016 DRAFT Housing Production Plan. Schedule vote to adopt Plan on April 5, 2016.

Financial impact expected:

Approximate agenda time requested: 10 minutes

Representative(s) expected to attend meeting: Jody Kablack, Sudbury Housing Trust reps.

Review:

Patty Golden	Pending
Melissa Murphy-Rodrigues	Pending
Barbara Saint Andre	Pending
Patricia A. Brown	Pending
Board of Selectmen	Pending

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**DRAFT**

**TOWN OF SUDBURY**

# **Housing Production Plan**

Attachment 4.a: DRAFT Sudbury HPP 2016 3.16.16 (1706 : Housing Production Plan approval)

2016

Prepared for: Town of Sudbury, MA

Prepared by:  
Regional Housing Services Office (Lara Plaskon, Elizabeth Rust) and  
Jennifer M. Goldson, AICP, JM Goldson community preservation + planning and  
Sudbury Department of Planning and Community Development

Sponsored by the Sudbury Housing Trust

Sudbury Housing Production Plan

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Attachment4.a: DRAFT Sudbury HPP 2016 3.16.16 (1706 : Housing Production Plan approval)

## Introduction

Housing Production Plans, defined in 760 CMR 56.03 and administered by the Department of Housing and Community Development (DHCD), offer proactive strategies for planning and developing affordable housing. As defined, the HPP identifies the housing needs of a community and the goals and strategies it will use to identify and achieve the 10% threshold of the MGL Chapter 40B state mandate. The Town's status relating to this 10% threshold is documented on the Subsidized Housing Inventory (SHI), also administered by DHCD.

This HPP Program enables municipalities to develop a strategy to meet its affordable housing needs in a manner consistent with the MGL Chapter 40B statute, produce housing units in accordance with that plan, and demonstrate progress towards their affordable housing production.

By taking a proactive approach in the adoption of an HPP, cities and towns are better able to achieve their affordable housing and community planning goals. HPPs also give communities that are under the 10% threshold of Chapter 40B more control over comprehensive permit applications for a specified period of time, provided that the community is making steady progress in producing affordable housing on an annual basis.

More specifically, when a municipality has a certified HPP plan, the Zoning Board of Appeals may deny decisions on comprehensive permit applications as "consistent with local needs" under MGL Chapter 40B as a 'safe harbor'.

An HPP becomes certified only when the following 2 steps are completed: (1) an approved Housing Production Plan is on file at DHCD, and (2) a municipality approves the creation of affordable units equal to ½ of 1% of the total number of housing units (in Sudbury 30 units) for one-year certification, or 1.0% (60 units) for a two-year certification. For this purpose, units are created when a comprehensive permit approving the requisite number of housing units is approved, or the units are constructed. It is interesting to note that, as of 11/25/15, Tyngsborough is the only HPP certified community in Massachusetts, though 120 communities have approved HPPs. Certification is only complete when units are created (approved or constructed).

Sudbury has a Housing Production Plan that was approved by Department of Housing and Community Development on 7/14/11 and will expire on 7/13/16, after 5 years per the regulations. A renewal of the plan is required to maintain the approved plan status. With an approved plan, Sudbury has the continued opportunity to avail itself of the provisions and protections of a HPP as described above.

The HPP renewal process includes writing the plan, holding a public workshop, and finally adoption of the plan by the Planning Board and Board of Selectmen. There are three required components to the Housing Production Plan:

1. Needs Analysis – compilation of demographic data and housing information. Including affordability gaps, needs for age-restricted housing, family household population trends,

- and other pertinent information.
2. Goals – defined mix of housing desired, consistent with local and regional needs, including rental and homeownership, for families, individuals, persons with special needs, and seniors. The goals set out the numerical goal for annual housing production to reach 10%, with minimum annual production of 0.50% (30 units for Sudbury);
  3. Implementation Strategies – Specific projects, sites, initiatives with dates and outcomes.

The Sudbury Housing Trust held a public workshop on February 29, 2016, and then proceeded to complete the plan and present it to the Boards in March 2016. The Board of Selectmen adopted the Plan at their [insert date] meeting and the Planning Board at their [insert date] meeting.

## Executive Summary

Sudbury is a suburban community of 24.6 square miles, located 20 miles west of Boston and 26 miles east of Worcester in Middlesex County. It is divided by Routes 20 and 117 running east to west, and Route 27 running north to south. The Town is bordered by Wayland and Lincoln to the east, Framingham to the south, Concord and Maynard to the north, and Marlborough, Stow and Hudson to the west. Incorporated in 1639 with a population of 476, Sudbury is one of the oldest towns in New England. Primarily agricultural until after World War II and the ascendancy of the automobile, Sudbury is now a suburb of Boston, and largely a bedroom community. The colonial flavor of the historic town center and winding roads bordered by stone walls built by the farmers of yesteryear impart an historic, semi-rural ambience the town cherishes.

Sudbury's population was stable and small until the 1940's. From 1940 to 1970, and again in the 1990's the town experienced rapid growth periods, and the population now is showing signs of stabilization, though Sudbury continues to have an increasingly large family size, with correspondingly high number of school-aged children per household compared to the state and surrounding towns. The most recent build-out analysis, completed for the Town by Mullin & Associates in 1997 and the Metropolitan Area Planning Council (2000), conclude that Sudbury, under its existing zoning, could be built out by 2020 at a population of approximately 20,000.

Sudbury continues to make progress in the affordable housing realm. In the last decade, the Town has accomplished many housing initiatives including adding 140 units to the Subsidized Housing Inventory – from 3.91% to 6.05%. Other major accomplishments include:

- Establishing and funding the Sudbury Housing Trust, which has created 14 units of housing;
- Implementing the Small Grants Program which has provided over \$154,000 in assistance to 43 eligible households, 75% of which are seniors;
- Implementing the Home Preservation Program, converting eight existing market dwellings to affordable homes with perpetual deed riders;
- Developing the widely supported Habitat For Humanity project, creating two units of affordable housing;
- Permitting and funding the redevelopment of five properties owned by the Sudbury Housing Authority from older large single family homes, to new smaller duplex structures;
- Funding two units for buy-downs of homes to be purchased by the Sudbury Housing Authority for subsequent rental of which one unit has been completed;
- Permitting and funding the development of three units of perpetual deed restricted housing at the Maynard Road Homes, on property owned by the Sudbury Housing Trust;
- Increasing the number of affordable units in private 40B developments by working collaboratively with the developers during the permit process;



- Establishing and hosting the Regional Housing Services Office to leverage housing resources with neighboring communities, now in its fifth year of operation and the model for other similar regional collaborations (two operational groups for 12 communities, and three others in discussion);
- Adopting revisions to the Accessory Apartment zoning bylaw, facilitating development of accessory dwelling units;
- Continuing to support the Community Preservation Act program, and its funding of community housing.

The Housing Production Plan provides the framework for the housing program in Sudbury, and offers a comprehensive analysis for the benefit of the Town residents. The plan plays an important role in educating the community and providing data that will formulate future plans and strategies. The summary conclusions of the Housing Needs Analysis in Section 1 of the Housing Production Plan include:

1. The demographics of Sudbury households — compared to MA and the US — show that households in Sudbury are highly educated, married, white, professional, have more school aged children, have fewer 1-person households and make higher incomes.
2. The population of Sudbury is 17,659, which increased 5% from 2000 to 2010, comparable growth to neighboring towns. The largest age group of Sudbury's population was still 35-54 year olds (34% of total population), though the over 55 age group increased by 36% with the median age increasing from 39 to 43. Half (50%) of the households have children under 18, and 24% have persons 65 years or older.
3. Sudbury's median household income rose 43% from 2000 to \$169,505, significantly more than Middlesex County or the state as a whole. Even so, an estimated 11% of Sudbury households have incomes at or below 80% of AMI, and 1.9% of the Sudbury population is below poverty (below \$15,930 for a household of 2).
4. From the occupant view point, as of the 2010 Census, most of Sudbury's housing (92%) is ownership units and Sudbury has the lowest percentage (8%) of rental housing of its neighboring communities, but the Town has increased the amount of rental housing by 16 units over the last 10 years. In 2014 the Town added 64 units of rental housing at the Coolidge at Sudbury.
5. The median price of single family homes in Sudbury in 2015 was \$675,000, a 28% increase from 2000. 23% of Sudbury households are cost-burdened (spending over 30% of their income on housing), and 9% of households are severely cost-burdened (spending over 50% of income on housing). 93% of Sudbury households with income in the 30% to 50% AMI range (very low income) are cost burdened.
6. Sudbury has grown its affordable homeownership program from zero units in 2004, to thirty-seven (37) units in 2016. This program has a strong local component, with 50% of the units sold to first-time homeowners with connections to Sudbury.

In summary, Sudbury is a formerly rural community whose population grew rapidly in the second half of the 20th century, but growth has stabilized in the past ten years and is beginning to decline. Sudbury is dominated by families with children under 18, but in keeping with the statewide trend, has a growing 65+ demographic that is expected to grow dramatically in the next 15 years. The vast majority of Sudbury's housing stock is comprised of fairly large and expensive single family homes with market rental housing nearly non-existent. There is a great need for more affordable housing, particularly rental housing and housing targeted at the 65+ demographic.

The Town has articulated eight goals and nine strategies to define the framework and implementation activities for the housing plan. The goals range from preserving existing homes throughout town to increasing diversity of housing options through creating both homeownership and rental developments, with specific strategies identified to accomplish the goals.

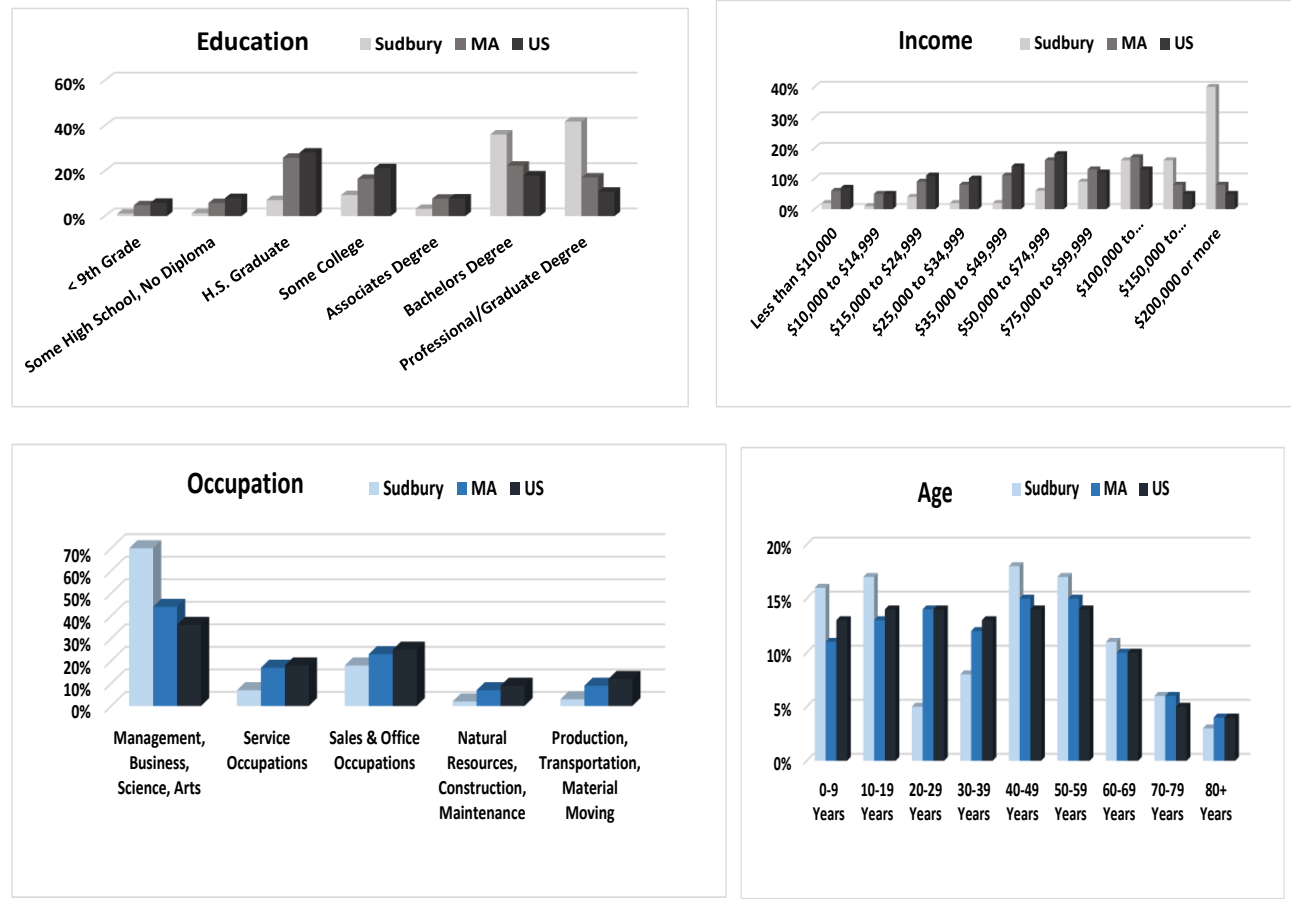
# Section 1: Comprehensive Housing Needs Assessment

## Section 1.1: Population and Household Analysis

### TRENDS

A snapshot of 2009-2013 American Community Survey (ACS) data generalizes that the residents of Sudbury are highly educated and earning well above the rest of the state and country. Additionally the residents are predominantly professionals with more school aged children than the rest of Massachusetts or the country.

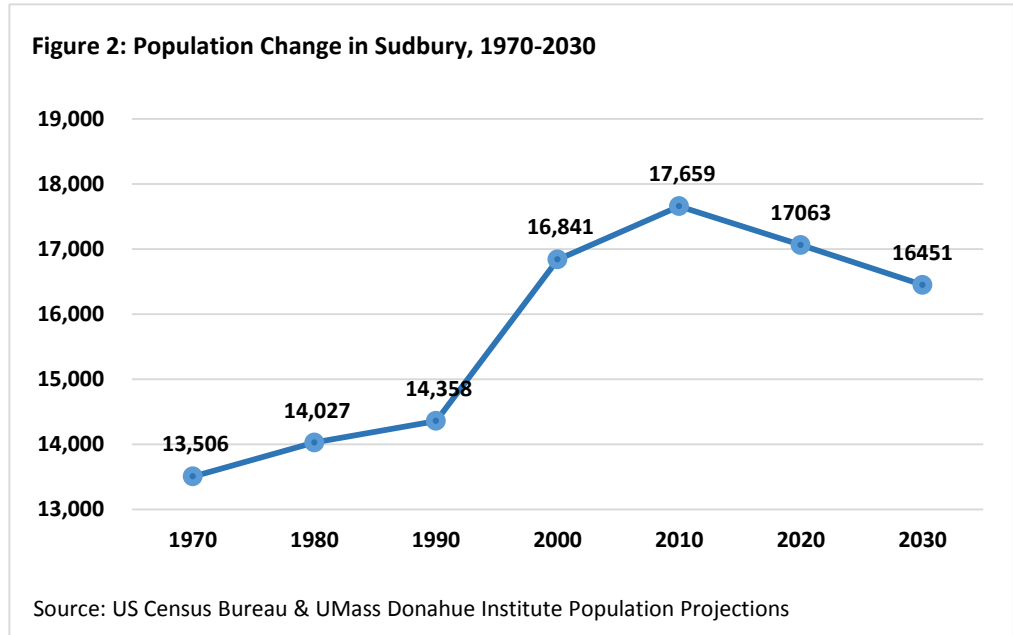
Figure 1: Sudbury Demographic Trends from 2010 US Census



Attachment4.a: DRAFT Sudbury HPP 2016 3.16.16 (1706 : Housing Production Plan approval)

**POPULATION AND HOUSEHOLD CHARACTERISTICS**

Sudbury’s population was stable and small until the 1940’s. Then, from 1940 to 1970, and again in the 1990’s, the town experienced rapid growth. However, 2010 Census data shows that Sudbury’s population growth has slowed over the last decade. In fact, population projections from the University of Massachusetts Donahue Institute show that Sudbury’s population will begin to decline by 2020 and will decline further by 2030.



The 5% growth in Sudbury’s population between 2000 and 2010 was only slightly higher than the overall 3% growth in the Massachusetts population, and was comparable to some of Sudbury’s neighboring communities.

**Table 1: Population Change, 2000-2010**

	Population 2000	Population 2010	% Change
Stow	5,902	6,590	12%
Marlborough	36,255	38,499	6%
Hudson	18,113	19,063	5%
Sudbury	16,841	17,659	5%
Concord	16,993	17,668	4%
Massachusetts	6,349,097	6,547,629	3%
Framingham	66,910	68,318	2%
Wayland	13,100	12,994	-1%

Source: 2000 & 2010 US Census

According to Census 2010, the population across the state, including Sudbury, is also growing older. Since 2000, the median age of a Massachusetts resident increased by over two and a half years, from 36.5 to 39.1, and the number of Massachusetts residents age 65 years or older increased by

Attachment4.a: DRAFT Sudbury HPP 2016 3.16.16 (1706 : Housing Production Plan approval)

5%.

The statewide aging trend was even more pronounced in Sudbury between 2000 and 2010 – the median age increased 3.7 years, from 38.8 to 42.5, and the 65+ population increased by 30%. Projections from the UMass Donahue Institute predict that this trend will become even more dramatic in the next two decades with the 65+ population in Sudbury more than doubling from 2010 numbers.

**Table 2: Population Change by Age in Sudbury**

Age Range	1990	2000	2010	2020	2030	Change 2010-2030	% Change 2010-2030
0-4	1,049	1,489	999	732	825	-174	-17%
5-19	3,142	4,223	4,962	3,675	2,835	-2,127	-43%
20-34	2,450	1,521	1,160	1,477	1,454	294	25%
35-54	5,237	6,327	6,087	4,578	4,409	-1,678	-28%
55-64	1,492	1,628	2,296	2,956	2,384	88	4%
65-74	579	977	1,194	1,875	2,279	1,085	91%
75+	409	676	961	1,590	2,265	1,304	136%

Source: US Census Bureau and UMass Donahue Population Projections

The 2010 Census reports that Sudbury has a total of 5,771 households. Compared to surrounding towns and Massachusetts as a whole, Sudbury continues to have a high percentage of family households with children under 18, and a high average family size. In fact, the average family size has slightly increased in the last ten years, and is higher than all surrounding communities and higher than Massachusetts overall.

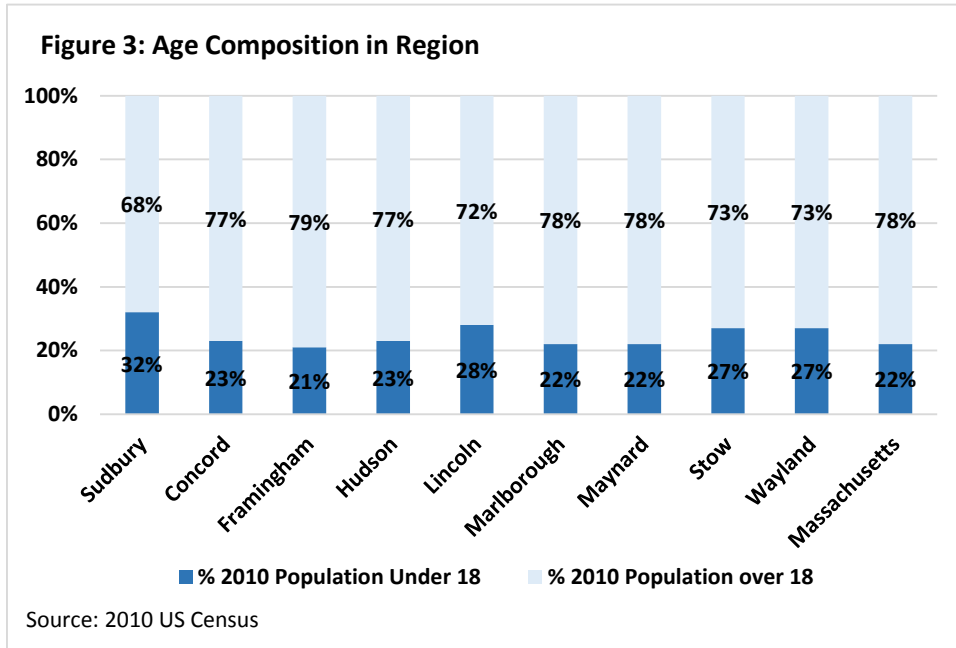
**Table 3: Household Composition**

	Family Households		% Senior Households (65+)	Average Household Size	Average Family Size
	Percent	% Families with own children <18			
Concord	69.2	46.1	36.7	2.46	3.02
Framingham	63.2	45.9	24.1	2.47	3.03
Hudson	68.2	44.1	26.8	2.53	3.07
Marlborough	62.8	46.2	22.0	2.46	3.06
Maynard	62.5	46.2	23.6	2.38	3.03
Massachusetts	63.0	28.3	25.6	2.48	3.08
Stow	78.3	47.5	24.9	2.71	3.10
Sudbury	85.7	57.9	23.6	3.02	3.30
Sudbury 2000	86.3	59.2	18.6	3.02	3.28
Wayland	76.5	50.5	31.4	2.69	3.13

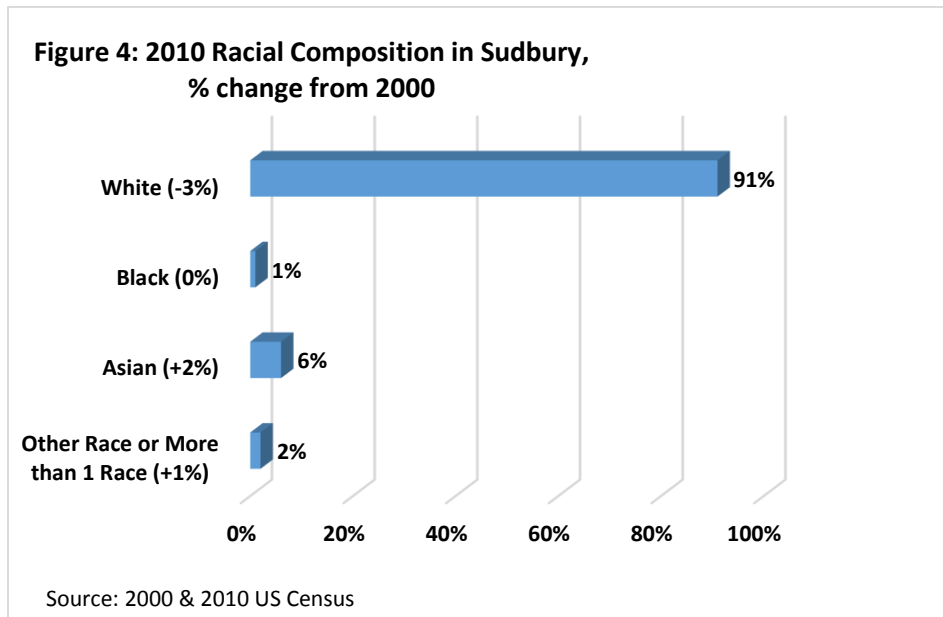
Source: 2010 US Census

This trend is also evident from a population standpoint. Sudbury continues to have the highest percentage of children under the age of 18 compared to the surrounding towns, and a much higher percentage than Massachusetts. This trend is consistent between the 2000 and 2010 Census.

In the last decade, however, Sudbury’s population of under 18 year olds grew only 3% while the over 18 population grew 6%. Of the 5,648 persons under 18 years old, Sudbury has 4,642 students in the K-12 school system, which is 82% of the under 18 year old population.



The minority and racial composition of Sudbury residents has not changed much since the 2000 Census. Figure 4 shows the racial composition of Sudbury according to the 2010 Census, and the data labels show the percent change from the 2000 Census. Minority residents have increased by 3% over the last decade, with Asians making up the largest increase. There is a corresponding decrease in the white population. The number of black residents – 149 or 1% of the population – is unchanged between 2000 and 2010. Similar to the racial composition of Sudbury, the ethnic composition has also changed very little. The percentage of Hispanic residents in Sudbury increased from 1% in 2000 to 2% in 2010.

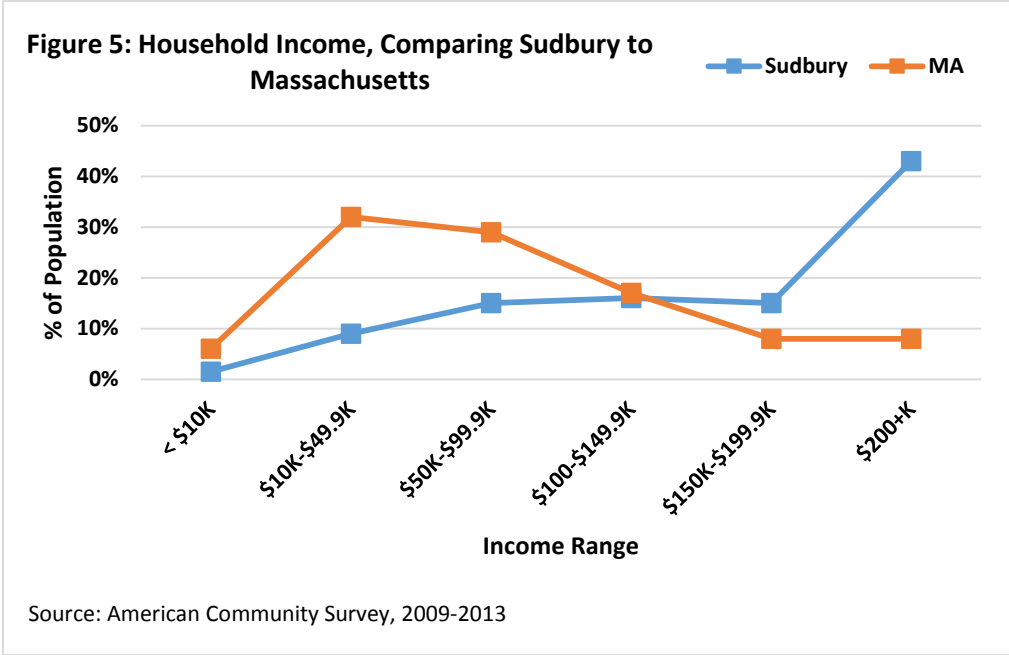


### **INCOME ANALYSIS**

The median income in Sudbury continues to rise – according to the 2010-2014 American Community Survey, Sudbury’s median income is up to \$169,505, an increase of 43% since 2000.

