



# TOWN OF SUDBURY DRAFT COMMUNITY HOUSING PLAN OCTOBER 21, 2004

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Additional copies of the plan can be obtained at the Planning Board office. The plan is also available on the town's website at

[www.town.sudbury.ma.us/committees](http://www.town.sudbury.ma.us/committees) (Community Housing Committee).

Comments on the draft plan can be emailed to the Community Housing Committee at [chc@town.sudbury.ma.us](mailto:chc@town.sudbury.ma.us).

The public comment period will run through November 29, 2004.

TOWN OF SUDBURY  
HOUSING PLAN  
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## **I. INTRODUCTION**

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 very small until the 1940's. From 1940 to 1980, the town experienced rapid growth and an increase in population of over 12,000 residents. In the last two decades, Sudbury's population has increased by just over 3,400 persons, and is showing signs of stabilization based on projections compiled by the Metropolitan Area Planning Council. Sudbury's current total population is 17,678 (2003 Town Census). Two recent build-out analyses, completed for the Town by Mullin & Associates (1997) and the Metropolitan Area Planning Council (2000), conclude that Sudbury could be built out in the next fifteen to twenty years at a population of approximately 20,000.

Sudbury has maintained its character by its restrictive zoning bylaws. Present day residential zoning for one acre lots was adopted primarily in the 1950's. In the 1970's, significant acreage was removed from commercial zoning into residential use, thereby forming the basis for the present day land uses. While successful in maintaining rural character, these zoning laws have recently shown to be impediments to creating a variety of housing types. Due to the high cost of land in Sudbury, and restrictions on the construction of multiple unit dwellings, the best economic return on land value is the construction of large single family dwellings. Few alternative styles of housing have been constructed in the last ten years.

In some ways Sudbury has kept up with the growth demands on the town. Attempting to meet the town's needs for more classroom space, the Town embarked on an ambitious program of school expansion and the construction of new schools in 1996. Sudbury currently has four elementary schools (grades K-5), one middle school and one regional high school. This expansion program increased school enrollment capacity to approximately 5,450 students (1850 in the high school; 3600 in the K-8 system). Past growth patterns suggest an increase of approximately 75-100 new students each year into both school systems (5% into the high school, 3% into K-8). These numbers anticipate the capacity of the K-8 system being reached in 4 years (2007), and the high school in 6 years (2009).

Sudbury's other 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.

Under the 2000 directive of Executive Order 418, Addressing the Housing Shortage in Massachusetts, many cities and towns throughout the Commonwealth are directing funds and effort into creating housing that is available to residents of all incomes and lifestyles, with particular attention being paid to low, moderate and middle income households. Executive Order 418 ties the creation of housing at various price levels and the removal of barriers to the development of affordable housing to the receipt by municipalities of state grant monies.

Massachusetts General Laws Chapter 40B (the state's Anti-Snob Zoning Act) sets a goal for each municipality in the Commonwealth to provide at least 10% of its housing stock for households making at or below 80% of the area median income. Sudbury's inventory is currently just under 4%, confirming the perception that Sudbury needs to increase its supply of housing availability for lower income residents.

Until now, there has been no consistent affordable housing advocacy group in Sudbury, with the exception of the Sudbury Housing Authority (SHA). Many committees have been formed and disbanded throughout the years (see Appendix B). The Sudbury Housing Authority owns and manages over 85 units of rental housing in Sudbury (40% of the total number of affordable units town-wide). However, the SHA's mandated purpose is to develop and manage low-income rental housing. Other needs in town have not been addressed.

In January, 2003, the Sudbury Board of Selectmen formed the Community Housing Committee (CHC) and charged the group with facilitating community housing efforts and creating methods for increasing and maintaining the availability of housing for households with low to middle income (see Appendix A). The CHC is composed of seven members, including board representation from the Board of Selectmen, Planning Board, and the Sudbury Housing Authority, and four resident at-large positions. It is appointed by the Board of Selectmen. In addition, the Executive Director of the Sudbury Housing Authority, and the Town Planner serve as liaisons and resources to the Committee.

The CHC was charged specifically to:

- Develop and periodically review a definition of "community housing".
- Educate the public about the needs for community housing in Sudbury and methods of meeting these needs within broad goals, including: to maintain and to increase a diversity of housing types and sizes to meet the needs of the Town of Sudbury and our traditionally diverse population; to increase the supply of community housing in Sudbury and to preserve existing community dwellings in order to enable people in changed circumstances to continue living in Sudbury; to

increase the options which allow older residents to remain in their own homes, enable Town and School employees and children of Sudbury residents to live in Sudbury, and enable those of modest to medium income to live in Sudbury.

- Identify, review, evaluate, and make recommendations on approaches for the preservation and expansion of community housing, including but not limited to, methods of making existing homes available to qualified families, subsidies to assist present home owners, and zoning and bylaw changes, consistent with Federal, State and local law.
- Increase the number of housing options by identifying possible private, Town-sponsored, or other public opportunities for community housing, and by assisting in the creation of these homes with support of initial planning and project formulation, the project approvals process, project development and completion, and collaboration with standing or special Town committees, consistent with Federal, State and local law.
- As housing planners, help define what kind of data on community housing is useful and what kind of housing, housing inventory, demographic, and financial data the Planning Department should gather and make available to the public. Assist the Planning Department to maintain a record of the Town's efforts to comply with affordable housing statutes.
- Report annually to the Board of Selectmen regarding the state of affordability in Sudbury, identification of existing and potential opportunities, resources and housing approaches, barriers to community housing, and promotion of appropriate Federal, State and local programs and regulatory changes.
- Review the Town Meeting articles and present comments and recommendations on those that affect community housing.
- Engage in such other actions and activities as are consistent with this charge.
- Report its activities to the Board of Selectmen on a quarterly basis.

The intent of this housing plan is to analyze local and regional housing needs, most specifically types of housing needed, and make recommendations on how to meet those needs. This plan builds on the goals contained in the Housing Element of the 2001 Sudbury Master Plan. Some of those goals have been implemented, such as construction of Frost Farm Village, working with private developers on comprehensive permit applications, and supporting the passage of the Community Preservation Act. Much more work is ahead. Creative thinking and careful planning will be needed to increase housing opportunities that allow Sudbury to grow into a diverse community, while preserving other important elements of its unique character.

Education of town residents is also a necessary component of any housing plan. The term “affordable housing” carries many negative implications. The state’s goal for the production of housing across a broad range of income levels lends itself to a more acceptable term, “community housing”. It implies housing that fits both the needs and the character of the community where it is built. Sudbury’s housing vision contains a variety of styles and prices that meet the needs of its workers, especially town and school employees and public safety personnel, but also for traditional and non-traditional families, employees who work in Sudbury businesses, empty-nesters, first time homebuyers, and housing that meets a portion of the regional share of housing needs.

In order to define “community housing”, the Community Housing Committee thought about the following questions:

- Who can and cannot afford to live in Sudbury?
- Can our children afford to remain in, or return to, Sudbury as they form their own households?
- Are special needs populations given adequate housing options in Sudbury?
- Do our elderly residents have adequate alternatives for remaining in Sudbury as they age?
- Do we provide the type of housing that promotes local economic development?
- In what direction is Sudbury headed in providing quality housing to a broad spectrum of residents?

The 2000 United States Census provides many of the answers to the questions above. The data the CHC used to analyze housing need is included in this report.

Sudbury is fortunate to have funds to assist in the development of community housing at this time. Passage of the Community Preservation Act in 2002 ensures a minimum of 10% of funds collected to be used for the development of community housing initiatives. Based on recent collections, over \$100,000 was reserved for housing projects in FY03, and \$200,000 per year will be reserved in FY04 and FY05. In addition, \$385,000 collected from the lease of land at Frost Farm Village has been earmarked (through special legislation) for housing initiatives to assist low or moderate income households. Sudbury has also recently joined the West Metro HOME Consortium, from which we expect to receive \$10,000 to \$15,000 in federal housing funds for low and moderate income housing initiatives each year.

## **II. COMMUNITY HOUSING HISTORY IN SADBURY**

Sudbury has attempted to increase the diversity of its housing stock for more than three decades. Initiatives ranging from zoning bylaw changes to purchase of land for the development of subsidized housing to construction of rental housing units have been proposed by more than 12 town committees. Many town residents were involved in these efforts, meeting with some successes. These include Longfellow Glen, Musketahquid Village, Sudbury Housing Authority single family houses and duplexes, Orchard Hill Assisted Living, Frost Farm Village and a current allocation from Community

Preservation Act funds to create multi-family rental units. However, other efforts, including Inclusionary zoning and designating town-owned sites for additional multi-family housing, have met significant resistance at Town Meeting. This will remain an issue until perceptions are changed, which this plan strives to do. A detailed compilation of Sudbury's past housing efforts is attached in Appendix B.

### **III. CURRENT HOUSING EFFORTS**

Sudbury has recently been attempting to address the issue of housing diversity and affordability in several different ways. Both from a political and a social perspective, housing has risen to a high level of priority amongst town boards, and local non-profit groups and religious institutions. A brief description of these activities includes:

**Housing Forum planned for October 21, 2004.** This forum will be sponsored by the First Parish Unitarian Church, the League of Women Voters of Sudbury and the Sudbury Board of Selectmen. The combination of these three groups highlights the inclusive nature of the local discussions on housing affordability.

**Report of the Blue Ribbon Housing Site Selectmen Committee (BRHSSC).** This 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 (10) parcels were identified by the BRHSSC as having the potential for scattered rental housing units. After public hearings were held by the Board of Selectmen, three parcels were on the warrant for action by the 2004 Annual Town Meeting. Of these 3 parcels, 2 were voted for transfer from the Selectmen to the Sudbury Housing Authority (Hudson Road and Wilshire Road). Hudson Road is on hold until a determination can be made regarding use of this parcel for a new police station. Wilshire Road has been deemed unbuildable due to soils.

Other Town of Sudbury properties were identified by the BRHSSC as having the potential for development into multiple community housing units at a later date, including the following:

C12,100	Melone Gravel Pit (North Road). 30.2 acres. Currently being mined for gravel.
H08,049 and J08,001	Land adjacent to the DPW facility on Old Lancaster, Pine Ridge and Washbrook Road. Approximately 4 acres. Currently vacant (but under investigation for wastewater treatment potential).
G09,200	Parkinson Land behind Ti-Sales off Hudson and Maynard Roads. 13.56 acres. Currently recreational use.
F09,006	Austin Drive, adjacent to Featherland Park. 5.77 acres. Currently vacant.
K11,006	Sudbury Training Field, Old County Road. 3.17 acres. Currently vacant. Historic site.



The BRHSSC complete list of Town-owned properties that are categorized as “not wet” or having other conservation concerns is included as Appendix C. These parcels will be analyzed for housing purposes in future years as additional needs are identified.

The Blue Ribbon Housing Site Selection Committee also compiled a list of all private, institutional and state-owned property that may be appropriate for community housing. This list includes several significant parcels, especially on or near Route 20 or Route 117. Several area churches own properties in the 3-5 acre range, and properties under Chapter 61, which the Town has a right-of-first-refusal to purchase, are also on this list. Land owned by the Sudbury Water District, a quasi-public agency, is on this list. Most of the Water District lands surround public drinking water supply wells, and would not be available for development. However, other parcels owned by the Water District and not used for water supply may be appropriate.

Most of the state and federal land in Sudbury is under the management of the United States Fish and Wildlife Service, and comprise lands in both the Great Meadows National Wildlife Refuge and the Assabet River Wildlife Refuge.

