



Town of Sudbury

PLANNING AND COMMUNITY DEVELOPMENT

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SUDBURY COMMUNITY HOUSING PROGRAM GUIDE

SUDBURY COMMUNITY HOUSING
PROGRAM DESCRIPTIONS

*SUDBURY OFFICE OF PLANNING AND
COMMUNITY DEVELOPMENT*

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SUDBURY COMMUNITY HOUSING - PROGRAM GUIDE

The Sudbury Community Housing Office expands the Town services and offers administrative and technical support related to affordable housing issues and coordinates the efforts of various town boards and committees to develop affordable housing opportunities and implement the Town's Community Housing Plan. Funded through Community Preservation Committee (CPC) and working in the Office of Planning and Community Development, the Community Housing Office staffs the Sudbury Housing Trust and works closely with the Sudbury Housing Authority (SHA) and other Town Boards and Committees.

This guide serves as detailed program description for the active elements of the Sudbury Community Housing efforts, created from the Community Housing Plan which outlines a multi-year strategy, with general objectives and specific actions. Many of those specific initiatives are currently active which are detailed in the sections below. The purpose of the guide is to inform the housing community, solicit ideas and suggestions, as well as to capture the accomplishments and current activities.

There are many housing programs offered throughout the Commonwealth as well as strategies and initiatives created in Sudbury that address high housing costs by creating new more moderate and affordable housing. However, a certified affordable unit to be counted in the State's Chapter 40B subsidized housing inventory (SHI) has specific criteria to be included. While some exceptions exist, this criterion includes:

1. They must be part of a "subsidized" development built or operated by a public agency, non-profit or limited dividend organization. This development must be subject to a regulatory agreement and monitored by a public agency or non-profit organization.
2. At least 25% of the units in the development must be income restricted to families with incomes of less than 80% of median and have rents or sale prices restricted to affordable levels, or 20% of the units for the benefit of those making 50% AMI. These restrictions must run at least 30 years.
3. The units are subject to an Affirmative Fair Marketing Plan which includes an open tenant and resident selection process.

It is the primary intention of this plan to develop housing that is counted in the SHI towards the Chapter 40B housing inventory and to assist those qualifying persons obtain affordable housing.

SUDBURY CHAPTER 40B PROGRAM (PROJECT# 06-01)

The goal of the Sudbury Chapter 40B Program is to assist all parties in these projects to complete successfully. The Sudbury Community Housing Program provides technical support and assistance during the application review and approval, the development and the closing process, as well as provides on-going monitoring services after initial purchase.

As part of the municipality, the housing office is involved in the projects during the entire 40B process. The Housing Office is able to advocate for the affordable homeowner and be right at the table from the beginning and have been successful at obtaining additional affordable units, as well as able to review the building specifications for the market rate and affordable units and probe where necessary.

40B GUIDELINES

Publish 40B guidelines. These guidelines were completed in conjunction with the Board of Selectmen, Zoning Board of Appeals, Community Housing Community, Sudbury Housing Authority and the Planning Board, with overall direction from the Board of Selectmen. The final guidelines document, dated 4/3/2007, was formally endorsed by all parties and approved by the Board of Selectmen on May 8th and is now posted on the Town's website.

Additionally, a 40B application form has been created and posted on the website to compliment the guidelines and facilitate the Zoning Board review.

MONITORING AND LOTTERY AGENT

Assume Monitoring and Lottery Agent responsibilities for new 40B projects in Sudbury, as guided by the regulatory agency guidelines and regulations. There are three major responsibilities as part of these responsibilities, which include:

- a) *Conducting the Lottery* - The Lottery Agent will perform all lottery, marketing and community outreach for the projects.
- b) *Auditing the Affordability Requirement* -The Monitoring Agent will determine the substantive compliance of the Project with the Affordability Requirement, Marketing Plan and Lottery Process, will audit residents for compliance to affordable housing deed restrictions, will maintain a waiting list, will audit re-sales, and prepare and deliver reports.
- c) *Auditing The Limited Dividend Requirement* - -The Monitoring Agent will review the adequacy and completeness of the Certified Cost and Income Statements, and determine final compliance of whether the Limited Dividend Requirement has been met. MassHousing has determined that they will retain this responsibility for all private 40B projects forward from September 2006.