Comparatively, the median income in our Metropolitan Statistical Area (Boston-Quincy-Cambridge) is \$98,500, up 50% over the same period. (This MSA area includes Metrowest and most of the communities within the I-495 belt. This is also the area that defines the income limits used in subsidized housing programs). While Sudbury’s median income has not had quite as high of a percentage increase as our MSA, it is still significantly higher than the median income in the MSA.

In terms of income range composition, Figure 5 compares the percentage of households in Sudbury at different income ranges to the percentage of households in Massachusetts at those same income ranges. Sudbury’s curve does not align with the curve of the state – in fact, it is quite opposite. On the lower end of the spectrum, 26% of Sudbury residents have household incomes of less than \$100K, and less than half of those under \$50K. However, 67% of Massachusetts residents have incomes under \$100K, with more than half of those under 50K. Unfortunately, these income ranges do not correlate precisely to the income limits of affordable housing programs.



For illustration and simplicity, assume that \$50,000 is the income limit for affordable housing, and there are no other requirements. It would still be incorrect to conclude that those 11% of Sudbury’s population who earn less than \$50,000 are in affordable housing situations. There is more to the definition of affordable housing than the income of the resident. The resident must be able to actually afford to live there, defined as not paying more than 30% of gross income on housing expenses.

Some low-income residents are seniors who are on fixed incomes. Other low-income households live in housing that they cannot afford. For example, a resident must make \$25,000 to ‘afford’ a home in Sudbury assessed at \$400,000, with no mortgage – only taxes and insurance. Seniors, or others who have less income than this and are living in their mortgage-free home, are struggling with housing burden – the term using to describe those paying more than 30% of gross income on housing expenses.

**Section 1.2: Housing Supply in Sudbury**

Sudbury has preserved its rural character through its local zoning bylaws that predominantly permit single family homes on one-acre parcels, and limit zoning for attached housing to age-restricted occupants.

The population trends are mirrored in the housing production. The 2010 Census reports a 5% increase in population and a 6% increase in housing units. Correspondingly, the 17% growth in population in the 1990’s is mirrored with a 15% increase in housing units. And from an overall perspective, Sudbury experienced significant building activity in the last 30 years, increasing the overall housing units by 41% since the 1980 Census, with a 26% increase in population.



Sudbury implemented many land use standards and guidelines for the Planning and Zoning Boards to manage this growth. The Site Plan Review Bylaw (2001) and the Comprehensive Zoning Bylaw (2001) provided definitive standards for the Planning Board. The Senior Residential Community and Incentive Senior Development bylaws adopted in the late 190’s permitted the construction of attached age-restricted housing.

The production of affordable housing has not kept pace with the production of market rate housing. There were 22 units of affordable housing added to the Subsidized Housing Inventory (SHI) from 1990 - 2000, versus 715 housing units created overall.

**Table 4: Population and Housing Unit Changes**

	1981-1990	1991-2000	2001-2010
Sudbury Population % Change	2%	17%	5%
Sudbury Housing Unit % Change	16%	15%	7%
Sudbury SHI %	4%	4%	5%

Source: 2010 US Census, DHCD SHI

Compared to neighboring communities, from a housing density perspective, Sudbury is denser than Stow and Lincoln, and less dense than all of the others. Again, this is not surprising given the predominance (96%) of single family homes in Sudbury on 1-acre lots.

**Table 5: Density of Neighboring Towns**

Town	2010 Population	2010 Year Round Housing Units	Area in Square Miles			Density per Land area square mile mile of land area		SHI (using 2010 Census)
			Total Area	Water Area	Land Area	Population	Housing Units	
Stow	6,590	2,500	18.1	0.5	17.6	374.4	142.0	7.2%
Lincoln	6,362	2,153	14.5	0.6	13.8	461.0	156.0	11.2%
Sudbury	17,659	5,921	24.6	0.3	24.3	726.7	243.7	6.0%
Concord	17,668	6,852	26.0	1.0	25.0	706.7	274.1	10.4%
Wayland	12,994	4,957	16.1	0.7	15.5	838.3	319.8	4.0%
Hudson	19,063	7,962	11.8	0.3	11.5	1657.7	692.3	11.5%
Marlborough	38,499	16,347	22.2	1.1	21.1	1824.6	774.7	10.2%
Maynard	10,106	4,430	5.4	0.1	5.2	1943.5	851.9	8.3%
Framingham	68,318	27,443	26.5	1.3	25.1	2721.8	1093.3	10.5%

Source: 2010 US Census, DHCD SHI

From the occupant viewpoint, as shown in Table 6, Sudbury continues to have the lowest percentage of rental housing compared to surrounding towns. Sudbury has not increased rental housing since 2000.

**Table 6: Housing Occupancy, Ownership vs. Rental**

Town	2010 Occupied Housing Units					2000 Occupied Housing Units				
	Total Housing Units	Total Occupied	% Total Occupied	% Owner Occupied	% Renter Occupied	Total Housing Units	Total Occupied	% Total Occupied	% Owner Occupied	% Renter Occupied
Stow	2,526	2,429	96%	89%	11%	2,128	2,082	98%	87%	13%
Lincoln	2,617	2,404	92%	71%	29%	2,911	2,790	96%	61%	39%
Sudbury	5,951	5,771	97%	92%	8%	5,590	5,504	97%	92%	8%
Concord	6,947	6,484	93%	77%	23%	6,153	5,948	97%	81%	19%
Wayland	5,021	4,808	96%	89%	11%	4,735	4,625	98%	92%	8%
Hudson	7,998	7,528	94%	72%	28%	7,168	6,990	98%	71%	29%
Marlborough	16,416	15,395	94%	58%	42%	14,903	14,501	97%	61%	39%
Maynard	4,447	4,239	95%	71%	29%	4,406	4,292	97%	70%	30%
Framingham	27,529	26,173	95%	55%	45%	26,734	26,153	98%	55%	45%

Source: 2010 US Census

According to the 2010-2014 American Community Survey (ACS), 90% of Sudbury's housing units are single family, detached homes. Despite the predominance of this type of home, the remaining 10% of Sudbury's housing units are attached, including 6% single family attached and 4% multi-family attached homes. These attached units were mostly permitted from 2000 to 2014 through local bylaws and Chapter 40B.

Sudbury has 454 units of Market Discount housing, meaning that the prices and rents are permanently discounted as documented in their legal frameworks. While many units are both discounted from market rates, and counted on the State's Subsidized Housing Inventory (SHI), there are some slight differences in Sudbury. Sudbury has 96 discounted Incentive Senior Development (ISD) units which do not count on the SHI as they do not meet the affordability guidelines. These cross all the categories of homeownership and rental, senior and family, as shown in the profile table below, and described in the sections below.

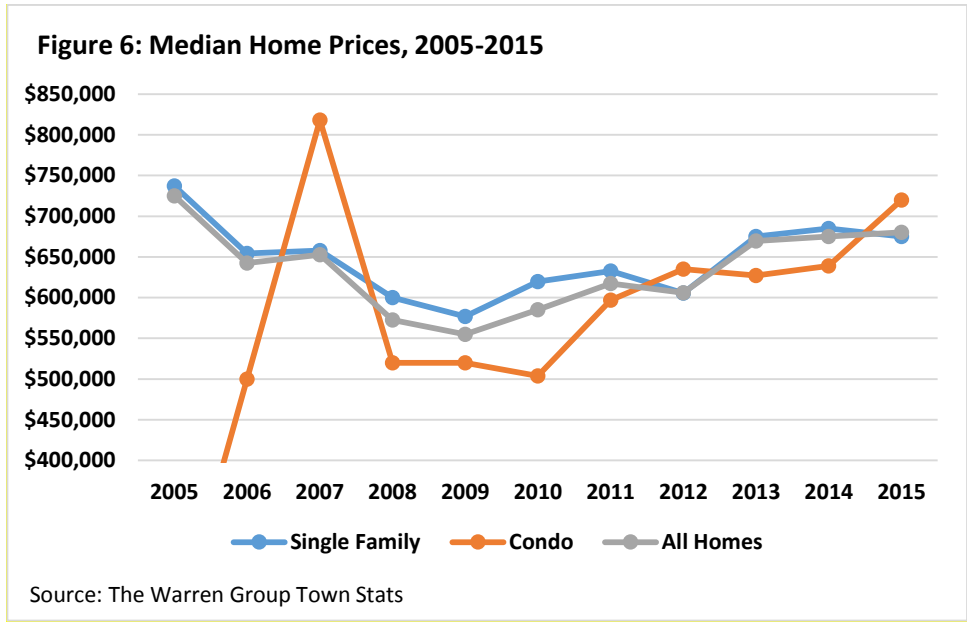
**Table 7: Market Discount Housing**

	# Units	SHI?	Housing Development
<b>Ownership:</b>			
Family Ownership	37	Y	Carriage Lane (4), Snowberry (2), Villages at Old County Road (10), Home Preservation (8), Habitat (2), Landham Crossing (8), Maynard Road (3)
Senior Ownership	96	N	Frost Farm (44), Grouse Hill (52)
<b>Rental:</b>			
Family Rental	98	Y	Longfellow Glen (70), SHA (28)
Senior Rental	223	Y	Longfellow Glen (50), SHA (64), Orchard Hill (45), Coolidge (64)
<b>Total</b>	<b>454</b>	<b>358</b>	

**MARKET RATE HOMEOWNERSHIP**

According to statistics from the Warren Group, the value of market rate homes in Sudbury hit a peak a decade ago, in 2005, at the height of the nationwide real estate boom. Following the peak was a slight downturn in the market that lasted for a few years, but home prices have been creeping back up over the last several years and they are nearly back to their 2005 height. Even when the housing market wasn't doing well, home prices in Sudbury still remained relatively strong, and Sudbury is now among the most expensive towns in Massachusetts.

The chart below shows median home prices in Sudbury over the past decade, beginning with the peak in median single family and overall median home prices in 2005. The median condo price was unusually low that year at \$182,000, but that was an anomaly likely resulting from a low number of condo sales during 2005 that were mostly affordable. Following another outlying year for condos in 2007 when the median price was unusually high, condo prices have followed a similar trend to single family homes. In 2015 the median price for single family homes was \$675,000. The median price for condos was \$719,900 and the median prices for all homes was \$680,000. This is a slight decrease for the price of single family homes from 2014, but a significant increase for the prices of condos from 2014.



**FAMILY AFFORDABLE HOMEOWNERSHIP**

Family affordable homeownership units are marketed and sold via lottery, as required under the Affirmative Fair Marketing guidelines issued by DHCD in May 2013. These guidelines establish standards for making affordable units available, and these standards must be followed in order for the unit to be counted on the Subsidized Housing Inventory, irrespective of the zoning mechanism that was used to permit the project (local regulations, 40B, 40R), or the subsidizing agency to which the unit and project belong (MassHousing, DHCD).

Lotteries are required for new construction and for units where there is sufficient demand. Resale units

Attachment4.a: DRAFT Sudbury HPP 2016 3.16.16 (1706 : Housing Production Plan approval)

do not require a lottery as there is a finite right of first refusal period which does not allow for the full marketing timeline required by a lottery.

There have been nine lotteries held in Sudbury in the last decade. The first, for the 4 Carriage Lane units, was held in 2004. This was followed by a lottery for the Snowberry Lane units in 2006 administered by the Sudbury Housing Trust. The Trust has held lotteries almost annually since then including units from its Home Preservation Program, as well as units offered through any private 40Bs. All lotteries have been well subscribed with ample eligible applicants demonstrating a strong demand for affordable homeownership units in Sudbury.

Through the lottery program, Sudbury assists all buyers of affordable units in town. There are 34 Sudbury owners of SHI-eligible restricted units of housing, and the following summarizes the resident profiles:

- Local Connection: Local connections are as defined by the DHCD allowable categories of current resident, municipal or public employee, family of local student, and employee of a business located in Sudbury: 44% of the owners have a local connection.
- Minority: minority categories include only Native American or Alaskan Native, Black or African American, Asian, Native Hawaiian or Pacific Islander; or other (non-White); and the ethnic classification Hispanic or Latino. 50% of the owners identify as minority.
- Household Composition: 50% are single parents, and there were 29 students amongst the 34 families at the time of purchase, or .8 children per household. Some families had younger children that are now school-aged, and others had older teens that are now graduated.

### **AGE-RESTRICTED HOMEOWNERSHIP**

Overall, Sudbury has seen the development of 231 units of age-restricted condominium homeownership in the last decade, which may indicate the ability and desire of Sudbury seniors to remain in town.

Market rate units have been permitted or created in Springhouse Pond (29), Maple Meadows (23), Mahoney Farm (33) Northwoods (24 created/43 permitted) and Dudley Brook Preserve (26). Market discount units have been created at Frost Farm Village (44) and Grouse Hill (52) under the local Incentive Senior Development bylaw. While these units are not on the State Subsidized Housing Inventory, they provide discounted opportunities for seniors.

The Frost Farm Village offers ownership condominium units for owners aged 55 and older. There are additional eligibility requirements that the owners must meet, including income and asset limits, and there is a maximum sales price set. There have been eleven resales of units in this development since 2009, with sales prices ranging from \$260,000 to \$341,250. These prices are below the maximum sales price, providing affordable options for the senior population looking to purchase 2-bedroom condominiums.

### **MARKET RATE RENTAL**

Sudbury has few market rate rental options, as shown in Table 6 above. According to a 12/9/15 search on Trulia.com, there were only 4 properties for rent in Sudbury. The available rentals include one small one-bedroom condo for \$1,000 per month, one three-bedroom house for \$3,500 per month, and two large five-bedroom houses – one for \$4,500 per month and the other for \$5,000 per month. The median rent based on this small sampling of rentals is \$4,000 per month.

Realtor opinion is that the rental market in Sudbury tends to be driven by the inability to sell single family homes, either the homeowner is moving and can't sell, or perhaps a developer is not selling a completed unit. There are few "investment" rental properties, specifically units built or purchased with the intent to rent.

### **FAMILY AFFORDABLE RENTAL**

There are 98 units of family (not age-restricted), affordable rental housing in Sudbury, 70 at Longfellow Glen, 28 operated by the Sudbury Housing Authority in scattered sites around town.

These units are in high demand. The waiting list at Longfellow Glen for the family units (2 and 3 bedrooms) is around 5 years, with 65 applicants on the 1-bedroom list, 124 applicants on the 2-bedroom list, and 67 applicants on the 3-bedroom list. The Sudbury Housing Authority units also have a long wait time of up to 12 years.

### **AGE-RESTRICTED AFFORDABLE RENTAL**

There are 188 units of age-restricted, affordable rental housing in Sudbury, 50 at Longfellow Glen, 64 at Musketahquid Village operated by the Sudbury Housing Authority, 10 at Orchard Hill, and 64 units at the Coolidge at Sudbury.

There is less wait time for age-restricted affordable rental units. There are 65 applicants on the 1BR list at Longfellow Glen where there is no priority for Sudbury residents. At the SHA- operated Musketahquid Village, there is a short wait for local seniors and it can take several years for a non-local senior to be offered a unit. There is less demand for the walk-up units on the second floor, and correspondingly more demand for units on the lower level. At Orchard Hill, the affordable waiting list includes one external person and a few current tenants who wish to transfer from a market unit to an affordable unit. At the Coolidge at Sudbury, there are 63 households waiting for a 30% unit and 15 households waiting for a 60% unit. The Coolidge at Sudbury has 4 physically accessible units and 5 sensory accessible units, all rented residents needing the features of the unit. The wait time at all these developments is unpredictable.

### **SPECIAL NEEDS HOUSING**

The U.S. Census Bureau defines a disability as a long-lasting physical, mental, or emotional condition. Residents with one or more disabilities can face housing challenges if there is a shortage of housing in a community that is affordable, physically accessible, and/or provides the supportive services that people with disabilities may need. According to the 2014 American Community Survey (ACS) 5-year estimates, 5% of Sudbury's civilian, non-institutionalized population report having one or more

disabilities. This includes 3% of children under 18 years of age, and 3% of the population 18 to 64 years of age. Notably, 20% of Sudbury’s 65 and older population reported having one or more disabilities. Sudbury’s rate of disability among all age groups is lower than the rate of disability for the same age groups in Middlesex County and in Massachusetts as a whole.

**Table 8: Population by Disability Status**

	Sudbury		Middlesex County		Massachusetts	
	Estimate	Percent	Estimate	Percent	Estimate	Percent
Total Civilian Noninstitutionalized Population	17,966		1,524,244		6,578,631	
With a Disability	938	5%	135,164	9%	744,676	11%
Under 18 years	5,536		321,036		1,399,175	
With a Disability	166	3%	10,567	3%	61,927	4%
18 to 64 years	10,118		1,002,111		4,259,781	
With a Disability	320	3%	62,499	6%	375,363	9%
65 years and over	2,312		201,097		919,675	
With a Disability	452	20%	62,098	31%	307,386	33%

Source: US Census Bureau, 2010-2014 American Community Survey

Across the inventory in Sudbury, there are 19 accessible units (all rentals) for individuals with mobility impairments – 11 units in Longfellow Glen, 4 in Musketahquid and 4 at the Coolidge at Sudbury. Two of the four units in Musketahquid and all four of the units at the Coolidge at Sudbury are rented to persons in wheelchairs.

## Section 1.3: Housing Gaps: Costs and Affordability

The following analysis reviews the demand for housing in Sudbury and the housing needs of local residents, while also assessing which housing options are actually affordable.

### **HOUSEHOLD INCOME**

Housing affordability is determined by comparing median incomes and the availability of housing options within various income ranges. Federal and state affordable housing programs group households by income using the area median family income (AMI) as the benchmark. As of 2015, extremely low income households at 30% AMI earn no more than \$29,550, very low income households at 50% AMI earn no more than \$49,250, and low income households at 80% AMI earn no more than \$69,700 per year for a family of four. The AMI referenced in this analysis is for the Boston-Cambridge-Quincy Metropolitan Statistical Area which includes Sudbury. Housing.ma reports that 4.4%, 4.1%, and 2.8% of Sudbury households (about 652 households) are extremely low, very low, and low income, respectively.

All subsidized housing programs include maximum income limits as part of their eligibility criteria.

While rental programs may offer deeper subsidies, making affordable units available to households in the 50% of AMI range or less, the homeownership programs mostly use the 80% AMI income limits. Households purchasing homes must qualify for a mortgage, requiring income stability, sufficient assets, and strong credit scores. However, there are homeownership programs and projects that use lower income limits. For example, Habitat for Humanity underwrites mortgages for participating homeowners with incomes under 50% - 60% of the AMI.

The 30%, 50%, 80% and 100% income limits are published by HUD for all areas in the country. Under federal statute, the 80% limit cannot increase above the national average except for the top 10 MSA areas. Boston is not in the top 10 MSA areas, and as such, the 80% limit is capped at the national average. This has the effect of reducing the mathematical AMI percentage. The below table (using the data for a household of 4) shows the effect over the last six years, where the 80% limit used in housing programs, is actually a different arithmetic percentage of the Area Median Income. As the chart below displays, the 2015 income limits show that the 50% and 100% figures have increased, while the 80% limit decreased as a percentage of median over the previous year.

**Table 9: Area Median Incomes in Recent Years**

	50% AMI	80% AMI	100% AMI	80% AMI is really
<b>2015</b>	\$49,250	\$69,700	\$98,500	71%
<b>2014</b>	\$47,050	\$67,750	\$94,100	72%
<b>2013</b>	\$47,200	\$67,350	\$94,400	71%
<b>2012</b>	\$48,900	\$65,000	\$97,800	66%
<b>2011</b>	\$48,150	\$64,200	\$96,500	67%
<b>2010</b>	\$45,900	\$64,400	\$91,800	70%

Source: HUD Income Limits

While this may be overly technical, and the HUD calculation is difficult to fully analyze, this does have affordability implications for the homeownership program. It becomes increasingly difficult for households to earn less than the decreased income limits, and still qualify for a mortgage, because these households must have saved a sufficient payment and possess strong credit in order to be approved. This has the effect of reducing the eligible applicant pool for the affordable housing programs, which has become apparent at the state level. However, Sudbury continues to receive strong interest in potential buyers for affordable homeownership due to the strong property values, and the significant affordability gap between affordable housing prices and market housing prices.

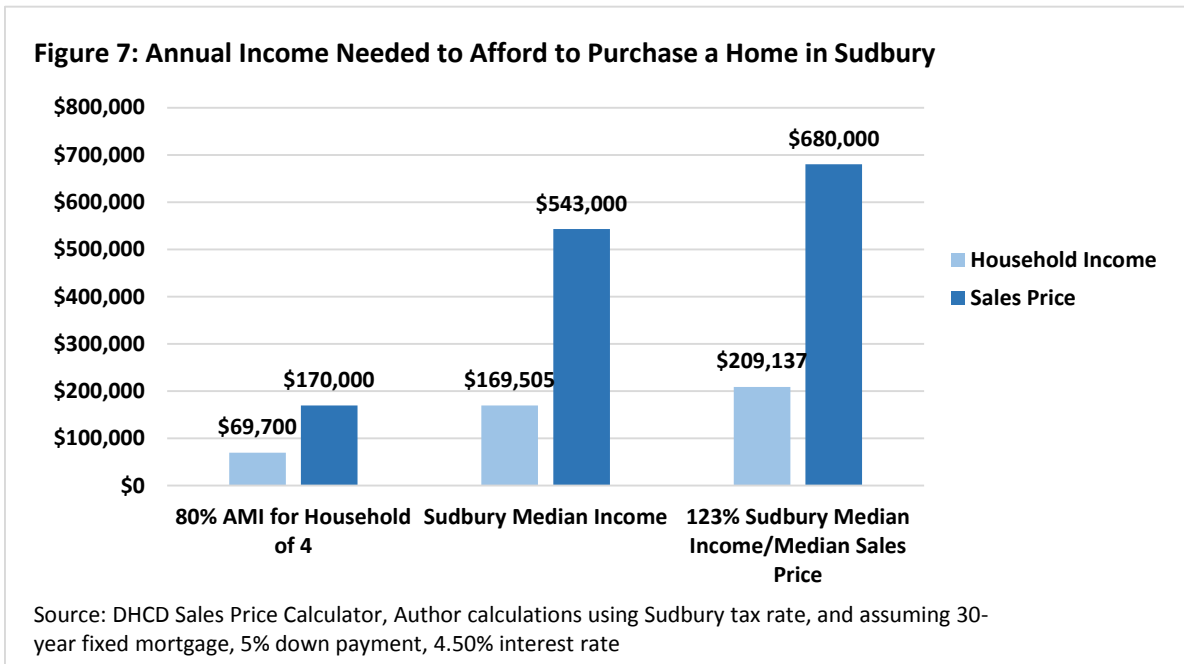
The table below identifies this affordability gap for both ownership and rental opportunities in Sudbury using the \$680,000 median home value per 2015 Warren Group statistics, and the \$4,000 median market rent per a December Trulia search. Given the high median rents/home prices, and the low AMI, it is not surprising that there is a large affordability gap for households in the income limits for our Metropolitan Statistical Area.

**Table 10: Affordability Gap**

	Household Income	Ownership: Affordable Price	Ownership: Affordability Gap	Rental: Affordable Rent	Rental: Affordability Gap
<b>50% AMI</b>	\$49,250	\$110,000	\$570,000	\$1,231	\$2,769
<b>80% AMI</b>	\$69,700	\$170,000	\$510,000	\$1,569	\$2,431
<b>100% AMI</b>	\$98,500	\$265,000	\$415,000	\$2,463	\$1,537
<b>120% AMI</b>	\$118,200	\$320,000	\$360,000	\$2,955	\$1,045

Source: Calculated using DHCD Affordability Calculator

The affordability gap shows us that there is a large disparity between what people at most income levels can afford and the median price for homes in Sudbury. Therefore, it is important to understand how much a household must earn to afford to purchase a median priced home. The table below shows us that households earning Sudbury’s quite high median income of \$169,505 could not afford to purchase a median-priced home in Sudbury. A household must earn 127% of the median income or \$214,935 to purchase a median priced home at \$680,000. Income data from the 2010-2014 American Community Survey tells us that 41% of Sudbury households earn more than \$200,000 per year. Therefore, about 60% of Sudbury households could not purchase a median priced home today. Many households, then, are either in housing they purchased/rented when prices were lower, they are in housing below the median prices, or they are housing cost burdened.



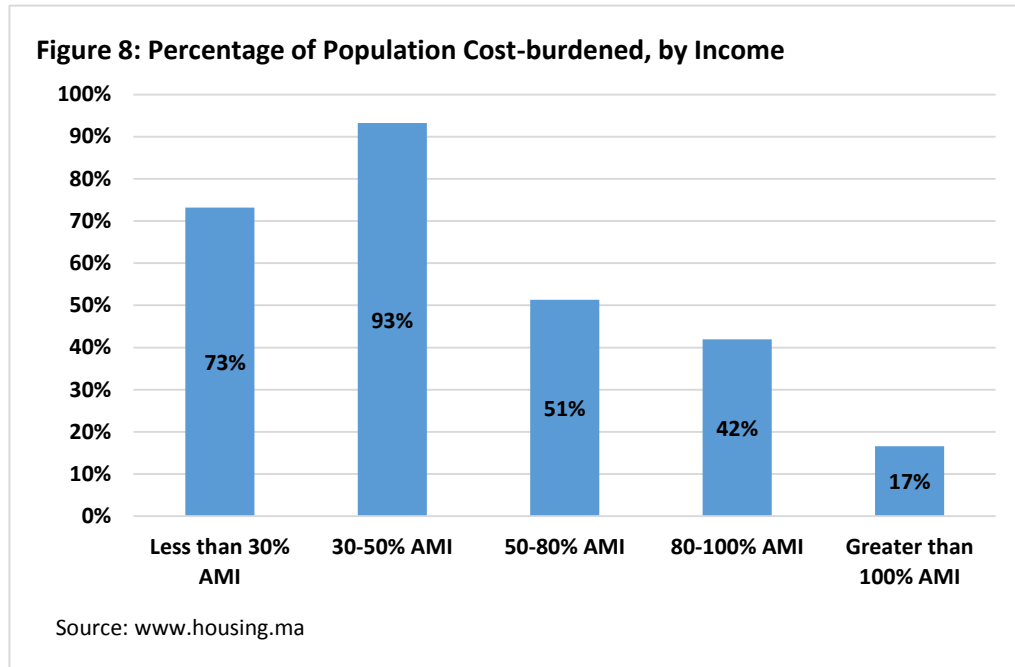
**HOUSING COST BURDEN**

One method to determine whether housing is affordable to a community’s population is to evaluate households’ ability to pay their housing costs based on their reported gross household income. Households that spend more than 30% of their gross income on housing are considered to be



'housing cost burdened,' and those that spend more than 50% are considered to be severely cost burdened.

