

Town of Sudbury

Sudbury Housing Trust

Flynn Building
278 Old Sudbury Rd
Sudbury, MA 01776
978-639-3387

<http://www.sudbury.ma.us>
Housing@town.sudbury.ma.us

Sudbury Housing Trust

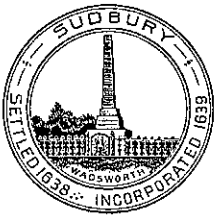
Agenda

January 2008, 8:00 AM
Thompson Conference Room
Flynn Building, 278 Old Sudbury Rd

Announcements

1. Topic: Meetings, Agenda, Minutes
8:00 – 8:10 a. VOTE: Approve Regular Minutes of 12/05
2. Legislation and Trust
8:10 – 8:20 a. Trust Annual Report – review, sign
3. Finances, Funding and Grants
8:20 – 8:35 a. VOTE: Ratify Finances as presented for January, review budget recast
b. Concord – Unit closed 12/19, \$400 profit. New resale in progress, \$500 fee.
c. Boxborough – Hired, small scope. \$1,500 net fee,
d. Natick – Responded to RFP 11/15, to be awarded within 90 days.
4. Active Projects
a. Dutton Parcel – No update, architecture drawings in progress.
b. 4 Longfellow – P&S signed, DHCD approval (attached), second estimates planned for January.
c. Washbrook Parcel Update – Preliminary site plan prepared, next step to review with Con Comm.
8:35 – 8:55 d. Melone Update – No update
e. Small Grants Program – Review funding options
8:55 – 9:10 f. Down Payment Assistance – VOICR winner qualifies for some support. Would like to pursue, if Trust supports. Would require a forgivable note from Trust.
g. 40B Updates
 - Snowberry – 7 of 8 units sold. Last will go for under \$500k
 - Old County Rd – Lottery held 12/10, 12 eligible applicants, 7 local. Local unit ready late summer – family excited. General unit has no scheduled date. Winner OK with delay. Developer owes \$4,000 for lottery work.
 - Village on rt20 – No activity
 - Commons – VOTE: Include veterans in Local Preference definition, see attached. Decision planned for January vote by ZBA. Includes additional affordable buy-down unit for \$140,000.
5. Outreach, other, reference
9:25 – 9:30 a. Fair Housing Planning – Should the Trust recommend to the Selectmen to commission a fair housing plan that includes a broad spectrum of Sudbury data? See attached.
b. Housing Update in neighboring communities – Wayland Feb 12. Weston, Stow, Concord, Sudbury participating.

Other business



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Minutes

Wednesday December 5, 2007, 8:00 AM
Silva Conference Room, Flynn Building, 278 Old Sudbury Rd

Present: Trustees: Peter Crowe (late), Michael Fee, Lydia Pastuszek, Larry O'Brien, Andrew Kaye
Staff: Jody Kablack, Beth Rust
Absent: Amy Lepak

The meeting commenced at 8:00am and adjourned at 9:25.

Minutes

Motion duly made and seconded, it was unanimously (5-0):

VOTED: To approve the minutes of regular session on November 8, the executive session minutes of November 8, and the regular session minutes of November 27

Finances

Motion duly made and seconded, it was unanimously (5-0):

VOTED: To ratify the finances and transactions for November as presented

Projects

Young project – Discussion on the defeat of the Young CPC article. While disappointing, the Trustees were constructive in discussion on strategies for next time. More education, information and outreach is important, including more vocal supporters, and encouraging more people to vote were some highlights.

Dutton Road – Review of Habitat RFP response. No other responses were received. The CHS will work with Habitat to ensure that the house has some architectural detail and curb appeal, which will be an upgrade to the HFH standard models. Discussions with the Sudbury Earth Decade Committee are continuing to bring in 'green' design techniques for this home. No further work will be done on the title, as the opinion of the foreclosure attorney indicated that the existing mortgage on the property is extinguished when the Town sold the land pursuant to the foreclosure statute. A memo to that effect will be sent to HFH for their information and files.

Motion duly made and seconded, it was unanimously (5-0):

VOTED: To award the Request for Proposal to Greater Worcester Habitat for Humanity for the construction of affordable housing on the Dutton Road parcel.