The Sudbury Housing Trust is able to perform local monitoring agent functions for all affordable housing that is built in Sudbury which ensures that affordable units created in Sudbury remain affordable and comply with all aspects of the affordability restriction.

Having the municipality act as lottery agent allows our outreach to be customized to the local community, and to be a true local presence during the application process, including the information sessions. We can ensure that all employees of the town and schools are notified by letter and carry news of the lottery and progress on the Town's website.

Through local lottery administration and monitoring, the Town gains valuable information relating to the housing needs for Sudbury home purchasers. We know that the majority are single parents (60%), there is a need for 1-Bedroom units (25%) – for all ages, the average Area Median Income (AMI) is 68% versus a program eligibility of 80%, that there is an unfilled demand for 120% AMI Housing for teachers, other municipal workers, and that there is strong local need (55% of applicants).

Through local monitoring and assisting the lottery winners through closing, new procedures have been put into place to assist the assessors' office for these units, and to provide timely unit information. This ensures that affordable sales price is used in pre-purchase appraisals.

The Housing Office assists the applicants in the qualification process. It is our policy and practice to ensure that each lottery winner is able to close and does close. The office assists all the way to closing - finding a first-time homebuyer course, suitable financing, and providing the next level of documents and process.

Lottery Agent Services

The lottery program is well documented, and has templates, forms, controls and audit procedures. It is a good model and is being offered to other municipalities. The Sudbury Housing Trust was hired by Concord and Boxborough for lottery agent services. Services provided include preparing and executing the marketing plan, creating and distributing applications, qualifying applicants and holding the lottery. We have been able to help towns create ready-buyer lists for upcoming units, which is a valuable asset for any municipality.

Carriage Lane

While CHAPA is the current Monitoring Agent, this responsibility for the 4 affordable units in the Carriage Lane development will be transferred to the Town of Sudbury upon any resale.

The Carriage Lane units have a deed rider which uses an older methodology for calculating the maximum resale price known as the discount rate method. These have a calculated discount rate – 33.33% - which is multiplied by the FMV of the unit upon resale. There was a unit sold in Carriage Lane in March of 2006 for \$600,000, which would create a comparable for the affordable unit at \$200,000 – above 'affordable' price. This is no longer 'affordable'. The CHAPA policies will not allow resales or refinancing at 'unaffordable' prices. If the discount rate method results in a unit having a price that is too high, CHAPA will allow only a lower price. The deed rider calls it the 'maximum sales price', key word maximum. CHAPA does not plan to change the deed rider to the newer multiplier methodology.

CHAPA sent a letter/survey to these home owners in December, 2006 outlining the provisions of their deed riders. The Community Housing Office has also sent a letter letting them know of the Town services. A response to that letter was received by the Community Housing Office inquiring about the capital improvement policy and the impact on resales prices.

Sudbury Meadows, Snowberry Lane

In June, 2006 the Town of Sudbury was approved by MassHousing as Monitoring Agent for two affordable units at the Sudbury Meadows. The Marketing Plan was approved by the ZBA, the application period completed on schedule with over 100 applications sent. Significant outreach was conducted to minority organizations and individuals identified through local preference categories. An information session was held at the library, and was attended by ~30 interested parties. Internal control procedures were written and followed with the eligibility of each application reviewed by two individuals. Two lottery winners were selected at a public drawing at Town Hall on November 2nd with a minority pre-lottery on October 31, which added an applicant to the local pool. Both initial lottery winners closed in January, 2007 and closing packages were sent to MassHousing after they were recorded. Cost certification procedures and formats were prepared and distributed with

assistance from Kevin P Martin CPA firm, who was selected as the Town's Reviewing CPA, after a selection process that included three approved firms. The first set of reports was received June 22, 2007, and another set in December 2007. There is still one unsold unit, which is keeping the project open. The Town of Sudbury has received all fees for these services, and these have been placed into the accounts of the Sudbury Housing Trust.

