

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

May 14 2008, 8:00 AM
Silva Conference Room
Flynn Building, 278 Old Sudbury Rd

Announcements

1. Topic: Meetings, Agenda, Minutes
8:05 – 8:15 a. VOTE: Approve Regular Minutes of 3/31/08

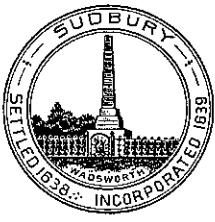
2. Legislation and Trust
8:15 – 8:30 a. Policy updates:
 - Local Preference update: Remove former resident in accordance with DHCD guidelines
 - CORI, Veterans -

3. Finances, Funding and Grants
8:30 – 8:45 a. VOTE: Ratify March financial transactions as presented
b. Monitoring Agent services update – MassHousing discussion
c. Buy-down replan

4. Active Projects
8:45 – 9:15 a. Dutton Parcel – Survey complete, Site Approval letter mailed, ZBA hearing possible for 6/16
b. Home Preservation – second home possibility
c. [Potential Executive Session] Washbrook Rd – See attached
d. Small Grants Program – Grant period open, one partial application received
e. New Town foreclosure list – Initial review, site visit in June/July
f. 40B Updates
 - Snowberry – 7 of 8 units sold, developer profit estimated at 9.7%.
 - Old County Rd – Request to move SHA unit, may suit lottery winners better, Developer agreement with Trust for HOME funds next.
 - Village on rt20 – No update
 - Commons – No update

5. Outreach, other, reference
9:15 – 9:20 a. Subsidized Housing Inventory – Increase of 1 unit for April, at Old County Rd, total 259, 4.6%
b. Fair Housing report – On Selectmen agenda 5/13, due to HOME Consortium 5/15. Your comments appreciated.

Other business



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Minutes
March 31 2008, 8:00 AM

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

The meeting commenced at 8:10am, and adjourned at 9:15.

Minutes

Motion duly made and seconded, it was unanimously (4-0):

VOTED: To approve the minutes of regular session of March 5 2008 and the Executive Session Minutes of March 5, 2008

Finances

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

VOTED: To ratify the February financial transactions as presented

There was an open discussion on the Trust taking on monitoring agent responsibilities and offering those services to neighboring municipalities. Since CHAPA does not perform this role any more, there is a potential market, though ties the Trust to other non-Sudbury projects and municipalities through the term of affordability, often in perpetuity. For the particular proposal at hand with the Concord Housing Development Corporation, the Trust agreed to propose a five-year renewable term.

Town Meeting Preparation

Reviewed the draft presentation, discussed the housing authority article, and the Board was encouraged to get people to attend Town Meeting.

Projects - Dutton Road

The application was submitted to DHCD on 3/28, complete with an executed Purchase & Sale. The outreach group has been formed and is starting regular meetings.

Projects – Home Preservation

A potential second home has been offered to the Trust. Further research will be done after Town Meeting.

Projects – Woods Walk Sanctuary

Background material was reviewed and briefly discussed. The Trust will sponsor a joint meeting of Town Boards once a proposal for feasibility has been submitted – probably around early May.

Local Preference

DHCD has issued new affirmative fair housing marketing requirements in February 2008, which prompt us to amend our Local Preference definition.

Allowable Preference Categories

1. Current residents: A household in which one or more members is living in the city or town at the time of application. Documentation of residency should be provided, such as rent receipts, utility bills, street listing or voter registration listing.
2. Family of Current Residents: Close relatives, including children or parents, of current resident of the city or town.
3. Municipal Employees: Employees of the municipality, such as teachers, janitors, firefighters, police officers, librarians, or town hall employees.
4. Employees of Local Businesses: Employees of businesses located in the municipality.

The current definition of Local Preference in Sudbury includes the following:

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

The METCO family preference was added in 2006. Also in 2006, the Community Housing Committee rejected a request to include employees of Sudbury private businesses.

We have two exceptions to the DHCD regulations – the former residents and the METCO families.