Motion duly made and seconded, it was unanimously (5-0):

VOTED: To grant Habitat for Humanity up to \$15,000 for the purposes of reimbursement of expenses for surveys, environmental impacts, fees and permits - in such manner as is in compliance with Chapter 30B.

Home Preservation – The list of repairs –including estimates - was reviewed. It is the intent of the Trust to provide a house in good standing and as such, the list of items was approved. It is anticipated that the estimates represent a reasonable idea of the cost of work to be done, and the overall repair budget of \$25,000 was approved previously.

Motion duly made and seconded, it was unanimously (5-0):

VOTED: To approve the list of high priority repairs for the 4 Longfellow Road house.

Small Town owned parcels – Two small Town owned parcels were reviewed, and the Trust decided not to pursue requesting a Town transfer for this Town Meeting, primarily due to the recent TM defeat.

Sudbury Housing Trust

In 2006 Town Meeting, Sudbury voted to accept Massachusetts General Law Chapter 44, Section 55C. This established the Sudbury Housing Trust which was voted by the Board of Selectmen in February 2007. The Sudbury Housing Trust was created as a blend of the Massachusetts General Law and our local desire for controlled flexibility. The powers and duties of the Trust allow it to buy and sell real estate, borrow and lend money, develop and hold property, and all with the benefits of being under the Town's municipal structure – insurance coverage, investment management and accounting, and other such administrative functions. The Trust requires Board of Selectmen approval for any real estate transaction, and Town Meeting approval to borrow, mortgage or pledge for amounts greater than the current Trust assets.

In its first year, the Trust accepted the mandated housing allocation of CPA funds, passed at 2007 Town Meeting, and has a current balance of \$405,000 as of December 31, 2007. These funds are used for feasibility and preliminary work for potential projects, as well as smaller scale development projects.

The Trust has been active in this first year. It has purchased a small parcel of land through the Town's low value tax foreclosure auction and has awarded the development contract to Habitat for Humanity, with ground-breaking planned for early summer 2008 after permits are issued. The Trust assisted in adding a unit to our affordable housing inventory through the Home Preservation program. An older home was purchased and is being resold, subject to a deed restriction, to an eligible purchaser created from our lottery. The Housing Trust was able to work 'real time' to put an offer on the property using their own funds. A current Sudbury family plans to close on this home in February.

The Sudbury Housing Trust is also the lottery and monitoring agent for some of our 40B projects. This allows Sudbury to customize the outreach to the local community, and to be a true local presence during the application process. Through this approach we know who is looking for affordable housing in Sudbury. Almost half are single parents, and almost half have connections to Sudbury; these are residents, town employees and teachers – families in our community. The Trust has also contracted its lottery services to neighboring communities through this expertise.

Other projects that the Trust is working on include a Small Grants program to help seniors and other lower income homeowners fund capital repairs, and a down payment assistance program using our HOME Consortium American Dream Downpayment Assistance funds.

The Trust worked closely with the Board of Selectmen, the Community Preservation Committee and other Town boards on a proposal to purchase property on Boston Post Road for a small housing development. This was defeated by a small margin from the required two-thirds majority at a special Town Meeting in December 2007. The Trust will continue to investigate suitable parcels and projects to bring before the Town and hopes for greater support in the future.

The Board is organized with Michael Fee as Chair, Lydia Pastuszek as Vice-Chair, Larry O'Brien as Selectman representative, and three at-large members Peter Crowe, Andrew Kaye and Amy Lepak. The Trust is supported by Beth Rust, Clerk and Community Housing Specialist, and Jody Kablack, Director of Planning and Community Development.

Respectfully Submitted by the Sudbury Housing Trust:

Michael Fee, Chair

Lydia Pastuszek, Vice-Chair

Peter Crowe

Andrew Kaye

Amy Lepak

Larry O'Brien

Sudbury Housing Trust
 Budget Review
 01.08.08

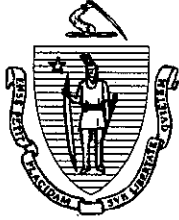
Desc	7/1/07 Budget	Detail	1/1/08 View	Difference
Revenue	\$303,428		\$277,228	\$26,200
	\$250,000 CPA		\$250,000	
	\$1,728 HOME Admin		\$1,728	
	\$16,000 up front, no funds expected in FY08 now		\$0	\$16,000
		Villages: \$3,200 upon signing Lottery Agreement, \$5,500 upon signing monitoring agreement, using CHAPA pricing.		
		Commons: 50% Monitoring Fee using	\$8,700	
		\$3,000 CHAPA pricing	\$3,000	
		\$4,000 Sudbury Resales (2)	\$0	\$4,000
		\$20,000 Non-Sudbury Lotteries	\$13,800	\$6,200
		Concord	\$4,500	
		Boxborough	\$1,800	
		Natick - marketing plan	\$7,500	
Expenses	(\$46,000)		(\$59,677)	\$13,677
		(\$180) Admin	(\$180)	
		(\$3,000) Snowberry Cost Certification	(\$3,000)	
		(\$8,000) VOQR: Advertising, 3rd party oversight	(\$3,095)	-\$4,905
		External lotteries (Boxborough/Natick)	(\$2,300)	\$2,300
		(\$10,000) Home small grant program: Assume half	(\$5,000)	-\$5,000
		(\$25,000) Development and Feasibility	(\$46,102)	\$21,102
		Dutton	(\$10,561)	
		Washbrook	(\$5,127)	
		Young	(\$3,799)	
		Longfellow	(\$25,815)	
		Other	(\$800)	
Salaries	(\$1,728)		(\$5,728)	\$4,000
		HOME admin funds	(\$1,728)	
Interest	\$20,000		\$20,000	\$4,000
		Additional hours funded by Concord	(\$4,000)	
Budget	\$275,700		\$231,823	\$43,877
Carryover	\$158,864		\$158,864	
Planned	\$434,564		\$390,687	