Villages at Old County Rd

A fee proposal for lottery and monitoring services has been executed for the 10 affordable units, including provisions for SHA units and the buy-down unit, and the Housing Trust will perform the lottery agent service. The Town will perform Monitoring Services for the affordability requirement and MassHousing will perform Monitoring Services for the Limited Dividend, as defined in the Monitoring Agreement. In accordance with the Comprehensive Permit, the Town will also do a cost certification for internal purposes as well.

The construction plan continues to be delayed due to market conditions. The sales prices have been set at \$158,000 for the 2BR and \$175,500 for the 3BR. The Town of Sudbury is planning to use the Sudbury portion of HOME funds available through membership in the WestMetro Consortium as well as CPA funds for the buy-down of one unit. The notice of Finding of No Impact (from an environmental impact) was completed, HUD has authorized the funds to be expended, and a Subsidy Layering Analysis – required because both federal HOME funds, and local CPA funds are being used – has been completed.

The lottery period opened on September 17th and the lottery was held on December 10th. Again, the Town of Sudbury was approved by MassHousing as Monitoring Agent. As lottery agent, the Marketing Plan was written, approved and executed with significant outreach performed. An information session was held at the library, and two 2 BR units were offered through lottery, unit 23 to a local winner, and unit 28 to the general pool winner. Unit 23 has a completion target of late summer, and the developer has provided no target for the unit 28/general pool unit. The winners were notified as such.

Sudbury Villages on Rt. 20

The Comprehensive Permit has been issued (July 9th), and no further work has been completed with respect to the affordable units. The project is 73 units, with 19 affordable. The Town continued its program of buying down an additional affordable unit in the project above the required 25%.

Agreement with developer had been reached with respect to the Sudbury Housing Trust performing the Lottery and Monitoring Agent work, though formal agreements have not yet been executed. The Board shall be permitted to independently enforce the Applicant's limited dividend obligations in the event the final determination shows noncompliance and the Monitoring Agent fails to pursue compliance in a timely manner.

Sudbury Village Commons – at Town Center

The Comprehensive Permit has been issued (1/14/2008) and the hearing closed. The project is defined as 21 units, 6 affordable, with the Town continuing the program of buying down an additional affordable unit in the project above the required 25%.

MUNICIPAL HOUSING TRUST (PROJECT# 06-02)

TOWN MEETING ARTICLE

In the 2006 Town Meeting, Sudbury voted to accept Massachusetts General Law Chapter 44, Section 55C, which established a municipal affordable housing trust fund. This state legislation - passed in January 2005 – addresses the statewide issue of housing production, by giving municipalities greater control and flexibility in creating housing that is right for each community.

GOVERNANCE, STRUCTURE AND DUTIES

The Sudbury Housing Trust was created as a blend of the Massachusetts General Law, the local provisions and Town Manager Act, and as well as careful review and consideration of Housing Trusts established by other towns and municipalities.

The Trust has a Board of Trustees appointed by the Board of Selectmen, and currently there are 6 Trustees, including a member of the Board of Selectmen, the Planning Board, the Housing Authority, a banker, a developer and an advocate. The Board is a governmental body and operates under many of the same laws as other Town boards and committees, including Open Meeting Law requirements, public records law and procurement. The Town Treasurer maintains the accounts and performs all financial responsibilities as with other town trusts.

The powers and duties of the Board allow them to buy and sell real estate, borrow and lend money, develop property, hold affordable housing restrictions on property and accept contributions and gifts of cash and property. In addition, the Trust can develop programs such as for first-time homebuyers, housing rehabilitation, or emergency repair programs.

The Sudbury Housing Trust requires Board of Selectmen approval for any of the following actions:

- a) to purchase real or personal property;
- a) to sell, lease, exchange, transfer or convey any personal, mixed, or real property; and
- b) to borrow money, or to mortgage or pledge Trust assets as collateral to the extent of the Trust's assets.

The Trust may not borrow, mortgage or pledge greater than the current Trust assets unless approved by the Board of Selectmen and by a 2/3 vote at any Annual or Special Town Meeting.