The following private, institutional and state properties which may be appropriate for community housing, include:

L07,026 (p/o)	Mahoney Property. Old Framingham Road. Approximately 30 acre parcel to be deeded to the Town. Soils make it difficult to site large scale development, but some development may be possible.
M10,013	St. Anselm’s Catholic Church. Landham Road. 5.9 acre parcel (including 11,000 sq. ft. church and 2500 sq. ft. rectory building) to be sold by the Archdiocese of Boston in 2004. Excellent soils, highly developable.
J08,315	Sudbury Water District. Washbrook Road. 0.7 acres. Vacant.
D13,500	Sudbury Water District. Concord Road. 10.24 acres. Vacant.
K04,015	Young property. Boston Post Road. Chapter 61. 7 acres. Single family residence.
K10,018	Shylovsky property. Boston Post Road. Chapter 61. 8.54 acres. Single family residence.

Other private properties which have been identified by the Land Use Priorities Committee as potentially suitable for housing include:

K11,202	MacArthur property. Old County Road. 5 acres. Vacant.
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H09,002 Village Green. Hudson Road. 2.77 acres. Existing office buildings may be suitable for condominiums or apartments.

K10,80/81/82 Mercury property. Boston Post Road. 4.66 acres. Vacant.

**Sudbury Housing Authority Scattered Site Project.** The Sudbury Housing Authority (SHA) received Community Preservation Act funding in 2003 in the amount of \$20,000 per unit for the creation of up to 16 rental units. Parcels are under investigation for feasibility.

**Community Preservation Act.** The CPA was passed in Sudbury in 2002. The Town now has greater opportunities to create community housing. Careful consideration of parcels coming out of Chapter 61 for housing has been on-going since passage of the CPA.

**West Metro HOME Consortium.** The Town of Sudbury recently joined a regional HOME consortium with the neighboring towns of Bedford, Belmont, Natick, Lexington, Newton, Needham, Framingham, Lincoln, Brookline, Watertown and Waltham. The total consortium budget is approximately \$1.7 million. Sudbury expects to receive approximately \$15,000 per year for low and moderate housing initiatives beginning in July of 2005.

**Carriage Lane Comprehensive Permit.** A sixteen unit town house project was approved under a comprehensive permit in 2002, creating four (4) units of community housing. A lottery was held in March of 2004, and the units were awarded to four households with Sudbury connections.

**Frost Farm Village Senior Housing Development.** In 2000, the Town of Sudbury leased an 11 acre parcel of town-owned land for the development of 44 below market condominium units for sale to Sudbury seniors. This development is fully occupied. Original unit prices were below \$200,000. Permanent price restrictions limit the resale value of these units.

#### **IV. SUDBURY'S HOUSING MARKET**

This section describes the housing market in Sudbury, including the factors affecting demand. These factors include the population variables of age distribution, household characteristics, and household income.

##### **Population and Age Distribution**

In 1990, Sudbury's population was 14,358. By 2000, the population had risen to 16,841, a 17.3% increase. The largest surge in population occurred from 1950-1970, when the town grew by over 10,000 people.

The median age of Sudbury residents has increased over the past 4 decades. In 1970 the median age of residents was 29.3 years; in 1980 it was 31.8 years; in 1990 it was 37.1

years and in 2000 it was 38.8 years. The age cohort 25-34 years experienced a decrease from 1990 (15-24) to 2000 of 30% . Generally, this age group is looking to establish themselves in a home, either as first time homebuyers or renters. A decrease in these age cohorts may reflect the inability to afford homes in Sudbury. This data is echoed in the Metrowest region, which may reflect regional housing prices that are too high for first time homebuyers. In tracking age cohorts from 1990-2000, we find decreases in the cohorts between 15-34 years, and increases in the 35-54 cohorts (families with young children). This data may again indicate an inability to find suitable housing for the first time homebuyer.

Sudbury's older age groups experienced an increase in population. According the Metrowest Economic Research Center, Sudbury experienced a 66 percent growth in the number of persons age 65 or greater between 1990 and 2000, much above the Metrowest average of 19.9%, the Massachusetts average of 5%, and the U.S. average in this age group of 12%. Since 1995, Sudbury has seen the development of over 150 units of senior housing developed, which may indicate the ability and desire of Sudbury seniors to remain in town. With more than 35% of Sudbury's total population reaching age 55 and above in the next decade, there will likely be an increase in demand for senior housing in town.

### **Household Characteristics**

Over 92 percent of Sudbury's 5590 housing units are owner occupied. The remaining 8 percent, or 444 units, are assumed to be rental units. The total number of housing units in Sudbury increased by 828 between 1990 and 2000. The total number of households increased by only 742 (4762 in 1990 to 5504 in 2000). Vacancy rates were less than 5% for all household types, both in 1990 and 2000, with homeownership units experiencing the lowest vacancy rate of 0.3% in 2000.

According to the 2000 U.S. Census, 66.5 percent of Sudbury residents lived in the same house between 1995 and 2000. Multiple Listing Service property transfer records indicate that the rate of property transfers, including sales of new homes, has remained in the five percent (5%) range for the last decade. This correlates to a fairly stable resident base even though the town is growing.

Throughout the twentieth century, the average size of the American household has decreased, and Sudbury households had followed this trend until the 2000 census. According to census figures, the average Sudbury household in 1970 had 4.07 people. In 1990 this figure had decreased to 3.0, and in 2000 the figure is 3.02. Renter-occupied units had fewer occupants, and averaged 2.34 persons per unit in 1990 and 2.14 persons per unit in 2000. The traditional family has also changed since 1980, with many more single head of household families, or those with other non-nuclear household make-up, including grandparents living with the family.

This slight increase in the number of persons per household may be due to the construction of larger homes over the past decade. Since 1990, over 850 new homes have been built in Sudbury. With the exception of homes on small, grandfathered lots in

older neighborhoods and senior developments, these homes contain 4-5 bedrooms each, and may attract larger families. In the 1960's, the average new home was approximately 1,800 gross sq. ft. in size and valued at approximately \$30,000. In the late 1990's, the average new home in a subdivision was 4,000 to 5,000 gross sq. ft. in size and valued at \$700,000, with many homes even larger.

### **Household Income**

Sudbury's high median income is the most significant factor affecting the type of housing that is available in town. Absent state mandates, market conditions and land values determine the type of housing that is constructed in any geographical area, including the ability to pay for housing. Sudbury has one of the highest median incomes in the state, and exceeds both the statewide and the national median. The table below provides a comparison of 1999 median incomes for selected Metrowest communities.

	<b>1999 Median Household Income</b>
Sudbury	\$118,579
Wayland	\$101,036
Natick	\$69,755
Ashland	\$68,392
Framingham	\$54,288
Metrowest	\$71,617
Massachusetts	\$50,502
United States	\$41,994

Source: 2000 US Census

## **V. HOUSING SUPPLY**

Sudbury is primarily a community of single family homes. Zoning prohibits the construction of apartment buildings and other multiple unit structures except for senior housing, and with the exception of the subsidized units described in the section below, none exist within the town borders. As of 2000, 95% of the town's housing stock was made up of detached single family homes. With the recent changes to Sudbury's zoning bylaws which allow multiple unit senior housing, the town has seen 107 units of senior housing constructed as of 2003 (1.9% of the total housing stock). The remaining 3.1% are attached units in either Musketahquid Village, or Longfellow Glen, both subsidized housing developments described in detail in the next section.

### **Owner and Renter Occupied Housing**

In 2000, approximately 92% of the town's housing units were owner-occupied and 8% were rented. Sudbury's housing occupancy was similar to that of the surrounding communities of Wayland, Ashland and Concord, and quite different from Framingham and Marlborough which have 45% and 39% rental units. The percentage of owner-occupied units in Sudbury was significantly higher than for the rest of Middlesex County, which averaged 38% rental units.

**Subsidized Units**

In 1993, 4.19% of Sudbury's housing units were affordable according to the state's definition of housing available to persons making at or below 80% of the Boston area median income and not exceeding 30% of gross income for housing costs. In 2000, because of the increase in total market rate units, that figure has decreased to 3.86% of the total housing units (5504).

In total, Sudbury's affordable housing units number 214, and include the following:

- Musketahquid Village - 64 elderly/disabled rental apartment units owned and managed by the Sudbury Housing Authority.
- Longfellow Glen - 50 elderly and 70 family rental apartment units owned and managed by a private corporation under Section 8 HUD vouchers.
- Orchard Hill Assisted Living – 9 rental assisted living units owned and managed by a private corporation.
- Sudbury Housing Authority scattered site housing for families - 21 single family and duplexes.
- Carriage Lane Residences - 4 units of affordable homeownership condominiums under the Housing Starts Program administered by MassHousing.

Frost Farm Village, the first town-sponsored housing effort, has recently completed and occupied 44 units of senior housing designed for sale to income and age-eligible buyers at below market prices. This development was initiated by the Housing Task Force of the Strategic Planning Committee based on the Senior Needs Assessment completed in 1995, and personal observation of many Sudbury seniors that there was no alternative for aging in place. This major effort by the town does not increase the town's percentage of state mandated affordable housing units due to its unique criteria for qualifying income and sales prices, which were geared towards Sudbury seniors and do not meet the state's requirements. However, it does provide an alternative living style for seniors at a less-than-market price.

**Housing Conditions and Lead Paint Hazards**

Sudbury's housing stock is relatively old. Over 50% of the owner occupied units were built prior to 1970 (34 years old), and approximately 8% are over 65 year years old. Fifteen percent are less than eight years old. As documented by the Town Assessing Department, the housing stock is in relatively good condition, reflected in recent home assessments.

Lead paint is assumed to have been utilized in approximately 74% of the homes built before 1980. This means that approximately 2900 housing units in Sudbury could potentially have lead paint.

**VI. MARKET TRENDS**

Sudbury experienced a huge surge of growth in the late 1950's and early 1960's; nearly half of Sudbury's existing housing stock was built between 1951 and 1970. Those

houses were built for young families outgrowing "starter" homes, and were priced at \$25,000–\$30,000. These same homes are now selling in the \$300,000–\$425,000 range.

According to the Sudbury Building Department records, 872 homes have been built since 1990. This is 15% of the total housing stock of 5693 units, and represents an average of 72 units constructed each year since 1990. Of the 872 units constructed, 765 were single family homes and 107 were senior condominiums. There was no construction of rental units, or other multi-family units, with the exception of 49 assisted living rental units at Orchard Hill, and sixteen (16) Carriage Lane condominiums built in 2003 and 2004.

However, the prices of all new housing being constructed in Sudbury now exceeds those older homes by 200–400%, which, while creating "diversity" of a sort, does not meet the objective of providing housing for the full range of income levels of Sudbury citizens. As land values increase and more houses are priced at the high end, the proportion of units available to the average citizen, and those below the median income, decreases. Based on Sudbury Building Department records, construction costs per unit in the year 2000 averaged approximately \$307,000 per unit for both single family homes and multi-family units (only non-subsidized units were analyzed). These figures are taken from only one sample of very high-end multi-family housing, and do not exhibit the same statistics regarding the cost of single versus multi-family housing as other towns have experienced. Regionally, statistics show that, generally, multi-family housing is less expensive to construct than single family homes. Because of its lower construction costs, multi-family housing is likely to be useful in providing housing which is affordable to low and moderate income families. Based on prior trends, most new construction in Sudbury can be expected to be single family homes, with high construction costs, unless the town takes decisive action to encourage other housing types.

The distribution of housing between single and multi-unit homes in the region differs greatly from community to community, as does the value of units. The tables below show that Sudbury has the highest percentage of single family dwellings, and the lowest percentage of multi-family dwellings of seven nearby Metrowest communities. Sudbury again leads the region in the percentage of home values exceeding \$500,000, with 23% of the existing housing stock in this category.