DHCD has agreed that the METCO is fine, since it's addressing a need for affordable housing for families with kids in local schools. The DHCD legal dept has asked how having a preference for former residents addresses an existing/current local housing need so that one is out. Upcoming housing projects that utilize the local preference definition – Habitat and Concord Alexan project, which is including Sudbury in the local preference.

In accordance with our housing policy process, the Trust recommends changes to the Selectmen to approve.

We could also take up the veteran question as we amend the local definition. The veteran's agent has recommended that the following be included as criteria for entry into the Local Pool:

1. Veterans with a Campaign Medal (war time service in a combat zone).
2. Veterans with a 30% permanent disability or greater.

This request first came up in November of 2007, during the application period for the Villages at Old County Road lottery. The veteran's agent had discussions with the Town's Community Housing Specialist, the Department of Housing and Community Development, a federal veterans affairs department, The Sudbury Zoning Board of Appeals, the Sudbury Housing Trust, neighboring communities and, most recently spoke at the Sudbury Housing Roundtable. The Commission on Disability has endorsed the second recommendation. The veteran's agent advocates for this change in light of the affordable housing shortage, and draws similarities with the housing landscape that World War II vets found upon their return home. He notes the alignment with the Selectmen's goals to provide diversity in housing. He estimates that there are six (6) qualifying veterans in Sudbury (none who have yet indicated interest in the affordable housing), and expanding the local preference state-wide would bring additional new entrants to the lottery. Sudbury's local definition compares similarly to other municipalities. There is no precedence found that includes non-local veterans (those with no ties to the municipality) in the local pool, as confirmed by discussions with surrounding towns and the state.

A statewide legislation change is the most preferable solution, and assistance was offered for this strategy. Possible amendments to the Sudbury local preference include allowing some percentage (25%?) of local lottery slots to veterans who are MA residents without Sudbury connections, or allow veterans into the local preference lottery based on distance from Sudbury, or some other kind of strategy. There is general appreciation for the service these people have given and interest in exploring a compromise. Any of these would be an exception to the DHCD local preference regulation.