The Trust has accepted the 10% minimum allocation of CPA funds in 2007, as well as prior year housing reserves, and is using those funds to create and preserve affordable housing with no further town meeting vote. The Trust is also able to accept other contributions for affordable housing, such as the Frost Farm revenue fund, HOME funds, or other money collected. The Trust also accepts the lottery and monitoring fees from Chapter 40B projects.

TRUST FORMATION

An Interim Trust was accepted by the Board of Selectmen on October 17th, 2006 and the permanent accounts were then created, expiring on 2/15/07 after the permanent Trust was voted, signed and recorded. Permanent Trustees were appointed by the Board of Selectmen for terms commencing on March 1 after public recruiting that started December 2006.

TRUST INITIATIVES

The Trust current has ~\$385,000 and has an active project portfolio in development. The Trust has also submitted a request to the CPC for the required 10% of housing allocation for the 2008 Town Meeting, as well as \$500,000 to continue the Buy-Down initiative.

Active Initiatives

- a) Establish a homeowner assistance program, utilizing Federal HOME American Dream Downpayment Initiative (ADDI) funds and the State's program to provide soft second mortgages to first-time homebuyers. Plans are underway to apply for ADDI funds for the VOCR lottery winner.
- b) Establish a small grants program to preserve and maintain homes. Program is in pilot now, and is accepting applications for a June grant period.
- c) Act as agent for housing initiatives as detailed elsewhere in this guide. Execute housing transactions as available from Plan initiatives (for example, Home Preservation or Small Parcel program). The Sudbury Housing Trust has purchased a small parcel and the deed is recorded in its name.
- d) Review new parcels – both private and Town-owned – for feasibility for community housing and work with all parties on those parcels, including the Melone property.
- e) Accept affordable housing fees from 40B Lottery and Monitoring Agent services, Frost Farm accruals, CPA funds.
- f) Review Sudbury opportunities for HOME consortium.

Ideas for Future Consideration

- a) Offer memberships to the Trust to provide a newsletter, and a circle of support
- b) Monitor the expiring use of the Longfellow Glen units. The HUD mortgage is due in 2014, and the affordable restrictions will be in jeopardy. The Trust could formulate a plan to keep those rental units in the Town's subsidized housing inventory.

SMALL PARCELS ACQUISITION (PROJECT# 06-03)

The overall goal of this program is to procure small lots, unbuildable to the current owners due to density restrictions, and offer them to be developed for affordable housing.

Implementing a scattered site program is an important aspect to Sudbury’s housing program by preserving neighborhood character. Scattered site housing is interspersed around town, and blends with Sudbury’s housing landscape. Older homes are nestled amongst large new construction across all areas of town.

SURVEY SMALL LOTS

The Community Housing Committee, in conjunction with the Sudbury Housing Authority, has performed an extensive survey to determine a ‘short-list’ of target parcels.

Each parcel in Town less than one acre with no dwelling or building on it was reviewed, and the Board of Health, Conservation Commission, and Town Engineering were consulted.

Through this process, many parcels were eliminated with twenty potential parcels identified to pursue. Letters and subsequent follow-up was performed. Some of the properties were on the Tax Title List.

DUTTON RD PARCEL

The Tax Petition was granted in February, and the properties offered through public auction. The Sudbury Housing Trust purchased one parcel at auction on Dutton Road, and has successfully completed soil testing, which had excellent results. Letters were sent to the abutters to that property.

An RFP for development of the parcel was issued October 12, 2007, and the Greater Worcester Habitat for Humanity was awarded the development opportunity. They are an active chapter of Habitat and Sudbury is part of their service area after a recent merger with the Framingham Habitat for Humanity.

The Habitat requirements for family selection include income restrictions at 25 - 50% AMI as well as a demonstrated need for housing and an ability to pay. DHCD has worked successfully with Habitat in their LIP program. Habitat has held information sessions at the Sudbury Goodnow Library in October, November and January, has received grants from the Sudbury Housing Trust, the Sudbury Foundation, and the United Methodist Church of Sudbury.

The parcel will be developed under a Comprehensive Permit. The comprehensive permit application has been submitted to DHCD, with preliminary elevation and architecture drawings have been submitted. A public meeting with the Selectmen was held to gain their support, and many community supporters voiced their support.