Housing.ma reports that 23% of Sudbury households are cost-burdened, and 9% of households are severely cost-burdened. However, cost burden does not impact all Sudbury households equally. Cost burden occurs at a much higher rate among lower income households than higher income households.



In total, somewhere between 1,300 and 1,400 households in Sudbury are housing cost-burdened, including 75% of low-income households – those earning below 80% of the AMI. This is a clear indicator of a need for more affordable housing, particularly rental housing, since households at the lowest ends of the income spectrum may not be able to afford a down payment or qualify for a mortgage.

## Section 1.4: Chapter 40B Statutory Minima – Housing Inventory & Land Area

Most affordable housing in Sudbury is created by private developers using MGL Chapter 40B which allows greater density and larger development than the Zoning Bylaw permits. Many residents feel that 40B developments are disruptive to neighborhoods and some projects are met with significant opposition when proposed.

An approved Housing Production Plan can assist a municipality to resist 40B development if certain criteria are met. As regulated in 760 CMR 56.03, a decision by a Board to deny a Comprehensive Permit shall be upheld if the municipality has achieved one or more of the Statutory Minima – 1) the city or town's SHI Eligible Housing units exceed 10% of its total housing units, or 2) SHI Eligible Housing exists in the city or town on sites comprising more than 1.5% of the total land area zoned for residential, commercial or industrial use. The requirements to 'count' on the SHI are shown on the box to the right.

For purposes of calculating whether the city or town's SHI eligible housing units exceed 10% of its total housing units, pursuant to M.G.L. c. 40B, § 20 and 760 CMR 56.00, there shall be a presumption that the latest SHI contains an accurate count of SHI Eligible Housing and total housing units.

### Three eligibility requirements for Chapter 40B projects

- Applicant is a public agency, a non-profit organization or a Limited Dividend Organization
- Project is fundable by a Subsidizing Agency under a Low or Moderate Income Housing subsidy program
- Applicant controls the site

If the Town uses the Housing Production Plan as an affirmative defense against an unpopular 40B, the Housing Appeals Committee (HAC) would make the final determination of computation of achieving the Statutory Minima.

If a community does not meet the statutory minima as described in this section, then it cannot deny a Comprehensive Permit, provided that the developers of Chapter 40B projects meet certain conditions – as detailed in the box on the left.

There are overlaps in requirements between the units counting on the inventory, and those permitted with a Comprehensive Permit issued under Chapter 40B. Specifically, if a project is fundable or the housing units are created under an approved housing subsidy program, a portion of the units will be reserved for households with income restrictions at regulated prices and rents. If the project uses 80% of the Area Median Income, then at least 25% of the units must be affordable; if the project is reaching lower income households (50% of the AMI), then at least 20% of the units must be affordable. These percentages are minimum thresholds, and can be higher, as is the case with most of the units permitted in Sudbury under Chapter 40B.

## **SUBSIDIZED HOUSING INVENTORY**

As further regulated in 760 CMR 56, the Massachusetts Department of Housing and Community Development (DHCD) maintains a Chapter 40B Subsidized Housing Inventory (SHI) representing the list compiled by the Department containing the count of Low or Moderate Income housing units by city or town. Housing units are eligible for this list if they meet a number of detailed criteria as defined in the regulations as summarized in the box on the right.

Sudbury has 358 units or 6.05% of its housing stock as affordable using the 2010 Census.

Sudbury added 140 SHI Units since 2006.

80% of the affordable housing units on Sudbury's SHI were created under Chapter 40B.

**Sudbury SHI 2016:** The Town's status relative to the 10% threshold is documented on the Subsidized Housing Inventory (SHI), also administered by DHCD. Sudbury has 5921 housing units counted on the 2010 Federal census, requiring 592 affordable units to be at 10%. Currently Sudbury has 358 affordable units, 6.05% in total, and 234 short of the 10% goal. The SHI 10% number changes at every decennial census when the town-wide housing units is updated and the SHI percentage recalculated using the new denomination in the equation.

### Five required elements to 'count' units on the SHI

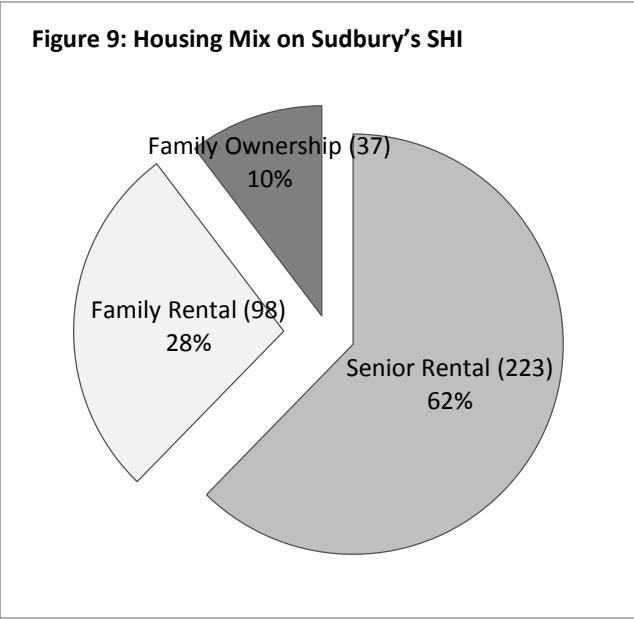
- Occupancy limited to households earning up to 80% of AMI
- Housing units created under an approved housing subsidy program
- Property has a recorded use restriction, restricting occupancy and specifying other details
- Housing units are subject to an Affirmative Fair Marketing and Resident Selection Plan
- Maximum housing cost parameters are met

**Table 11: Sudbury 2016 SHI**

Project	Type	40B project	Total in Project	SHI	Total Affordable	Market
Orchard Hill	Rent	Yes	45	45	10	35
Longfellow Glen	Rent	Yes	120	120	120	0
SHA Scattered Sites	Rent	Yes	27	27	27	0
Carriage Lane	Own	Yes	16	4	4	12
Habitat	Own	Yes	2	2	2	0
Snowberry	Own	Yes	8	2	2	6
Villages at Old County Road	Own	Yes	37	10	10	27
Landham Crossing	Own	Yes	32	8	8	24
Coolidge	Rent	Yes	64	64	64	0
Maynard Road Homes	Own	Yes	3	3	3	0
Home Preservation	Own	No	8	8	8	0
SHA	Rent	No	1	1	1	0
Musketahquid	Rent	No	64	64	64	0
Total			427	358	323	104

Of the 358 affordable housing units on the SHI, 90% are rental units, and 10% homeownership. It should be noted that all units in an affordable rental development ‘count’ towards the SHI even if they are rented on a market rate basis, while in homeownership developments only the individual affordable units are counted. Of the 321 rental units on Sudbury’s inventory, all but 35 are truly affordable and provided to income eligible households.

Sudbury has made significant progress towards its affordable housing goals in the last five years, with increases in family and senior rental, and family homeownership. Family homeownership units have increased from zero in 2000, to 37 units in 2016. This increase is attributed to private 40B developments and locally sponsored programs initiated by the Sudbury Housing Trust (14 units in total – 8 Home Preservation units, 2 habitat for Humanity units, 1 buy-down unit and 3 units at Maynard Road).



Sudbury has two large 40B projects currently being reviewed by the Zoning Board of Appeals, each for 250 units of family rental. Sudbury Station is proposed in historic Sudbury town center, and Avalon Sudbury is proposed at the Raytheon site, as part of a larger mixed use campus. Either of these projects, if approved as presented, will bring Sudbury to the 10% threshold, though the units may lapse based on the timing of the issuance of building or occupancy permits.

**Sudbury SHI 2020:** Based on actual Building Dept. data for 2010-2015, and estimates for housing growth from 2016 – 2020, Sudbury’s total housing units (the denominator) are projected to increase by 373 units in 2020, to 6294, increasing the SHI 10% threshold number to 629, requiring 266 units to get to 10%. These numbers are estimates, which could be higher or lower, as described below. These projections do not take into account either of the potential pending 40B applications, however they do count 5 Home Preservation units added by the Housing Trust through this decade. Additional calculations of potential developments are shown below for illustration.

With one 250 unit project developed in the next few years (and 5 projected units through the Sudbury Housing Trust Home Preservation Program), Sudbury could attain 10% in this decade, but will be 41 units short in 2020 with the change in the total number of housing units. Adding two 250 unit projects will jump the SHI to 12.7% in 2020, and keep Sudbury at over 10% until 2030. Sudbury’s break even number to be at or above 10% past 2020 (until 2030) would be met with the creation of approximately 300 qualified affordable housing units.

40B units are be counted on the SHI when the Comprehensive Permit is filed with the Town Clerk.

Units will lapse (be removed) from the SHI if more than:

- 12 months elapse between zoning permit and building permit
- 18 months elapse between building permit and occupancy permit

Attachment 4.a: DRAFT Sudbury HPP 2016 3.16.16 (1706 : Housing Production Plan approval)

**Table 12: SHI Projections**

	1/1/16	2020: +5 HP units	2020: +250 rental units	2020: +500 rental units	2020: +300 rental units
Total Housing Units	5921	6294 (+373 units total)	6544	6794	6594
10% Requirement	592	629	654	679	659
Affordable units (numerator)	358	363	613	863	663
Difference (+/- 10%)	-234	-266	-41	+184	+4
SHI%	6.05%	5.77%	9.37%	12.7%	10.05%

**LAND AREA CRITERIA**

As mentioned above, Chapter 40B requirements can also be met if affordable housing exists on more than 1.5% of the total land area zoned in town for residential, commercial, and industrial uses. The portion of any site that has low and moderate income housing units inventoried by DHCD is proportionately included toward the 1.5%.

Calculating whether SHI Eligible Housing exists in the city or town on sites comprising more than 1.5% of the total land area zoned for residential, commercial, or industrial use, pursuant to M.G.L. c. 40B, § 20, involves first calculating the total land area.

This analysis is included in the Housing Production Plan, not as a defensive mechanism to certification, but with the interest to include all housing related information in this plan. As shown below, Sudbury is far from achieving the land area statutory minima, and another 80 acres would be needed to achieve the 1.5% Minima. Sudbury understands that the Housing Appeal Committee (HAC) would make the final determination on this issue. Per regulation, the Total Land Area:

1. Shall include all districts in which any residential, commercial, or industrial use is permitted, regardless of how such district is designated by name in the city or town's zoning by law;
2. Shall include all unzoned land in which any residential, commercial, or industrial use is permitted;
3. Shall exclude land owned by the United States, the Commonwealth or any political subdivision thereof, the Metropolitan District Commission or any state public authority, but it shall include any land owned by a housing authority and containing SHI Eligible Housing;
4. Shall exclude any land area where all residential, commercial, and industrial development has been prohibited by restrictive order of the Department of Environmental Protection pursuant to M.G.L. c. 131, § 40A. No other swamps, marshes, or other wetlands shall be excluded;

5. Shall exclude any water bodies;
6. Shall exclude any flood plain, conservation or open space zone if said zone completely prohibits residential, commercial and industrial use, or any similar zone where residential, commercial or industrial use are completely prohibited.
7. No excluded land area shall be counted more than once under the above criteria.

The land area used for affordable housing investigates only sites of SHI Eligible Housing units inventoried by the Department or established according to 760 CMR 56.03(3)(a) as occupied, available for occupancy, or under permit as of the date of the Applicant's initial submission to the Board, shall be included toward the 1.5% minimum. For such sites, only the proportion of the site area that is occupied by SHI Eligible Housing units (including impervious and landscaped areas directly associated with such units) shall count.

Sudbury has a total land area of 15,825 acres, of which 9,948 acres is available for residential, commercial, and industrial uses, and 5,877 acres are excluded per regulations cited above. Sudbury must have at least 1.5% of these acres (149 acres) as affordable housing sites. Currently, 58 acres are used for affordable housing. Therefore, another 80 acres is needed to meet the 1.5% minimum.

**Table 13: 40B Overall Land Area Summary**

Total Land Area, per 760 CMR 56.03(3)(b)	9,948 acres
Statutory Minima of 1.5%	149 acres
Total Affordable Housing Land Area	69 acres
Additional Land Area Needed to Meet 1.5% Minima	80 acres

**Table 14: Total Land Area Calculation, 2011**

Description	Area (in acres)	Explanation
Sudbury Boundary	15,825	
Roads	970	Excluded as publicly owned
Rivers, Ponds, Water Bodies, Streams	194	Excluded as water bodies
Federal & State Land	2,170	Excluded as publicly owned (includes Floodplain)
Municipal Land	451	Excluded as publicly owned
Sudbury Valley Trust/ Sudbury Water	822	Land that is deed restricted in perpetuity for conservation
Conservation Restrictions	1,270	Only land restricted in perpetuity
<b>Total Land Area</b>	<b>9,948</b>	<b>Total Land Area, per 760 CMR 56.03(3)(b): land where residential, commercial, or industrial use is permitted, regardless of how such land or district is designated by name in the town's zoning by law</b>

Source: Planning Department, 2011

Table 15: Affordable Housing Land Area

Project	ADDRESS	Total Units	SHI Units	% SHI	Land Area	SHI Land Area
Carriage Lane	725 Boston Post Rd	16	4	25%	2.43	0.61
Habitat	219 Pratts Mill, 490 Dutton	2	2	100%	0.43	0.43
Home Preservation	Eight scattered site homes	8	8	100%	3.43	3.43
Longfellow Glen	655 Boston Post Rd	120	120	100%	22.61	22.61
Orchard Hill	761 Boston Post Rd	45	45	100%	10.18	10.18
SHA Scattered Sites	Various	19	19	100%	6.35	6.35
SHA LIP Unit	Willis Lake	1	1	100%	0.3	0.30
SHA: Musketahquid Village	55 Hudson Rd	64	64	100%	7.82	7.82
SHA: Fairbanks Circle	42 - 56 Fairbanks Circle	8	8	100%	5.58	5.58
Sudbury Meadows	1, 8 Snowberry Lane	8	2	25%	4.93	1.23
Villages at Old County Road	6 Old County Road	37	10	27%	6.02	1.63
Sudbury Housing Trust	278 Maynard Road	3	3	100%	1.00	1.00
Landham Crossing	192 Boston Post Road	32	8	25%	8.50	2.13
The Coolidge	189 Boston Post Road	64	64	100%	5.95	5.95
<b>Total</b>		<b>427</b>	<b>358</b>		<b>85.53</b>	<b>69.24</b>

## Section 1.5: Development Constraints and Limitations

Sudbury's infrastructure needs have not kept pace with the growing population. The road network in Sudbury consists of many old, narrow roads which serve as main thoroughfares through town. Route 20, a state highway, is a two lane road and there is no plan to widen it at the present time. The town has no sewer service – all lots utilize on-site septic systems to treat wastewater. The town derives its drinking water from underground wells which, according to the 2000 MAPC build-out analysis, are estimated to be able to serve the growing population at build-out.

### **WETLANDS AND ENVIRONMENTAL**

Sudbury has made significant improvements in its land use regulations for new development over the last two decades, and continues to do so. Since 1988, the Town has enacted a Cluster Development Bylaw, Water Resource Protection Bylaw, local Wetlands Administration Bylaw and Stormwater Management Bylaw, all of which contain performance standards in the areas of open space protection, erosion control, storm water management, and prevention of commercial and industrial pollution. The Town Boards and staff carefully review development plans prior to construction, during construction and post-construction. Redevelopment sites are required to upgrade existing stormwater and wastewater facilities to current standards, or to some higher level of protection.

Much of Sudbury's remaining land is environmentally constrained by wetlands, soils and groundwater protection bylaws. Easily developed land that could sustain higher densities than single family development is in short supply.

### **SOILS**

In many towns the type of soils found in the town limits or prohibits the installation of septic systems, and thus limits development. In Sudbury, 40% of the soils in Town are hydric soil, floodplain soils or soils with a shallow depth to bedrock, thereby putting significant pressure on the remaining upland areas for development. The remaining soils are the sandy soils of glacial outwash soils which have a fast percolation rate, and the more compact till soils have a slower percolation rate. Most of these soils are suitable for septic systems, given enough depth of soils, percolation rate, water table and adequate land area for the system.

### **WATER**

Sudbury is served by 9 operating wells which are administered by the Sudbury Water District. The Water District provides drinking water to town residents and also water for fire protection. Most wells produce good quality water, with a variety of treatment taking place in various wells as needed. The 2014 Water Quality Report includes details on Sudbury's water quality in comparison to State and Federal standards.



Sudbury generally has conditions suitable for public drinking water supply wells. However, 5 of the 9 water supply wells (generating 58% of the total Sudbury water supply) are located in aquifers with a high vulnerability to contamination. These well fields are adjacent to the Route 20 business district and are vulnerable to contamination from commercial and industrial uses. Thus, the Town has identified the need to create a municipal sewer collection system for the business district along Route 20 as the current conditions make it difficult to maintain the current septic systems.

The Water District's water withdrawal permit is authorized by MassDEP under the Water Management Act (WMA). The most recent guidelines, under the Sustainable Water Management Initiative, includes water policy that supports ecological needs while meeting the needs of economic growth to ensure prudent and sustainable use of water, maintain healthy watersheds and gradually improve degraded ones. Any requests to increase water withdrawal must be approved by MassDEP.

### **TRANSPORTATION**

No major highways run through Sudbury, however, the old coach roads still remain the major auto-routes. Sudbury lies equidistant from Route 128 to the east and Route 495 to the west, connected by Route 20 (Boston Post Road). Route 20 has been the traditional commercial byway since the 17<sup>th</sup> century when mills and stores located there. Route 27 carries traffic into the center of town from Wayland, turning north toward Maynard, with a branch continuing west toward Hudson as Hudson Road. Nobscot Road is another major route, running south from Route 20 to Framingham. On the northern side of Town, Route 117 runs east and west connecting Sudbury to Concord and Maynard.

There are approximately 160 miles of roadway in Sudbury today. As of the last ownership status report in 1997, there are 5.3 miles of state road, 18.6 miles of county road, 102.9 miles of town roads, and 15.4 miles of private roads. Build-out projections increase the total length of new roads by 43 miles.

### **WASTE WATER**

Since Sudbury is served by septic systems, the types of soils are an important factor in the growth rate of the town. Approximately 40% of the town is glacial outwash plain which is characterized as sandy soils with rapid percolation rates. Systems in these soils must be designed to compensate for the fast percolation rate of the soils so the leachate achieves the purification necessary to protect the groundwater. Approximately 20% of the town is glacial till/moraine soils which present the opposite problem with slow percolation rates.

Sudbury has its own local Board of Health Regulations which define design requirements more stringently than state Title 5 requirements for septic systems in these soils. Floodplain soils and hydric soils are found in wetlands and river/stream systems and are not suitable for septic systems under Title 5, local regulations or the Wetland Protection Act. Approximately 30% of Sudbury is wetland/floodplain area. Since a significant portion of the town is not suitable for installation of septic systems, there is added pressure for development in those areas of town with suitable soils.

The Route 20 business corridor is also served by individual septic systems. This area is substantially located in areas of gravel, sand and silt. These types of soils, and the density and types of

businesses, pose a potential threat to the groundwater. Since much of this high density business area is just north of many of the town wells, the Town is very concerned about the threat of groundwater pollution and protecting the wells. The town has instituted an aquifer protection Bylaw which provides additional protection and regulates land uses within the town aquifers.

From a development perspective, general guidelines are that a private septic system can support at its maximum 90 bedrooms, for developments larger than 90 bedrooms the only option for wastewater disposal is a privately owned treatment plan.

### **SCHOOLS**

Beginning in the late 1990's, the Town embarked on an ambitious program of school expansion and the construction of new schools to meet the town's needs for more classroom space. Sudbury currently has four elementary schools (grades K-5), one middle school and one regional high school. The physical expansion program of 1996 by the Sudbury Public Schools increased school enrollment capacity to approximately 3600 in the K-8 system. In 2004, Sudbury completed the construction of the new Lincoln Sudbury Regional High School which provided state of the art facilities, and increased the school enrollment capacity to 1,850 students.

After these significant projects, the combined enrollment capacity of all the schools is 5,450 students, however the actual enrollment data is less – 4,424 as of FY16 – with projected decreases through 2020. This correlates with the 2010 census data which reports that the population growth in Sudbury is stabilizing after the dramatic increase in the 1990's. However, it is important to note that Sudbury continues to have an increasingly large family size, with a correspondingly high number of school-aged children per household compared to the state or surrounding towns.

The enrollments in the schools have been steadily decreasing since FY10, except for an increase at the high school in FY14. [This is shown in the table below, please note that the LSRHS enrollment includes the Lincoln children (15%) and does not include the tuition pupils attending other schools which averages 33 students per year.] However, this decrease does not eliminate the stress of those 'bubble grades' – large grades that slowly pass through the system. For example, a significant drop in enrollment is projected in FY18 after a particularly large class graduates from the high school. Fortunately, the building expansion programs completed in the past make Sudbury's facilities well-positioned to handle up and downs in enrollment, irrespective of the operating budgetary impacts of enrollment bubbles.

**Table 16: School Enrollment, Historical & Projections**

		K-8		LSRHS		Total	
		# Students	% Change	# Students	% Change	# Students	% Change
Enrollment 19-20 (P)	FY '20	2,597	-1.2%	1,487	-3.4%	4,084	-2.0%
Enrollment 18-19 (P)	FY '19	2,629	-1.9%	1,538	-0.4%	4,167	-1.4%
Enrollment 17-18 (P)	FY '18	2,681	-2.2%	1,544	-4.4%	4,225	-3.0%
Enrollment 16-17 (P)	FY '17	2,742	-2.8%	1,612	0.6%	4,354	-1.6%
Enrollment 15-16	FY '16	2,822	-1.8%	1,602	-0.9%	4,424	-1.5%
Enrollment 14-15	FY '15	2,874	-2.1%	1,617	-1.5%	4,491	-1.9%
Enrollment 13-14	FY '14	2,936	-2.4%	1,641	3.7%	4,577	-0.2%
Enrollment 12-13	FY '13	3,007	-2.3%	1,580	-1.3%	4,587	-1.9%
Enrollment 11-12	FY '12	3,077	-0.6%	1,601	-0.8%	4,678	-0.7%
Enrollment 10-11	FY '11	3,095	-2.2%	1,614	-0.1%	4,709	-1.5%
Enrollment 09-10	FY '10	3,164		1,615		4,779	

Source: 2015 Sudbury Town Warrant, SPS, LSRHS

## Section 1.6: Municipal Fiscal Impact

There has been much reference in Sudbury to the fiscal impacts of the State's "40B" affordable housing law in Sudbury. Under the M.G.L. Chapter 40B Comprehensive Permit process, a developer can override local zoning when the host community lacks a minimum of 10 percent affordable housing as a percentage of the town's housing stock. State approved 40B developments must have a minimum of 25 percent low-income housing (reserved for households earning below 80% of median income) and, typically, nearly three-quarters of housing units in a 40B development are sold at market-rates. This statute is a zoning incentive mechanism for development, and has been used for many years by public, non-profit and private developers.

On a state level, the University of Massachusetts Donahue Institute (UMDI) prepared a study in 2007 to determine whether mixed-income developments that have been built in the state did, in fact, place new burdens on their communities. This study incorporated extensive field work in seven municipalities with mixed-income, homeownership developments. Complete details of the report findings and methodology are included in the full report, *The Fiscal Impact of Mixed- Income Housing Developments on Massachusetts Municipalities* found on the Town's website.

From the executive summary, the UMass Donahue Institute analysis found:

- The immediate fiscal impact of mixed-income homeownership developments may not be as great as is often assumed. The eight home ownership housing developments in the study did not have any measurable negative impact on public services in their municipalities.
- School costs are rising in cities and towns throughout Massachusetts; however, those increased costs are occurring in communities with declining enrollments as well as increasing enrollments. In short, enrollment is not the most significant factor driving increases in school costs.
- Using the fair share methodology developed for this study, this report demonstrates that mixed-income housing units, including 40B projects, have the same fiscal impact as the vast majority of their neighbors.

- The implications of this study for the state, developers and municipalities are that towns may be able to plan appropriately for development in a manner that ensures that future growth does not have a long-term negative fiscal impact.

In 2010, the Planning and Community Development Department prepared a detailed fiscal analysis of the recent private 40B developments, comparing them to what could be developed under zoning regulations on those same parcels. The 40B analysis used real data from three private homeownership developments in Sudbury, where 25% of the units are affordable and 75% are market rate. The conventional zoning analysis used property attributes, and assumed a sales price of \$800,000 per lot, above the median assessed value of \$577,300. The higher estimated sales price is used, though it should be noted that the location of these properties is less desirable than more private and secluded parcels. The 40B analysis used actual student counts from the occupied units, and the conventional zoning used the average of 1.8 students per household, as provided by the Sudbury Public School administration. Also of note, the municipal and school cost data was calculated using an average cost methodology, using data from the FY10 Town Warrant and used per household/per student averages. A more accurate marginal cost analysis would reduce the school and municipal costs for all households, and would reflect the incremental cost of the next student or home. However, this information is extremely complicated to calculate and is not available for Sudbury.

Consistent with the conclusions of the UMass Donahue Institute report, the results show that these 40B developments in Sudbury have comparable fiscal impact than if the same property was developed into subdivisions, and in fact appear to be less detrimental than conventional zoning. This is mostly due to the significant property tax revenue generated by the increased number of units than conventional zoning allows, despite the increased number of overall children.

It should be noted that a detrimental fiscal impact is shown with the average cost methodology in both scenarios. It is estimated the breakeven point is a home valued at \$1.7 million value and a household with 2 students. However, it is noted that the 40B developments generate over \$452,000 of revenue, while the subdivisions would have generated \$136,240.