<b>Town</b>	<b>Single Family</b>	<b>Multi-Family</b>	<b>Total</b>	<b>% Single Family</b>	<b>% Multi-Family</b>
Sudbury	5346	244	5590	95.6%	4.4%
Ashland	4330	1464	5794	75%	25%
Concord	5004	1149	6153	81%	19%
Framingham	14,082	12,652	26,734	53%	47%
Marlborough	7832	7071	14,903	53%	47%
Natick	8762	4606	13,368	66%	34%
Wayland	4394	341	4735	92.8%	7.2%

Source: 2000 U.S. Census

### Value of Owner-Occupied Housing Units in Metrowest

	<b>Sudbury</b>	<b>Ashland</b>	<b>Concord</b>	<b>Framingham</b>	<b>Marlborough</b>	<b>Wayland</b>
Total Units:	<b>4,813</b>	3,876	4,255	12,520	7,027	3,993
Less than \$100,000	<b>0</b>	<2%	<1%	<2%	3%	<1%
\$100,000 to \$199,999	<b>3%</b>	41%	<2%	39%	53%	4%
\$200,000 to \$299,999	<b>19%</b>	36%	14%	42%	29%	20%
\$300,000 to \$399,999	<b>23%</b>	15%	23%	12%	10%	28%
\$400,000 to \$499,999	<b>21%</b>	4.5%	20%	3%	3%	17%
\$500,000 to \$749,999	<b>23%</b>	<1%	22%	1%	1%	20%
\$750,000 and over	<b>10%</b>	<1%	18%	<1%	<1%	10%

Source: 2000 U.S. Census

A build-out analysis prepared by the Metropolitan Area Planning Council in 2000 projects an additional 2028 homes could be built in Sudbury. Given the rate of growth in recent decades, it is projected that buildout will occur in the next fifteen to twenty years. Prior trends suggest that these will be primarily single family homes.

## VII. DEMOGRAPHICS

According to the 2000 Census, 94% of Sudbury's population is white (15,930 people); 3.6% is Asian (615 people); 1.1% is Hispanic or Latino (193 people); 0.7% is Black or African American (123 people); 0.6% identify themselves as two races (103 people); 0.3% identify themselves as some other race (51 people); 0.07% are Native Hawaiian and other Pacific Islander (12 people); and 0.05% are American Indian and Alaskan Native (9 people). It is noteworthy that large percentages of minority households in Sudbury make over \$100,000 annually, including 80% of all Hispanic or Latino households; 33% of all Black or African American households; 75% of all Asian households and 48% of households identified as 2 or more races.

Sudbury has a reputation as a wealthy community. The 2003 median income is over \$118,000, and the median house assessment is \$595,900. These figures are historically higher than the region, the state and the country. However, not all residents are wealthy. The 2000 U.S. Census indicates that there are many Sudbury residents who may be in need.

The Department of Housing and Urban Development (HUD) calculates the median income for U.S. metropolitan and non-metropolitan areas each year. Sudbury is within the Boston metropolitan area, which median income in 2004 has been calculated at

\$82,600. HUD defines households as extremely low (those making less than 30% of the area median), low (those making 31-50% of the area median), moderate (those making 51-80% of the area median) and middle (those making 80-95% of the area median). Most state and federal housing programs assist households making up to 80% of the median income, adjusted for household size. **According to the 2000 U.S. Census, twenty-eight percent (28%) of all Sudbury households fall into one of these categories. Twenty-two percent (22%) of all Sudbury households are below 80% of the area median.**

The U.S. Bureau of the Census defines poverty status for 1999 as income falling below the annual level income of \$12,700 for a family of four. In 1999, there were 102 families (1.9%) and 466 individuals (2.8%) at this income level in Sudbury. 86% of the families had children. 63% of the families were headed by a woman. 69 of the 466 individuals, or almost 15%, were over the age of 65, while the over-65 population is about 10% of the town's total.

### **Persons in Need**

**Extremely Low income:** According to the 2000 Census, 8% of Sudbury households (463 out of 5523) qualify as extremely low income. Among this income group, there are 88 renter households making less than \$20,000 who pay more than 30% of their income for rent. Races in this income group include 26 African American households (44% of the total African-American households in Sudbury) and 11 Asian households (5% of the total Sudbury Asian population).

**Low income:** According to the 2000 Census, 5% of Sudbury households (273 out of 5523) qualify as low income. Among this income group, there are 67 renter households making between \$20,000 and \$34,999 who pay more than 30% of their income for rent. This income group represents 15% of all renter households in Sudbury. Only 6 of these households contain a minority group, identified as 2 or more races.

**Moderate income:** According to the 2000 Census, 9% of Sudbury households (493 out of 5523) qualify as moderate income. Among this income group, there are 18 renter households making between \$35,000 and \$49,999 who pay more than 30% of their income for rent. Twenty seven (27) of these households contain a minority household: 11 Hawaiian, 7 Hispanic or Latino and 9 identified as 2 races.

**Middle income:** According to the 2000 Census, 6% of Sudbury households (327 out of 5523) qualify as middle income. Among this income group, only 10 renter households making between \$50,000 and \$74,999 pay more than 30% of their income for rent. 31 middle income households are minority households: 13 Black or African American and 18 Asian.

### **Elderly**

Just under ten percent of Sudbury's population is age 65 or older, but 15% of all households include persons who are age 65 or older (873 out of 5523). Forty-nine



percent of elderly households are extremely low or low income (298 households) and another fifteen percent are moderate income. Therefore, over 60% of all elderly households in Sudbury are income eligible for most federal and state housing programs (440 households). These figures are compared to 14% of households below 65 years of age which are extremely low, low or moderate income (792 households). Less than 1% of elderly residents are below the poverty level (69 individuals)

Only a small percentage of residents over the age of 65 are renters (135). However, 30% of all renters are 65 or over. Most of these residents live in subsidized housing at either Longfellow Glen or Musketahquid Village.

Elderly homeowners pay the smallest percentage of their income on housing costs, as compared to elderly renters and younger homeowners. 25% of homeowners over the age of 65 spend over 30% of their income on housing costs, as compared to 50% of renters over the age of 65. Those resident households under the age of 65 who pay greater than 30% of their income on housing are 34%. These statistics highlight the fact that many elderly homeowners have owned their homes for many years and few have mortgages on the property any longer, which is reflected in lower housing costs. 84% of the elderly households have owned their homes for over 30 years, compared to 19% of the households under the age of 65.

Elderly homeowners have accumulated enormous equity in their homes. The median house assessment in Sudbury is currently \$595,900, and without a mortgage, many elderly homeowners have considerable wealth in their real estate asset.

Elderly homeowners also have the ability to apply for property tax exemptions through the local Assessor. Sudbury offers a variety of exemptions and tax reduction programs for seniors with limited means of income.

Sudbury Seniors are served by a very active Council on Aging (COA) and Senior Center. The COA provides transportation to shopping, social activities and medical appointments; schedules seminars on educational, financial, health and wellness, and other related topics; provides lunch several times weekly; refers residents for health services, housing, fuel assistance, and in-home services; and provides leisure activities at the center on a daily basis.

Baypath Elder Services in Framingham is the designated Massachusetts Aging Services Access Point for Sudbury seniors. Baypath provides vital services such as care coordination, homemaking, meals, legal aid, etc.

A limited number of hours are available through the Town social worker's office for senior case management. These cases have included seniors at risk for eviction from subsidized units due to accidental fire setting, declining mental status, etc. Every effort is made (in conjunction with Baypath's Elder At Risk Program) to safely maintain these seniors in their apartments.

**Renters**

According the 2000 US Census, 41% of all Sudbury renter households spend 30% or more of their income on rent. The median figure for percentage of household income spent on rent in Sudbury is 25.6%. Eight percent (8%) of the renters in Sudbury are minorities, which is slightly higher than the overall percentage of all minority Sudbury residents (5.4%).

Based on the Boston area median income, the maximum affordable monthly rent for a family of four, including utilities, for a very low income household is \$606; for low income households it is \$1010; for moderate income households it is \$1566; and for middle income households it is \$1919. None of the listed market rate rental units in Sudbury during the first three quarters of 2003 advertised rents within range of the low or moderate income level for a family of four (3 or more bedrooms), and only 2 units were within the low or moderate income level for a family of 2. Two units were single room rentals under \$700.

**Owners**

Based on the 2000 US Census, 22% of all homeowners in Sudbury are paying more than 30% of their income on housing costs. However, over 60% of all owner-households earning less than \$50,000 annually pay over 30% of their income on housing. This percentage drops down to 11% of owner-households paying over 30% of their income on housing costs when the income level rises to greater than \$75,000 annually.

Seventeen and one-half percent (17.5%) of Sudbury's households (almost 1,000 households) have incomes of less than \$50,000. Based on standard calculation of spending not more than 30% of income on housing costs, \$50,000 income would allow a family to spend \$1,250 per month for housing (including real estate taxes and insurance if owned, and utilities if rented). A mortgage of this amount would enable a family to purchase a house in the \$175,000 to \$184,000 range.

**Special Needs Populations and Services**

Special needs housing covers a broad range of needs, but is most commonly used in reference to people with mental retardation or mental health disabilities. These populations are protected under both federal and state Fair Housing laws, and the development of group housing to meet their needs is exempt under local zoning (M.G.L. Chapter 40A, sec. 3). Other types of special needs housing refers to accessible housing for persons with physical disabilities, and other types of needs such as parenting grandparents; HIV/AIDS population; people in drug or alcohol recovery; victims of domestic violence; and others with short or long term needs requiring specialized housing design or professional services.

Sudbury is within the Metrowest service area for State supported social services. Residents with a variety of needs can access services from agencies located in Framingham, Natick, Concord, Acton, etc.

The Town of Sudbury has a full-time community social worker. The Board of

Health contracts with several local social workers and Eliot Community Human Services for outpatient treatment. Treatment is targeted for residents unable to access traditional care.

**Homelessness**

Residents are referred to South Middlesex Opportunity Council (SMOC) for one of their Emergency Shelter Programs. One male was referred in 2003. One Sudbury female is currently homeless.

**Mentally Ill**

The Metro Suburban Area office of the Massachusetts Department of Mental Health (DMH) provides services to Sudbury. DMH estimates that “1/2 of 1% of the residents” in Sudbury are active clients. The DMH Director of Community Services is concerned over 1) the limited number of affordable units for young adults, and 2) the ability of existing units to accommodate the needs of the mentally ill.

24-hour crisis services are available through Psychiatric Emergency Services in Framingham. Outpatient services are available through Eliot Community Human Services (Concord) and Framingham Mental Health.

**Domestic Violence**

Victims of domestic violence are referred to Voices Against Violence – a Framingham Program which receives funding from D.P.H., D.S.S., and the Massachusetts Office of Victim Assistance.

During the 2003 calendar year Sudbury Police received 52 calls for domestic violence and 34 restraining orders were implemented. 15 arrests occurred for domestic assault and battery.

**Mental Retardation/Developmental Delay**

Services are provided through the Middlesex West office of the Massachusetts Department of Mental Retardation. 76 residents received services during 2003 (49 under age 22, 22 between 23 and 49 years of age, 5 over age 60).

**Veterans**

The Town of Sudbury employs a part-time Veterans' Agent. The Veterans' Office provides myriad services including information on health, employment, financial and burial assistance among others, using state and federal agencies such as the Massachusetts Office of Veterans' Services and the federal Veterans' Administration.

**Persons with HIV/AIDS**

The Massachusetts Department of Public Health surveillance program reports “less than five but not zero” HIV/AIDS cases in Sudbury as of 1/1/04.

**Disabilities**

Sudbury's population contains 2,274 residents (13%) who are non-institutionalized with disabilities, over ½ of whom are between the ages of 16 and 64. Eleven units at Longfellow Glen, and 4 units at Musketahquid, are handicap-accessible. There are no known residences or group homes constructed for persons with disabilities, with the exception of the Orchard Hill Assisted Living Facility, the Wingate Nursing Home and the SPEC Center (rehabilitation).

Some residents have the means to modify their residence to accommodate their disabilities, others do not. Two families applied during 2003 for the Home Modifications Loan Program (offered by the State via collaboration of M.R.C. and C.E.D.A.C.).

Seventy-eight (78) residents were registered clients with the Massachusetts Rehabilitation Commission in 2003.