WASHBROOK RD PARCEL

A parcel owned by the Sudbury Water District has potential, and we have been working closely with the Sudbury Water District on this project. The Water District board agreed to allow the Town to perform testing on the site, as it was recognized that it was surplus land for the Water District.

Recognizing the importance of community involvement, letters were sent to all the nearby neighbors. In the fall, an engineering firm was hired to perform necessary testing to investigate what might be possible.

The property edges HOP Brook, though not directly, and so wetlands delineation and riverfront marking was required. The flagging has been done and ConCom is satisfied with those results.

Testing to date is encouraging and we are assuming that a small house and septic can be accommodated and still observe the 100 foot requirement and the 10% 'no disturb' requirement. Plans have been drawn that mark the flood plain, and design a septic system to support four BR.

The material for filing the Notice of Intent filing has been started. An alternatives analysis has been completed and reviewed preliminarily with Conservation Commission. The Trust continues to be concerned over the constraints in the parcel, and even though there is no acquisition cost, they are considering whether to move forward.

Through the SWD annual meeting, the Water Commissioners are authorized to transfer this surplus land to the Sudbury Housing Trust, after successful completion of the testing. A formal request to complete the transfer will be made after the Con Comm findings have been issued.

TOWN PROPERTIES (PROJECT# 06-04)

CHAPTER 61A PROPERTIES

Periodically, the Town is offered to purchase property under Chapter 61A/B. The Town was offered the Young property, at 804 Boston Post Road. After extensive hearings, discussions, feasibility and planning, a special Town Meeting was held in December to obtain the Town's approval to purchase. The article was defeated by 22 votes, or 6%, and arguments cited concern over affordable housing in general and impact to the schools. Thorough data analysis was performed for this proposal, including fiscal analysis projections. These used real data from Sudbury, and extrapolated that there would be an additional 11 student in the proposed 16-unit development (a mix of 1/2/3bedroom homes), many (7) of whom these are already from Sudbury.

MELONE FEASIBILITY

The Town believes that the Melone and Mahoney properties present tremendous opportunities for development into municipal uses for the citizens of Sudbury. A careful evaluation of the properties is needed with public input and open discussion on the properties.

This direction has been endorsed by the 2006 Sudbury Annual Town Meeting which approved funding for the feasibility studies of both parcels. In support of this Town Meeting article, on November 8, 2005, the Board of Selectmen voted that it was their intent that the former Mahoney and Melone lands owned by the Town will be used for either mixed affordable housing and recreational purposes or individual affordable housing and recreational projects.

The studies are funded by Community Preservation Act funds, which require only CPA eligible uses (open space, recreation, historic preservation and community housing). Other uses, though they may arise during public discussion of the project, will not be contemplated within the scope of this project.

The RFP was issued by the Town of Sudbury, after review by a task force made up of staff from the Conservation Commission, the Park and Recreation Department, the Department of Public Works, the Board of Health and the Department of Planning and Community Development. Goldsmith, Prest & Ringwall have been selected from that process and have started their feasibility engagement.

Additionally, Sudbury and the Melone property was selected to participate in the 495/MetroWest Corridor Partnership with the University of Massachusetts at Amherst's Department of Landscape Architecture and Regional Planning on an initiative designed to provide municipalities with more resources on residential development and density issues. Through this program, Sudbury was provided – free of charge – objective site development plans using techniques allowing higher density housing projects, but specifically designed with municipal input to be attractive, consistent with community character, and appropriate in setting, while successfully addressing the common objections to density and meeting the needs of the housing market. In addition to these site development plans, participating municipalities will benefit from a final presentation and analysis with findings and recommendations. The UMASS design material is posted on the website.

HOME PRESERVATION PROGRAM (PROJECT# 06-05)

SUMMARY

The Sudbury Home Preservation Program is a strategy developed as part of the Community Housing Plan, published in February 2005, which outlines the overall broad brush goals of this program, to purchase single lot “tear downs” for first time homebuyers. Properties would then be subject to an affordable housing restriction and sold under the DHCD LIP program.

Preserving the ‘tear-down’ homes in Sudbury, by creating affordable homes, have multiple benefits.