Table 17: 40B Zoning Analysis

	Total Impact	# Units	Property Value	Property Tax Revenue	# Students	Student Cost (\$13,045/stdnt)	Municipal cost (\$2,716/HH)
Carriage Lane	-\$90,589	16	\$5,658,600	\$96,366	11	\$143,498	\$43,457
Old County Road	\$14,524	37	\$17,554,735	\$298,957	14	\$183,938	\$100,495
Snowberry Lane	-\$29,668	8	\$3,363,900	\$57,287	5	\$65,226	\$21,729
	-\$105,733	61	\$26,577,235	\$452,610	30	\$392,663	\$165,681

## By Right Zoning Analysis

	Total Impact	# Units	Property Value	Property Tax Revenue	# Students	Student Cost (\$13,045/stdnt)	Municipal cost (\$2,716/HH)
Carriage Lane	-\$25,147	2	\$1,600,000	\$27,248	4	\$46,963	\$5,432
Old County Road	-\$62,868	5	\$4,000,000	\$68,120	9	\$117,407	\$13,580
Snowberry Lane	-\$37,721	3	\$2,400,000	\$40,872	5	\$70,444	\$8,148
	-\$125,736	10	\$8,000,000	\$136,240	18	\$234,814	\$27,160

Source: Sudbury Assessors, 2010 Town Warrant, Community Housing Office

Researchers examining the soaring cost of housing in Massachusetts say the problem has been exacerbated by low rates of home building across the state, which over the past decade has averaged roughly a third of what it was during the tech boom of the 1980s, and they attribute some of the lack of production to local resistance in part because of the concern about the potential financial risks to the community, burdening public schools and other municipal services.

Most recently, on 3/15/2016, a new study from UMass Dartmouth was published in conjunction with the Massachusetts Housing Partnership which finds that the negative impacts from new housing developments on local institutions are often low, and even when the strain is felt, the increase in tax revenue generated by new residents greatly exceeds the costs to towns and cities. The bottom line, the study indicates, is that there is substantially more state tax income and sales tax revenue generated by these developments — more than enough to provide for any local shortfalls. While the research indicates that new housing means new revenue for the state, it's less clear how these benefits might trickle down to the local level. Currently there is no mechanism in place for redistributing these specific revenue increases to affected cities and towns in any targeted way. But a bill introduced in the Legislature (H.1111) this year seeks to reduce barriers to housing development — while also offering a pathway for areas with new housing to receive set-aside funds.

## Section 1.7: Existing Local Tools and Resources

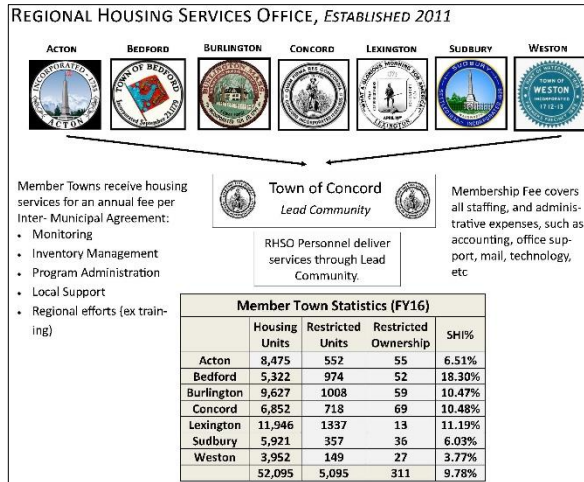
The Town of Sudbury has a number of local resources that assist with the creation of affordable housing in Sudbury, including the Regional Housing Services Office, the Sudbury Housing Trust, the Sudbury Housing Authority, the Community Preservation Act, private developers, West Metro HOME Consortium, zoning tools, and a variety of plans and strategies.

### REGIONAL HOUSING SERVICES OFFICE (RHSO)

The Regional Housing Services Office (RHSO) is a regional collaboration structured through an Intermunicipal Agreement (IMA) to provide the member towns of Acton, Bedford, Burlington, Concord, Lexington, Sudbury, and Weston with technical assistance in affordable housing matters. Sudbury was a charter member in 2011 and the Lead community for the first three years of the RHSO's existence, hosting the RHSO office.

The RHSO performs most of the housing-related activities for the Sudbury Housing Trust and the Town such as monitoring services, inventory management, HOME Program administration, and local support for community specific initiatives.

The RHSO also provides regional support to individuals searching for or residing in affordable housing, and property managers leasing units of affordable housing. The RHSO website, [www.RHSOhousing.org](http://www.RHSOhousing.org), has information for the above groups including information on resident services, housing inventories, and contact information for new opportunities. The RHSO is currently developing a secure portal to share regulatory and other information with member communities.

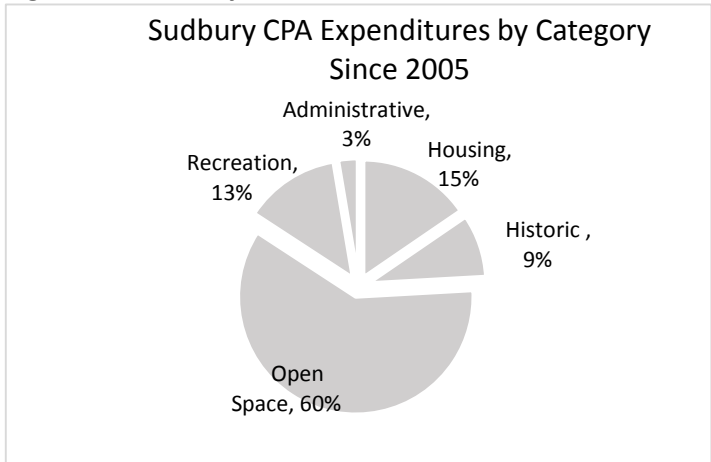


### COMMUNITY PRESERVATION ACT (CPA)

In 2002, Sudbury residents voted to adopt the CPA with a 3% surcharge on all real estate property tax bills. This program continues to be well supported.

There are four eligible activities that can be funded with Community Preservation Act funds: Community Housing; Historic Preservation; Open Space and Recreation. The first three are required and the fourth is optional. The legislation requires that 10% of all collected funds (local and state) must be spent on each of the three required activities.

**Figure 10: Sudbury CPA Funds**, Source: 2016 CPC Data



In summary, almost \$32 million was collected over the fourteen years of program implementation from 2003 through 2015, with \$19.6 million from local tax receipts, \$10.6 million in state match, and the remainder from interest. The state match has averaged 35% over the last five years.

Through the CPA, the Town has appropriated \$4,393,396 for affordable housing to fund local projects and

leveraged other funding mechanisms as shown in the table below to create 25 units of housing with an average contribution of \$175,736 per unit.

**Table 18: Sudbury CPA Housing Appropriations**, Source: Sudbury CPC

Fiscal Year	Project	# Units Created	Amount
2005	To buy down market units and convert them affordable	3	\$500,000
2006	Funds for the Sudbury Housing Authority	4	\$360,000
2006	Mahoney/Melone Feasibility studies	0	\$25,000
2007	Appropriation to the Sudbury Housing Trust of accumulated 10% housing reserves	2	\$385,000
2008	Partial funding for redevelopment SHA-owned single family dwellings with new, duplex units	6	\$600,000
2008	Funds to continue Sudbury Housing Trust's efforts to provide for the preservation and creation of affordable	3	\$750,000
2009	Funds to continue Sudbury Housing Trust's efforts to provide for the preservation and creation of affordable	1	\$208,000
2010	Funds to continue Sudbury Housing Trust's efforts to provide for the preservation and creation of affordable	1	\$180,000
2011	Funds to continue Sudbury Housing Trust's efforts to provide for the preservation and creation of affordable	1	\$190,000
2012	Funds to continue Sudbury Housing Trust's efforts to provide for the preservation and creation of affordable	1	\$200,000
2013	Funds to continue Sudbury Housing Trust's efforts to provide for the preservation and creation of affordable	1	\$342,796
2014	Funds to continue Sudbury Housing Trust's efforts to provide for the preservation and creation of affordable	1	\$100,000
2014	Sudbury Housing Authority Tub Enclosures	0	\$200,000
2014	Melone Master Plan	0	\$150,000
2015	Funds to continue Sudbury Housing Trust's efforts to provide for the preservation and creation of affordable	1	\$202,600
	Total	25	\$4,393,396.00

Attachment4.a: DRAFT Sudbury HPP 2016 3.16.16 (1706 : Housing Production Plan approval)

### **SUDBURY HOUSING TRUST**

The Sudbury Housing Trust was established at the 2006 Annual Town Meeting by accepting Massachusetts General Law Chapter 55C Section 55C through article 33. The Trust was chartered in February 2007 and the Trust documents recorded at the Middlesex Registry of Deeds book/page 49096/353.

The Trust was created with strong recommendation from the Community Preservation Committee to facilitate spending the mandated CPA housing funds in accordance with the 2005 Community Housing Plan and subsequently approved plans and policies.

Since its creation in 2007, the Trust has directly created 14 units of housing (8 units through Home Preservation, 2 Habitat, 3 Maynard Road Homes, 1 buy-down at Old County Road), and assisted the creation of another 70 units (Coolidge and Sudbury Housing Authority).

The Sudbury Housing Trust receives funds through annual CPA appropriations, external revenue through lottery and monitoring agent services, and interest income on its fund balance, with CPA funds the largest component. The CPC has recommended to Town Meeting the mandated 10% each year, and each year this article has passed. The funds requested must be spent on community housing.

In 2015, the Trust added its eighth home to the Town's subsidized housing inventory under the successful Home Preservation Program. In this program, smaller, less expensive homes are purchased and sold, subject to a permanent deed restriction, to eligible first-time homeowners selected from a lottery. In this way, homes are converted to affordable housing, preserving existing housing stock. The Housing Trust is able to work in 'real time' to put offers on the property and use their own funds for required health and safety repairs.

The Trust continues to sponsor the Small Grants Program to help seniors and other moderate income homeowners fund health and safety repairs in their homes. The Program has three rolling grant periods annually. So far the Program has awarded 45 grants for over \$128,000, and 76% of the grantees are senior households. In FY15, the Trust awarded 8 grants for a total of \$28,360; the easy-to-submit application can be found on the Town's website.

The Trust is nearing completion of the construction of three units of affordable housing at the Maynard Road Homes consistent with the terms of the Comprehensive Permit. The groundbreaking was in the summer of 2015, and the homes will be ready for occupancy in the spring of 2016.

The Sudbury Housing Trust performs lottery, resale and monitoring agent services for Sudbury and other neighboring communities, providing local opportunities for eligible buyers with connections to Sudbury and others looking for affordable housing in our area, as well as generating a revenue stream for the Sudbury Housing Trust. In FY15, the Trust received \$56,000 in fee revenue. This revenue is used to fund the small grants program and dedicated staffing.



### **SUDBURY HOUSING AUTHORITY**

In 1969, MGL Chapter 121B, Section 3, was passed to allow the creation of housing authorities by cities and towns and shortly thereafter, in 1971, Town Meeting voted to establish the Sudbury Housing Authority for the purpose of "providing housing for elderly persons of low income." It was the 204th housing authority formed in the Commonwealth and the original 5 members were appointed by the selectmen.

Since its establishment, the Sudbury Housing Authority has been enthusiastically active in creating and maintaining affordable housing in Sudbury, creating 69 units of housing in its first 10 years of operation, and 16 units in the next 10 years (1980's).

Musketahquid Village, consisting of 64 apartments and a community building for seniors, is the largest SHA property, and the SHA also manages 28 units of family rental housing in duplexes and single family homes across town. These properties were developed with State grants and Town donated land, and include the successful duplex redevelopment program, where the Sudbury Housing Authority converted four larger single family homes to duplexes.

The SHA has provided leadership over the years in bringing other affordable housing mechanisms to Town Meeting for consideration. These included advocating for zoning for handicapped and physically disabled persons (defeated 1979), participation in town commissioned committees and task forces for parcel suitability, inclusionary zoning, long range planning and other housing related studies.

The Sudbury Housing Authority Board of Commissioners is comprised of one state appointee and four elected representatives.

### **HOME FUNDS**

HOME is a federal housing program administered by the U.S. Department of Housing and Urban Development (HUD). HUD distributes funds to groups of adjacent communities who create a local consortium. The West Metro HOME Consortium is administered by the City of Newton and currently has fourteen members: Newton, Bedford, Belmont, Brookline, Concord, Framingham, Lexington, Lincoln, Natick, Needham, Sudbury, Watertown, Waltham, and Wayland.

The allocation amount varies according to HUD formulas based on entitlement parameters of population, rental housing units occupied by the poor, poverty households living in rental housing units built before 1950, families in poverty, and rental housing units with problems.

The Consortium also brings each community into a local housing network. The network provides both informal contacts among housing professionals and opportunities for more formal exchanges of information and technical assistance.

The Town of Sudbury joined the Consortium in 2005, and has since received HOME program and administrative funds annually. Sudbury was able to fund the buy-down of a unit at the Villages at

Old County Road with the accumulated allocated HOME funds (\$101,000). This produced an additional affordable unit above the required 25% in this private 40B homeownership project. Additionally, Sudbury used \$96,666 of HOME funds to support the Coolidge at Sudbury project.

### **PREVIOUS LOCAL PLANS AND STRATEGIES**

Sudbury has invested significant resources - staff; consultants; and volunteers - in developing and publishing strategic and important land use plans to help guide development for the future.

The **2001 Master Plan – Sustainable Sudbury** was prepared by the Sudbury Planning Board and outlines key goals, strategies and guidelines for Sudbury.

The **2005 Community Housing Plan** prepared by the Sudbury Community Housing Committee, provides a framework for the development of affordable housing, and also lays out potential implementation strategies. This housing plan was the sound starting point of this housing production plan.

The **2009 Community Preservation Committee Report** provides details on the Town goals for community preservation, criteria for project assessment, and procedures for solicitation of project proposals.

The **2009 Open Space and Recreation Plan** identifies many environmental factors and open space needs through the year 2013.

The **2011 Housing Production Plan** provides a solid baseline for Sudbury's housing goals using the 2010 Census.

The **2013 Analysis of Impediments to Fair Housing Choice** is a HUD-required report which reviews the local laws, regulations, and administrative policies, procedures, and practices affecting the housing for persons identified as a protected class.

### **ZONING**

Sudbury continually creates and enhances its zoning bylaws. Below are three specific bylaws that can create market discount housing.

The **Incentive Senior Development** was adopted in 1998 to provide discounted housing development opportunities for seniors. It allows for up to four (4) dwelling units per buildable lot in exchange for dedicated open space, occupancy requirements (aged 55+), and unit resale and price restrictions. Since its inception, 96 units have been approved. See section 5400 of the Sudbury Zoning Bylaw.

The **Village Business District bylaw** is a mixed-use zoning district bylaw adopted in 1994 which allows apartments over stores by right. This district encompasses an approximately 0.5 stretch along Route 20. No units have been produced under this bylaw due to the lack of sewage facilities on Route 20. See section 2230 of the Sudbury Zoning Bylaw.

The **Accessory Dwelling Unit** bylaw was initially adopted in 1994 and significantly revised in 2009. It allows the creation of an accessory unit in any district in Town. They can be either within the structure of the main house or in a detached structure. Since the recent revisions 14 accessory apartments have been approved. See section 5500 of the Sudbury Zoning Bylaw.

## Section 2: Affordable Housing Goals

### Section 2.1: Defining Housing Goals

In addition to analyzing Sudbury's housing needs through the needs assessment presented in Section I, the housing planning process engaged the broader community in an evaluation of needs and identification of goals through an online survey and a planning workshop.

#### Summary of Online Survey Results

The online survey was open from January 29<sup>th</sup> through March 4<sup>th</sup>, 2016. In that period, 97 people participated in the survey. The survey included 15 questions. In addition to demographic questions, the survey included the following questions:

- How likely are you to move out of Sudbury in the next five years?
- If extremely likely or very likely to move out of Sudbury in the next five years, which of the following factors do you believe most influence your likelihood of moving out of Sudbury?
- How important is it to you to stay in Sudbury (either in your current home or not) as you age?
- If it is extremely important or very important to stay in Sudbury as you age, what factors need to change/improve to enable you to stay in the community as you age?
- For renters: How likely is it that you will be a home in Sudbury in the next 10 years?
- If you indicated that buying a home in Sudbury in the next 10 years is moderately likely, slightly likely, or not likely for you, which factors do you believe most influence your likelihood of buying a home in Sudbury?
- Think about an "ideal community" for you to live in and rate how important the following community characteristics would be for you.
- Which types of policies/initiatives do you want local planners and policy makers in Sudbury to spend their time on in the next five years?



#### Sudbury Community Workshop

February 29, 2016

## Key Findings

- About one of every four survey respondents indicated that it was moderately likely, very likely, or extremely likely to move out of Sudbury in the next five years. Most (89%) of these respondents indicated that the factor that most influences their likelihood of moving out is that the housing/living costs are too high.
- About 84% of resident respondents indicated that it was moderately, very, or extremely important to stay in Sudbury as they age, but many of these respondents indicated a need for pedestrian improvement, more transit options (e.g., buses, ride shares/taxis), and expanded community services (e.g., health and wellness services/programs).
- Respondents ranked the following three policies/initiatives the highest when asked that they want local planners and policy makers in Sudbury to spend their time on in the next five years:
  - #1 Help people stay in the community as they age.
  - #2 Help people stay in their homes as they age.
  - #3 Encourage preservation of existing smaller homes.

## Summary of Community Workshop Results

Outreach for the workshop included notices in the Sudbury Town Crier, an announcement on the Town website, and email notifications to town employees as well as members of boards, commissions and interested citizens. The Community Housing Workshop was held on February 29, 2016 at the Goodnow Public Library and was attended by members of the Board of Selectmen, the Community Preservation Committee, the Planning Board, the Sudbury Housing Trust, the Sudbury Housing Authority, the Council on Aging, the Zoning Board of Appeals, the Sudbury League of Women Voters, residents of affordable housing units, and residents at large.

The workshop was designed to engage residents in focused discussion about housing needs and opportunities in Sudbury. The purpose of this workshop was to give participants context and information that would enable them to discuss Sudbury's housing goals from 2011 and whether they still serve the Town's affordable housing needs. The following emerged as the most crucial housing goals:

- Higher density housing aligned with pedestrian accessibility and public transit
- Workforce housing with a local preference

The main objectives of the forum were the following:

### Community Input

This was a two-fold objective: the first objective was to get participants thinking about their own housing needs throughout their lives, what housing options exist in Sudbury and how housing can better serve and strengthen the community. The second was to examine goals from the 2011 Housing Production Plan and determine if they are still relevant and if not, how can the Town improve or

revamp them.

## Information

A presentation informed attendees of the progress Sudbury has made since the 2011 Housing Production Plan was implemented and described Sudbury's current housing environment and affordable housing needs. With Sudbury closing in on the 10% SHI goal, residents and housing advocates were urged to begin think about how to best achieve their long term goals and preserve the 10% beyond 2020. Finally, participants were introduced to topics of availability of housing in Sudbury and the gaps in affordability in the community.

## Methods

To achieve workshop objectives, JM Goldson facilitated interactive exercises that engaged workshop participants and fostered focused discussion. The workshop consisted of two group exercises, as well as group polling and small group discussions. Brief summaries of the results of each exercise are provided below with detailed summaries attached.

### *Digital Group Polling*

Group polling enables workshop organizers to get a picture of who participants are. How long have they lived in Sudbury? How old are they? Do they rent or own their homes? How do they perceive the affordability and availability of housing in the community? In addition, polling shows participants where they fit in the demographic make-up of their community and tests their knowledge of housing issues.

Eighty-two percent of respondents live in Sudbury. Thirty percent of them have moved to the Town since 2000 and twenty-five percent have lived there since before 1989. Seventy-two percent own their homes and seventy percent are aged 55+. Less than 20% have school aged children.

Participants knew that the over 65-population is projected to grow by thirteen percent by 2030 and make up one quarter of the Town's population. However, fewer than half knew that 5-19 year-old population is expected to decrease by eight percent by 2030. Participants are aware that there are a large number of low to moderate income households in the Town but only thirty-five percent of respondents knew that those households number more than 650.

### *Small Group Discussions*

#### **Exercise #1: Housing types and housing needs**

Group exercise #1 was an ice breaker exercise consisting of five questions designed to get participants talking about the types of homes they have lived in throughout their lives and to think about whether their current homes support or hinder their current needs. In addition, participants were asked to think about how Sudbury's housing options can best serve the community currently, and as residents' age.

Respondents listed a wide variety of homes they have lived in throughout their lives, including single

family homes, two- and multi-family homes, apartments, dormitories, sororities and fraternities, condominiums and military barracks. The second question addressed how well current homes serve participant's needs. The majority of respondents feel their homes currently serve them very well though some said their houses are too big now that they are "empty nesters."

With seventy percent of workshop participants aged 55 and over, the topic of aging in place is timely and important. The third discussion question asked participants to consider how well their current homes would serve them as they age. Every group identified barriers to aging in place in their current homes. Barriers ranged from lack of first floor bedrooms and bathrooms, too many stairs inside and out, poor bathroom design, maintenances challenges like shoveling and mowing, high taxes and distance from shopping. A few commented that their homes serve them well because they have a first floor master bedroom, an elevator and grounds keeping, or their homes are paid for and debt free.

Lastly, how do respondents think Sudbury housing options support or hinder community building and are there additional housing options that would further benefit the community? Participants identified the following barriers to building community:

- Lack of variety of housing types in many price ranges
- Lack of rental housing
- High cost of housing discourages young families from moving to Sudbury
- Lack of affordable options for non-seniors
- Lack of sidewalks
- Lack of public transportation, wide dispersal of housing and dependence on driving

Many participants noted that Sudbury's number of age-restricted developments are a benefit to the community.

Participants identified the following as further benefits to community building:

- Mixed use development and walkable commercial areas
- Accessory apartments
- Affordable housing without age restrictions for specific populations (Sudbury fire and police, teachers, and Veterans)
- Increased density
- Housing with supportive services for seniors

### **Exercise #2: Confirm, Challenge or Build?**

Working in groups of four to six, participants examined each of the eight housing goals from the 2011 HPP and confirmed, challenged, or built on them. Three additional questions helped participants identify further goals to add to the 2016 HPP update.

*2011 Goal #1: Promote a diversity of housing types in Sudbury to meet the needs of a changing and diversified population.*

All groups confirmed this goal and half of the groups also wanted to build on it. Groups that built on this goal questioned the idea of "diversified population." Groups added that socioeconomic and

racial diversity and diversity of family types was important to clarify. One group added that a measurement of progress with target dates and number of units created should exist.

**2011 Goal #2: Create more affordable rental and home ownership units for eligible households making less than 80% AMI with local preference.**

All groups had some members who confirmed Goal #2, with half the groups also having members who wanted to build on or challenge this goal. Two groups want to lower the AMI limit to focus on low and extremely low income households. Another two groups confirmed that the local preference should include workforce housing, explaining that a local preference deepens ties to the community and promotes local support for affordable housing.

**2011 Goal #3: Increase diversity of housing options by enabling housing in business districts including apartments above commercial spaces.**

Half of the groups confirmed this goal and the remainder challenged it and built on it. One group that confirmed the goal noted that mixed use development is positive in that it reduces the need for driving. The group that built on the goal thought that there should be more than one story of housing over commercial space. One story of housing does not achieve a big enough benefit to housing production.

The groups that challenged this goal noted that developers are disinclined to pursue this mode. Another said it doesn't make sense to pursue this when better options for housing exist and another feared losing important commercial space to housing.

**2011 Goal #4: Preserve affordability restrictions on existing units for the longest period possible.**

All groups confirmed this goal with one noting that achieving this goal creates stability for residents of affordable housing and preserves a stable inventory of housing in the Town.

**2011 Goal #5: Leverage local Community Preservation Act funds and Sudbury Housing Trust funds and other local resources towards affordable housing production.**

Most groups wanted to build on this goal. Two groups noted that the process for allocating funds needs to be more clear and straightforward so that funds are put to the best use. Some groups saw this goal as an opportunity to work more productively with developers and also as a way to purchase land. Finally, one group thought about what should happen with funds once the Town reaches 10% SHI. Some members of this group thought the funds should continue to be used for housing production while others believed the funds should go to maintenance and upkeep of affordable units.

**2011 Goal #6: Preserve existing small homes and dwellings.**

Groups responded very differently to this goal. Two groups confirmed it with one noting that this approach preserves the character of the community. Others challenged it. One group noted that it is not a cost effective approach to reach 10% SHI. Another challenged whether the Town should act



as a real estate broker and another challenged whether it is practical to preserve a single home where multiple homes could be built.

**2011 Goal #7: Maintain and advance capacity with planning advocacy.**

Groups confirmed this goal with one saying that they did not understand it and another noted that the plan needs to be more specific.

**2011 Goal #8: Encourage creation of workforce housing-units that are affordable to middle income households making between 80% and 120% AMI.**

Groups confirmed this goal and emphasized their advocacy for housing to be marketed to people who work in the Town already like police and fire employees and teachers. One group wondered if there is a market for this housing for Town employees and the local work force.

**What's next?**

The last three discussion questions focused on what may have been missing from the 2011 HPP goals and what should be included in the 2016 Plan. These questions also addressed issues of aging in place, and what barriers, opportunities and compromises participants identify that can help address Sudbury's housing needs.

Two groups noted that inclusionary zoning should be the main strategy to achieve and maintain 10% affordability. Groups remarked that once the Town achieves 10%, it should prioritize the preservation of units and continue to pursue other important housing related goals like increasing multigenerational housing options, promoting mixed use development and allowing accessory apartments as well as pursuing only age restricted 40B development. Finally, one group noted that the Town's goal should be "real" 10% affordability not just "legal" affordability, and another noted that the Town should not only preserve its 10% but also be proactive about maintaining affordable inventory into 2030 as the population expands, particularly the elderly.

Participants had a lot of ideas about how to ensure seniors could remain in Sudbury as they age. Participants noted that Sudbury seniors need more supportive services and continuing care or "progressive" facilities. Policy changes that would support aging in community include multifamily zoning and increased density, and developing a public transit system as well as improving pedestrian access to commercial areas.

Lastly, participants considered what barriers, opportunities and compromises do or should factor into how Sudbury addresses its housing needs. Principally, respondents identified lack of education about affordable housing as a barrier. There is a divide in the community about how it should develop and who should be encouraged to live there. One group thought Annual Housing Forums would be a good way to educate and update residents about housing issues. Another saw the school community as an important partner in this discussion.

## Section 2.2: Affordable Housing Goals

The 2016 Sudbury Housing Production Plan presents eight (8) affordable housing goals. These goals build from the goals contained in the 2011 Community Housing Plan with the input from the 2016 Community Housing workshop, and the 2016 online survey.