**Regional Housing Needs**

Sudbury's subsidized housing inventory is open to non-residents, however residents receive preference for most of the units. At our current inventory of less than 4%, we are falling short of providing enough subsidized housing for Sudbury's population needs. We are therefore not contributing inventory to the region.

According to the Metrowest Cohesive Commercial Statistical Area Economic Profile 2004, compiled by the Metrowest Economic Research Center, over 54% of all jobs in the Metrowest region had annual average wages of \$32,300 or less. According to the same data, the average cost of an existing single family home in the region is \$421,500. The neighboring communities of Marlborough and Framingham both contain large percentages of immigrants, and low and moderate income households, who could conveniently relocate to Sudbury if units were available. However, lack of public transportation in Sudbury may deter such relocation.

**VIII. INDICATORS OF HOUSING NEEDS****Indicators of Need for Rental Housing**

Rental housing is generally the least expensive means of housing, and is critical to households who cannot afford to own a house. Even if rents are in the range of monthly mortgage payments, real estate taxes and insurance drive up the cost of homeownership more than rental housing. However, the incidental real estate costs become the burden of the renter in the form of higher rental prices. In Sudbury, almost 50% of the rental housing is subsidized. That leaves only 200 units of rental housing for households who do not qualify for subsidized housing assistance because their incomes are too high. Due to the overall lack of rental units, renter-occupied households may be living in housing that is inappropriate or mismatched to their needs in terms of size and type.

The Massachusetts Housing Partnership has identified indicators of needs for rental housing:

- Percentage and Type of Rental Housing

According to the 200 U.S. Census, Sudbury currently has only 444 rental units, or just over 8% of the total housing stock, compared to the rest of Massachusetts (excluding Boston), which averages 35% of housing in rental units. Of these 444 units, 213 are subsidized. Almost 50% of Sudbury's rental units are in single family homes, which usually represent the most expensive type of rental housing. Almost 70% of Sudbury's rental housing is over 20 years old, with only 61 units constructed in the last 13 years (49 of which are assisted living units).

- High Market Rents and Lack of Available Rentals

Sudbury's median rent is \$756 according to the 2000 U.S. Census, and its low amount reflects the fact that almost 50% of the rental units are subsidized. Market rents in Sudbury during the first 3 quarters of 2003 ranged in price from \$700-\$1400 for a one-bedroom apartment to \$1700-\$2500 without utilities for a three-bedroom house. All of the market rate three bedroom units are out of reach for families making 80% or less of the area median income (assuming 30% of income as a maximum housing cost). This income can afford a \$1300 rental, plus \$300 for utilities. Therefore it is not surprising that 40% of all renters pay at least 30% of their gross household income for rent and utilities.

The rental vacancy rate in Sudbury is extremely low. The waiting list for Sudbury Housing Authority subsidized family units is currently closed and contains 51 families. There is approximately one vacancy per year, indicating a wait of up to 51 years for the last family on the list. The waiting list for family units at Longfellow Glen is 3 to 5 years.

- Family Rental Housing

34% of Sudbury's rental units are occupied by households with 3 or more people, and 60% of Sudbury renters are less than 60 years of age.

- Rental Housing for Older Residents

40% of Sudbury renters are over the aged of 60 years. In the 55 to 75 year age group, 52% of renters pay over 30% of their gross income for rent. This high figure could be partly due to establishments which include board in their rent.

### **Indicators of Need for Homes for First Time Homebuyers**

Purchasing power for first-time homebuyers is influenced by both the income of the purchaser and the range of housing prices in a community. Housing prices must reflect the sale price, homeowner's insurance, real estate taxes and mortgage insurance, and in general these costs should not exceed 30% of the household income.

The Massachusetts Housing Partnership has identified indicators of needs for first time homebuyer housing:

- **Market Prices of Housing for Sale**

The large boom in Sudbury's population growth occurred in the 1950-1970's, when over 2500 houses were built (almost 50% of Sudbury's total housing stock). Many of these houses are some of the most affordable homes in town today due to their smaller size and the small lots they occupy. Recent real estate listings for homes in the old Halper Homes neighborhoods range in price from \$345,000 to \$542,500, and the average sale price of these homes over the last 2 years was \$410,500. Other lower priced houses are located in the Pine Lakes and Pine Rest neighborhoods, which contain smaller, older homes, many of which were former summer camps converted into year-round residences. Recent real estate listings in the Pine Rest and Pine Lakes areas range in price from \$249,000 to \$450,000, with the average sale price over the last 2 years of \$354,000.

- **Length of Time on the Market of Homes for Sale**

Over the last decade, single family real estate listings in the Multiple Listing Service for Sudbury averaged 88 days on the market.

- **Affordability Gap for Median Income Households (and those with lower income)**

The affordability gap in Sudbury can be calculated by taking the price range of home sales and equating it to 30% of the area median income to determine if a household making the median income could afford to buy in Sudbury. Given the above prices for the smallest homes in Sudbury, 80% of the 2003 Boston area median income of \$62,650 for a family of 4, a five percent (5%) down payment, taxes, insurance and PMI, the maximum price that a median income family could afford is below \$165,000. As of January 1, 2004, there were 2 houses on the market for this price or lower. The affordability gap calculated above acts as an exclusionary measure for households to move into Sudbury unless their household income is much higher than the area median.

The median income of Sudbury residents is much higher than the Boston area median (\$118,579 in 2000). Sudbury's own median income was \$118,579 in 2000, while the median single family home assessment in Sudbury is \$595,900. The maximum price home that the median Sudbury household can afford is approximately \$320,000 (including mortgage, taxes and insurance). Sudbury's own affordability gap is over \$270,000.

### **Indicators of Need for Senior Housing**

Population projections for the age cohort 55+ indicate that Sudbury's senior population could reach over 6,000 persons in the next 2 decades. Ninety (90) percent of this group own their own home, and fifty-seven (57) percent of all 55+ households (1130

households) have incomes over \$60,000, making them ineligible for traditional subsidized senior housing units. While Sudbury has been responsive to creating alternative types of housing for seniors, the need still exists for more.

The Massachusetts Housing Partnership has identified indicators of needs for senior housing:

- Income Relative to the Number of Subsidized Senior Housing Units

Sudbury has 163 residents over age 75 earning less than \$30,000, yet only 118 subsidized rental housing units serving this segment of the population. If this segment of the population totaled twice the number of available units or more, MHP research would indicate that we have a need. The relatively short resident waiting list for elderly units at Musketahquid Village and Longfellow Glen (less than one year) further support the fact that Sudbury has an adequate supply of senior units for low and moderate income residents. At both of these developments, the non-resident wait list is 1 to 3 years.

- Payment of greater than 30% income for rent by those age 55 and over

Sudbury census data indicates that we have 104 residents over the age of 55 who pay more than 30% of their income for rent. If this number were (again) 236, that would indicate a need.

- Provide diverse types of housing for seniors

Sudbury has encouraged the construction of market and below market rate senior homeownership units through the adoption of the Senior Residential Bylaw and the Incentive Senior Development Bylaw. Since 1997, 3 developments have been constructed (or are in construction), and 2 developments are in the permitting stage. When these developments are completed, the inventory of senior homeownership units in Sudbury will total 205. Price ranges for these units are between \$195,000 (Frost Farm) to over \$700,000 (Springhouse Pond). Given that 56% of Sudbury residents aged 55 and over have incomes of over \$75,000 (999 residents), and the popularity of these units, there seems to be a market for more senior homeownership units, but not necessarily subsidized units.

- Condition of existing senior housing developments

The newest senior development is Frost Farm, which contains 44 homeownership units in the \$195,000 price range. The other market-rate condominium projects, Northwoods and Springhouse Pond, are also new (built within the last 5 years). The rental units are older, with Musketahquid Village built in 1976, and Longfellow Glen constructed in 1984. Newer rental units for seniors may be a need.

## **IX. SUMMARY OF STATISTICS AND HOUSING NEEDS**

- ♦ Sudbury has 214 units of certified affordable housing. In order to meet the state goal of 10% , we need an additional 345 units.
- ♦ If we continue to grow at the current rate (counted as new housing units built per year), we will need approximately 50 more affordable units by the year 2010 to reach our 10%.
- ♦ 22% of all Sudbury households make less than \$66,000.
- ♦ The median Sudbury income cannot afford to purchase the median Sudbury home. A \$67,000 affordability gap exists.
- ♦ A family making 100% of the Boston area median income experiences a \$134,000 affordability gap in Sudbury between what they can afford to pay and the median home price. This gap increases as income decreases.
- ♦ Sudbury has only 444 rental units. One-half of these are subsidized. This number is lower than any of the surrounding towns.
- ♦ One-third of the homes in Sudbury are valued at \$500,000 and over. This percentage is higher than any of the surrounding towns.
- ♦ The demographic figures stated in section VII indicate that creating community housing in Sudbury at a variety of price levels will not substantially change the makeup of the current population.

Based on the above indicators, Sudbury's greatest housing needs are:

- The limited supply of rental housing units in Sudbury makes it a likely need, both for market and below-market units. The long waiting list for subsidized units indicates that subsidized family rental housing is particularly needed. A vacancy rate of less than 5% is "considered a condition where renters are subject to limited choices and increasing rental costs." (Massachusetts Housing Partnership Housing Needs Assessment Workbook). Sudbury's vacancy rate at close to zero places us squarely in that category.
- Homeownership needs for first time homebuyers, and those residents making less than the Sudbury median income are apparent. Homes in a range of prices from \$165,000 to \$320,000 are needed.
- Also lacking are alternative types of housing for special needs residents. While units at both Musketahquid Village and Longfellow Glen are handicap-accessible, and several units are targeted for special needs residents, these complexes lack support services that would traditionally be in place if the facility specialized in special needs.
- Senior homeownership units at a variety of price levels.



## **X. IMPEDIMENTS TO THE DEVELOPMENT OF COMMUNITY HOUSING IN SUDBURY**

1. Lack of public sewerage. Higher density development is constrained in Sudbury due to wastewater disposal. The entire town relies on septic systems to handle wastewater. Sudbury officials have been examining the issue of sewerage portions of the Route 20 area, which presents the greatest opportunity for higher density, smart growth development (both residential and commercial). However, financial and political issues make this a long term project.
2. Zoning. Creating affordable housing has been very difficult in Sudbury. Efforts over the past 10 years to increase zoning options for affordable housing, transfer land, and approve affordable housing developments have met with little success. Our victories in this area include adoption of an accessory apartment bylaw in 1993 and adoption of a price-restricted senior housing bylaw in 1998 (which is not "affordable" by state standards but complies with EO418). Other legislative approvals dealing with housing include adoption of the CPA; approval to partially fund a small rental housing project with CPA funds; creation of the Frost Farm Village condominiums and transfer of land from the Selectmen to the Sudbury Housing Authority (1988 and 2004). Defeats include: inclusionary housing bylaw (1993 and 1994); and transfer of land from the Selectmen to the Housing Authority (1987, 1996 and partial defeat in 2004).
3. Cost of land in Sudbury. Purchase of land for affordable housing projects is not economically feasible. Single house lots are selling in the \$350,000 to \$700,000 range presently.
4. Development constraints. 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.
5. Limited staff/no community development corporation to initiate and oversee housing projects. Development of subsidized housing is not a central function of local government, and without expertise it is difficult to do. Sudbury has not been adverse to private development of affordable housing. Only two Chapter 40B developments have been proposed in the last 8 years, and both were approved. Public development of housing requires technical expertise not presently accounted for in Sudbury's small staff.