- It creates new affordable units driving towards the 10% goal
- It provides first-time homeownership opportunities to Sudbury and other qualifying households
- It preserves existing housing stock, and neighborhood character
- It provides the quickest method of creating available affordable housing
- It conserves materials.

The program is financially feasible though the subsidy required reflects the high-cost of land in Sudbury.

One way we are planning to create new affordable units in a scattered site program is to buy older homes, or what we affectionately call “tear downs” - and then sell them as affordable, subject to a deed restriction and sold under the DHCD LIP program.

OFFERED UNDER LIP PROGRAM

Sudbury will create these Home Preservation units under the Local Initiative Program (LIP), administered by Department of Housing and Community Development (DHCD), as Local Action Units (LAU) which give communities the opportunity to include housing units on the state’s Subsidized Housing Inventory (SHI) that were built without a Comprehensive Permit but which meet LIP criteria.

LIP local action units must result from city or town action or approval and typically involve new construction, building conversion, adaptive re-use, rehabilitation, or creation of new affordability with an existing project. Like units in comprehensive permit projects, sale prices of LAUs are set so that a household earning 70% of area median income would not expend more than 30% of income for housing.

Sudbury has received DHCD approval for the Home Preservation Program.

LOCATING AN ELIGIBLE BUYER

Potential purchasers have been obtained through a lottery held on December 10, 2007. This lottery offered the Home Preservation unit as well as the units for the Villages at Old County Road. The application and marketing plans indicated this, and the approvals were completed for both.

The homes offered in this program will be done in a pattern of local-general-local, a pattern of three repeating.

CLOSING ON THE HOMES

The Sudbury Housing Trust is continually searching for appropriate homes for this program. These would be well-maintained homes for sale, in the ~\$400,000 price range. The Trust will select the home, and once the offer has been accepted, it will place a refundable deposit. A home inspection will occur, and final votes from the Trustees and the Board of Selectmen would be obtained.

At this point, DHCD will calculate the sales price. This is a regulated formula, and planning amounts average \$170,000 - \$200,000

The Sudbury Housing Trust recognizes that these are older homes, and initial repairs may be needed prior to closing. It is not the intention of the Housing Trust to burden the potential buyer with excessive maintenance costs, and inspection results will be addressed on a case-by-case basis. The Sudbury Housing Trust will have an inspection performed, and will complete a home repair plan for the potential purchaser to review.

It is the intention of the Trust to never take title to the property, but to facilitate the conversion from market rate to affordable.

A suitable home has been found in North Sudbury and has been sold to an eligible purchaser. The Trust completed repairs including a new roof, and all new windows. The unit has been added to the SHI since the DHCD deed rider has been recorded.

MUNICIPAL HOUSING SERVICES (PROJECT# 06-06)

Through the establishment of the Community Housing Office in the Department of Planning and Community Development, the Town is able to provide a central focal point for housing information in Sudbury.

COMMUNITY CONNECTIONS

The housing community is broad and covers many segments. Developing and maintaining contact and expertise within each segment the key underlying aspect to the entire Sudbury Community Housing Program.

Education, Outreach and Publicity

Educating homeowners and landowners of the town's need and desire to create community housing is an important element for success.

The Housing Office maintains a website and publishes information, reports and other pertinent data on housing in Sudbury on a regular basis, including a 'housing' email address (Housing@Sudbury.Ma.Us).

The League of Women Voters of Sudbury held an information forum on housing entitled, Opening the Door: Affordable Housing in Sudbury, on November 14th to cover current efforts.

The Housing Office has assisted in the annual housing meeting of neighboring communities. Wayland, Concord, Weston and Sudbury housing members met on December 11, 2006 and again in February 2008.

The website contains such general information including a summary of Sudbury Affordable Housing options for potential applicants with income limits, and sales prices, rents and contact information.

Agency Collaboration

Developing funding sources and keeping current with regulatory guidelines and programs form the backbone of the Housing Program. These include the HOME Consortium, MassHousing, CHAPA, DHCD and Mass Housing Partnership.