Sudbury Housing Trust
FY08 Transactions

Date	Post MO	Amount	Balance	Account	Description	Payer/Payee
7/1/07	Jun-07		\$158,864		Carryover	
7/10/07	Jul-07	250,000.00	\$408,864	712543/430000	2007 TM 26: FY08 housing reserves	Town
7/31/07	Aug-07	847.43	\$409,712	712548/48200	Interest - July	Town
8/31/07	Sep-07	1,876.93	\$411,588	712548/48200	Interest - August	Town
9/19/07	Sep-07	(561.23)	\$411,027	712557/522100	Dutton Rd- Septic Testing	Sullivan Connors
9/19/07	Sep-07	(3,627.48)	\$407,400	712557/522100	Washbrook Rd - Wetlands flagging, Septic Testing	Sullivan Connors
10/5/07	Oct-07	(2,598.75)	\$404,801	712557/522100	Young proforma	Building Initiatives
10/16/07	Oct-07	1,839.81	\$406,641	712548/48200	Interest - September	Town
10/17/07	Nov-07	(180.00)	\$406,461	712557/522100	CHAPA event	CHAPA
11/1/07	Nov-07	(220.00)	\$406,241	712557/522100	VOCR advertisements	Sampan
11/6/07	Nov-07	(280.00)	\$405,961	712557/522100	VOCR advertisements	Action Unlimited
11/6/07	Nov-07	2,000.00	\$407,961	712543/430000	Concord Lottery (p1)	Concord
11/7/07	Nov-07	(1,594.80)	\$406,366	712557/522100	VOCR advertisements	CNC
11/8/07	Nov-07	(321.30)	\$406,045	712551/511100	Salary: 10 hours	Beth
11/14/07	Nov-07	(1,000.00)	\$405,045	712557/522100	4 Longfellow - Deposit on 4 Longfellow	REMAX
11/14/07	Nov-07	(740.00)	\$404,305	712557/522100	4 Longfellow - Home Inspection	HomeQuest
11/16/07	Nov-07	1,875.04	\$406,180	712548/48200	Interest - October	Town
11/20/07	Nov-07	(1,200.00)	\$404,980	712557/522100	Young Conceptual site plan	Building Arts
11/20/07	Nov-07	(321.30)	\$404,658	712551/511100	Salary: 10 hours	Beth
11/30/07	Nov-07	1,000.00	\$405,658	712543/430000	4 Longfellow - Deposit reimbursement	Town
12/1/07	Dec-07	(300.00)	\$405,358	712557/522100	Town Owned parcels - Title search	Mary Gibney
12/6/07	Dec-07	(75.00)	\$405,283	712557/522100	4 Longfellow - Pest Inspection	AJ Williamson
12/31/07	Dec-07	1,744.07	\$407,028	712548/48200	Interest - November	Town
12/31/07	Dec-07	1,770.12	\$408,798	712548/48200	Interest - December	Town
12/31/07	Dec-07	(642.60)	\$408,155	712551/511100	Salary: 20 hours	Beth
1/31/07	Jan-08	(642.60)	\$407,512	712551/511100	Salary: 20 hours	Beth
1/3/08	Jan-08	2,000.00	\$409,512	712543/430000	Concord Lottery (p2)	Concord
1/17/08	Jan-08	(3,425.00)	\$406,087	712557/522100	Washbrook Rd - Topo survey, septic design	Sullivan Connors
1/17/08	Jan-08	(1,970.00)	\$404,117	712557/522100	Dutton Rd- Septic Design, Topo survey	Sullivan Connors
1/25/08	Jan-08	4,000.00	\$408,117	712543/430000	VOCR lottery fee (1)	Trask
1/25/08	Jan-08	(1,000.00)	\$409,845	712543/430000	HOME admin funds	City of Newton
1/23/08	Feb-08	600.00	\$408,845	712557/522100	VOCR lottery oversight	CJHowe
2/21/08	Feb-08	(642.60)	\$409,445	712543/430000	Boxborough (1 of 3)	Boxborough
2/26/08	Feb-08	500.00	\$408,803	712551/511100	Salary: 20 hours	Beth
2/27/08	Feb-08	1,704.44	\$409,303	712543/430000	Concord - Emerson Annex	Concord
2/28/08	Feb-08	(181.75)	\$410,826	712551/511100	Interest - January	Town
2/27/08	Mar-08	(3,834.58)	\$406,991	712557/522100	Portion of salary, short by 139.55	Sudbury Lumber
2/27/08	Mar-08	(9,150.00)	\$397,841	712557/522100	4 Longfellow: Windows	Constitution Contracting
3/6/08	Mar-08	(1,800.00)	\$396,041	712557/522100	4 Longfellow: Roof	Arthur K Smith
3/11/08	Mar-08	(1,800.00)	\$394,241	712557/522100	4 Longfellow: Windows (1)	Arthur K Smith
3/15/08	Mar-08	(139.55)	\$394,101	712551/511100	Salary adjustment	Town
3/18/08	Mar-08	(2,686.15)	\$391,415	712557/522100	4 Longfellow: Windows (3)	Arthur K Smith
3/18/08	Mar-08	(800.00)	\$390,615	712557/522100	4 Longfellow: Paint (1)	Arthur K Smith
3/18/08	Mar-08	(444.38)	\$390,171	712557/522100	4 Longfellow: Windows	Sudbury Lumber
3/18/08	Mar-08	(125.00)	\$390,046	712557/522100	Add Boxborough to Town Insurance	MIAA
3/23/08	Mar-08	1,326.12	\$391,372	712548/48200	Interest - February	Town
3/23/08	Mar-08	(642.61)	\$390,729	712551/511100	Salary: 20 hours	Town
3/31/08	Mar-08	1,244.36	\$391,974		Interest - March	