## **XI. HOUSING GOALS AND OBJECTIVES**

**GOALS:** Maintain and increase a diversity of housing types in Sudbury to meet the needs of a changing and diversified population with respect to age, disability, household size and income. Provide a share of regional housing needs for persons earning 80% or lower of the Boston MSMA median income. Specifically,

- ♦ Attempt to achieve the goal of 10% of the town's total housing units affordable to households making less than 80% of the area median income.
- ♦ Increase the number of housing units that are affordable to middle income households making less than 120% of the area median income.
- ♦ Give preference to persons with ties to Sudbury (residents, relatives, employees, Metco families) in all housing production programs.
- ♦ Preserve affordability restrictions on existing and new units for the longest period possible.
- ♦ Use town funds to leverage outside funding for housing creation.

**Objectives:** Increase home ownership opportunities for first time buyers, especially those who now live or work in Sudbury. Increase rental opportunities for all income levels, ages, special needs and Sudbury workers through reuse and redevelopment of existing housing stock and new development which harmonizes with existing development and the landscape.

### **Strategies - General:**

- Create or work with a non-profit housing development agency to develop community housing in Sudbury.
- Encourage locally appropriate comprehensive permits under M.G.L. Chapter 40B as a means of producing community housing units. Work with both developers and landowners to identify sites and create partnerships.
- Identify appropriate parcels for community housing – both public and private parcels. Rezone if necessary. Purchase land where the opportunity exists.
- Educate the residents on what community housing is and what it looks like, the need and moral obligation to provide housing for all citizens and the desire of the town to create these types of housing units.
- Investigate state, federal and private funding sources to supplement local funding.

### **Strategies – Zoning/Ordinances**

- Revise Zoning Bylaw to allow apartments in commercial buildings in all business and industrial districts. Enlist owners of commercial properties in this effort.
- Revise accessory apartment bylaw to allow apartments for all income levels and occupations with limits only on number of occupants and square footage.
- Adopt multi-family overlay districts in appropriate areas, particularly in areas in close proximity to Route 20.
- Adopt an Inclusionary Zoning bylaw requiring the provision for community housing in all subdivisions with greater than 10 lots.

- Study MGL Chapter 58, section 8C (Affordable Housing Tax Agreements) for applicability in Sudbury.

**Strategies – Community Preservation Act:**

- Use CPA funds to purchase large parcels which can support community housing along with recreation and/or open space.
- Use CPA funds to purchase single lot “tear-downs” for first time homebuyers. Properties would then be subject to a permanent affordable housing restriction.
- Use CPA administrative funds to staff a non-profit housing development agency or consultant to enable the town to have expertise to study housing issues or investigate properties on a timely basis.
- Use CPA funds to purchase properties, including those coming out of agricultural use (Chapter 61A properties) for small scale comprehensive permits for rental or first time buyer units.
- Use CPA funds to buy down the purchase price of new or existing condominium units to qualifying levels.

**Strategies - Private Development:**

- Develop guidelines as a means to facilitate the permitting process for comprehensive permits. Guidelines should include standardized pro-formas for finances and design issues. Selectmen support and adoption of these guidelines is critical.
- Identify parcels which would accommodate housing developments under comprehensive permits. Such developments may include elderly housing, low and moderate income housing, co-housing, special needs housing, and first time buyer opportunities.
- Research housing possibilities for major public and private parcels on Rte. 117 and Rte. 20. Creating more dense residential development along major roads or adjacent to existing services and jobs follows the state’s Smart Growth principles.
- Pursue extension/survival of affordability restriction on units at Longfellow Glen, due to expire in 2014.

**Strategies – Town and Public Development:**

- Foreclose on tax title properties and resell for or develop into community housing. Many of these properties will be small, possibly non-conforming lots which would be ideal for the development of one or two units of housing.
- Investigate and suggest swaps of non-designated town-owned wetland for small upland conservation parcels adjacent to existing neighborhoods. This would allow scattered site inclusion of affordable housing in already developed areas. Conservation acreage will be maintained or increased.
- Rent town-owned houses to low/mod households. On occasion, the Town obtains a house either as a gift or as part of a land purchase or transfer. In the future, such houses should be used for low/mod housing unless a good reason exists to do otherwise. Whenever tenants leave a house currently owned by the Town, low/mod households should be the first priority in selecting the new tenants.

- Research the availability of state and Sudbury Water District owned land for community housing development. Particularly in the case of Water District property, “green” construction and waste disposal methods would make the development more attractive to the Town.
- Take a detailed look at the Blue Ribbon Committee’s list of disqualified Town parcels. This exhaustive list provides us with an invaluable inventory of land the Town owns and the current status of each parcel. Although not chosen for the Housing Authority’s project, there are parcels of land which could be made available for housing with some extra work, such as a legislative change of status or a swap with the Conservation or Park and Recreation Commissions.
- Research funding availability for community housing construction projects through state and federal housing programs.

### **Strategies – Non-Profits**

- Work with religious institutions to develop community housing on their properties. Enlist Habitat for Humanity in this endeavor. Many churches and synagogues in Sudbury assist Habitat locally and in other parts of the country. A presentation should be prepared by the Community Housing Committee and Habitat to present the idea of building community housing on land held by religious institutions right here in Sudbury.
- Work with a non-profit housing development agency to develop properties obtained by the Town either by tax-taking or CPA purchase. Such non-profits play a critical role in the development of community housing and the Community Housing Committee will work beforehand to find and develop good relations with them.
- Work with appropriate social service agencies to find and rehab town-owned or other buildings for congregate care (supervised, staffed housing) of the physically and developmentally disabled. Currently, Sudbury has only a small program of this sort run at Longfellow Glen. Creation of facilities dedicated to congregate care would not only help Sudbury families with disabled adult children but also would confirm our commitment to housing all members of our community.

### **Strategies – Regional**

- Work with businesses to create housing in the business districts. Sudbury currently allows housing in the Village Business District, and the CHC hopes to propose zoning changes which would allow housing in other business and industrial areas. We will encourage land and lease holders to convert unused or under-used space to apartments, stressing the flexibility and security such diverse use gives them.
- Join local consortiums and organizations to develop creative and regional approaches to community housing. Sudbury has joined the West Metro HOME consortium, allowing our larger neighbor Framingham to do so also. This will provide the town with several thousand dollars a year for low income housing starting in July of 2005. Work with the MetroWest Affordable Housing Coalition

and the Citizens' Housing and Planning Agency to provide for Sudbury's share of regional housing needs.

## **XII. ACTION PLAN**

Create 2-8 units of community housing per year for the next 5 years.

STRATEGY	PROJECT INITIATOR	FUNDING SOURCE	TARGET COMPLETION DATE	HOUSEHOLDS SERVED
<b>PREDEVELOPMENT</b>				
Receive certification of Housing Plan by DHCD.	Town Manager Town Planner		December 2004	
Receive approval of Housing Plan as a component of the WestMetro HOME Consortium Consolidated Plan.	Town Manager Town Planner		July 2005	
Develop Comprehensive Permit Criteria	Comm. Housing Committee	N/A	2005	
Identify Appropriate Parcels for Purchase	Comm. Housing Committee		On-going	
Develop Master Plan for Melone Gravel Pit	Town Manager	CPA	2006	
St. Anselm's Feasibility Study	Town Manager	CPA	November 2004	
Comprehensive Permit Guidelines	Comm. Housing Committee		2005	
<b>DEVELOPMENT</b>				
SHA Rental Housing	SHA	CPA, HOME	2006	16 L/M
Buy down of modest homes	Housing Trust	CPA	2005 +	2 per year
Buy down price on existing condominium units	Town/Housing Trust	CPA	When available	
Small scale homeownership comprehensive permit	Housing Trust/Non-profit developer	CPA	When available	
Purchase Chapter 61 Parcels for housing development	Selectmen	CPA	When available	20-40 L/M
St. Anselm's Church	Selectmen	CPA +	2005/2006	Potentially 20-40 L/M
<b>ZONING</b>				
Revise Accessory Apartment Bylaw	Planning Board	N/A	2005	
Adopt Inclusionary Zoning Bylaw	Planning Board	N/A	2006	
Adopt Business District Zoning Changes allowing residential uses	Planning Board	N/A	2006	

### **XIII. FUNDING MECHANISMS**

#### CPA Funds

The Town currently collects just over \$1 million in local CPA revenues. In 2003, and again expected in 2004, a state match of \$1 million is added to the local revenues. Pursuant to the CPA legislation, a minimum of 10% of all CPA revenues must be used for the development of housing benefiting persons making at or below 100% of the area median income. Based on current collections, the five year (2004-2009) projection of CPA housing funds will yield approximately \$1 million. Town Meeting can also appropriate additional funds for housing, as recommended by the Community Preservation Committee.

#### Frost Farm Revenues

Proceeds from the lease of land at the Frost Farm Village Condominiums total \$385,000, which has been reserved in a special affordable housing account to benefit persons making at or below 80% of the area median income. Special legislation was approved in 2003 for the ear-marking of these funds to provide additional housing opportunities in Sudbury.

#### HOME funds

As mentioned earlier, the Town of Sudbury expects to receive \$15,000 each year from the West Metro HOME Consortium to benefit persons making at or below 80% of the area median income. It is also possible that additional funds from the consortium balance may be used to fund a project in Sudbury if another community can not use the funds in a timely manner.

#### Massachusetts Housing Partnership (MHP) Grants

MHP provides pre-development grants to communities for feasibility studies. It is possible that Sudbury may apply for these grants. The Sudbury Housing Authority received an MHP grant in 2003 for investigation of properties for the scattered site rental housing program.

#### Department of Housing and Community Development (DHCD) Priority Development Funds

The newest funding mechanism for communities for planning assistance for the production of affordable housing units comes from a joint program funded by DHCD and MassHousing. Up to \$50,000 per community can be awarded. The Town is in the process of completing both the Commonwealth Capital application form, and certification under Executive Order 418.

#### Private Funding

There are many quasi-public and private institutions and foundations that invest in and finance affordable housing developments, including the Boston Foundation, MassHousing and MassDevelopment. Many of these sources are sought once a specific project is identified.

## **XIV. COMMUNITY PARTICIPATION**

### **Town Employees Survey**

A survey was compiled by the Community Housing Committee and distributed to Sudbury Public School employees in 2004. It was thought that this sample group represented a broad range of ages, incomes and desire to live in Sudbury. A response rate of approximately 26% was achieved. A tabulation of responses is included in Appendix D.

### **Board/Committee Review**

- ❖ Draft Report to be reviewed and discussed by the Sudbury Board of Selectmen on October 5, 2004.
- ❖ Draft Report to be reviewed and discussed by the Sudbury Planning Board on October 13, 2004.
- ❖ Draft Report to be reviewed and discussed by the Sudbury Housing Authority on October 4, 2004.
- ❖ Draft Report to be reviewed and discussed by the Sudbury Community Preservation Committee on October 6, 2004.
- ❖ Draft Report to be circulated to the Sudbury Finance Committee, Sudbury Public School Committee, Lincoln-Sudbury Regional School Committee, and Town of Sudbury Department Heads on October 21, 2004.

### **Public Comments**

- ❖ Draft Report to be Distributed to the general public at the October 21, 2004 Housing Forum.
- ❖ Public Comment Period on Housing Plan, October 21- November 29, 2004.
- ❖ Final Report submitted to the Board of Selectmen in December, 2004.

## **XV. APPENDICES**

- A. Community Housing Committee Charge
- B. Sudbury's Affordable Housing History
- C. List of Town properties compiled by the Blue Ribbon Housing Site Selection Committee
- D. Employee Survey

## APPENDIX A COMMUNITY HOUSING COMMITTEE TOWN OF SUDBURY

### **Mission Statement**

It is the intention of the Selectmen, in creating a permanent Community Housing Committee, to provide a mechanism for the Town to facilitate community housing efforts and creating methods for increasing and maintaining the availability of housing for people with low to middle income. To that end, in furtherance of the Master Plan and goals of the Board of Selectmen, the Community Housing Committee will work closely with all Town boards, committees, and departments which will, to the extent possible, identify and volunteer available resources to support the Town's goal of housing diversity.