**GOAL 1: CREATE MORE AFFORDABLE HOUSING OPPORTUNITIES, BOTH RENTAL AND HOMEOWNERSHIP, FOR ELIGIBLE HOUSEHOLDS, INCLUDING FOR HOUSEHOLDS WITH VERY LOW AND EXTREMELY LOW INCOMES, AND PROVIDE LOCAL PREFERENCE TO THE EXTENT ALLOWABLE UNDER STATE AND FEDERAL FAIR HOUSING LAWS, AT A MINIMUM MEETING THE STATE'S MGL C.40B AFFORDABLE HOUSING GOALS BY 2025 WITH AIM TO PRODUCE AN AVERAGE OF 28 UNITS PER YEAR (OR 0.5% OF YEAR ROUND HOUSING UNITS UNTIL THE 10% THRESHOLD IS REACHED.**

In order to address regional housing needs, Sudbury will continue to produce or permit and build units that are affordable to households earning under 80% of the Area Median Income, as Sudbury is committed to making steady progress towards the 10% goal, in accordance with all regulations and guidelines including the interagency agreement regarding housing opportunities for families with children (included as Appendix A).

Sudbury will continue to offer local preference to the extent allowable by law, giving local residents preference in affordable housing tenancy. All marketing and placement efforts will continue to follow Affirmative Fair Housing Marketing guidelines as provided by DHCD.

**GOAL 2: PROMOTE A DIVERSITY OF HOUSING OPTIONS IN SUDBURY TO MEET THE NEEDS OF A CHANGING AND AGING POPULATION AND PROMOTE A MORE SOCIO-ECONOMICALLY AND RACIALLY DIVERSE POPULATION, INCLUDING CONSTRUCTING NEW UNITS AND PRESERVING EXISTING DWELLINGS.**

This goal encourages small units, housing scattered in existing residential neighborhoods, and two-family homes oriented towards smaller households. The Town was encouraged to promote rental and homeownership housing, with emphasis on rental developments, and smaller developments centered in business areas. The Sudbury Housing Trust Home Preservation Program helps to preserve existing dwellings as affordable housing.

**GOAL 3: SUPPORT AGING IN THE COMMUNITY THROUGH INCREASED MULTI-GENERATIONAL HOUSING OPTIONS, MIXED-USE DEVELOPMENT IN WALKABLE NEIGHBORHOODS, ACCESSORY APARTMENTS, PROGRESSIVE SENIOR FACILITIES, SUPPORTIVE SERVICES, AND THE LIKE.**

The workshop and survey results clearly articulate the priority of developing housing near services such as churches, schools, and parks, and on main roads, enhancing the vitality of the business districts. Priorities also include services and housing that supports an aging population.

**GOAL 4: INCREASE MIXTURE OF USES IN BUSINESS DISTRICTS BY ENCOURAGING CREATION OF HOUSING UNITS IN COMMERCIAL SPACES.**

Residential apartments above first floor level businesses is allowed in only one zoning district in

Sudbury (Village Business District). This tool should be expanded to all commercial districts. The Town should also consider a mixed use zoning bylaw allowing both residential and commercial uses to be developed on the same parcel, either in separate buildings or together. Creating housing near areas of commerce encourages walkability and reduces traffic, and generally produces smaller housing units which sell or rent for more affordable rates than single family homes.

**GOAL 5: PRESERVE AFFORDABILITY RESTRICTIONS ON EXISTING AFFORDABLE UNITS FOR THE LONGEST PERIOD ALLOWABLE UNDER THE LAW, FOSTERING HOUSING STABILITY FOR LOW/MODERATE INCOME HOUSEHOLDS. ENSURE EXISTING AFFORDABLE UNITS ARE DECENT AND SAFE BY SUPPORTING THE PHYSICAL PRESERVATION AND MAINTENANCE OF THESE PROPERTIES.**

The Town is the named Monitoring Agent for the 40B homeownership developments in Sudbury and these units are monitored through the Department of Planning and Community Development with assistance from the Regional Housing Services Office. Local monitoring decreases the likelihood of losing affordable units. CPA and other funds should be allocated towards the maintenance of affordable housing once the Town reaches the 10% threshold.

**GOAL 6: LEVERAGE LOCAL RESOURCES, INCLUDING THE COMMUNITY PRESERVATION ACT AND SUDBURY HOUSING TRUST FUNDS, TO CREATE AFFORDABLE HOUSING.**

Sudbury has a strong commitment to the Community Preservation Program, and the Sudbury Housing Trust and the Sudbury Housing Authority are well established as capable transactional entities to create housing units using CPA funds.

**GOAL 7: MAINTAIN AND ADVANCE CAPACITY TO IMPLEMENT LOCAL HOUSING INITIATIVES AND CONTINUE LOCAL PLANNING, EDUCATION, AND ADVOCACY TO PROMOTE ACHIEVEMENT OF LOCAL AFFORDABLE HOUSING GOALS.**

Participants reinforced the importance of supporting and strengthening the capacity of local organizations and institutions that provide affordable housing so Sudbury has a strong infrastructure for meeting its housing needs and is able to respond to housing opportunities in a timely and effective manner with transparent and efficient processes.

Increasing the public awareness of the affordable housing program is noted as a key mechanism to furthering affordable housing in Sudbury.

In addition, proactive planning will continue to be valuable in the years ahead to increase the Town's infrastructure and capabilities.

The strength of the planning efforts in Sudbury, through the Planning Board and the Sudbury Housing Trust enable the housing strategies to be implemented. This includes advancing zoning options and creating new bylaws, providing leadership in public meetings to implement the housing goals and strategies, and providing leadership to the region.

**GOAL 8: ENCOURAGE CREATION OF WORKFORCE HOUSING-UNITS THAT ARE AFFORDABLE TO MIDDLE INCOME HOUSEHOLDS MAKING BETWEEN 80% AND 120% AMI.**

Workforce households, both local municipal employees and employees of local businesses, earn slightly over the 80% income limits, and cannot afford market rate housing in Sudbury. Enabling people who work in Sudbury to live in Sudbury creates a sustainable community and helps to reverse the trend of exporting professionals during the day, and importing the service workers.

## Section 3: Implementation Strategies

Sudbury has defined nine (9) implementation strategies to accomplish the affordable housing goals, as outlined in this section. The strategies defined in this section are the specific initiatives by which Sudbury can achieve its housing production goals as defined in Section 2.

The strategies are grouped by major category including zoning related strategies (Section 3.1), identification of specific sites for Comprehensive Permit applications (Section 3.2), identification of municipally owned parcels (Section 3.3), development of housing programs (Section 3.4) and participation in regional collaborations addressing housing development (Section 3.5).

Strategy	Goal 1 Create more SHI-eligible housing	Goal 2 Promote a diversity of housing	Goal 3 Support an aging population	Goal 4 Housing in the Business Districts	Goal 5 Monitor and Preserve existing homes	Goal 6 Leverage local funds and resources	Goal 7 Maintain, advance capacity	Goal 8 Create workforce housing
1: Inclusionary Zoning	X	X	X			X	X	X
2: Expand Village Business District	X	X	X	X		X	X	X
3: Private 40B Developments	X	X	X	X			X	
4: Review Private Properties	X	X			X	X	X	
5: Municipal Properties	X	X	X			X	X	X
6: Home Preservation Program	X	X			X	X	X	
7: Small Grants Program			X		X		X	
8: Dedicate Housing Staff	X	X	X	X	X	X	X	X
9: Regional Housing Services Office	X				X		X	

The implementation strategies will be implemented over the next five years as shown below. The lighter shaded years indicate strategies that are ongoing and/or should be implemented as opportunities arise, rather than a specific schedule.

#	Housing Strategies	FY2016	FY2017	FY2018	FY2019	FY2020	Responsible Entity	Supporting Entities
1	INCLUSIONARY ZONING						Town Meeting	Planning Board, Sudbury Housing Trust
2	EXPAND VILLAGE BUSINESS DISTRICT						Town Meeting	Planning Board, Sudbury Housing Trust
3	PRIVATE 40B DEVELOPMENTS						ZBA	Selectmen
4	OTHER PRIVATE PROPERTIES						Selectmen	Planning Board, Sudbury Housing Trust
5	TOWN-OWNED PROPERTIES						Selectmen	Planning Board, Sudbury Housing Trust
6	HOME PRESERVATION PROGRAM						Sudbury Housing Trust	CPC
7	SMALL GRANTS PROGRAM						Sudbury Housing Trust	
8	DEDICATE HOUSING STAFF						Town Manager	CPC, Sudbury Housing Trust
9	REGIONAL HOUSING SERVICES OFFICE						Selectmen	CPC, Sudbury Housing Trust

## Section 3.1: Zoning Bylaw Amendments

### **STRATEGY 1: INCLUSIONARY ZONING**

Inclusionary zoning is another tool to create affordable housing and helps to ensure that production of new affordable units keeps pace with the overall rate of new development of market rate units in the community, thereby helping to ensure continued compliance with the State's 10% affordable housing goal. Inclusionary zoning requires that a percentage of housing units in new market rate developments be affordable and count on the Subsidized Housing Inventory. Inclusionary zoning ordinances vary substantially among municipalities. These variables can include:

1. Mandatory or voluntary ordinance.
2. Percentage of units to be dedicated as inclusionary housing.
3. Minimum size of development that the ordinance applies to.
4. Whether inclusionary housing must be built on site.
5. Whether fees can be paid in lieu of building inclusionary housing.
6. Income level or price defined as "affordable," and buyer qualification methods.
7. Appearance and integration of inclusionary housing units.

**Measurable Milestones:** The Planning Board could review an Inclusionary Zoning Bylaw proposal in the fall of 2017. After detailed review and analysis with public comment, the Planning Board could bring an Inclusionary Zoning Bylaw to the 2018 Annual Town Meeting for acceptance.

### **STRATEGY 2: EXPAND VILLAGE BUSINESS DISTRICT**

The Housing Production Plan workshop participants clearly prioritized this strategy. There is currently a Village Business District Zoning in place though it has created no units of housing due to the lack of Town wastewater disposal services.

A new mixed use zoning bylaw is under consideration for a Town Meeting vote in 2016. There are many good examples in Massachusetts of successful mixed use business districts and corridors, and studying these examples will be the cornerstone of this effort. Preserving the character of Sudbury and creating development opportunities without allowing overdevelopment is of utmost concern, therefore adopting proper zoning controls needs to be carefully studied and executed.

**Measurable Milestones:** The Town will vote on adopting a mixed use zoning bylaw in 2016, and continue implementation through FY2017 if approved.

## Section 3.2: Private Property

### **STRATEGY 3: ADVANCE TOWN GOALS THROUGH PRIVATE 40B DEVELOPMENTS**

The plan to reach 10% assumes that most of the units required are created through this strategy, private 40B developments.

There are two private 40B developments under review currently for Sudbury described in Section 1.4. Throughout each project, the Town will pursue advancing the town housing goals. This may be in the form of increasing the number of affordable units, ensuring the equitable distribution and high-quality amenities for the affordable units, allowing for the maximum local preference units to the extent allowable by law, requiring regulatory agreements and other legal framework documents are prepared timely and accurately, and other items related to the affordability requirement as appropriate.

Once the Town reaches the 10% threshold, the Zoning Board has the option of approving or denying Comprehensive Permit applications. At that time, applications which clearly address the housing goals noted in this Plan should be considered, including applications which propose a large percentage of affordable units, affordable age-restricted units, and units created in business districts or as part of a mixed use district.

**Measurable Milestones:** The Department of Planning and Community Development provides staff assistance to the Zoning Board of Appeals for Comprehensive Permits. Through the public hearings, the department ensures that the projects meet the state and local guidelines, that issues from all parties are heard and addressed, and that the Town's housing goals are accomplished. These activities are currently active with the 40B projects under review.

### **STRATEGY 4: REVIEW OTHER PRIVATE PROPERTIES FOR HOUSING**

The Town reviews private parcels for affordable housing development when the opportunity arises. Some private properties of interest include Chapter 61 (Forestry), 61A (Agriculture), and 61B (Recreation) property. These parcels are under special designated tax status to the benefit of both the Town and the landowners. Many of the parcels enrolled in this program are of interest for preservation of open space and conservation. Some parcels would also be suitable for a small number of housing units in addition to the larger open space use. These are explored in detail when those properties are sold or converted and the Town considers exercising its Right of First Refusal.

If parcels are purchased by the Town, the Sudbury Housing Trust, or the Sudbury Housing Authority for development, the developments should always produce a large percentage of affordable units (greater than 25%), and should meet other housing goals identified in this Plan.

**Measurable Milestones:** The Town will review any property under Chapter 61, 61A or 61B for suitability for affordable housing, when the Town considers exercising its Right of First Refusal.

## Section 3.3: Identification of Municipal Parcels

Sudbury has invested significant time into exploration of municipal properties for housing purposes. In 2003, the Blue Ribbon Housing Site Selection Committee (BRHSSC) committee was formed by the Board of Selectmen to assess town-owned parcels of land for development into community housing, specifically scattered site rental housing in duplex or triplex units. Ten parcels were identified by the BRHSSC as having the potential for scattered housing units, however none of these initial parcels were successful in gaining support for the development of affordable housing.

The lists generated by this Committee should be periodically reviewed for suitability for development. Additionally, other Town of Sudbury properties that were identified in past reports as having the potential for development into community housing units should also be considered.

### **STRATEGY 5: INVESTIGATE TOWN-OWNED PROPERTIES FOR HOUSING**

#### **MELONE GRAVEL PIT**

The Melone property is a 46 acre parcel located on Route 117, North Road, identified on Town Assessor Map C12-100, and zoned Research District. It is the largest municipal property that would be suitable for development for commercial, recreation, or housing purposes.

The Town purchased this property in 1992 and has operated a gravel operation on the parcel since the 1990's. Estimates from the Department of Public Works indicate that nearly all the gravel has been removed from the parcel.

Sixteen (16) acres of the property is located in the Town of Concord, six (6) of which are presumed to be outside all wetland and riverfront resource areas and could be included in this project scope for development. This parcel lies within a DEP designated Zone II, Aquifer Protection District, and entirely within the Sudbury Water Resource Protection District, which will require protections for groundwater supplies as well as special permitting. One of the Town's water supply wells is located directly across the street from the parcel. Concord's Dug Meadow well field is adjacent to this parcel as well. There may also be groundwater contamination concerns from the adjacent property previously owned by Unisys, which is currently being monitored by DEP. There is a wireless communications tower on an abutting parcel owned by the Sudbury Water District, Assessor's Map C12-004.

From the time of initial purchase, the Board of Selectmen has been interested in planning for the future of this parcel. This is the largest remaining, buildable Town-owned property and it has much development potential. The land offers potential for trail connections to both Sudbury and Concord conservation lands, area to construct new playing fields, and suitable soils for residential housing. Commercial uses may also be feasible. Community Preservation Funds allocated towards studying this property in 2014 should be used to assist in determining the best use of the parcel.

**Measurable Milestones:** The Board of Selectmen should decide on the best use for the Melone property.



## Section 3.4: Development of Housing Programs

### **STRATEGY 6: ADVANCE THE HOME PRESERVATION PROGRAM**

The **Home Preservation Program** is an existing program offered by The Sudbury Housing Trust to preserve current housing stock while creating affordable Local Action units. This program offers single-family detached homes with their own yard at affordable prices, preserving them for first time homebuyers. The houses are subject to a Local Initiative Program affordable housing restriction, and the Trust subsidizes the difference between the market price and the affordable price.

Once a ranked buyer list is established through a lottery, the home will be selected for purchase. Buyers will be offered the home in ranked order and the Trust will work closely with the buyer through the offer process.

The Sudbury Housing Trust, continually searches for appropriate homes for this program. These are well-maintained 2 or 3-BR homes being sold on the open market. When a suitable property is found, The Trust negotiates a market purchase price, and takes the lead on bringing the parties together from the offer through to the closing. The Trust does not buy the property, but facilitates the transaction between the seller and income-eligible buyer.

The Town also recognizes that initial repairs on the homes may be needed prior to closing. The Trust completes required home repairs based on inspection results from licensed local home inspectors. The inspection results and the home repair plan are available for the potential purchaser to review.

**Measurable Milestones:** The Home Preservation Program has completed eight homes in this program, and plans to create one unit per year, provided that CPC and Town Meeting approve and appropriate funds.

### **STRATEGY 7: CONTINUE THE SMALL GRANTS PROGRAM**

The Sudbury Housing Trust has sponsored the Small Grants program, designed to provide assistance to moderate income-eligible Sudbury residents to make repairs and alterations to their homes for safety and health reasons.

This program addresses house repairs like minor plumbing or electrical, light carpentry, doorbell switch, window repairs, broken or clogged gutters or downspouts, door repairs or replacements, step or porch repairs, lock repair or replacement, insulation, cement work or masonry repair, tiling, plaster patching and wallpapering, sheet-rock repair, touch-up painting, smoke/CO2 detectors, weather stripping, bathroom grab bars, interior painting or wallpapering.

The process is designed to be simple and quick, with grants awarded two times a year for up to \$5,000 per grant. This financial assistance is given on an unsecured basis; there is no repayment required of the funds awarded, though there are some property and income eligibility

requirements. All award recipients are required to give the Sudbury Housing Trust a 60-day notice before listing their home for sale – in case the Trust wishes to purchase the property as a Home Preservation unit. Applications are evaluated and prioritized based on health and safety considerations, and financial need of the applicant. Grants are awarded three times per year.

**Measurable Milestones:** Continue funding and administration of the Small Grants Program.

## Section 3.5: Advancement of Local Capacity & Participation in Regional Collaborations

### **STRATEGY 8: DEDICATED HOUSING STAFF**

All initiatives require dedicated and experienced staff to implement. Creating affordable housing in compliance with all state legislation, regulation, and guidelines, that meets the desire and preferences of the local political body, and is attractive and an enhancement to the character of the town requires time, energy and expertise.

Dedicated housing staff provide a central focal point for housing related activities in Sudbury and enables the Town to progress in many of its housing initiatives. Housing staff is currently provided through the Regional Housing Services Office, administrative support in the Department of Planning and Community Development and the Sudbury Housing Trust. Community Preservation Act funds are the primary source of funding.

**Measurable Milestones:** Continue funding dedicated housing staff.

### **STRATEGY 9: CONTINUE MEMBERSHIP TO THE REGIONAL HOUSING SERVICES OFFICE**

Sudbury is very active in regional housing efforts, and helped to initiate an innovative Regional Housing Services Office established through an inter-municipal agreement (IMA) with the Towns of Acton, Bedford, Burlington, Concord, Lexington, Sudbury, and Weston.

The participating Towns benefit in preserving their investments in affordable housing through proactive monitoring and leveraging regional expertise. Concord currently acts as the lead community and hosts the Regional Housing Services Office.

There are benefits on all sides for this collaboration. The member towns receive high-level service on an as-needed basis without individual procurement processes or staffing expense.

This initiative started with leadership from MAPC (Massachusetts Area Planning Council) in January 2009. Through discussions, meetings and conferences, it became evident that there was a need in some of the Metrowest communities for housing staff services. MAPC awarded three District Local Technical Assistance grants to support the project, from concept to implementation.

The participating Towns have signed the Inter-Municipal Agreement and the Regional Housing Services Office Revolving Fund has been authorized.

**Measurable Milestones:** Continue membership in the Regional Housing Services Office.

## APPENDIX A: Interagency Agreement regarding housing for families

### INTERAGENCY AGREEMENT

#### Regarding Housing Opportunities for Families with Children

This Interagency Agreement (this "Agreement") is entered into as of the 17th day of January, 2014 by and between the Commonwealth of Massachusetts, acting by and through its Department of Housing and Community Development ("DHCD"), the Massachusetts Housing Partnership Fund Board ("MHP"), the Massachusetts Housing Finance Agency (in its own right and in its capacity as Project Administrator designated by DHCD under the Guidelines for Housing Programs in Which Funding is Provided By Other Than a State Agency, "MassHousing"), the Massachusetts Development Finance Agency ("MassDevelopment") and the Community Economic Development Assistance Corporation ("CEDAC"). DHCD, MHP, MassHousing, MassDevelopment and CEDAC are each referred to herein as a "State Housing Agency" and collectively as the "State Housing Agencies".

#### Background

A. DHCD's 2013 Analysis of Impediments to Fair Housing Choice ("AI") includes action steps to improve housing opportunities for families, including families with children, the latter being a protected class pursuant to fair housing laws, including the federal Fair Housing Act, as amended (42 U.S.C. §§ 3601 *et seq.*) and Massachusetts General Laws Chapter 151B. In order to respond to development patterns in the Commonwealth that disparately impact and limit housing options for families with children, such steps include requiring a diversity of bedroom sizes in Affordable Production Developments that are not age-restricted and that are funded, assisted or approved by the State Housing Agencies to ensure that families with children are adequately served.

B. The State Housing Agencies have agreed to conduct their activities in accordance with the action steps set forth in the AI.

C. This Agreement sets forth certain agreements and commitments among the State Housing Agencies with respect to this effort.

#### Definitions

1) "Affordable" - For the purposes of this Agreement, the term "Affordable" shall mean that the development will have units that meet the eligibility requirements for inclusion on the Subsidized Housing Inventory ("SHI").

2) "Production Development" - For purposes of this Agreement "Production Development" is defined as new construction or adaptive reuse of a non-residential building and shall include rehabilitation projects if the property has been vacant for two (2) or more years or if the property has been condemned or made uninhabitable by fire or other casualty.



Agreements

NOW, THEREFORE, DHCD, MHP, MassHousing, MassDevelopment and CEDAC agree as follows:

Bedroom Mix Policy

1) Consistent with the AI, it is the intention of the State Housing Agencies that at least ten percent (10%) of the units in Affordable Production Developments funded, assisted or approved by a State Housing Agency shall have three (3) or more bedrooms except as provided herein. To the extent practicable, the three bedroom or larger units shall be distributed proportionately among affordable and market rate units.

2) The Bedroom Mix Policy shall be applied by the State Housing Agency that imposes the affordability restriction that complies with the requirements of the SHI.

3) The Bedroom Mix Policy shall not apply to Affordable Production Developments for age-restricted housing, assisted living, supportive housing for individuals, single room occupancy or other developments in which the policy is not appropriate for the intended residents. In addition, the Bedroom Mix Policy shall not apply to a Production Development where such units:

- (i) are in a location where there is insufficient market demand for such units , as determined in the reasonable discretion of the applicable State Housing Agency; or
- (ii) will render a development infeasible, as determined in the reasonable discretion of the applicable State Housing Agency.

4) Additionally, a State Housing Agency shall have the discretion to waive this policy (a) for small projects that have less than ten (10) units and (b) in limited instances when, in the applicable State Housing Agency's judgment, specific factors applicable to a project and considered in view of the regional need for family housing, make a waiver reasonable.

5) The Bedroom Mix Policy shall be applicable to all Production Developments provided a Subsidy as defined under 760 CMR 56.02 or otherwise subsidized, financed and/or overseen by a State Housing Agency under the M.G.L. Chapter 40B comprehensive permit rules for which a Chapter 40B Project Eligibility letter is issued on or after March 1, 2014. The policy shall be applicable to all other Affordable Production Developments funded, assisted, or approved by a State Housing Agency on or after May 1, 2014.



Attachment4.a: DRAFT Sudbury HPP 2016 3.16.16 (1706 : Housing Production Plan approval)

## APPENDIX B: DHCD Affirmative Fair Housing Marketing Guidelines

The Commonwealth of Massachusetts has a compelling interest in creating fair and open access to affordable housing and promoting compliance with state and federal civil rights obligations. Therefore, all housing with state subsidy or housing for inclusion on the Subsidized Housing Inventory (SHI) shall have an Affirmative Fair Housing Marketing Plan (AFHMP).

To that end, DHCD has prepared and published comprehensive guidelines that all agencies use to guide the resident selection of affordable housing.

In particular, the local preference allowable categories are specified:

- **Current residents:** A household in which one or more members is living in the city or town at the time of application. Documentation of residency should be provided, such as rent receipts, utility bills, street listing or voter registration listing.
- **Municipal Employees:** Employees of the municipality, such as teachers, janitors, firefighters, police officers, librarians, or town hall employees.
- **Employees of Local Businesses:** Employees of businesses located in the municipality.
- **Households with children attending the locality's schools,** such as METCO students.

These guidelines were revised in May 2013, and the guidelines in full can be found at the following link:

<http://www.mass.gov/hed/docs/dhcd/hd/fair/afhmp.pdf>

## APPENDIX C: COMMUNITY WORKSHOP RESULTS

### Group Exercise #1

*Working with table mates in groups of three to six, participants discussed the following questions.*

#### 1. What types of homes have you lived in throughout your life?

As people move through life cycles (from childhood to old age), the types of homes they live in often change (e.g., single family, two-family, townhouse, apartment, apartment over a shop).

Housing Types Participants Identified	Table Name					
	A	B	C	D	E	F
Single family home	x	x	x	x	x	na
Two- or multi-family home/ Triple decker	x	x			x	
Apartment	x	x	x	x	x	
Dormitory			x	x	x	
Sorority/Fraternity				x		
Military Barracks				x	x	
Condo	x		x	x	x	
Row house/ Town House	x	x				

2. How adequately does your current home accommodate your present housing needs? In what ways would your current home support or hinder aging in place?

3. To what extent does your current home support or hinder aging in place?

4. To what extent do housing options in Sudbury support or hinder building/maintaining a strong community?

5. What additional housing options, if any, would benefit the community and why?

### Group Exercise #2

*Working with table mates in groups of three to six, participants discussed the following questions.*

1. To what extent are the following goals from 2011 still relevant?

*Confirm, Challenge or Build on these goals.*

2011 Goal	Table					
	A	B	C	D	E	F
1. Promote a diversity of housing types in Sudbury to meet the needs of a changing and diversified population.	CO CH B	CO B	CO B	CO	B	CO
2. Create more affordable rental and home ownership units for eligible households making less than 80% AMI with	CO CH	CO CH	CO B	CO	NA	CO

<b>local preference.</b>	B					
<b>3. Increase diversity of housing options by enabling housing in business districts including apartments above commercial spaces.</b>	CH B	CO B	CO	CH	B	CO
<b>4. Preserve affordability restrictions on existing units for the longest period possible.</b>	CO	CO B	CO	CO	CO	CO
<b>5. Leverage local Community Preservation Act funds and Sudbury Housing Trust funds and other local resources towards affordable housing production.</b>	CO CH B	CO	B	B	CO	CO
<b>6. Preserve existing small homes and dwellings.</b>	B CH	CO	CO CH	CO	CO	CO
<b>7. Maintain and advance capacity with planning advocacy.</b>	CO CH B	CO B	CO	B	CO	NA
<b>8. Encourage creation of workforce housing units that are affordable to middle income households making between 80% and 120% AMI.</b>	CO CH B	NA	B	CO	CO	CO CH

CO= Confirm, CH= Challenge, B= Build

2. *What other housing goals should be included in the 2016 Plan, including goals that would apply if Sudbury exceed the 10% goal for affordable housing?*

3. *Older people may face certain issues that make it challenging for them to stay in the community. Should Sudbury better support aging in the community for older residents? If so, how?*

4. *What other issues should be considered in this planning process? What barriers, opportunities, and/or compromises should be considered to help address your community’s housing needs?*



## APPENDIX D: ONLINE SURVEY SUMMARY

### Online Survey Summary

Working with the Planning Department and Regional Housing Office, planning consultant JM Goldson created an online survey through Survey Monkey that consisted of 14 questions. The Town broadly advertised the survey through the Planning Department website. The survey link was emailed to boards and commissions, publicized on social media, posted on the Town's website, as well as announced at local meetings. The survey was live from January 29-March 4, 2016. Ninety-seven people participated. The purpose of the survey was to increase public engagement to further inform the Housing Production Plan and help determine policy direction.