Sudbury Housing Trust
Functional Financial View

	FY 2007 (7/06 - 6/07)	Actual	FY 2008 (7/07-6/08) Remaining	Total	FY 2009 (7/08-6/09)	FY 2010 (7/09-6/10)	FY 2011 (7/10-6/11)	Total	Comments
Balance Forward	\$0	\$158,864		\$158,864	\$390,687	\$925,120	\$962,648		
Trust Account									
Sudbury 40B Income									
Meadows: 8 (2) units CPA	\$24,598 \$0	\$0	(\$3,000) (\$3,000)	(\$3,000) (\$3,000)	\$0	\$0	\$0	\$21,598 (\$3,000)	Unrestricted
VOCR: 37 (10) units Lottery Fee	\$7,000	(\$2,095)	(\$1,000)	(\$3,095)	\$37,400	(\$3,000)	\$0	\$38,305	
Advertising	\$0	(\$2,095)	\$0	(\$2,095)	\$31,900			\$31,900	
Monitoring Fee	\$7,000	\$0	\$0	\$8,000	(\$2,000)			(\$4,095)	
Third Party Oversight	\$0	\$0	(\$1,000)	(\$1,000)	(\$500)			\$15,000	
CPA	\$0	\$0	\$0	\$0	\$0	(\$3,000)		(\$1,500) (\$3,000)	
Sudbury Villages (RT20): 73 (19) units Villages Lottery	\$0	\$0	\$8,700	\$8,700	\$35,000	\$12,800	\$12,000	\$68,500	Negotiated
Villages Monitoring	\$0	\$3,200	\$3,200	\$6,400	\$32,000	\$12,800	\$6,500	\$54,500	\$320/per
Sudbury Commons 20 (5) units Resales (1/yr@ 2.5%)	\$0	\$3,000	\$3,000	\$6,000	\$3,000	\$0	\$0	\$17,000	\$71k total
Sudbury 40B Sub-total	\$31,598	(\$2,095)	\$7,700	\$5,605	\$79,400	\$13,800	\$16,000	\$146,403	Monitoring only 1 resales per/yr @ 2.5%
CPA funds in the Trust									
10% Housing Appropriation	\$135,000	\$250,000	\$0	\$250,000	\$750,000	\$250,000	\$250,000	\$1,635,000	Restricted to 100% AMI
CPA Sub-total	\$135,000	\$250,000	\$0	\$250,000	\$750,000	\$250,000	\$250,000	\$1,635,000	
Projects									
Development and Feasibility	(\$7,941)	(\$8,727)	(\$37,375)	(\$46,102)	\$0	\$0	\$0	(\$54,043)	
Dutton	(\$7,941)	(\$561)	(\$10,000)	(\$10,561)	\$0	\$0	\$0	(\$18,502)	
Washbrook	\$0	(\$3,627)	(\$1,500)	(\$5,127)	\$0	\$0	\$0	(\$5,127)	
Young	\$0	(\$3,799)	\$0	(\$3,799)	\$0	\$0	\$0	(\$3,799)	
Longfellow	\$0	(\$740)	(\$25,075)	(\$25,815)	\$0	\$0	\$0	(\$25,815)	
Other	\$0	(\$800)	\$0	(\$800)	\$0	\$0	\$0	(\$800)	
Frost Farm Income	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
Non-Sudbury Lottery income	\$0	\$2,000	\$9,500	\$11,500	\$25,000	\$30,000	\$385,000	\$385,000	
Concord	\$0	\$2,000	\$2,500	\$4,500	\$0	\$0	\$35,000	\$101,500	
Boxborough	\$0	\$0	\$1,500	\$1,500	\$10,000	\$15,500	\$15,500	\$4,500	
Natick	\$0	\$0	\$5,500	\$5,500	\$0	\$0	\$0	\$1,500	
Other	\$0	\$0	\$0	\$0	(\$10,000)	(\$10,000)	(\$10,000)	(\$35,000)	
House Grant Program	\$0	\$0	(\$5,000)	(\$5,000)	(\$300,000)	(\$200,000)	(\$500,000)	(\$500,000)	
Buy-Down Program	\$0	\$0	\$0	\$0	(\$285,000)	(\$180,000)	(\$410,000)	(\$102,543)	
Projects Sub-total	(\$7,941)	(\$6,727)	(\$32,875)	(\$39,602)	(\$285,000)	(\$180,000)	(\$410,000)	(\$102,543)	
Administrative									
HOME Admin Funds	\$1,738	\$0	\$1,728	\$1,728	\$1,728	\$1,728	\$1,728	\$8,650	
Interest	\$506	6,439.21	13,560.79	\$20,000	\$20,000	\$20,000	\$20,000	\$80,506	5% on \$400K
Salaries	(\$1,523)	(\$643)	(\$5,085)	(\$5,728)	(\$31,695)	(\$68,000)	(\$75,000)	(\$181,946)	decreasing CPC funding
Home funded	\$0	\$0	(\$1,728)	(\$1,728)	\$0	\$0	\$0	(\$1,728)	
Concord funded	\$0	(\$643)	(\$3,357)	(\$4,000)	\$0	\$0	\$0	(\$4,000)	
Trust admin expenses	(\$514)	(\$180)	\$0	(\$180)	(\$9,967)	(\$46,272)	(\$53,272)	(\$93,464)	
Admin Expenses Sub-total	\$207	\$5,617	\$10,203	\$15,820	(\$9,967)	(\$46,272)	(\$53,272)	(\$93,464)	
Total Trust Funds	\$158,864	\$405,658	-\$14,972	\$390,687	\$925,120	\$962,648	\$1,585,376	\$1,585,376	

Sudbury Housing Trust
Functional Financial View

	FY 2007 (7/06 - 6/07)	FY 2008 (7/07-6/08)	FY 2009 (7/08-6/09)	FY 2010 (7/09-6/10)	FY 2011 (7/10-6/11)	Total	Comments
	Actual	Remaining	Total				
Non-Trust Funds and Projects							
HOME Project Funds	\$22,339	\$22,220	\$22,220	\$22,220	\$22,220	\$111,219	
HOME Project - VOCR	\$0	(\$44,559)	(\$44,559)		(\$66,660)	(\$111,219)	
CPC Buy-Down funds	\$0	(\$170,000)	(\$170,000)		\$0	(\$490,000)	Commit 04.08. Spend 04.09
VOCR	\$0	\$0	\$0			(\$55,000)	
Villages	\$0	\$0	\$0			(\$125,000)	
Commons	\$0	\$0	\$0			(\$140,000)	
Home Preservation	\$0	(\$170,000)	(\$170,000)			(\$170,000)	
Other Grants	\$0	\$0	\$0			\$0	Specific projects
Grant Sub-total	\$22,339	-\$362,339	-\$362,339	-\$617,780	-\$44,440	-\$980,000	
Total Funds Available	\$181,203		\$28,348	\$307,340	\$984,868	\$1,540,936	\$605,376
Other Trust Assets							
Pratts Mill/Dutton land	\$7,000		\$7,000	\$7,000	\$7,000	\$7,000	
Market Value	\$7,000		\$7,000	\$7,000	\$7,000	\$7,000	