The Community Housing Committee will collaborate with Town departments, committees and citizen groups to design programs which are consistent with the historic aesthetic character of the Town and preserve the natural resources of Sudbury. The Community Housing Committee will make recommendations to the Board of Selectmen, other Town committees and Town Meeting. While the Committee does not have the ultimate power to commit Town resources or approve projects, it is the Selectmen's intention to support reasonable actions and recommendations of the Committee that are in line with the Master Plan and the published goals of the Board of Selectmen to the extent that Town Bylaws, Town Meeting action and budgetary limits permit.

### **Membership and Officers**

The Community Housing Committee shall have seven voting members. One member shall be from the Board of Selectmen, one shall be from the Planning Board, and one shall be from the Sudbury Housing Authority, all appointed by their respective boards. The remaining four shall be resident at-large positions, and shall be appointed by the Board of Selectmen. All appointments shall be for a term of three years. For the four at-large positions, it is desirable to have representation from as many of the following areas as possible: land planning, construction, real estate law, government housing, real estate development, and housing financing. All Committee members shall be expected to educate themselves as necessary to address issues affected by these areas. Appointments shall be staggered: no more than three members' terms will end in one year, two in the following year, and two in the third year. Each year, a Chair and a Clerk will be elected by the regular members from among their number.

In addition, the Executive Director of the Sudbury Housing Authority, and the Town Planner or her/his representative will serve as liaisons and resources to the Committee.

The Committee may create from time to time, in consultation with the Board of Selectmen, sub-committees or ad hoc advisory boards comprised of various housing constituents such as Town and school employees, subsidized housing tenants, and special needs persons; and of various housing professionals such as bankers, architects, builders, and planners; and of various advocates and citizens concerned with community housing. Committee members may participate in committees, task forces, or working groups related to community housing that are created by the Board of Selectmen or others.

### **Responsibilities and Functions**



The Community Housing Committee is responsible for developing options for creating and promoting community housing opportunities throughout the Town, including education, consensus building, and the development and annual update of a community housing plan, encompassing strategies and goals for a five-year period.

The Committee will:

- Develop and periodically review a definition of "community housing".
- Educate the public about the needs for community housing in Sudbury and methods of meeting these needs within broad goals, including: to maintain and to increase a diversity of housing types and sizes to meet the needs of the Town of Sudbury and our traditionally diverse population; to increase the supply of community housing in Sudbury and to preserve existing community dwellings in order to enable people in changed circumstances to continue living in Sudbury; to increase the options which allow older residents to remain in their own homes, enable Town and School employees and children of Sudbury residents to live in Sudbury, and enable those of modest to medium income to live in Sudbury.
- Identify, review, evaluate, and make recommendations on approaches for the preservation and expansion of community housing, including but not limited to, methods of making existing homes available to qualified families, subsidies to assist present home owners, and zoning and bylaw changes, consistent with Federal, State and local law.
- Increase the number of housing options by identifying possible private, Town-sponsored, or other public opportunities for community housing, and by assisting in the creation of these homes with support of initial planning and project formulation, the project approvals process, project development and completion, and collaboration with standing or special Town committees, consistent with Federal, State and local law.
- As housing planners, help define what kind of data on community housing is useful and what kind of housing, housing inventory, demographic, and financial data the Planning Department should gather and make available to the public. Assist the Planning Department to maintain a record of the Town's efforts to comply with affordable housing statutes.
- Report annually to the Board of Selectmen regarding the state of affordability in Sudbury, identification of existing and potential opportunities, resources and housing approaches, barriers to community housing, and promotion of appropriate Federal, State and local programs and regulatory changes.
- Review the Town Meeting articles and present comments and recommendations on those that affect community housing.
- Engage in such other actions and activities as are consistent with this charge.
- Report its activities to the Board of Selectmen on a quarterly basis.

## APPENDIX B SUDBURY'S AFFORDABLE HOUSING HISTORY

Gathered by Jo-Ann Howe  
Sudbury Housing Authority

1969: Mass. General Laws, Chapter 121B, Section 3, was passed to allow the creation of housing authorities by cities and towns for the purpose of elimination of substandard areas or abolition of slums, and for providing safe and sanitary housing for families or elderly persons of low income at rentals which they can afford.

1970: The Moderate Income Housing Committee was formed and presented its report to the 1971 Annual Town Meeting. This committee existed until the formation of a nonprofit housing organization in 1973.

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 a commonwealth of 300 cities and towns and the original 5 members were appointed by the selectmen.

April, 1972: Town Meeting voted against the establishment of a multi-unit residence bylaw, 196 in favor, 217 opposed. It would not have established apartment districts, but would have allowed a developer to go to Town Meeting for approval of a particular garden apartment or townhouse project with a density not exceeding 6 units per acre.

April, 1973: Town Meeting again rejected a multi-unit residence bylaw, this time with 182 in favor and 303 opposed.

April, 1973: Town Meeting transferred approximately 8 acres of the Oliver land to the SHA for the construction of Musketahquid Village for the elderly, at a cost of \$40,700 to the SHA (the Town had paid \$80,000 for the entire parcel and retained about 13 acres for a future fire station). A grant was received from the Commonwealth for \$1,645,000 and the Village, consisting of 64 apartments and a community building, was opened in 1976.

April, 1973: Town Meeting established a private nonprofit housing corporation comprised of Sudbury citizens, to examine the possibilities of construction or conversion of housing at sites scattered throughout the Town for persons of moderate income. This group disbanded after the construction of Longfellow Glen.

April, 1974: Town Meeting voted to extend the mandate of the SHA by authorizing purchase of not more than 50 units from existing housing stock in the Town for rental to families of moderate and low income with funding from the Commonwealth's family housing program under Chapter 705. (Only 8 units were eventually purchased, due to the cap set on per unit cost by the state, and the high cost of Sudbury real estate.)

Spring, 1975: A state grant under the 705 program for \$175,000 allowed the purchase of five existing single family houses. Maximum cost per unit was set by the state at \$32,000. Three were purchased in north Sudbury and two in Pine Lakes.

July, 1975: A grant of \$30,756 was awarded to the SHA by HUD for the leasing of 10 units under the Section 8 program. In June of 1977 the funding was withdrawn due to the fact that no

housing was found in Sudbury within the HUD fair market rental rates.

April, 1977: Article 26 of Annual Town Meeting was passed. The Housing Issues Group had met informally beginning in 1976 and consisted of representatives from the Board of Health, Finance Committee, SHA, Sudbury Non-Profit Housing Corporation and Planning Board. Its purpose was to act to meet the housing needs in Town instead of allowing "Big Government" to act, and it hoped to provide for continuing Town Meeting involvement. The article read: "To see if the Town will vote to establish a Housing Policy and direct certain Town boards and/or committees to study specific alternatives and report thereon.

A. Provisions of the Sudbury Housing Policy are as follows:

1. Recognition of the social obligation to include in available housing supply residential units for a broad spectrum of families in differing economic conditions; ie, low, moderate and high income units.
2. Whenever possible the approach to meeting all these needs should be left to the private economic sector and governmental administrative rules and practices should be so constructed and applied as to encourage the private sector. Resources such as community development block grant funds, other available funds and programs such as CETA (Comprehensive Employment and Training Act) should be sought to the extent that Sudbury is eligible for same.

B. The following alternatives for housing needs shall be studied by the listed boards or committees (not outside consultants) and reports thereon shall be made to the Town at the next Annual Meeting by the Planning Board.

1. Planned unit development (PUD): Planning Board/Health Department/Non-Profit Housing Corporation
2. Cluster zoning: Planning Board/Health Department
3. Tax abatement or deferral: Housing Authority/Board of Assessors
4. Multi-unit housing of moderate density: Planning Board/Housing Authority/Health Department/Building Inspector/Non-Profit Housing Corporation
5. Transfer of development rights: Planning Board/Board of Health/Conservation Commission

C. There shall be a Citizen Group consisting of 3-5 people, appointed by the Moderator, to work with the various groups charged with the above studies. These people shall not be on Town boards or committees or in housing groups.

D. The Sudbury Housing Authority shall report annually to the Town on the condition of the housing supply especially as applied to Sudbury persons of low or moderate income and elderly persons for the next five years (to 1982) or to such further time as it may deem appropriate;" or act on anything relative thereto.

April, 1977: Town Meeting considered an accessory apartment (in-law apartment) bylaw submitted by the Planning Board and defeated it by more than 2:1.

January, 1978: Selectmen requested that SHA apply for Section 8 funding. SHA voted not to submit application since no change had occurred in Sudbury's housing market since Section 8 funding had to be returned in 1977.

February, 1978: Application for funding was submitted to the Commonwealth by SHA for 15 units of congregate housing for severely physically disabled persons. Award of \$570,150 was

granted in July of 1978.

March, 1978: Sudbury Town Counsel wrote an opinion stating that although the SHA was created for the specific purpose set forth in the warrant at the 1971 Annual Town Meeting, the SHA, in fact, acquired all of the duties, authority and obligations set forth in Chapter 121B regardless of the very specific wording of the Article.

April, 1978: Town Meeting indefinitely postponed an article submitted by the Planning Board which would have established a committee of non-Planning Board members to continue the work of the Housing Issues Study Group as authorized by the 1977 Town Meeting and to prepare articles for the 1978 Town Meeting to allow the following new residential classifications: multi-unit housing, planned residential developments, transfer of development rights, and cluster zoning. The Planning Board's warrant report stated that since no funding was voted to hire a consultant, that the "question of housing alternatives is too important to risk failure by undertaking too grandiose a scheme of broad scope without providing adequate support to do it properly... the task is too great for a citizens' committee to undertake properly without professional assistance of some kind."

April, 1979: Town Meeting considered Article 27, submitted by the SHA, which attempted to add the words "or low-income handicapped persons" following the words "for elderly persons of low income" to the zoning bylaw entitled "Basic Requirements," thereby allowing this type of residence in Sudbury. A 2/3 vote was required and it was defeated with 756 in favor and 433 opposed.

April, 1979: Town Meeting defeated Article 28, submitted by the SHA, which would have authorized a plan to develop a congregate facility for 12-15 severely physically disabled persons on land on Nobscot Road, approximately opposite the back entrance to the Star Market Plaza. SHA planned to purchase the 2.8 privately owned acres for \$45,000-\$55,000 with funding that had been received from the Commonwealth.

December, 1979: The Chapter 705 acquisition program was reactivated at the state level after four years, and the SHA applied for funding for 10 units. Application was rejected because of the high cost of houses in Sudbury.

1980: Housing Impact Study looked at 119 parcels of vacant land over 10 acres in size for potential for residential development. Recommended alternative zoning for multi-family and other higher density residential land uses, and lower density zoning in areas to be protected.

May, 1981: An application by the SHA for Chapter 705 funding to purchase 5 houses was accepted and \$225,000 was awarded for that purpose.

March, 1983: Only 3 houses were purchased with the grant received in 1981, and a balance of \$59,000 was left in the account with no houses available in Sudbury at that price. The remaining money was used to rehab the eight 705 houses and in 1985 the state added to that funding, for a total of \$189,000.

Spring, 1983: The concept of "elder cottages" also known as "granny flats" was investigated by the SHA. ( A small, temporary modular structure would be erected adjacent to an existing single family house for the purpose of housing an elderly parent.) The concept was rejected because of septic concerns by the Board of Health and the general feeling that it was inappropriate for Sudbury.

March, 1984: Longfellow Glen, consisting of 50 units of elderly and 70 units of family housing, was opened for occupancy. This apartment complex on Route 20 is owned and operated privately and all rents are subsidized via the federal government's Section 8 program.

1984: SHA applied to the state for three Chapter 707 rental assistance certificates which would have provided subsidies to be used toward the rental of single rooms or apartments in private homes by low income individuals or families. Request was denied due to the demand for such certificates and shortage of funding.