#### Respondent Characteristics

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Of the 97 survey respondents, 95% (92) live in Sudbury and two respondents work in Sudbury and the remainder neither live nor work in the Town. Thirty-four percent of respondents are between the ages of 40-49, and 47% are 50 years or older. Fifty-nine percent of participants have children under the age of 18 and 97% of respondents who live in Sudbury also own their homes.

#### Affordability & Community Priorities

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Nine percent of respondents are extremely or very likely, and an additional 15% are moderately likely, to move out of Sudbury in the next five years. Of those who are extremely or very likely to move, 89% cited the high cost of living as the most relevant factor, and 55% cited their desire for a more urban community as the most relevant factor.

Forty-one percent of respondents indicated that it is extremely or very important for them to stay in Sudbury as they age, and an additional 42% indicated that it is moderately important for them to stay in the community as they age. Respondents were given factors to choose that would enhance their ability to age in the community, ranging from the availability of "lifestyle housing" to increased transit options to expanded home-based services. Of these factors, respondents ranked the following highest:

- More than 40% of respondents identified pedestrian improvements, and 35% identified increased transit options.
- More than 22% of participants identified the availability of service enriched housing, 25% cited lifestyle housing, and 29% desire expanded community services like health and wellness programs.

Five participants wrote in responses. These included:

- Lower taxes
- Lower taxes for seniors
- Keep small town character
- No overcrowding

One question asked, “Think about an ‘ideal community’ for you to live in and rate how important the following community characteristics would be for you.” The options included; a place with quality public schools, a place with a mix of housing costs, a place with lots of small children, and others. The highest ranking responses, using a weighted average, were as follows:

- **TO LIVE IN A PLACE WITH QUALITY PUBLIC SCHOOLS**
- **A PLACE THAT ATTRACTS YOUNG PROFESSIONALS TO LIVE**
- **A WIDE DIVERSITY OF AGES**
- **HOUSING OPTIONS CLOSE TO SHOPS**
- **HOUSING OPTIONS CLOSE TO PUBLIC TRANSIT**

Six respondents wrote in additional characteristics important to them. These included:

- Increase racial and economic diversity
- Good community facilities
- Carefully managed land use
- Highly monitored compliance and by-laws
- Housing for people with multiple chemical sensitivities

The final survey question asked, “Which of the types of policies/initiatives do you want local planners and policy makers in Sudbury to spend their time on in the next five years?”. The survey asked respondents to prioritize the options. More than 40% of respondents ranked the following three options “high priority”:

- Encourage preservation of existing small homes
- Help people stay in their homes as they age
- Help people stay in the community as they age

Additional write-in responses included:

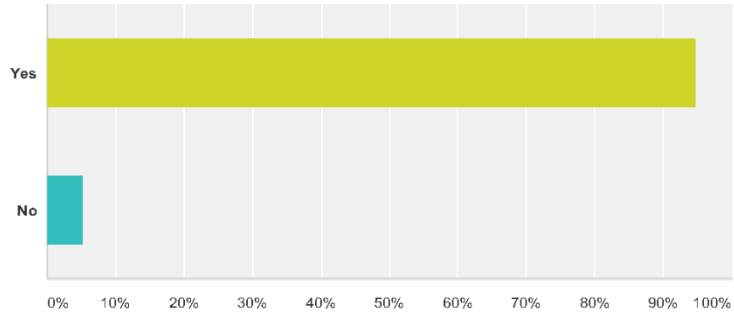
- Incorporate transportation into housing planning
- Growth cannot exceed traffic capacity
- Lower property taxes
- Build more sidewalks to improve connectivity
- Don’t create more housing. Preserve open space.
- Without mobility improvements (pedestrian and public transit) it is not practical for seniors to try to stay in their homes.

# APPENDIX E: ONLINE SURVEY RESULTS

Sudbury HPP 2016

## Q1 Do you currently reside in Sudbury?

Answered: 97 Skipped: 0



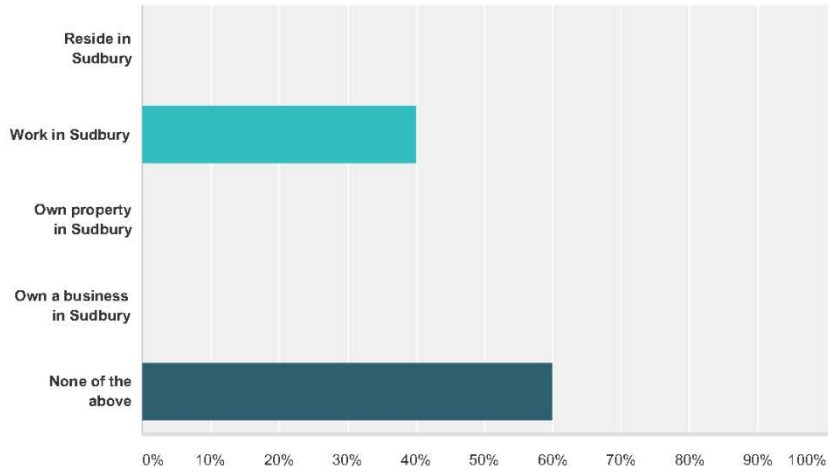
Answer Choices	Responses	
Yes	94.85%	92
No	5.15%	5
<b>Total</b>		<b>97</b>

Attachment4.a: DRAFT Sudbury HPP 2016 3.16.16 (1706 : Housing Production Plan approval)

Sudbury HPP 2016

**Q2 Please check all of the following that apply to you:**

Answered: 5 Skipped: 92



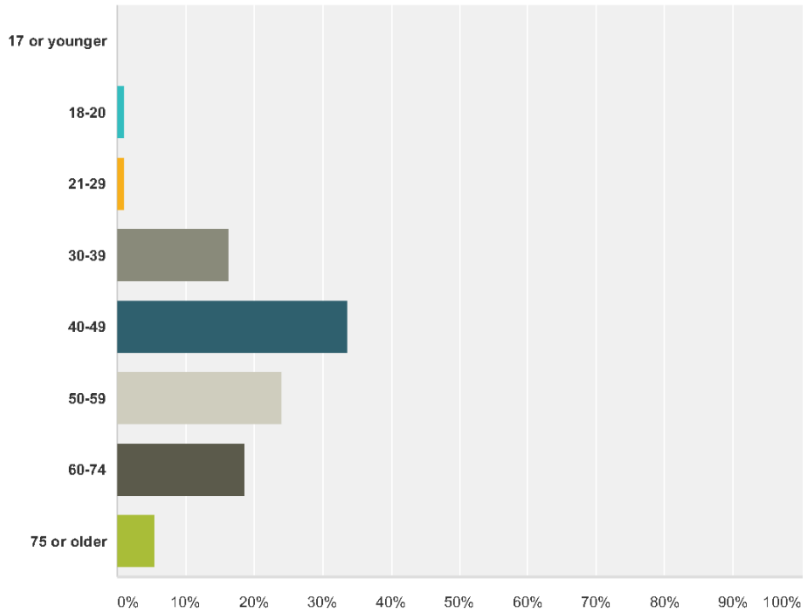
Answer Choices	Responses
Reside in Sudbury	0.00% 0
Work in Sudbury	40.00% 2
Own property in Sudbury	0.00% 0
Own a business in Sudbury	0.00% 0
None of the above	60.00% 3
<b>Total Respondents: 5</b>	

Attachment4.a: DRAFT Sudbury HPP 2016 3.16.16 (1706 : Housing Production Plan approval)

Sudbury HPP 2016

**Q3 What is your age?**

Answered: 92 Skipped: 5



Answer Choices	Responses
17 or younger	0.00% 0
18-20	1.09% 1
21-29	1.09% 1
30-39	16.30% 15
40-49	33.70% 31
50-59	23.91% 22
60-74	18.48% 17
75 or older	5.43% 5
<b>Total</b>	<b>92</b>

Attachment4.a: DRAFT Sudbury HPP 2016 3.16.16 (1706 : Housing Production Plan approval)

Sudbury HPP 2016

**Q4 What is your age?**

Answered: 0 Skipped: 97

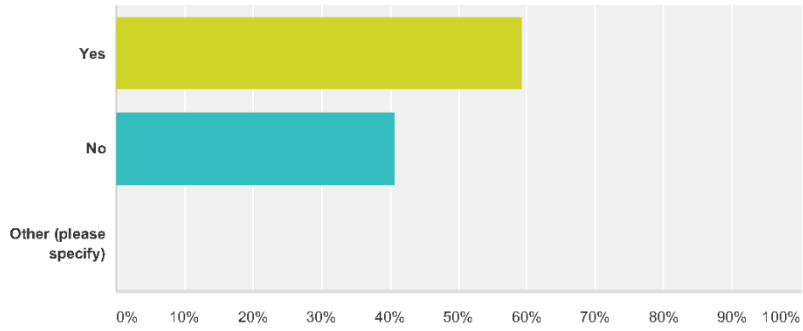
! No matching responses.

Answer Choices	Responses
17 or younger	0.00% 0
18-20	0.00% 0
21-29	0.00% 0
30-39	0.00% 0
40-49	0.00% 0
50-59	0.00% 0
60-74	0.00% 0
75 or older	0.00% 0
<b>Total</b>	<b>0</b>

Sudbury HPP 2016

**Q5 Do you have any children under 18 who reside in Sudbury?**

Answered: 91 Skipped: 6



Answer Choices	Responses
Yes	59.34% 54
No	40.66% 37
Other (please specify)	0.00% 0
<b>Total</b>	<b>91</b>

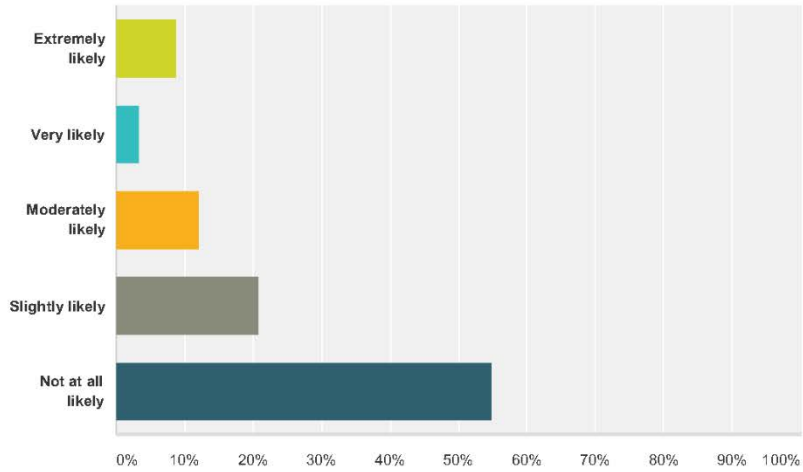
#	Other (please specify)	Date
	There are no responses.	

Attachment4.a: DRAFT Sudbury HPP 2016 3.16.16 (1706 : Housing Production Plan approval)

Sudbury HPP 2016

**Q6 How likely are you to move out of Sudbury in the next five years?**

Answered: 91 Skipped: 6



Answer Choices	Responses
Extremely likely	8.79% 8
Very likely	3.30% 3
Moderately likely	12.09% 11
Slightly likely	20.88% 19
Not at all likely	54.95% 50
<b>Total</b>	<b>91</b>

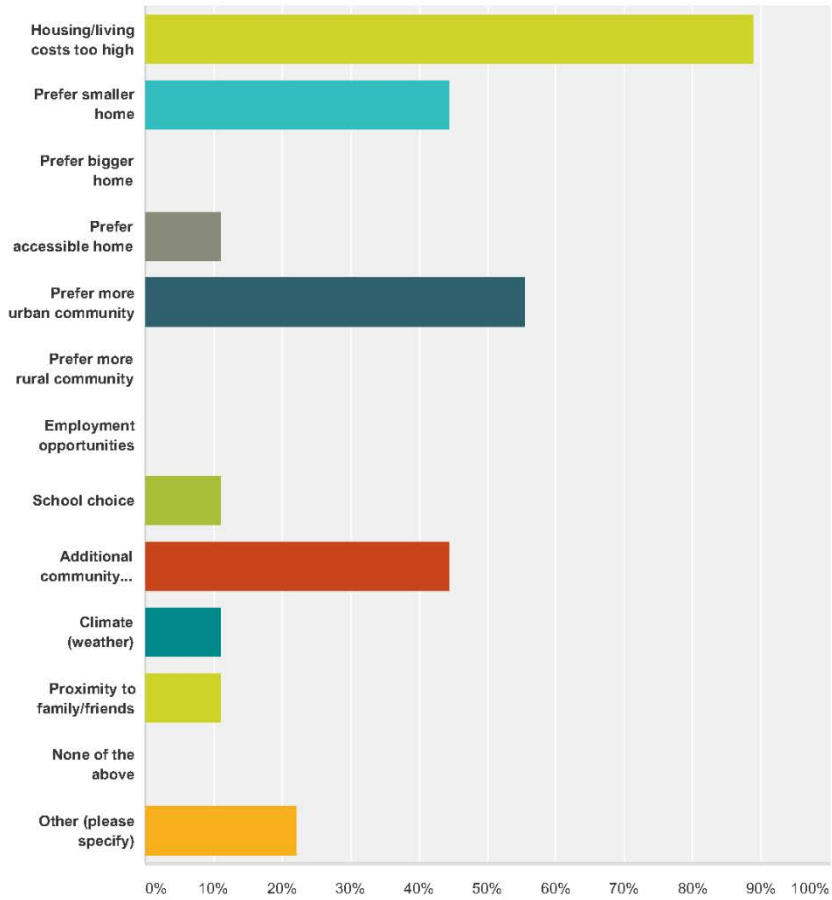
Attachment4.a: DRAFT Sudbury HPP 2016 3.16.16 (1706 : Housing Production Plan approval)



Sudbury HPP 2016

**Q7 You've indicated that it is extremely likely or very likely that you will move out of Sudbury in the next five years. Which of the following factors do you believe most influence your likelihood of moving out of Sudbury? (Check all that apply)**

Answered: 9 Skipped: 88



Answer Choices	Responses
Housing/living costs too high	88.89% 8
Prefer smaller home	44.44% 4
Prefer bigger home	0.00% 0
Prefer accessible home	11.11% 1

Sudbury HPP 2016

Prefer more urban community	55.56%	5
Prefer more rural community	0.00%	0
Employment opportunities	0.00%	0
School choice	11.11%	1
Additional community services/local amenities	44.44%	4
Climate (weather)	11.11%	1
Proximity to family/friends	11.11%	1
None of the above	0.00%	0
Other (please specify)	22.22%	2
<b>Total Respondents: 9</b>		

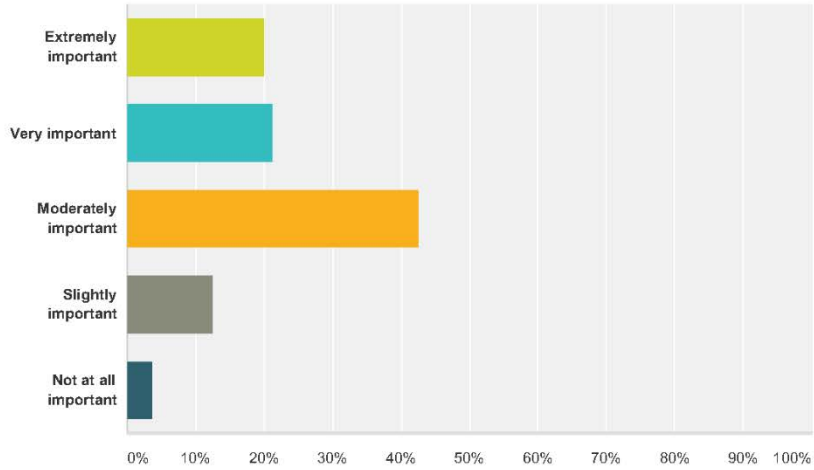
#	Other (please specify)	Date
1	I need housing that is suitable for someone with multiple chemical sensitivities.	3/1/2016 6:08 PM
2	Don't like what the town is becoming. Thinking about moving husband's body out of cemetery as well.	3/1/2016 6:00 AM

Attachment 4.a: DRAFT Sudbury HPP 2016 3.16.16 (1706 : Housing Production Plan approval)

Sudbury HPP 2016

**Q8 How important is it to you to stay in Sudbury (either in your current home or not) as you age?**

Answered: 80 Skipped: 17



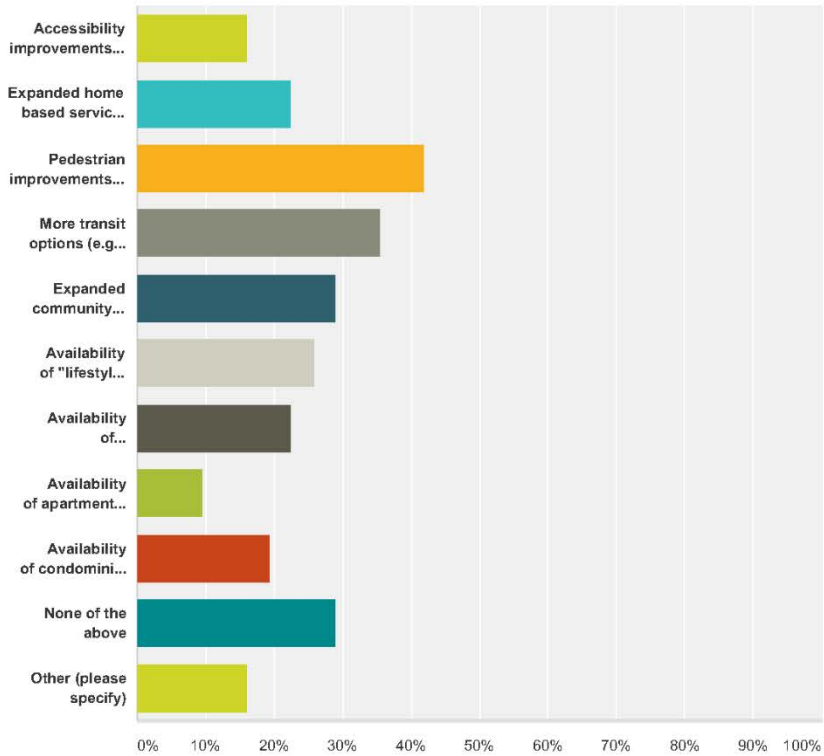
Answer Choices	Responses	Count
Extremely important	20.00%	16
Very important	21.25%	17
Moderately important	42.50%	34
Slightly important	12.50%	10
Not at all important	3.75%	3
<b>Total</b>		<b>80</b>

Attachment4.a: DRAFT Sudbury HPP 2016 3.16.16 (1706 : Housing Production Plan approval)

Sudbury HPP 2016

**Q9 You've indicated that it is extremely important or very important to stay in Sudbury as you age. What factors need to change/improve to enable you to stay in the community as you age? (Check all that apply)**

Answered: 31 Skipped: 66



Answer Choices	Responses
Accessibility improvements to home (e.g., installation of ramps, grab bars, first floor bedroom or bath)	16.13% 5
Expanded home based services (e.g., home repair, chores, companion care, meal delivery, adult day care)	22.58% 7
Pedestrian improvements (e.g., safer sidewalks with ramps, clearly-demarcated cross walks, more and longer walk signals at crossing)	41.94% 13
More transit options (e.g., buses, ride shares/taxis)	35.48% 11
Expanded community services (e.g., health and wellness services/programs)	29.03% 9

Sudbury HPP 2016

Availability of "lifestyle housing" (i.e. designed for active older adults, including single-family and/or multi-family with social or recreational amenities such as clubhouses)	25.81%	8
Availability of "service-enriched housing" (i.e., offers a set of services intended to meet residents' evolving needs and can include co-housing, continued-care retirement communities, assisted-living, and skilled-care nursing homes)	22.58%	7
Availability of apartments in walkable neighborhood	9.68%	3
Availability of condominiums in walkable neighborhood	19.35%	6
None of the above	29.03%	9
Other (please specify)	16.13%	5
<b>Total Respondents: 31</b>		

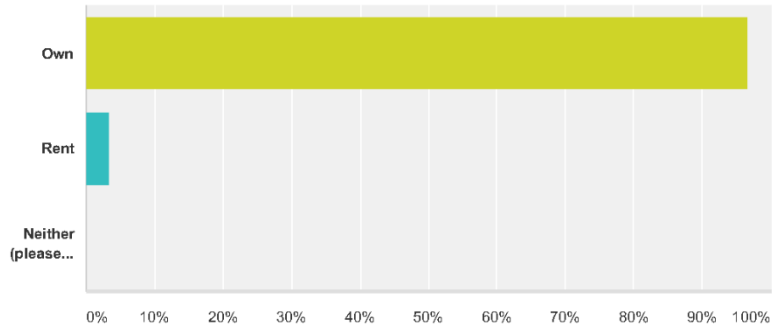
#	Other (please specify)	Date
1	improved town community center (pool, outdoor pool), walkable town center	3/1/2016 11:09 AM
2	less taxes	3/1/2016 8:41 AM
3	No overcrowding	2/29/2016 9:54 PM
4	Population control - keeping the character of the town as small	2/20/2016 12:08 PM
5	Modifying property taxes so seniors can stay	2/18/2016 3:59 PM

Attachment 4.a: DRAFT Sudbury HPP 2016 3.16.16 (1706 : Housing Production Plan approval)

Sudbury HPP 2016

**Q10 Do you rent or own the place where you live?**

Answered: 88 Skipped: 9



Answer Choices	Responses
Own	96.59% 85
Rent	3.41% 3
Neither (please specify)	0.00% 0
<b>Total</b>	<b>88</b>

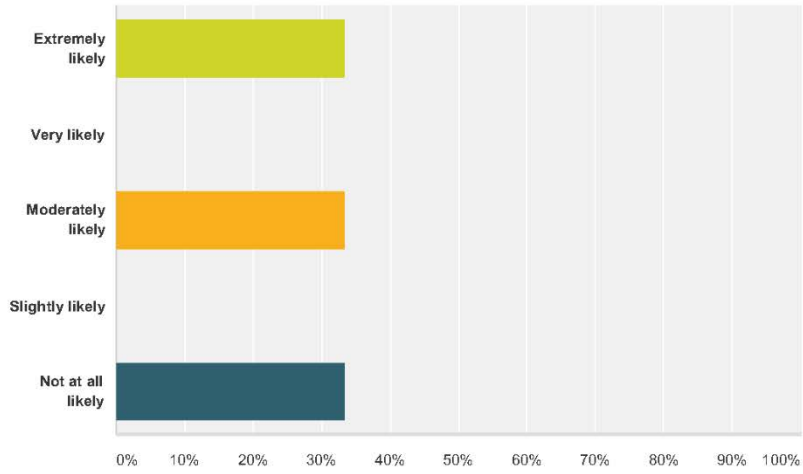
#	Neither (please specify)	Date
	There are no responses.	