Commonwealth of Massachusetts
**DEPARTMENT OF HOUSING &
COMMUNITY DEVELOPMENT**

Deval L. Patrick, Governor ♦ Timothy P. Murray, Lt. Governor ♦ Tina Brooks, Undersecretary

December 19, 2007

John C. Drobinski
Chair, Board of Selectmen
278 Old Sudbury Road
Sudbury, MA 01776

RE: LIP Local Action Unit Approval – 4 Longfellow Road

Dear Mr. Drobinski:


The Local Initiative Program recently received information identifying 4 Longfellow Road as the first unit to be purchased by the Town of Sudbury for resale to an income-eligible first-time homebuyer under the town's Home Preservation Program. I am pleased to inform you that the unit has been approved.

At least two weeks prior to the sale of the home, DHCD should receive copies of the buyer's signed Purchase and Sale Agreement and loan commitment letter, as well as contact information for the closing attorney. We will then prepare a deed rider and resale price certificate for the closing. Please send these items to Elsa Campbell.

The unit will be added to the Subsidized Housing Inventory as soon as the deed rider is recorded and a copy is submitted to us.

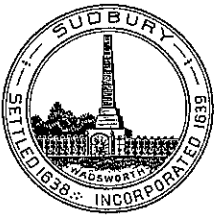
Let me congratulate you on your continued efforts to bring affordable housing to Sudbury. If you have any questions please feel free to contact Erin Bettez at (617) 573-1309.

Sincerely,



Catherine Racer
Associate Director

cc: Beth Rust, Sudbury Community Housing Specialist
DHCD Policy Office



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Sudbury Housing Trust Small Grant Program Guidelines

Section 1: Purpose and Priorities

The purpose of the Sudbury Small Grant Program is to make funds available to rehabilitate existing units occupied by low and moderate income eligible households to make them safe and sanitary and to preserve housing stock in Sudbury.

The program is funded and sponsored by the Sudbury Housing Trust, whose purpose is to provide for the preservation and creation of affordable housing in the Town of Sudbury for the benefit of low and moderate income households. The funds distributed under the program are intended and are required to further the purpose of the Trust.

Section 2: Financial Assistance for Rehabilitation

Financial assistance for rehabilitation will be used to correct conditions dangerous to health and safety; to correct substandard conditions; to improve weatherization and energy efficiency; to provide, on a limited basis architectural access for families with disabled members; within the limits of Program Guidelines.

OPEN: Funding requirements.

Option 1: Offer as unsecured, unconditional funds, no repayment, using unrestricted funds (non-CPA) from Trust

Option 2: Offer with a no interest note, and a repayment schedule forgivable over 5 years, using CPA funds. Work with Town Counsel to craft eligibility and mortgage. (Note: This is a grey area in CPA; some municipalities have programs that enable low- and moderate-income households to afford housing by providing direct subsidies based on specified terms and conditions without long-term deed riders, though Sudbury TC does not currently feel that this is a CPA-eligible expense.)

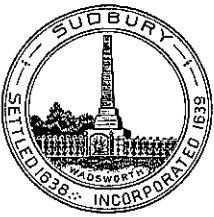
Option 3: Offer with Federal HOME funds, similar to unrestricted, though dwelling must be free of lead-paint.

Section 3: Eligible Rehabilitation Projects

Eligible projects include, but, are not limited to the following list of small in-home capital repairs. Maintenance and general upkeep is excluded. From a technical perspective, project must impact basis to be included.

HANDI-MAN JOBS: Minor plumbing, light carpentry, doorbell switch, window repairs, broken or clogged gutters or downspouts, door repairs or replacements, step or porch repairs, lock repair or replacement, cement work or masonry repair, tiling, plaster patching and wallpapering, sheet-rock repair, touch-up painting, smoke/CO2 detectors.