1985: Housing Need in Sudbury was written by the Metropolitan Area Planning Council and analyzed 1970 and 1980 census data to calculate affordable housing needs in Sudbury and region.

April, 1985: The SHA printed an "Open Letter to All Residents of the Town of Sudbury" in the Town Crier, requesting "input into the decision of whether to build or acquire additional housing in Sudbury". There were no responses.

April, 1985: The SHA printed a full page questionnaire in Bentley's Community Calendar, requesting the opinions of all Town residents which would be used in making "responsible decisions on future housing." 76 responses were received. The response rate, at 1 1/2% of total households, was too small to have any statistical significance other than indication of lack of interest in housing issues.

June, 1985: The SHA sent a letter to the General Services Administration requesting a gift of 8 acres of the Fort Devens Annex for the construction of 8 units of low income family housing. Request denied.

September, 1986: At a joint meeting of the SHA and Planning Board it was agreed that an inclusionary or incentive zoning bylaw would be advantageous to the Town by allowing a developer to increase the number of houses to be built if electing to provide affordable housing within the development.

April, 1987: Town Meeting voted 63% in favor of donating Town-owned land for housing, but a 2/3 vote was required. The SHA had received a funding award of \$1,092,000 for construction of 14 units of Chapter 705 rental housing for low income families on donated land. The Commonwealth later withdrew the funding.

February, 1988: The Selectmen appointed the Sudbury Housing Partnership Committee (SHPC) to aid in the development of affordable *homeownership* programs in Sudbury, in contrast to the affordable *rental* programs under the purview of the SHA. This committee met for three years, submitted a housing proposal to Town Meeting in 1988, and was dissolved by the Selectmen in July of 1996.

April, 1988: A request to Town Meeting by the SHPC for the donation of the Town-owned Parkinson Land, to be used for the construction of a mixed-income homeownership development, was passed over.

April, 1988: A variant on the SHA's 1987 request for land transfer was passed by 84% of Town Meeting. Sites at Fairbank, Old Meadow Road and Pine Street were transferred from Town ownership to the SHA and subsequently a grant was awarded by the Commonwealth for \$1.2 million dollars for the construction of 12 units of Chapter 705 rental housing for low income

families, which were later built and dedicated in July of 1991.

December, 1988: An incentive zoning workshop, sponsored jointly by the SHA and Planning Board, was held at the Town Hall with a guest speaker from MAPC.

January, February, and August, 1989: SHA submitted 3 applications to the federal government under the terms of the Stewart B. McKinney Homeless Assistance Act of 1986, to lease/purchase a portion of the 284 acre Fort Devens Annex which had been declared excess property by the federal government. If successful, the SHA planned for the construction of approximately 100 units of mixed-income housing on the property. Applications were rejected because of Government's insistence that the land be used only for a rigidly defined "homeless" population.

April, 1989: A Fair Housing Resolution was passed by Town Meeting, which expressed commitment to enforcing anti-discrimination laws and promoting equal choice and access to housing for all persons.

April, 1989: A request for \$50,000 to be used for the first phase of a Comprehensive Growth Management Program was submitted by the Planning Board but withdrawn due to shortage of funds available from the Town. Among other things, this plan would have provided baseline information on housing stock and a detailed implementation schedule for selected alternatives.

September, 1989: A resolution was passed that had been submitted to Town Meeting by the Selectmen as a compromise between Fort Devens Annex abutters and the SHA, requesting that the SHA and SHPC present a Long Range Plan for Affordable Housing Development to the 1990 Annual Town Meeting, and to report annually thereafter to Town Meeting on specific projects and progress versus the Long Range Plan.

November, 1989: A Housing Forum was held at the Town Hall to solicit input and dialogue from Town residents and boards regarding the direction of future affordable housing. Most participants were abutters of the Fort Devens Annex.

April, 1990: An Affordable Housing Handbook and Long Range Plan were presented to Annual Town Meeting, having been created by the SHA and the SHPC in response to a request of the 1989 Special Town Meeting.

Components of the Long Range Plan include:

1. Develop a coalition of support to create an incentive zoning bylaw.
2. Continue to work with Town boards and private developers to create more affordable housing through private and publicly funded programs.
3. Work toward the passage of an accessory apartment bylaw.
4. Develop a Housing Plan acceptable under Ch. 140B.
5. Work toward the passage of a land bank bylaw.
6. Investigate the creation of a nonprofit housing corporation.
7. Work toward finding ways of keeping Longfellow Glen affordable when its lease restriction is up in 2004.

April, 1992: An accessory apartment ("in-in-law apartment") bylaw, submitted by the Inclusionary Zoning Study Committee and the Planning Board, unanimously passed at Town Meeting. Occupancy is available only to relatives of the owner, domestic employees, and people of low and moderate income.

April, 1993: An inclusionary zoning bylaw, submitted by the Inclusionary Zoning Study Committee and the Planning Board, was defeated at Town Meeting.

April, 1994: An inclusionary zoning bylaw and a reservation of lots (for affordable housing) bylaw, submitted by the Inclusionary Zoning Study Committee and the Planning Board, were defeated at Town Meeting.

April, 1996: A first time homeownership proposal submitted by the Housing Authority was soundly defeated at Town Meeting. It asked the Town to transfer 3 parcels of Town-owned land on which 4 single family houses would have been built by a non-profit and sold by lottery to first time homebuyers, with preference given to local families and deed restrictions on future sales to avoid windfall profits. An escrow account would have been created which would have preserved \$25,000 from the sale of each house. The annual interest from that money would have been used to reimburse the town for taxes lost due to the affordability of the houses.

July, 1997: The Housing Task Force of the Strategic Planning Committee began to meet and decided to focus on affordable senior condominiums rather than affordable family housing, since this concept would be more acceptable to the Town. 44 condominiums were eventually built at Frost Farm, off Route 117, and occupied in 2003. Land was donated by the Town so that the housing could be sold to people over 55 at deeply discounted prices.

June, 1999: Orchard Hill, an assisted living facility, opened on Route 20. Nine of the 45 apartments are set aside for low-income residents.

January, 2001: Executive Order 418 was signed by the governor, which addresses the state's housing shortage by tying the creation of housing at various price levels to the receipt by municipalities of certain state grant monies.

2001: Sudbury's Master Plan approved, which includes a Housing Element with the goal to "Encourage greater diversity of housing opportunities in Sudbury to meet the needs of a changing and diversified population with respect to age, household size and income." Objectives are to "Increase the diversity of Sudbury's housing stock" and to "Provide housing for the full range of income levels of Sudbury citizens."

April, 2001: The Frost Farm Housing Fund, in the amount of \$385,000, was established by a vote of Town Meeting to be used for the purpose of providing additional affordable housing in Sudbury, and funded by income received from the Frost Farm Village Condominiums. This was confirmed by a Special Act of the Legislature in July of 2002.

April, 2002: Community Preservation Act passed at Town Meeting, which will provide funding from local tax revenues for affordable housing, open space/recreation, and historical preservation.

April, 2003: Town Meeting voted to spend \$320,000 of CPA funding, to be combined with private funding, to build 16 rental units for low income families on Town-owned land to be transferred at the April, 2004 Town Meeting. SHA withdrew articles requesting sites for those units on Longfellow Road, Hemlock Road, North Road, Newbridge Road and Hudson Road because of strong opposition by abutters of two sites.

July, 2003: The Community Housing Committee, a permanent committee appointed by Selectmen, began to meet. CHC's mission to provide a mechanism for the Town to facilitate

community housing efforts and create methods for increasing and maintaining the availability of housing for people with low to middle income. It is responsible for developing options for creating and promoting community housing opportunities throughout the Town, including education, consensus building, and the development and annual update of a community housing plan encompassing strategies and goals for a five-year period.

July, 2003: Blue Ribbon Housing Site Selection Committee appointed by Selectmen to review all possible Town-owned sites for rental housing, to be presented at the 2004 Annual Town Meeting in conjunction with withdrawn proposal from 2003 ATM.

2003: Carriage Way, Sudbury's first market rate condo complex for people of all ages, was constructed under MGL 40B. It has Sudbury's first 4 affordable homeownership units among the 16 units constructed.

April 2004: Annual Town Meeting voted to transfer two town-owned sites to the SHA for affordable rental housing: Hudson Road, which will be on hold until the Town determines whether it is needed for a police station, and Wilshire Road, which was determined to be unbuildable after the vote.



APPENDIX C  
Town of Sudbury Owned 81 sites NOT listed as "WET" or "ConCom"

Parcel ID	Location	Acreage	Town Planner Notes (unless labeled otherwise)
F-0010-0030.0	## CONCORD RD	21.26	Nixon School
G-0008-0008.0	77 HUDSON RD	13.56	Hudson Rd fire station; may have buildable area. <b>BRHSSC Note: at least 1.5 acre buildable</b>
H-0007-0027.0	0 PRATTS MILL RD	46.62	Curtis School; School Committee voted not to release for housing. <b>BRHSSC Note: 2 sites</b>
H-0008-0049.0	0 OLD LANCASTER RD	16.13	DPW facility. <b>BRHSSC Note: 1 site along street. Also contributes to the pair at Washbrook.</b>
J-0008-0001.0	0 WASH BROOK RD	4.03	portion of property in riverfront area. <b>BRHSSC Note: with Pine Ridge, 2 sites (1 includes some of the DPW lot)</b>
K-0006-0205.0	0 ROBBINS RD	0.67	Some wetlands
M-0010-0018.0	10 LANDHAM RD	0.45	Contains SHA single family unit
K-0006-0036.0	0 WILSHIRE RD	2.04	Vacant
C-0009-0106.0	0 NORTH RD	0.92	North Rd parcel; irregularly shaped; may be wet
K-0006-0037.0	45 OLD MEADOW RD	1.89	SHA duplex. <b>BRHSSC Note: potential for 2 duplexes</b>

G-0009-0200.0	0	HUDSON RD	12	behind Ti-Sales; bad access. <b>BRHSSC Note: exclude due to potential future uses</b>
F-0006-0020.0	0	FAIRBANK RD	5.58	SHA Fairbank Circle units. <b>BRHSSC Note: already 4 buildings on site</b>
C-0007-0020.0	0	MOSSMAN RD	6.37	Longfellow Rd parcel; donated for P&R use; may need legislative approval
H-0005-0027.0	0	HEMLOCK RD	1.12	Hemlock Rd parcel; may need legislative approval
F-0005-0005.0	0	HUDSON RD	28.77	Haskell Field; purchased with federal funds; will need legislative approval
F-0010-0014.0	##	LINCOLN RD	93.94	LSRHS. <b>BRHSSC Note: needs L-S SC, may need Lincoln Town Meeting vote</b>
L-0008-0012.0	0	RAYMOND RD	18	Feeley Field; may need legislative approval
C-0010-0500.0	0	NORTH RD	28.91	Davis Field; may need legislative approval
F-0010-0001.0	0	FEATHERLAND PK	30.73	Featherland Park; may need legislative approval
H-0004-0278.0	62	PINE ST	0.9	SHA duplex
F-0004-0124.0	0	HUDSON RD	0.12	very small. <b>BRHSSC Note: possibly combine with F-4-132</b>
F-0004-0132.0	0	PINEWOOD AVE	0.11	very small. <b>BRHSSC Note: possibly combine with F-4-124</b>