Attachment4.a: DRAFT Sudbury HPP 2016 3.16.16 (1706 : Housing Production Plan approval)

Sudbury HPP 2016

**Q11 How likely is it that you will buy a home in Sudbury in the next 10 years?**

Answered: 3 Skipped: 94



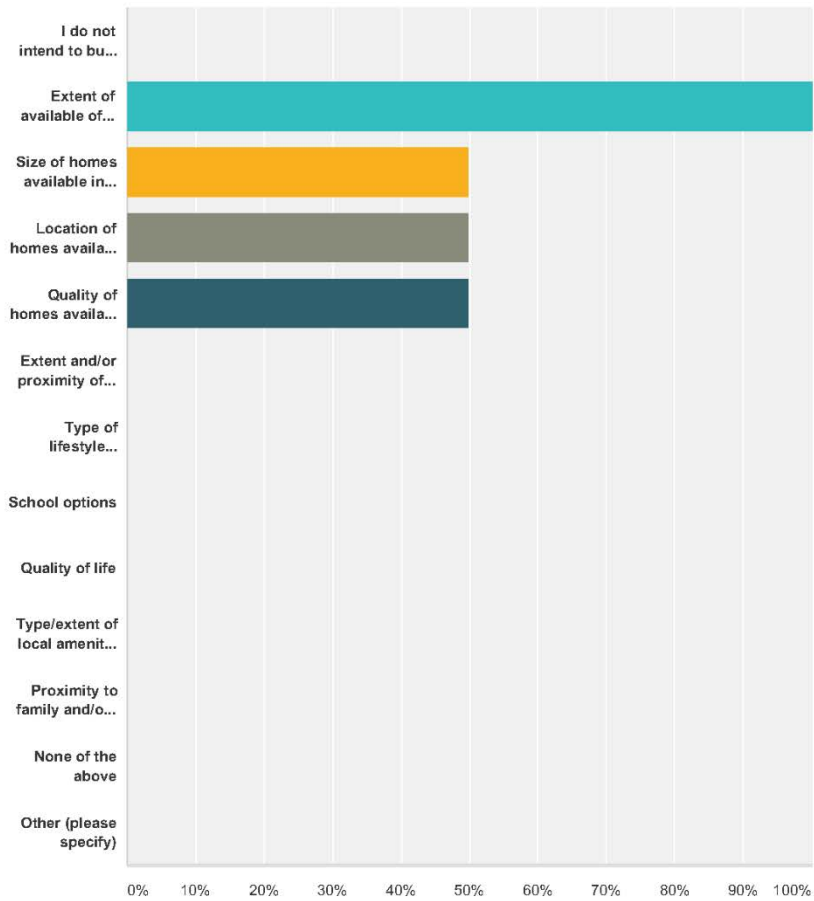
Answer Choices	Responses	Count
Extremely likely	33.33%	1
Very likely	0.00%	0
Moderately likely	33.33%	1
Slightly likely	0.00%	0
Not at all likely	33.33%	1
<b>Total</b>		<b>3</b>

Attachment4.a: DRAFT Sudbury HPP 2016 3.16.16 (1706 : Housing Production Plan approval)

Sudbury HPP 2016

**Q12 You've indicated that buying a home in Sudbury in the next 10 years is moderately likely, slightly likely, or not likely for you. Which of the following factors do you believe most influence your likelihood of buying a home in Sudbury? (Check all that apply)**

Answered: 2 Skipped: 95



Answer Choices	Responses
I do not intend to buy a home in the next 10 years	0.00% 0
Extent of available of homes in your price range	100.00% 2
Size of homes available in your price range	50.00% 1



Sudbury HPP 2016

Location of homes available in your price range	50.00%	1
Quality of homes available in your price range	50.00%	1
Extent and/or proximity of employment opportunities	0.00%	0
Type of lifestyle options in community	0.00%	0
School options	0.00%	0
Quality of life	0.00%	0
Type/extent of local amenities (parks, recreation, libraries, houses of worship)	0.00%	0
Proximity to family and/or friends	0.00%	0
None of the above	0.00%	0
Other (please specify)	0.00%	0
<b>Total Respondents: 2</b>		

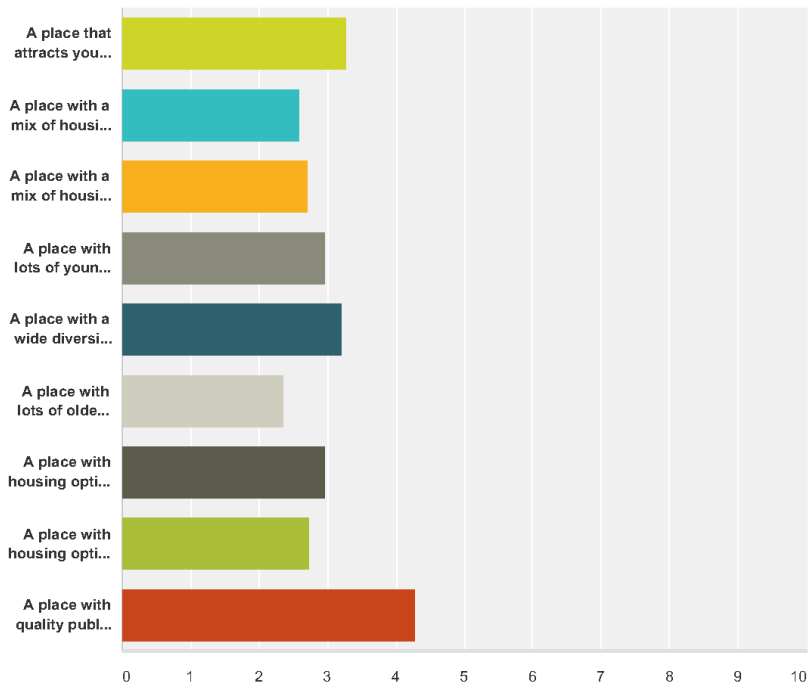
#	Other (please specify)	Date
	There are no responses.	

Attachment 4.a: DRAFT Sudbury HPP 2016 3.16.16 (1706 : Housing Production Plan approval)

Sudbury HPP 2016

**Q13 Think about an "ideal community" for you to live in and rate how important the following community characteristics would be for you:**

Answered: 86 Skipped: 11



	Extremely important	Very important	Moderately important	Slightly important	Not at all important	N/A	Total	Weighted Average
A place that attracts young professionals to live	11.76% 10	32.94% 28	32.94% 28	15.29% 13	7.06% 6	0.00% 0	85	3.27
A place with a mix of housing options (e.g., apartment, condominium, single family, town house, etc.)	10.71% 9	22.62% 19	15.48% 13	16.67% 14	34.52% 29	0.00% 0	84	2.58
A place with a mix of housing cost	10.47% 9	18.60% 16	24.42% 21	25.58% 22	20.93% 18	0.00% 0	86	2.72
A place with lots of young children	7.06% 6	30.59% 26	29.41% 25	17.65% 15	15.29% 13	0.00% 0	85	2.96
A place with a wide diversity of ages	4.65% 4	43.02% 37	32.56% 28	9.30% 8	10.47% 9	0.00% 0	86	3.22
A place with lots of older adults	1.16% 1	13.95% 12	30.23% 26	27.91% 24	26.74% 23	0.00% 0	86	2.35
A place with housing options close to services/shops	16.67% 14	25.00% 21	19.05% 16	16.67% 14	22.62% 19	0.00% 0	84	2.96

Sudbury HPP 2016

A place with housing options close to public transit	9.41% 8	22.35% 19	22.35% 19	20.00% 17	23.53% 20	2.35% 2	85	2.73
A place with quality public schools	56.47% 48	22.35% 19	12.94% 11	4.71% 4	2.35% 2	1.18% 1	85	4.27

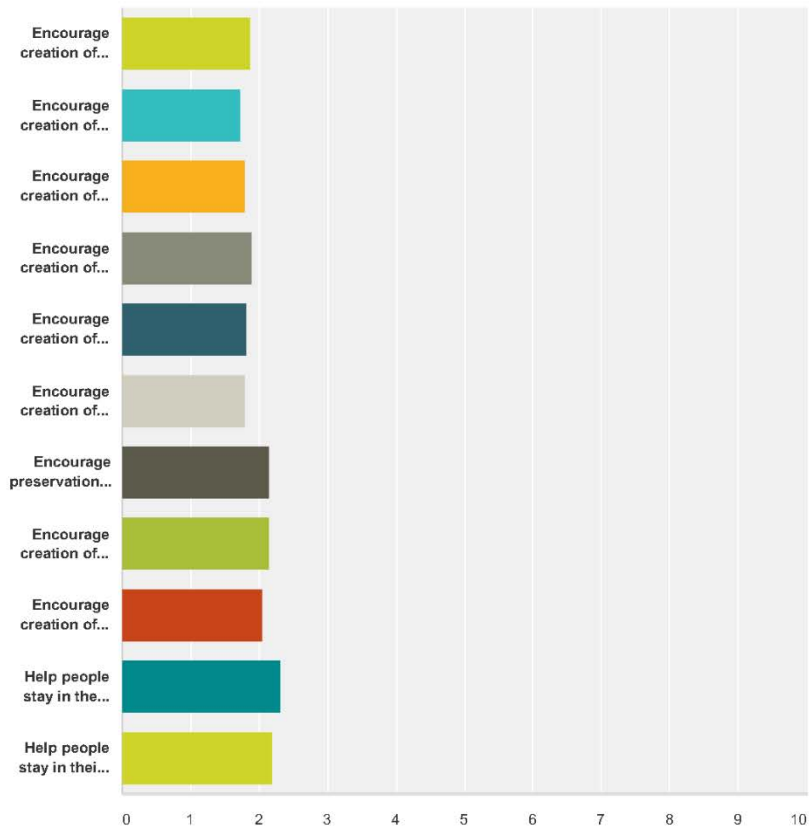
#	Other (please specify)	Date
1	Housing suitable for someone with multiple chemical sensitivities. This consideration outweighs all others for me except cost.	3/1/2016 6:11 PM
2	Good community facilities	3/1/2016 11:10 AM
3	The high-achieving schools are what attracted myself and husband (engineer & psychologist) to this town to live in a tiny house with an extremely high tax rate. Want to maintain a VERY high quality in the schools. If we lose that, we would move and find more for our money elsewhere.	3/1/2016 11:05 AM
4	Stability - Carefully Managed land use	2/29/2016 10:27 PM
5	a range of cultural, ethnic, and economic diversity	2/17/2016 3:43 PM
6	Extremely Important: A place that monitors for compliance and enforces its' bylaws.	2/16/2016 4:12 PM

Attachment4.a: DRAFT Sudbury HPP 2016 3.16.16 (1706 : Housing Production Plan approval)

Sudbury HPP 2016

**Q14 Which of the types of policies/initiatives do you want local planners and policy makers in Sudbury to spend their time on in the next five years?**

Answered: 85 Skipped: 12

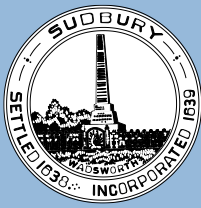


	High Priority	Medium Priority	Low Priority	N/A	Total	Weighted Average
Encourage creation of homes attractive to families	21.95% 18	43.90% 36	34.15% 28	0.00% 0	82	1.88
Encourage creation of homes attractive to young professionals	10.00% 8	52.50% 42	37.50% 30	0.00% 0	80	1.73
Encourage creation of homes with a convenient walk to business/services	19.28% 16	37.35% 31	39.76% 33	3.61% 3	83	1.79
Encourage creation of homes with a mix of price ranges	32.93% 27	24.39% 20	41.46% 34	1.22% 1	82	1.91
Encourage creation of more housing options/choices	33.33% 27	14.81% 12	50.62% 41	1.23% 1	81	1.82

## Sudbury HPP 2016

Encourage creation of smaller homes	<b>24.39%</b> 20	<b>30.49%</b> 25	<b>43.90%</b> 36	<b>1.22%</b> 1	82	1.80
Encourage preservation of existing smaller homes	<b>40.96%</b> 34	<b>32.53%</b> 27	<b>25.30%</b> 21	<b>1.20%</b> 1	83	2.16
Encourage creation of more energy efficient homes	<b>36.14%</b> 30	<b>42.17%</b> 35	<b>21.69%</b> 18	<b>0.00%</b> 0	83	2.14
Encourage creation of sustainably-built homes (e.g., environmentally responsible and resource-efficient design and materials)	<b>32.93%</b> 27	<b>39.02%</b> 32	<b>28.05%</b> 23	<b>0.00%</b> 0	82	2.05
Help people stay in the community as they age	<b>46.99%</b> 39	<b>37.35%</b> 31	<b>15.66%</b> 13	<b>0.00%</b> 0	83	2.31
Help people stay in their homes as the age	<b>43.37%</b> 36	<b>32.53%</b> 27	<b>24.10%</b> 20	<b>0.00%</b> 0	83	2.19

#	Other (please specify)	Date
1	Incorporate transportation planning in the housing plans	3/2/2016 12:18 PM
2	Energy efficiency products must be balanced with products suitable for someone with multiple chemical sensitivities. For ex. Smart meters may be efficient but sicken some sensitive people. Some commercial green cleaning products may be environmentally friendly but have fragrances. The best housing would be suitable for someone with mold allergies, electromagnetic vulnerabilities, intolerance to fluorescent lighting, and traffic and environmental pollutants.	3/1/2016 6:49 PM
3	It is impractical for the elderly to stay in single family homes out here as they age - too much maintenance in large yards, snow, poor home construction (ice dams), and distance from commuting options. The community is not walkable and there are no public transit options. It is not a viable goal for the town to try to keep the elderly in place or even in townhomes because mobility is still an issue.	3/1/2016 11:09 AM
4	Growth can't exceed traffic capacity	2/29/2016 10:28 PM
5	1) Lowering property taxes, 2) Making roads more safe to walk on by addressing traffic and people who speed on side-roads	2/24/2016 4:25 PM
6	Don't create more housing. Preserve open space.	2/17/2016 4:46 PM
7	Build more walkways to provide the needed connectivity.	2/16/2016 4:15 PM



SUDBURY BOARD OF SELECTMEN  
Tuesday, March 22, 2016

**MISCELLANEOUS (UNTIMED)**

**5: Authorize contract for Peer Review Consultant Services, Horsley Witten Group**

REQUESTOR SECTION

Date of request: March 16, 2016

Requested by: Jody Kablack

Formal Title: Discussion and possibly vote whether to authorize the Town Manager to execute the contract for Stormwater peer review services for the Meadow Walk Sudbury application (National Development/Raytheon redevelopment) from Horsley Witten Group dated March 9, 2016 in the amount of \$14,000 (estimated).

Recommendations/Suggested Motion/Vote: Discussion and possibly vote whether to authorize the Town Manager to execute the contract for Stormwater peer review services for the Meadow Walk Sudbury application (National Development/Raytheon redevelopment) from Horsley Witten Group dated March 9, 2016 in the amount of \$14,000 (estimated).

Background Information:

Contract attached. **Potential vote on this item at next meeting, April 5, 2016.**

Financial impact expected:None. Contract paid out of developer peer review fees.

Approximate agenda time requested: 10 minutes

Representative(s) expected to attend meeting:

Review:

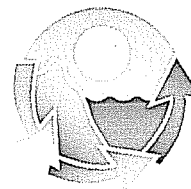
Patty Golden	Pending
Melissa Murphy-Rodrigues	Pending
Barbara Saint Andre	Pending
Patricia A. Brown	Pending
Board of Selectmen	Pending

03/22/2016 7:30 PM

# Horsley Witten Group

*Sustainable Environmental Solutions*

294 Washington Street • Suite 801 • Boston, MA 02108  
857-263-8193 • horsleywitten.com



March 9, 2016

Ms. Jody Kablack  
Director of Planning and Community Development  
Town of Sudbury  
278 Old Sudbury Road  
Sudbury, Massachusetts 01776

RE: Meadow Walk Sudbury  
Preliminary Master Plan and Phase 1: Grocery Store  
Peer Review Consultant Services

Dear Ms. Kablack and Board Members:

The Horsley Witten Group, Inc. (HW) is pleased to submit this proposal to the Sudbury Planning Board to provide an engineering peer review of the 526 & 528 Boston Post Redevelopment proposed at the Raytheon property in Sudbury. We understand that the entire 50 acre parcel will be developed in multiple phases. VHB on behalf of BPR Sudbury Development LLC (Applicant), have submitted a Preliminary Stormwater Management Master Plan for the Full Build Redevelopment of the 50 acre parcel as well as the Site Plans and Stormwater Management Report for Phase 1: Grocery Store at Meadow Walk. The proposed design for Avalon Sudbury, a comprehensive permit application and part of the full buildout is anticipated in the near future. A majority of the Full Build redevelopment will be within the jurisdiction of the Wetlands Protection Act. The Applicant will be required to file a Notice of Intent (NOI) with the Sudbury Conservation Commission for each Phase of development within the 100-foot Buffer Zone of the jurisdictional wetland resource areas.

We offer the following scope of work and fee proposal to review the Preliminary Stormwater Management Master Plan and the Stormwater Management Report for Phase 1:

## **SCOPE OF SERVICES**

This scope of services includes a site visit, an initial review of documents submitted to the Town, preparation of a technical memorandum to summarize our findings, attendance at town staff meetings and public hearings, and a follow up review of the Applicant's response to our initial comments.

### **Task 1. Site Visit**

This task includes HW participate in a site visit of the Raytheon property at 526 & 528 Boston Post with representatives from VHB. The purpose of the site visit is to become familiar with the existing site conditions and verify field assumptions reported in the Applicant's submission package.

Sudbury Planning Board  
March 9, 2016  
Page 2 of 5

***Deliverable***

- Participation by HW professional staff at a site visit.

**Task 2. Stormwater Review, Preliminary Master Plan**

HW staff will conduct a peer review of the documents submitted to the Planning Board entitled Preliminary Stormwater Management Master Plan, 526 & 528 Boston Post Redevelopment Sudbury, MA, dated November 2015. HW will also confer with the Board's staff and other town department heads, as well as other peer review consultants engaged by the town, to determine compliance with applicable town bylaws and state wetland regulations. The review will evaluate the general methodology to determine whether proposed methods are generally correct and consistent with the MassDEP Stormwater Management Standards, standard engineering practice; and whether the preliminary master design will adequately manage the stormwater on and adjacent to the site.

This task will include the review of the master phasing plan, stormwater management, and potential impacts to regulated resource areas. The stormwater review will include design assumptions, study limits, the hydrologic model, and assessment points, and evaluation of the master stormwater management system as a holistic approach to managing the stormwater throughout the 50 acre parcel.

**Task 3. Stormwater Review, Phase 1: Grocery Store at Meadow Walk Sudbury**

Similar to Task 2, HW staff will conduct a peer review of the Site Plans and Stormwater Management Report submitted to the Planning Board entitled Grocery Store at Meadow Walk Sudbury, dated March 2016. As the basis for this review, HW will utilize the Town of Sudbury Stormwater Management Bylaw Regulations, the MassDEP Wetlands Protection Regulations (310 CMR 10.00), the 2008 Massachusetts Stormwater Handbook, and general application of accepted industry standards. The review will assess the level of completeness of the submitted information based on Town and State requirements; evaluate the general methodology to determine whether proposed methods are correct and consistent with standard engineering practice; and whether the proposed design will adequately manage the stormwater on and adjacent to the site.

This task will verify that the Phase 1 design is consistent with the Preliminary Master Plan proposed for the full buildout evaluated in Task 2. The stormwater review will include review of design assumptions, study limits, the hydrologic model, and assessment points, evaluation of the stormwater management system capacity and ability to convey peak flows, hydraulic calculations, sizing of drainage systems (e.g., pipes, catch basins, channels, and detention/infiltration areas), selection of and site suitability for proposed stormwater practices (particularly any infiltration practices), and the proposed erosion and sediment control plan.



Sudbury Planning Board  
March 9, 2016  
Page 3 of 5

#### **Task 4. Technical Peer Review Letters**

HW will provide the Planning Board with an initial technical peer review narrative to assist the Board in developing a decision regarding the Preliminary Master Plan as well as the Phase 1 Site Plan. Technical findings produced during the stormwater review will be compared with local rules and regulations and state laws to determine if specific conditions for approval are appropriate. HW will also coordinate as necessary with town officials, and or other consultants and, upon request, will provide recommendations for conditions in the event the Planning Board issues an approval of the proposed project. HW will provide a final report that includes an analysis of our findings, proposed recommendations, and guidance to the Town.

Our comments will be organized using a numbering scheme so that they can be easily referenced and addressed by the Applicant in its response. We will include recommendations, where appropriate, for revisions to the master plan as well as the Phase 1 design to bring them into compliance with applicable requirements and performance standards.

Upon receipt of a response to our comments, HW will prepare a second peer review letter. For budgeting purposes, HW assumes that the revisions to the Applicant's plan will be somewhat limited in nature and will not be a complete reconfiguration of the site layout, drainage, stormwater management, or utility designs.

Following any further responses and revisions to the design plans, operation and maintenance plan, or calculations by the Applicant, HW will prepare a final peer review letter with recommended permit conditions.

##### ***Deliverables:***

- Initial peer review letter with recommendations for plan revisions for regulatory compliance;
- Second follow-up peer review letter in response to the Applicant's revisions;
- Final peer review letter with recommended permit conditions as appropriate.

#### **Task 5. Hearing Attendance**

Under this task, HW professional staff will attend up to three (3) town staff meetings as well as up to six (6) Planning Board public hearings to present the findings of the peer reviews and to respond to any questions from the Board, the Applicant and the attending public.

##### ***Deliverable:***

- Participation by HW professional staff at three (3) town staff meetings.
- Participation by HW professional staff at six (6) public hearings.

Sudbury Planning Board  
 March 9, 2016  
 Page 4 of 5

At the request of the Planning Board, HW can be available to attend additional hearings, participate in working meetings with the Applicant and Town staff to review our comments and recommendations, or provide additional rounds of peer review services. The fee for these services would be calculated based on our standard rates and agreed upon in advance with the Town.

#### SCHEDULE

HW is available to begin this peer review immediately at the receipt of a signed contract with the Town of Sudbury. We request that all materials required as part of the review be available to us at least 21 days prior to a scheduled public hearing on this matter. HW is anticipating attendance at the public hearing scheduled for March 30, 2016.

#### PROPOSED FEE

TASK	FEE
Task 1. Site Visit	\$ 600
Task 2. Stormwater Review Master Plan	\$ 2,850
Task 4. Stormwater review Phase 1	\$ 2,850
Task 3. Technical Peer Review Letters	\$ 2,700
Task 5. Hearing Attendance	\$ 5,000
<b>TOTAL:</b>	<b>\$ 14,000</b>

#### ELEMENTS AND ASSUMPTIONS:

- We have assumed that our review will be limited to the materials submitted to our office, or from information discussed at public meetings, and discussions with the applicable Town staff. We have assumed that we will not be on-site to witness soil tests, percolation tests or other field investigations.
- We will provide the above services for an estimated fee of \$14,000. This estimated fee includes all technical review services and reimbursable expenses (i.e., reproduction and delivery services) necessary to perform the tasks listed above. Additional services beyond those listed above will be charged as an extra to the contract upon the approval of the Town. If attendance at additional hearings is requested, the fee for these services would be calculated based on our standard rates and agreed upon in advance with the Town.
- In order to ensure a timely review process and allow adequate time for the Town and the Applicant to review our reports, we would request that any additional review materials, including revised submittals be received by our office at least 21 calendar days prior to a scheduled hearing date. If the review materials are submitted within that period, HW will commit to providing our report at least seven (7) calendar days prior to said meeting to allow

Sudbury Planning Board  
March 9, 2016  
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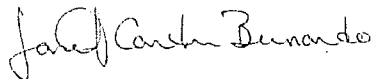
the Applicant time to provide their responses to ensure that their application will be processed in a timely manner. If review materials are submitted beyond this date, HW will not commit to completing a review for that specific hearing date.

- This proposal does not include services for sampling and testing of materials, surveying, or construction inspection.
- If any of the above assumptions prove to be false, or if work is required beyond the scope as proposed, HW will discuss those needs with you and develop any necessary contract amendments.
- HW will review this project in as timely a manner as possible in order to accommodate the Applicant's and the Planning Board's schedules. Should it become necessary to request additional review time, we will notify the Town and the Applicant.

Thank you for the opportunity to provide this proposal to the Sudbury Planning Board. We welcome the opportunity to work with you again. Please do not hesitate to contact me at 857-263-8193 or at [jbernardo@horsleywitten.com](mailto:jbernardo@horsleywitten.com) with any questions regarding this proposal.

Sincerely,

HORSLEY WITTEN GROUP, INC.



Janet Carter Bernardo, P.E.  
Senior Project Manager

ACKNOWLEDGED AND APPROVED:



Authorized Signature



Title



Date

## HORSLEY WITTEN GROUP – STANDARD HOURLY RATES - 2016

The following hourly rates for Horsley Witten Group personnel shall apply:  
These rates will remain in effect through January 1, 2017, after which time HW may adjust hourly rates.

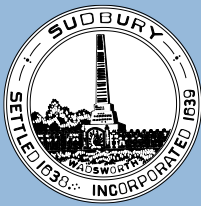
<u>Title/Personnel</u>	<u>2016 Rate</u>
• <u>Principal</u> <i>Claytor, Horsley, Nelson</i>	\$185/hr
• <u>Associate Principal</u> <i>Kelly, Longo, Noble</i>	\$155/hr
• <u>Senior Project Manager</u> <i>Bernardo, Chateaufneuf, Estey, Ford, Lee, Pickering, Price</i>	\$140/hr
• <u>Project Manager/Engineer/Scientist/Landscape Architect</u> <i>Ball, Camilli, Hoffman, Kitchell, Kuchar, Lamoureux, Relstab, Simons, West</i>	\$130/hr
• <u>Engineer/Scientist/Surveyor/Planner</u> <i>Davis, Hedman, Henderson, Keefer, Kittila, Ladue, MacKenzie, MacKnight, McAllister, Pereira, Moravec, Nye,</i>	\$95/hr
• <u>Graphics/Landscape Architect/ Environmental Scientist/CAD-GIS Technician</u> <i>Bean, Cabral, Carlson, Carreira, Glover, Jabbs, P. Kelly, Kite, Meade, Moore, Laverriere, Snider,</i>	\$80/hr
• <u>Intern</u>	\$45/hr
• <u>Administrative Assistant</u> <i>Bourne, Cosgrove, DelPonte, Orciuch, Rood</i>	\$50/hr
• <u>2-Man Survey Crew</u>	\$145/hr

### *Other Direct Costs (ODC)*

The following rates shall apply to project-related expenses:

- |                         |  |
|-------------------------|--|
| ○ Mileage               | Based on current federal mileage reimbursement |
| ○ Facsimile             | \$1.00/page                                    |
| ○ B&W Copies 8 ½ x 11   | \$0.20/page                                    |
| ○ B&W Copies 11 x 17    | \$0.50/page                                    |
| ○ Color Copies 8 ½ x 11 | \$1.00 page                                    |
| ○ Color Copies 11 x 17  | \$1.50 page                                    |
| ○ Plotter Prints        | \$1.50/sq. ft.                                 |
| ○ Mylar Plotter Prints  | \$2.50/sq. ft.                                 |
| ○ Subcontractor Fees    | Cost + 15% Mark up                             |

The client shall be billed for disposable field supplies and/or special equipment if applicable.  
Other direct expenses incurred will be billed at cost.



SUDBURY BOARD OF SELECTMEN  
Tuesday, March 22, 2016

**MISCELLANEOUS (UNTIMED)**

**6: Archaeological Sensitivity Assessment, Village at Sudbury Station**

REQUESTOR SECTION

Date of request: March 16, 2016

Requested by: Jody Kablack

Formal Title: Vote to proceed with an Archaeological Sensitivity Assessment as generally described in the attached Scope of Services from Public Archaeology Laboratory dated Feb. 25, 2016, conditioned on the consent of the developer or property owner to conduct a site visit/walkover survey as described in Task 3 of the proposal, or else elimination of said Task 3, and to authorize the Town Manager to negotiate the final contract, pending the identification of a funding source.

Recommendations/Suggested Motion/Vote: Vote to proceed with an Archaeological Sensitivity Assessment as generally described in the attached Scope of Services from Public Archaeology Laboratory dated Feb. 25, 2016, conditioned on the consent of the developer or property owner to conduct a site visit/walkover survey as described in Task 3 of the proposal, or else elimination of said Task 3, and to authorize the Town Manager to negotiate the final contract, pending the identification of a funding source.

Background Information:  
Scope of Services attached.

Financial impact expected: Cost of contract is \$3,909.00. Funding available from \_\_\_\_\_.

Approximate agenda time requested: 10 minutes

Representative(s) expected to attend meeting:

Review:

Patty Golden	Completed	03/16/2016 1:46 PM
Melissa Murphy-Rodrigues	Pending	
Barbara Saint Andre	Pending	
Patricia A. Brown	Pending	
Board of Selectmen	Pending	03/22/2016 7:30 PM



## Scope of Services Village at Sudbury Station Sudbury, Massachusetts

### *Archaeological Sensitivity Assessment*

*February 25, 2016*

Submitted to:

**Town of Sudbury**  
278 Old Sudbury Road  
Sudbury, MA 01776

In response to a request from the Town of Sudbury, PAL is pleased to submit the following scope of services for archaeological investigations as part of the proposed Village at Sudbury Station project in Sudbury, Massachusetts. The proposed project will include the construction of a 250 unit 40B housing development on a 38-acre parcel that is primarily undeveloped woodland.