ADAPTATIONS: Bathroom grab bars, raised toilets or toilet seats, hand-held shower heads, tub transfer bench, tub seats, tub rails, bed transfer bars, railings throughout the house, change door knobs to levers, hood-up bells to light switches, hook-up flashing light to phone, install various phone volume



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control devices, intercom entryway buzzer system, small ramps, light switch height.

CONTRACTOR WORK: Electrical, plumbing, heating, interior painting or wallpapering or plaster/sheet-rock work, floors, appliance repair or installation, masonry, siding, roofing, carpentry or minor sewage problem.

Excluded Project examples: Heating oil, appliance repair, cleaning, TV/Cable/Computer installation or repair, other maintenance.

Section 4: Funding Available

The maximum grant available is \$3,000 per grant period and no household of a given property address may receive more than \$10,000 total from the Small Grants Program over the lifetime of the program. The grants are not sufficient for large projects – septic – and other work. The homeowner must cover any costs above and beyond that amount according to their agreement with the contractor. Grant Period is defined as the date which the application was received and considered complete up to the date that the final payment was issued, not to exceed \$3,000 in a grant period.

A one year wait period, from the date the last payment was issued, is required before an applicant can re-apply to the Small Grant Program.

The grants are funded from Community Preservation Funds obtained through the Sudbury Housing Trust.

The one year wait period can be waived in emergency situation upon approval by the Program Inspector and the Program Manager. An emergency situation is defined as a situation that poses a danger to the health/safety of the occupant. The determination of an “emergency situation” is determined by the Program Inspector.

Section 5: Program Eligibility - Confirm

Income – 100% is for CPA, 80% if federal

The combined income of all parties living in the home must be less than 100% of the Boston Area Median Income. This limit corresponds to the Community Preservation Act requirement. This is calculated at twice the 50% AMI HUD income limits. All sources of regular income such as; earnings, Social Security, Pension, Interest Income, etc.:

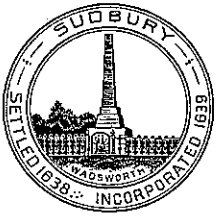
# in HH	100% AMI Income
1	\$58,900
2	\$67,300
3	\$75,700
4	\$82,400

Assets – Up to Trust requirements

The participant’s Total Assets are not to be greater than the median home price in Sudbury, which for 2006 is \$625,000.

Assets are defined as; Net Home Equity in the property (Sudbury Assessed Property Value minus all mortgages) and all of the assets (Checking and Savings Acct., CD’s, etc.).

Home-owner - Up to Trust requirements



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The Applicant must be the owner of the property, and a full-time resident of the property. The resident must also plan to remain a full-time resident for the entire full year/12 months following the completion of the repair, and will be required to provide notarized certification of that.

The property in which the owner lives must be located within the Town of Sudbury.

Section 6: Procedure

While the steps below are listed in order, it is expected that the Applicant will work with the Program Manager and Program Inspector on an iterative process as needed.

- 1) Yearly Program budget set by Trust
- 2) Applicant obtains estimate of work to be done provided by person to perform work. It is recognized that referrals and indications of repairs can come to the program by the Fixit Program at the Senior Center, repairmen, the Board of Health, the Town Social Worker, or the Building Inspector. The Program Inspector will maintain a list of contractors and home repair craftsmen, though takes no responsibility for their work.
- 3) Home repair estimate approved by Program Inspector
- 4) Applicant applies for grant, and provides appropriate documentation
- 5) Administrator qualifies applicant, within one week of receipt of the application, and probably within 2 days.
- 6) Grant awarded, on a first-come-first served basis. In the event the funding is depleted for the year, the Applicant will be placed on a waiting list maintained by the Administrator.
- 7) Home repair completed, within 12 month from the award date.
- 8) Trust pays repair bill directly to repair provider.
- 9) Grant closed

Veteran criteria for "Local Pool"

Peter Harvell, the Town of Sudbury Veteran's Agent, has requested that the Sudbury Local Preference qualification be expanded to include veterans. In 40B projects, 70% of the units (rounded down) can be set aside for local preference applicants.

This would be effective in the ZBA decision for the Sudbury Commons that is being voted January 14, 2008. (Note: Sudbury will not be the lottery agent for this project, as the project consultant is also a lottery service provider.)