Activities include monthly review of those organization websites, attendance at member meetings and conferences, and periodic communications as needed. The Community Housing Specialist maintains the HOME program annual action plans, CAPER result plans and related documents.

The office was included in the Mass Housing Partnership Housing Institute panel session on June 15th, has participated in a current Housing and CPA Advisory Panel sponsored by MHP by sitting on the advisory panel and speaking as a panelist at the resulting workshop on December 13, 2007. Will speak at the 2008 Mass Housing Partnership Housing Institute in June again.

Sudbury Collaboration

There are multiple housing groups in Sudbury that provide input and direction to the Community Housing Program. These include the Board of Selectmen, Planning Board, the Zoning Board of Appeals, The Sudbury Housing Authority, and the Sudbury Housing Trust.

The Community Housing Specialist is dedicated staff to the Sudbury Housing Trust, and in that capacity assists in preparing agendas, minutes and goals, providing back-up material and status

and assisting as needed and requested. The housing specialist also works with the other Boards to help co-ordinate housing activities.

The Sudbury Housing Roundtable was held in 03/07, 10/07, and 02/08. These provide a public forum for housing initiatives, and a forum for all interested boards, committees and residents to review current projects and collaborate to reach successful outcomes.

The Housing Office has prepared a strategic five-year plan with funding projections which has been distributed and reviewed amongst the housing community in Sudbury.

AFFORDABLE HOUSING INVENTORY

Maintaining accurate records is a key component to the Sudbury Community Housing Program. The office validates the Subsidized Housing Inventory (SHI) as published by DHCD; and requests new units as needed.

The percentage of affordable housing is tracked and recorded by the State through the Subsidized Housing Inventory (SHI), which is based on the number of certified affordable units as a percentage of the 2000 total housing inventory (5,582 units for Sudbury).

Sudbury's affordable housing consists of both rental and homeownership units, family and senior housing alike as listed in the Affordable and Market Discount Rate Housing document.

Sudbury's Affordable Housing Inventory is published now at 258 units, or 4.6%, an increase of 0.7%, or 40 units, from June, 2006. The increase is due to:

1. 2 homeownership units developed on Snowberry Lane
2. 36 rental units in Orchard Hill -since Orchard Hill is a rental development all it units 'count' towards the state's inventory.
3. 1 homeownership unit at Villages at Old County Road
4. 1 homeownership unit for the Home Preservation Program

AFFORDABLE HOUSING INTEREST AND WAITING LIST

There are two lists that the office maintains: the Affordable Housing Interest List and Waiting List. The waiting list represents qualified individuals from prior lotteries. There are 12 persons on this waiting list. This will be used for any resales that become available.

The Affordable Housing Interest List contains a list of all persons who have contacted the Community Housing Office May 2006 and are interested in future affordable housing homeownership opportunities. There are currently 105 persons on this list.

FAIR HOUSING COMPLIANCE

This project will serve to ensure that the Town of Sudbury is in full compliance with all Fair Housing requirements.

The Fair Housing act requires that there no discrimination for housing. The Community Housing Specialist plays the role of the Fair Housing Director for the Town of Sudbury. Initial actions included the disbandment of the defunct Fair Housing Committee in December 2006 which was an administrative activity only and does not in any way represent any indication for Sudbury to reduce any anti-discrimination activities. To the contrary, Sudbury continues its active commitment to Fair Housing efforts.

Fair Housing training is being given to Sudbury through membership in the WestMetro HOME Consortium and its contract with the Fair Housing Center of Greater Boston. Included in this

training is the referral and complaint intake process, training workshops oriented to realtors, property managers and landlord and information on fair housing rights for the general public with a focus on race, national origin, family status and source of income to be distributed. Realtor training was held on September 20, with 3 Sudbury realtors attending.

Additional design and construction requirements established under the Fair Housing Act (which covers, amongst other unit types, condo for sale units in buildings with four or more units) and included in this HUD-sponsored website, which has good examples and information on the topic, <http://www.fairhousingfirst.org/fairhousing/requirements.html>.

Sudbury is in progress preparing an Analysis of Impediments to Fair Housing in the spring of 2008, as a requirement of the WestMetro HOME Consortium.