F-0009-0006.0	0	AUSTIN DR	5.77	unused portion of Featherland Park; wet near RR track; may have buildable area
H-0007-0238.0	0	BLUEBERRY HILL LN	0.61	adjacent to conservation land; all riverfront
H-0007-0239.0	0	BLUEBERRY HILL LN	1.51	adjacent to conservation land; may have small buildable area
L-0009-0235.0	0	CLIFFORD RD	0.92	wetland; flood plain
C-0006-0133.0	56	GREAT RD	0.46	SHA single family unit
C-0007-0012.0	41	GREAT RD	0.46	SHA single family unit
C-0007-0110.0	11	FORD RD	0.69	SHA single family unit
C-0007-0114.0	19	GREENWOOD RD	0.69	SHA single family unit
F-0006-0001.0	40	FAIRBANK RD	8.05	Fairbank Community Center
F-0005-0140.0	0	WILLIS LAKE DR	0.11	very small
K-0007-0012.0	0	BOSTON POST RD	0.61	Rt. 20 fire station; too small for additional development
C-0010-0022.0	##	NORTH RD	0.66	North Rd fire station
M-0009-0020.0	0	WARREN RD	0.23	Mausoleum
J-0009-0007.0	0	CONCORD RD	0.36	front of Wadsworth Cemetery
B-0008-0009.0	0	NORTH RD	0.13	wet/Cedar Swamp
B-0008-0011.0	0	POWERS RD	0.76	wet/Cedar Swamp
B-0009-0009.0	0	POWERS RD	0.06	too small
C-0006-0004.0	0	ELSBETH RD	0.05	too small
C-0008-0057.0	0	NORTH RD	1.8	landlocked; wet
D-0006-0502.0	0	IRONWORKS RD	21.11	Open Space for subdivision; permanent restriction
D-0009-0004.0	##	HAYNES RD	8.21	Haynes School; no additional space for development

D-0009-0201.0	0	MARLBORO RD	1.03	pond/designated conservation land
D-0010-0015.0	0	PANTRY RD	1.1	cemetery
D-0010-0017.0	0	PANTRY RD	1.46	cemetery
F-0004-0010.0	0	LAKE SHORE DR	0.21	adjacent to Willis Lake; unbuildable
F-0004-0302.0	8	OAKWOOD AVE	0.23	SHA single family unit; too small for additional development
F-0004-0601.0	21	GREAT LAKE DR	0.17	SHA single family unit; too small for additional development
F-0004-0810.0	0	CRYSTAL LAKE DR	0.07	too small
F-0005-0117.0	0	WILLIS LAKE DR	0.57	narrow; can't get septic grading outside of 50' from wetlands
F-0005-0219.0	2	BEECHWOOD AVE	0.25	SHA single family unit; too small for additional development
F-0006-0015.0	0	COUNTRY VILLAGE LN	0.25	irregularly shaped; road right-of-way
F-0007-0407.0	0	MARK LN	0.01	too small
G-0005-0005.0	0	DUTTON RD	2.78	adjacent to Stearns Mill Pond; all riverfront area
G-0005-0701.0	0	PRATTS MILL RD	0.09	too small
G-0006-0558.0	9	RICHARD AVE	0.12	SHA single family unit; too small for additional development
G-0009-0003.0	0	CONCORD RD	24.71	landlocked
G-0009-0005.0	0	CONCORD RD	4.1	cemetery
G-0009-0006.0	0	CONCORD RD	1.98	cemetery
G-0009-0007.0	0	CONCORD RD	4.28	cemetery

G-0009-0015.0	0	CONCORD RD	0.05	Town Pound
G-0009-0016.0	0	CONCORD RD	1.4	cemetery
G-0009-0018.0	0	CONCORD RD	5.13	Peter Noyes School rear parking lot; pond
 H-0008-0041.0	 55	 HUDSON RD	 6.82	 Musketaquid Village; no room for additional development
H-0009-0004.0	0	CONCORD RD	0.7	Grinnell Park
H-0009-0048.0	##	CONCORD RD	4.4	Hosmer House/Heritage Park
H-0009-0062.0	##	CONCORD RD	27.16	Town Hall/Loring Parsonage/Flynn Building
 H-0011-0305.0	 0	 WATER ROW	 2.39	 Dickson property. Purchased with CPA funds; permanent restriction; will need legislative approval to convert
J-0009-0008.0	0	CONCORD RD	6.38	cemetery
K-0006-0038.0	0	OLD MEADOW RD OFF	0.06	too small
 K-0008-0006.0	 ##	 BOSTON POST RD	 0.63	 Police Station; too small for additional development
K-0008-0033.0	21	CONCORD RD	0.88	Library; too small for additional development
K-0012-0002.0	0	BOSTON POST RD	28.26	Landfill
M-0008-0206.0	0	RAYMOND RD		part of Raymond Rd right-of-way
M-0008-0207.0	0	RAYMOND RD		part of Raymond Rd right-of-way
M-0008-0208.0	0	RAYMOND RD		part of Raymond Rd right-of-way
M-0008-0209.0	0	RAYMOND RD		part of Raymond Rd right-of-way
 M-0009-0001.0	 80	 WOODSIDE RD	 11.5	 Loring School; not enough room for additional development

M-0010-0698.0	0 LETTERY CR	2.99	Open Space for subdivision; permanent restriction
M-0010-0699.0	0 LETTERY CR	2.24	Open Space for subdivision; permanent restriction

**APPENDIX D**

**TOWN OF SUDBURY  
COMMUNITY HOUSING COMMITTEE  
EMPLOYEE SURVEY**

The Community Housing Committee has been established by the Selectmen to help facilitate community housing efforts and create methods for increasing and maintaining diverse housing opportunities in Sudbury. The Committee is gathering information about the quality and quantity of housing currently available in Sudbury and is asking survey participants for their views. Your response will greatly assist the Town plan for future housing initiatives in Sudbury.

1) Do you currently live in Sudbury? Yes \_\_\_\_\_ No \_\_\_\_\_

1a) If No, why? (If YES, please proceed to question 2.)

- My preference is to live elsewhere \_\_\_\_\_
- I can't find the type of housing I need in Sudbury \_\_\_\_\_
- I can't afford to live in Sudbury \_\_\_\_\_

Comments: \_\_\_\_\_

2) How far do you commute to work? Miles \_\_\_\_\_ Travel time \_\_\_\_\_

3) Do you currently rent or own your residence? (Circle one) Own Rent

4) How many adults are in your household? (Include yourself) \_\_\_\_\_ Ages? \_\_\_\_\_

5) How many children are in your household? \_\_\_\_\_ Ages? \_\_\_\_\_

6) What is your household yearly income range?

Less than \$45K      \$ 45K to \$ 65K    \$ 65K to \$85K      Over \$85K

7) To help in the development of appropriate housing in Sudbury, which of the following housing types would you prefer:

Rental Apartment      Condominium      Single family house

8) What do you think the Town should do to enhance housing opportunities in Sudbury?

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If you have any questions about this survey, please email to [chc@town.sudbury.ma.us](mailto:chc@town.sudbury.ma.us)

**Please return this survey to the box located at the front office of each school.**

**The Committee will pick them up on February 6, 2004.**

## M E M O R A N D U M

To: Community Housing Committee  
 From: Roger Van Duinen  
 Date: July 29, 2004  
 RE: Results of Survey to Elementary and Middle Schools

I have completed entering the data from our survey and have compiled the following basic observations and conclusions. Please see the attached chart for raw tables and trees.

Overall, our teachers have a relatively high level of home ownership at 85%.. This is significantly higher than the national average of 68% and the Boston Metro average of 60%\*. This result skews slightly as the population is broken into those who currently reside in Sudbury (91% ownership) and those who don't (79% ownership).

Based on statistics compiled from Arbitron, commute times for teachers living outside of Sudbury are slightly higher than average for the Boston Metro Area, at 33 minutes vs 28.4 minutes. In addition, the standard deviation of commute times is high at 15 minutes. This indicates that 70% of teachers commute between 18 minutes and 48 minutes. 30% of teachers commute either less than 18 minutes or more than 48 minutes. The commute times don't vary significantly if the teachers outside of Sudbury are further split by the reason for not living in Sudbury (Choice or Affordability).

Looking beyond the top line statistics, it is clear that the population breaks down into 3 very distinct populations accounting for 90% of survey respondents:

- Already live in Sudbury (33%)
- Don't live in Sudbury primarily due to a **preference** (32%)
- Don't live in Sudbury primarily due to **affordability** (25%)

Focusing in on the immediate opportunity to provide affordable housing to teachers (and other Sudbury town employees) is to focus on those respondents who currently don't reside in Sudbury due to Affordability and who currently don't own homes. Although this group is relatively small (8%) of respondents, they do provide some insight into their demographic differences with the rest of the group. I have outlined their profile below:

- Average Commute Miles = 16
- Average Commute Time = 32 minutes
- Average Household Income = \$53k

The most glaring difference between this group and the population as a whole is the drop in household income from \$82k for the entire group to \$53k for this group.

Although this group is a small (8%) of teachers, if factored up to the 400 staff members in the K-8 system, it would represent over 30 individuals. This does represent a real opportunity to improve the lives of some Sudbury employees.

Although I won't be able to attend the 8/3 meeting, I will have access to email and will strive to answer any questions that come up during the meeting.

\* 2002 Census



Count of Counter	Why Not?						
Live in Sudbury	(blank)	Preference	Afford	Preference & Afford	Housing Type & Afford	Housing Type	Grand Total
Yes		32				1	2
No			33	27	9	2	71
Grand Total		32	33	27	9	3	106

Live in Sudbury	Data	Why Not?						
		(blank)	Preference	Afford	Preference & Afford	Housing Type & Afford	Housing Type	Grand Total
Yes	Count of Counter		32				1	2
	Average of Commute Miles		3					10
	StdDev of Commute Miles		1.3					0.0
	Average of Commute Time		7				40	20
	StdDev of Commute Time		2.86					0.00
	Average of Income\$		\$96k			#DIV/0!	\$25k	\$100k
	Average of Own?		100%				0%	0%
No	Count of Counter			34	27	9	2	72
	Average of Commute Miles			17	18	18	8	17
	StdDev of Commute Miles			8.8	11.6	9.1	#DIV/0!	9.7
	Average of Commute Time			33	33	33	23	33
	StdDev of Commute Time			15.93	15.22	16.21	10.61	15.38
	Average of Income\$			\$81k	\$74k	\$67k	\$40k	\$76k
	Average of Own?			85%	78%	67%	50%	79%
Total Count of Counter			32	34	27	9	3	107
Total Average of Commute Miles			3	17	18	18	8	12
Total StdDev of Commute Miles			1.3	8.8	11.6	9.1	#DIV/0!	14.1
Total Average of Commute Time			7	33	33	33	28	25
Total StdDev of Commute Time			2.86	15.93	15.22	16.21	12.58	30.82
Total Average of Income\$			\$96k	\$81k	\$74k	\$67k	\$35k	\$82k
Total Average of Own?			100%	85%	78%	67%	33%	83%

Own? 0

Live in Sudbury	Data	Why Not?						
		Preference	Afford	Preference & Afford	Housing Type & Afford	Housing Type		Grand Total
Yes	Count of Counter					1	2	3
	Average of Commute Miles						10	10
	StdDev of Commute Miles						0.0	0.0
	Average of Commute Time					40	20	#DIV/0!
	StdDev of Commute Time						0.00	23.45
	Average of Income\$					\$25k	\$100k	\$75k
	Average of Own?					0%	0%	0%
No	Count of Counter		5	6	3	1		15
	Average of Commute Miles		21	10	21	8		17
	StdDev of Commute Miles		7.4	5.0	8.1	#DIV/0!		8.3
	Average of Commute Time		43	27	43	15		34
	StdDev of Commute Time		9.57	7.48	14.43	#DIV/0!		13.07
	Average of Income\$		\$55k	\$58k	\$45k	\$25k		\$52k
	Average of Own?		0%	0%	0%	0%		0%
Total Count of Counter			5	6	3	2	2	18
Total Average of Commute Miles			21	10	21	8		16
Total StdDev of Commute Miles			7.4	5.0	8.1	#DIV/0!		8.1
Total Average of Commute Time			43	27	43	15	#DIV/0!	34
Total StdDev of Commute Time			9.57	7.48	14.43	0.00		9.06
Total Average of Income\$			\$55k	\$58k	\$45k	\$25k	\$100k	\$56k
Total Average of Own?			0%	0%	0%	0%	0%	0%