The project is being reviewed by several Town departments and MassHousing and will be subject to review by the Massachusetts Historical Commission (MHC).

The goal of the archaeological sensitivity assessment will be to compile information about previously documented cultural resources within the project's Area of Potential Effects (APE), and to assess the archaeological sensitivity of the project area where ground disturbance may occur. The results of the assessment will be used to make recommendations regarding the need for and potential scope of additional cultural resource investigations, if necessary.

This scope of services outlines the tasks that will be undertaken as part of the archaeological sensitivity assessment for the Village at Sudbury Station project.

#### **Task 1: Consultation and Coordination**

The Project Manager/Principal Investigator will serve as the PAL point of contact for all project-related communication and be responsible for coordinating the tasks associated with conducting the work and the quality and timeliness of all work products.

#### **Task 2: Research Review**

PAL will conduct a review of the Massachusetts Historical Commission's (MHC) Inventory of the Historic and Archaeological Assets of the Commonwealth (MHC Inventory) files to identify previously recorded archaeological resources within and near the project's APE. The file review will include archaeological resources that are listed or evaluated as eligible for listing in the State or National Registers and surveyed properties that have not been evaluated for registration. Copies of pertinent documentation for properties identified will be obtained.



Cultural resource management (CRM) reports salient to the project study area also will be consulted as will town histories and historic maps. Copies of pertinent documentation for the project area will be reviewed, as available. PAL staff will also consult with the proponent to identify and sources of information about past land use and activity in the project area. Other expected sources of information will include (but not be limited to) historic maps, environmental data, and cultural resources reports.

### **Task 3: Site Visit/Walkover Survey**

Field investigations will consist of a systematic pedestrian survey of the project area. Existing conditions and any indications of archaeological sites will be noted on scaled project plans. The fieldwork will also include recordation and documentation of any aboveground features such as stone walls, enclosures, and/or cartpaths within the project area.

Information collected during the research and existing conditions/environmental review will be used to assess the archaeological sensitivity of the project area. PAL's predictive model considers various criteria to rank the potential for the project area to contain archaeological sites. The criteria are proximity of recorded and documented sites, local land use history, environmental data, and existing conditions. The project area will be stratified into zones of high, moderate, and low archaeological sensitivity which will be depicted on scaled project maps.

### **Task 5: Sensitivity Memorandum**

Following the inventory file review search and walkover, a technical memorandum will be prepared for the project. The memorandum will provide a summary of the findings of the inventory file review and contain a map and accompanying table listing cultural resources identified within the project area as well as areas of high, moderate and low archaeological sensitivity. The table will list the archaeological sites, including whether or not they are listed or have been evaluated as eligible for listing in the State or National Registers. Recommendations about the potential of the project to impact historic properties and additional consultation that may be required under federal or state historic preservation laws will be included.

The memorandum will also include a scope of work and cost proposal for additional cultural resource investigations, if recommended.

### **Task 6: Mapping**

PAL will provide the proponent with electronic map files that contain the location and designation of significant properties that are identified during the inventory file review.

### **Project Schedule**

PAL is prepared to begin work immediately upon written notice to proceed (NTP). The memorandum can be submitted within three weeks of the NTP. The walkover survey will take one day to complete



and can be scheduled within one week of the NTP, weather permitting. **The walkover cannot be completed when the ground is obscured by snow cover.**

### **Project Personnel**

Archaeological investigations will be carried out under the direction of a Principal Investigator with the assistance of a Project Archaeologist. All supervisory personnel meet the qualifications set by the National Park Service (36 CFR Part 66, Appendix C) for direction of archaeological projects.

### **Cost**

A fee proposal is attached.



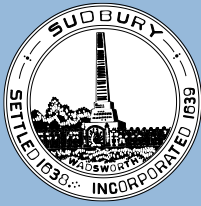


**PUBLIC ARCHAEOLOGY LABORATORY**  
- COST PROPOSAL -

PREPARED FOR **Town of Sudbury**  
DATE **February 25, 2016**  
PROJECT **Village at Sudbury Station**  
SERVICES **Archaeological Sensitivity Assessment**

PERSONNEL	TASK	HOURS	RATE	COST
Principal Investigator	Consultation/Coordination	6	110.48	663
	Walkover Survey	8	110.48	884
	Sensitivity Memorandum	12	110.48	1,326
Archaeologist	Inventory File Review	4	50.64	203
	Walkover Survey	8	50.64	405
GIS Specialist	Technical Graphics/Maps	4	73.65	295
TOTAL PERSONNEL COSTS		42		3,775
OTHER EXPENSES	DESCRIPTION			COST
Reproduction	Report Preparation, Copying, Graphics, etc.			20
Communication	Express Mail			20
Expendable Supplies	Archival Paper, Bags, etc.			10
Mileage		150	Miles @ \$ 0.56	84
TOTAL OTHER EXPENSES				134
<b>TOTAL PAL COST PROPOSAL</b>				<b>3,909</b>

*\* This quote is valid for 120 days from date listed above.*



SUDBURY BOARD OF SELECTMEN  
Tuesday, March 22, 2016

**MISCELLANEOUS (UNTIMED)**

**7: Call Special Town Meeting for May 3 and open warrant**

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Vote to call a Special Town Meeting within Annual Town Meeting for Tuesday, May 3, 2016, at 7:30 p.m in the Lincoln-Sudbury Regional High School Auditorium, and to open the Warrant commencing March 23, 2016, and to close the Warrant for Special Town Meeting at 5:00 p.m., Friday, April 1, 2016.

Recommendations/Suggested Motion/Vote: Vote to call a Special Town Meeting within Annual Town Meeting for Tuesday, May 3, 2016, at 7:30 p.m in the Lincoln-Sudbury Regional High School Auditorium, and to open the Warrant commencing March 23, 2016, and to close the Warrant for Special Town Meeting at 5:00 p.m., Friday, April 1, 2016.

Background Information:

Financial impact expected:

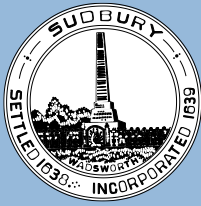
Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Melissa Murphy-Rodrigues	Pending
Barbara Saint Andre	Pending
Patricia A. Brown	Pending
Board of Selectmen	Pending

03/22/2016 7:30 PM



SUDBURY BOARD OF SELECTMEN  
Tuesday, March 22, 2016

**MISCELLANEOUS (UNTIMED)**

**8: LS request - budget amendment**

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Discussion and possible vote on a proposed amendment to the FY16 budget for Lincoln-Sudbury Regional High School. Bella Wong to attend.

Recommendations/Suggested Motion/Vote: Discussion and possible vote on a proposed amendment to the FY16 budget for Lincoln-Sudbury Regional High School. Bella Wong, Superintendent, to attend.

Background Information:

Documents to be provided at meeting

Financial impact expected:

Approximate agenda time requested:

Representative(s) expected to attend meeting: Bella Wong, Superintendent

Review:

Patty Golden	Pending
Melissa Murphy-Rodrigues	Pending
Barbara Saint Andre	Pending
Patricia A. Brown	Pending
Board of Selectmen	Pending

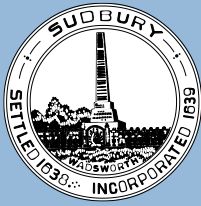
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rec'd at mtg  
3/22/16

Lincoln-Sudbury Regional School District					
Fund Balances	Year-End FY13	Year-End FY14	Year-End FY15	Proposed Vote	Mid-Year FY16
Excess & Deficiency	\$ 391,667	\$ 613,833	\$ 1,176,919	\$ (600,000)	\$ 576,919
Stabilization	\$ 312,074	\$ 312,074	\$ 312,074	\$ 600,000	\$ 912,074

	FY18 (Summer 2017)
Fields T1 and T2	\$ 830,000
Stadium Field	\$ 450,000



## SUDBURY BOARD OF SELECTMEN

Tuesday, March 22, 2016

**MISCELLANEOUS (UNTIMED)****9: Loring Parsonage**REQUESTOR SECTION

Date of request:

Requestor: Town Counsel

Formal Title: Move to declare the Loring Parsonage, 288 Old Sudbury Road, Sudbury, MA, available for disposition by means of a 30-yr. lease restricted to a qualified Massachusetts non-profit, 501(c)(3) entity for use and operation of the building as a Sudbury history center and museum, said lease being for the express purpose of providing a museum to display artifacts, materials and programs appropriate to the study of American history, and in particular the history of New England and Sudbury, including Native American history; further, the lessee is required to undertake the funding of the design, structural stabilization and renovation of the building, said renovation to include any change in footprint approved by the Town; and further that the Town may provide at its discretion, funding toward such work; and further, to approve the terms of the lease as set forth in the draft Request for Proposal.

Recommendations/Suggested Motion/Vote: Move to declare the Loring Parsonage, 288 Old Sudbury Road, Sudbury, MA, available for disposition by means of a 30-yr. lease restricted to a qualified Massachusetts non-profit, 501(c)(3) entity for use and operation of the building as a Sudbury history center and museum, said lease being for the express purpose of providing a museum to display artifacts, materials and programs appropriate to the study of American history, and in particular the history of New England and Sudbury, including Native American history; further, the lessee is required to undertake the funding of the design, structural stabilization and renovation of the building, said renovation to include any change in footprint approved by the Town; and further that the Town may provide at its discretion, funding toward such work; and further, to approve the terms of the lease as set forth in the draft Request for Proposal.

## Background Information:

Procurement rules for the disposition of real property require that the Board of Selectmen declare the property available for disposition and state the terms therefor for publication. Town Counsel has prepared the RFP for such lease which will be advertised, as required, in the Central Register of 3/23/16 for a 30-day period with responses due 4/27/16. The RFP draft of the 30-year lease containing the terms for such lease is provided for BOS review.

Financial impact expected:

**TOWN OF SUDBURY  
REQUEST FOR PROPOSALS  
LEASE OF THE LORING PARSONAGE**

**Introduction and Lease Requirements**

The Town of Sudbury, through its Town Manager, is seeking proposals from qualified Massachusetts non-profit 501(c)(3) entities to enter into a lease limited to a thirty-year period specifically for repurposing the Town-owned historic Loring Parsonage located at 288 Old Sudbury Rd. for use and operation of the building as a Sudbury history center and museum. The lease is for the express purpose of providing a museum to display artifacts, materials and programs appropriate to the study of American history, and in particular the history of New England and Sudbury, including Native American history.

The Lease will require the accepted proposer (hereinafter “Lessee”) to undertake the funding of the design, structural stabilization and renovation of the building, said renovation to include any change in footprint approved by the Town. The Town may provide, at its discretion, funding toward the design, structural stabilization and renovation of the building. This will include the design and construction involving stabilization, code upgrades, permitting and other such requirements enabling initial use. Compliance with fire codes and inclusion of a fire suppression system is required. All contracts in connection with the stabilization and renovation of the building including the appropriate architectural, engineering and consulting services shall be contracted by the Town of Sudbury under the direction of the Permanent Building Committee. Such stabilization and renovation including design and construction which may be phased is projected to cost approximately \$954,000 and shall be publicly bid.

All such work to be performed is subject to approval from the Town, including but not limited to, the Building Inspector, Board of Health, Wiring Inspector, Plumbing and Gas Fitting Inspector, as appropriate, and any Town boards and committees having purview of the work contemplated by virtue of the age and location of the house. All permitting is the responsibility of the Town.

The Lease Agreement will also include the following:

- approval by the Town of plan for funding phased renovation;
- approval of all construction plans by the Town as overseen by the Permanent Building Committee.
- acceptance and receipt of donated funds for construction purposes;
- approval by the Town for the use of Town funds obtained through the Harry Rice will cy pres process and/or the Wood-Davison House donations for use in the construction process;
- approval by the Town of occupancy plans and any security measures necessary;
- approval of any desired changes in layout of the building by Town agencies;
- payment by the Lessee over term of license for fuel, electricity, telephone, and other utilities which are provided or are to be provided to the premises, cleaning, indoor maintenance, insurance in accordance with Town requirements;

- provision by the Town for water supply, snowplowing and shoveling, grounds maintenance, rubbish disposal, and septic requirements;
- provision for non-specific parking availability in Town parking areas;
- provision for negotiation of capital expenditures if required to allow operation of building;
- provision for written lease amendments to be signed by the authorized parties;
- prohibition for assignment or subletting without written approval;
- provision for termination of lease, notice, and problem correction;
- prohibition of any activity which would constitute a violation of the conflict of interest law (M.G.L. c.268A);
- provision for disclosure of beneficial interests by the Lessee;
- provision for indemnification of the Town holding the Town of Sudbury harmless from and against all claims, damages, or loss arising out of any damage to the building or related real property, or to any person including the Lessee's employees, independent contractors, and visitors to the premises or any others using or occupying the building or premises;
- provision to specify that the lease constitutes the entire agreement and that there are no agreements other than those incorporated therein.

### **Background**

The Loring Parsonage, a 3,100 s.f. historic building located in the Town Center Historic District and adjacent to the Town Hall, was built in 1730 and enlarged and altered over time. It has been utilized by the Town since 1931 for many purposes including town offices, storage of historical objects and use by town related organizations. Currently half of the first floor is occupied by the Lincoln-Sudbury Town Employees Federal Credit Union while the remainder of the space is used only sporadically. Restoration will involve approval of the Town's Historical Commission and any exterior changes will require the issuance of a Certificate of Appropriateness from the Town's Historic District Commission. All rehabilitation work must conform to the Secretary of Interior's Standard for the Treatment of Historic Properties.

Extensive exterior preservation and restoration involving installation of a new cedar shingle roof, clapboard replacement, window restoration, door replacement/restoration, painting and exterior access for the handicapped was performed in 2009.

In 2014, a Conditions Assessment and Feasibility Study was completed by Spencer & Vogt Group for the Sudbury Historical Society in regard to repurposing the Parsonage for a history center and museum. This study includes information relative to the 2001 Space Study and is available on the Town's website for information [https://sudbury.ma.us/thbrc/?attachment\\_id=198](https://sudbury.ma.us/thbrc/?attachment_id=198).

**The current condition of the property renders it unusable for the purpose of a history center/museum at the present time.**

### **Site Visit**

The property will be made available for inspection by appointment. Prospective proposers may make arrangements by calling Facilities Director James Kelly at \_\_\_\_\_. For description, see Property Information attached.

### **Instructions to Respondents, Proposal Requirements and Submission**

Requests for interpretation or supplemental information must be made in writing to the Facilities Director by e-mail to kellyj@sudbury.ma.us and must be received by the Facilities Director no later than \_\_\_\_\_ 2016. Any interpretation or supplemental information provided to respondents will be issued in the form of written addenda to the RFP and will be sent by e-mail to all persons on record as having received the RFP no later than \_\_\_\_\_, 2016.

Responses to this RFP are due on or before 1:00 p.m., \_\_\_\_\_, 2016, addressed to the Facilities Director, Town of Sudbury, 275 Old Lancaster Road, Sudbury, MA 01776 and placed in a sealed envelope marked "Lease Proposal – Loring Parsonage" with the Proposer's name, address and date. No Proposal received after such time and date established for opening shall be accepted for consideration. Timely delivery of a proposal at the location designated shall be the responsibility solely of the responder. The Town assumes no responsibility for delivery made or attempted to be made outside of regular business hours. The Town will not accept a proposal delivered by telephonic, electronic or facsimile means. Each response must include one original and 10 copies of the proposal together with one electronic copy on diskette.

Each Proposal shall include the entity's 501(c) (3) Articles of Organization and list the officers of the organization. Proposers shall address the evaluation criteria and include such experience relevant to the project and any other information it wishes to submit.

Additionally the Proposer shall present a proposed use plan, a rehabilitation plan, and a business plan addressing financing capability and ability to sustain the maintenance expenses required by the Town under the terms of the Lease.

Proposals may be corrected or modified prior to the time of opening by submitting a superseding proposal in a sealed envelope marked "Modified Proposal – Loring Parsonage" and the date, addressed as above. Proposals may be withdrawn prior to the time of opening by written request to the Facilities Director. Such corrections, modifications, or withdrawal must be received prior to the deadline for submitting Proposals.

The Town reserves the right to waive formalities in any Proposal, and reserves the right to reject any proposal that is determined not to be in the best interest of the Town. This Request does not obligate the Town to enter into any disposition or lease of the property.



### **Proposal Evaluation**

The lease will be awarded by the Board of Selectmen to the proposer who best fulfills the purpose of providing a museum to display artifacts, materials and programs appropriate to the study of American history, and in particular the history of New England and Sudbury, including Native American history. This will be based on the following factors, which will be evaluated and ranked by the Town Manager or her designee:

- Responsiveness and completeness of Proposal; 10%
- Appropriateness of overall plan and readiness to proceed; 30%
- Availability and source of funds to carry out the first phase of the restoration/rehabilitation; i.e. design, structural improvements and other construction required to allow occupancy for purpose intended; 30%
- Appropriateness of artifacts and archival material for display; 30%

The evaluation criteria to be employed are as follows:

#### 1. **Responsiveness and completeness of Proposal.**

**Highly Advantageous:** Proposer has submitted all documentation required and has demonstrated his understanding of the project concept.

**Moderately Advantageous:** Proposer has submitted all documentation required but has failed to demonstrate his understanding of the project concept.

**Not Advantageous:** Proposer has submitted some or none of the documentation required and has failed to demonstrate his understanding of the project concept.

#### 2. **Appropriateness of overall plan and readiness to proceed.**

**Highly Advantageous:** Proposer has demonstrated that he has carefully considered and has formulated a project plan to rehabilitate the building for the designated use and can proceed upon such plan at the execution of the Agreement.

**Moderately Advantageous:** Proposer has demonstrated that formulation of a project plan to rehabilitate the building for the designated use is in progress but cannot proceed upon execution of the Agreement.

**Not Advantageous:** Proposer cannot demonstrate that he has an overall plan formulated to rehabilitate the building for the designated use and cannot proceed upon execution of the Agreement.

#### 3. **Availability and source of funds to carry out the first phase of the restoration/rehabilitation; i.e. design, structural improvements and other construction required to allow occupancy for purpose intended.**

**Highly Advantageous:** Proposer has demonstrated that he has the funding to complete the design work in full for the project and has identified other sources of funding to commence the first phase of restoration/rehabilitation.

**Moderately Advantageous:** Proposer has some funding available to commence the design work.

**Not Advantageous:** Proposer has no funding available at this time.

4. **Appropriateness of artifacts and archival material for display.**

**Highly Advantageous:** Proposer is in possession of a major collection of artifacts and archival material related to the history of Sudbury, New England, and America, including Native American history.

**Moderately Advantageous:** Proposer is in possession of some artifacts and archival material related to the history of Sudbury, New England, and America, including Native American history.

**Not Advantageous:** Proposer is not in possession of artifacts and archival material related to the history of Sudbury, New England, and America, including Native American history.

Interviews of some or all proposers may be conducted at the discretion of the Town Manager.

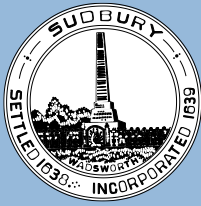
All information submitted will become public records. The selected Proposer must submit a disclosure of beneficial interests as required by M.G.L. c.7, s.40J with its proposal.

The Town Manager shall take such action with regard to acceptance or rejection of Proposals as she may determine to be in the best interest of the Town of Sudbury.

Melissa Murphy Rodrigues  
Town Manager

Date:

Attachment9.a: KP-#550094-v1-SUDB\_Loring\_parsonage\_lease\_RFP (1733 : Loring Parsonage)



SUDBURY BOARD OF SELECTMEN  
Tuesday, March 22, 2016

**MISCELLANEOUS (UNTIMED)**  
**10: Citizens' Comments continuation**

REQUESTOR SECTION

Date of request:

Requested by: Leila S. Frank

Formal Title: Citizens' Comments continuation (if needed)

Recommendations/Suggested Motion/Vote: Citizens' Comments continuation (if needed)

Background Information:  
none

Financial impact expected:n/a

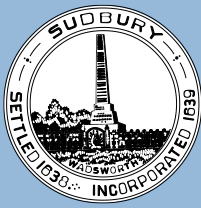
Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Melissa Murphy-Rodrigues	Pending
Barbara Saint Andre	Pending
Patricia A. Brown	Pending
Board of Selectmen	Pending

03/22/2016 7:30 PM



SUDBURY BOARD OF SELECTMEN  
Tuesday, March 22, 2016

**MISCELLANEOUS (UNTIMED)**  
**11: Discuss upcoming agenda items**

REQUESTOR SECTION

Date of request:

Requested by: Leila S. Frank

Formal Title: Discuss upcoming agenda items

Recommendations/Suggested Motion/Vote:

Background Information:

Financial impact expected:

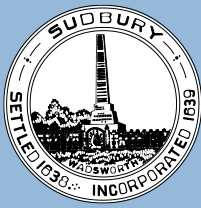
Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Melissa Murphy-Rodrigues	Pending
Barbara Saint Andre	Pending
Patricia A. Brown	Pending
Board of Selectmen	Pending

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SUDBURY BOARD OF SELECTMEN  
Tuesday, March 22, 2016

**CONSENT CALENDAR ITEM**

**12: Minutes approval**

REQUESTOR SECTION

Date of request:

Requested by: Leila S. Frank

Formal Title: Vote to approve the regular session minutes of March 8, 2016.

Recommendations/Suggested Motion/Vote: Vote to approve the regular session minutes of March 8, 2016.

Background Information:

Attached draft minutes

Financial impact expected:

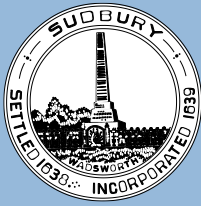
Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Melissa Murphy-Rodrigues	Pending
Barbara Saint Andre	Pending
Patricia A. Brown	Pending
Board of Selectmen	Pending

03/22/2016 7:30 PM



SUDBURY BOARD OF SELECTMEN  
Tuesday, March 22, 2016

**CONSENT CALENDAR ITEM**

**13: Billiard Table License Renewal 2016**

REQUESTOR SECTION

Date of request:

Requestor: James Wiegel, Finance Officer, American Legion Post 191

Formal Title: As the Licensing Authority for the Town of Sudbury, vote to renew a billiards table license for the American Legion Sudbury Post #191, Inc., Phillip M. McKenzie, Manager, 676 Boston Post Road, said license to expire on May 1, 2017.

Recommendations/Suggested Motion/Vote: As the Licensing Authority for the Town of Sudbury, vote to renew a billiards table license for the American Legion Sudbury Post #191, Inc., Phillip M. McKenzie, Manager, 676 Boston Post Road, said license to expire on May 1, 2017.

Background Information:  
Application attached

Financial impact expected:\$25 license fee

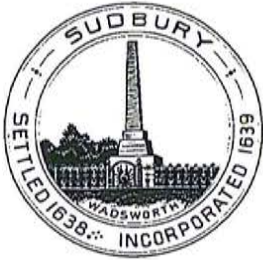
Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Melissa Murphy-Rodrigues	Pending
Barbara Saint Andre	Pending
Patricia A. Brown	Pending
Board of Selectmen	Pending

03/22/2016 7:30 PM



RECEIVED  
BOARD OF SELECTMEN  
SUDBURY, MA

2016 MAR - 7 P 12: 52

TOWN OF SUDBURY  
Office of Selectmen  
278 Old Sudbury Road  
Sudbury, MA 01776  
(978) 639-3381, Fax (978) 443-0756  
[BOAdmin@sudbury.ma.us](mailto:BOAdmin@sudbury.ma.us)

### APPLICATION FOR POOL TABLE LICENSE

Please complete the form below and return to the Board of Selectmen's Office by **April 11, 2016**.

Applicant name: American Legion Post 191  
 Address: 076 Boston Post Road Phone: 978.443.7674  
 Business name: American Legion  
 Address: 076 Boston Post Road  
 Number of pool tables: 1  
 Location (if different than above) 1/9  
 Expiration Date: May 1, 2016

*All Pool Table licenses expire May 1<sup>st</sup> and MUST be renewed annually.*

\$25 Application Fee made payable to Town of Sudbury

*I hereby apply for a pool table license within the Town of Sudbury.*

Applicant Signature: [Handwritten Signature]

Date: 5 MAR 16

## American Legion Billiards Table Department Feedback 2016

**From:** Nix, Scott  
**Sent:** Monday, March 07, 2016 2:57 PM  
**To:** Frank, Leila  
**Subject:** RE: American Legion Pool Table License

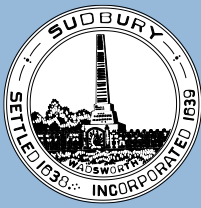
Leila,

We **DO NOT HAVE ANY CONCERNS** with the renewal.

Respectfully,

Scott Nix  
Chief of Police  
Sudbury Police Department  
75 Hudson Road  
Sudbury, MA 01776





SUDBURY BOARD OF SELECTMEN  
Tuesday, March 22, 2016

**CONSENT CALENDAR ITEM**

**14: Eagle Scout recognition**

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Vote to enter into the Town record and congratulate Nicholas Weston St. George of Troop 60, to be recognized at a Court of Honor on Sunday, April 3, 2016, 5:00 p.m., at Congregation Beth El, 105 Hudson Road, for having achieved the high honor of Eagle Scout.

Recommendations/Suggested Motion/Vote: Vote to enter into the Town record and congratulate Nicholas Weston St. George of Troop 60 to be recognized at a Court of Honor on Sunday, April 3, 2016, 5:00 p.m., at Congregation Beth El, 105 Hudson Road, for having achieved the high honor of Eagle Scout.

Background Information:  
Attached invitation from Troop 60

Financial impact expected:

Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Melissa Murphy-Rodrigues	Pending
Barbara Saint Andre	Pending
Patricia A. Brown	Pending
Board of Selectmen	Pending

03/22/2016 7:30 PM

Sudbury Boy Scout Troop 60  
Cordially invites you to join us in honoring  
*Nicholas Weston St. George*

For Achieving the Rank of  
**Eagle Scout**

A Court of Honor will be held  
Sunday, April 3, 2016  
5:00 p.m.

Congregation Beth El  
105 Hudson Road  
Sudbury, MA

Dessert and Coffee will be served

R.S.V.P. by March 25, 2016

Silvy Brookby  
284 Willis Road  
Sudbury, MA 01776  
or sbrookby@yahoo.com



★ EAGLE SCOUT COURT OF HONOR ★

EAGLE