Our current definition of Local Preference includes the following:

- 1) current residents
- 2) child of current Sudbury resident
- 3) parent of current Sudbury resident
- 4) former Sudbury residents
- 5) families with children currently participating in the METCO program of the Sudbury/LS schools
- 6) employees of the Town of Sudbury
- 7) employees of the Lincoln-Sudbury Regional High School system
- 8) employees of the Sudbury Public School system
- 9) employees of the Sudbury Water District
- 10) employees of the Sudbury Housing Authority.

This definition has been unchanged in recent years. The METCO family preference was added for the Snowberry Lane lottery. In December of 2006, the Community Housing Committee rejected a request to include employees of Sudbury private businesses.

Mr Harvell has reviewed both aspects of this proposal with the membership of the VFW. He recommends that the following be included as criteria for entry into the Local Pool, feeling that these are both very limiting criteria for veterans and those that could meet these thresholds would make good neighbors.

1. Veterans with a Campaign Medal (war time service in a combat zone).

VFW discussion on whether to limit it to those veterans who have actual combat experience (have a "Battle Star" device on their Campaign Medal) or whether serving in a combat zone exposed to the dangers of combat was sufficient (just a Campaign Medal).

2. Veterans with a 30% disability or greater.

The debate centered around what level of disability (10% to 100%) should a Veteran have to be rated before they were allowed into the Local Pool. The threshold was determined to be a 30% disability, this is the level at which you are considered a "Disabled Veteran".

It is not known what impact this will have on the number of applicants in the local pool. I don't think (though cannot be certain) that any veterans in these categories have applied even to the general pool for our past lotteries. I wondered if greater outreach would provide some additional opportunities to the veteran community in the general pool.

After adoption, we might expect increased probability for providing reasonable accommodation for the units if a person with disability should win the lottery. The following condition is in the decision, *"If a household or households requiring modifications for disabled living is selected in the lottery for the initial sales of the six (6) Affordable Units, the Applicant shall make such reasonable modifications at the Applicant's expense, in accordance with M.G.L. c. 151B."*

Fair Housing Planning

This is a HUD requirement that recipients of HUD housing grants are required to certify that grants are administered in conformity with fair housing, and that the "projected use of funds has been developed so as to give maximum feasible priority to activities which will benefit low- and moderate- income families..." As part of the WestMetro HOME Consortium, Sudbury is subject to this requirement.

HUD has increased their review of such activities, and has indicated that this year they are expecting the WestMetro Consortium communities to "report more on activities furthering fair housing, including activities addressing impediments to fair housing identified in the Consortium's Analysis of Impediments (AI), as well as activities addressing the needs of minorities, persons with disabilities, and those with limited English proficiency (LRP)."

The components that HUD certifies are:

- Conduct an Analysis of Impediments (AI), identifying impediments to fair housing choice through analysis.
- Take appropriate actions.
- Maintain records.

The scope of the AI is broad, covering the full array of public and private policies, practices and procedures affecting housing choice including some information that is contained in the 2005 Housing Plan (zoning, demographics).

It might also be valuable to bring together data from other areas in Town including Veterans Agent, Council on Aging, Town Social Worker, Sudbury Housing Authority, schools/Town HR departments, Longfellow Glen, realtors, congregations, Commission on Disability, and other sources as needed to gain further data on Fair Housing issues.

As part of past years' HUD reporting submission, the following *Impediments to Fair Housing* for Sudbury were identified.

1. The high cost of construction and property make it difficult to maintain and develop housing that is affordable to a diverse population.
2. The perception that new affordable and family housing increases the demand on the town for services, such as schools, can curtail support for family housing.
3. There is a small existing minority population in Sudbury. Outreach is necessary to reach a diversity of households.

Sudbury is addressing these issues in a number of ways through the housing programs and projects, and will continue during the next fiscal year/s. Working through a broad group in Sudbury may increase the actions and results.

Newton performed an extensive AI effort, and concluded the following four (similar) impediments with actions. Their 68-page analysis is detailed, and can assist Sudbury with regional data and other information.

1. Zoning and land use policies limit the availability of land to develop affordable housing.
2. High cost of housing and lack of available land for new development limits opportunities and choices.
3. Lack of Education and Outreach
4. Monitoring and investigative testing is needed to ensure fair housing practices.