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				
Balance Forward	\$0	\$158,864	\$389,577	\$919,952	\$954,422		
Trust Account							
Sudbury 40B Income							
Meadows: 8 (2) units	\$24,598	\$0	\$0	\$0	\$0	\$21,598	Unrestricted
CPA	\$0	(\$3,000)	(\$3,000)			(\$3,000)	
VOCR: 37 (10) units	\$7,000	\$905	\$905	(\$3,000)	\$0	\$41,305	
Lottery Fee	\$0	\$4,000	\$4,000			\$31,900	
Advertising	\$0	(\$2,095)	(\$2,095)			(\$2,095)	
Monitoring Fee	\$7,000	\$0	\$0	\$8,000		\$15,000	
Third Party Oversight	\$0	(\$1,000)	(\$1,000)			(\$1,000)	
CPA	\$0	\$0	\$0	(\$3,000)		(\$2,500)	
Sudbury Villages (RT20): 73 (19) units	\$0	\$5,500	\$5,500	\$9,800	\$12,200	\$56,500	Negotiated
Villages Lottery	\$0	\$0	\$0	\$12,800	\$9,700	\$54,500	\$3200/per
Expense/Advertising	\$0	\$0	\$0	(\$3,000)		(\$9,000)	\$11k total
Villages Monitoring	\$0	\$5,500	\$5,500		\$5,500	\$11,000	\$11k total
Sudbury Commons 20 (5) units	\$0	\$0	\$0	\$0	\$0	\$6,000	Monitoring only
Resales (1/yr@ 2.5%)	\$0	\$0	\$0	\$4,000	\$4,000	\$12,000	1 resales per/yr, 2.5%
Sudbury 40B Sub-total	\$31,598	\$905	\$3,405	\$75,400	\$16,200	\$137,403	
CPA funds in the Trust							
10% Housing Appropriation	\$135,000	\$250,000	\$250,000	\$250,000	\$250,000	\$1,635,000	Restricted to 100% AMI
CPA Sub-total	\$135,000	\$250,000	\$250,000	\$250,000	\$250,000	\$1,635,000	
Projects							
Development and Feasibility							
Dutton	(\$7,941)	(\$35,013)	(\$47,813)	\$0	\$0	(\$55,754)	
Washbrook	(\$7,941)	(\$2,531)	(\$10,000)	\$0	\$0	(\$20,472)	
Young		(\$7,052)	(\$8,552)			(\$8,552)	
Langfellow		(\$3,799)	(\$3,799)			(\$3,799)	
Other		(\$21,330)	(\$22,130)			(\$22,130)	
Frost Farm Income	\$0	\$0	\$0	\$0	\$0	\$385,000	
External Fees (net)	\$0	\$4,975	\$9,325	\$0	\$0	\$104,300	
Concord	\$0	\$4,500	\$4,000	\$30,000	\$35,000	\$8,500	
Concord CHDC	\$0	\$0	\$3,000			\$3,000	
Boxborough	\$0	\$475	\$1,325			\$1,800	
Other	\$0	\$0	\$1,000			\$1,000	
House Grant Program	\$0	\$0	(\$5,000)	(\$10,000)	(\$10,000)	(\$35,000)	
Buy-Down Program			(\$300,000)	(\$200,000)		(\$500,000)	
Projects Sub-total	(\$7,941)	(\$30,038)	(\$8,475)	(\$180,000)	\$410,000	(\$101,454)	
Administrative							
HOME Admin Funds	\$1,738	\$1,728	\$1,728	\$1,670	\$1,670	\$8,476	
Interest	\$506	14,228.32	5,771.68	\$20,000	\$20,000	\$80,506	5% on \$400K
Salaries	(\$1,523)	(\$3,534)	(\$5,728)	(\$31,695)	(\$75,000)	(\$181,946)	
Home funded		\$0	(\$1,728)			(\$1,728)	
Concord funded		(\$3,534)	(\$4,666)			(\$4,000)	
Trust admin expenses	(\$514)	(\$180)	(\$180)	(\$46,330)	(\$53,330)	(\$694)	
Admin Expenses Sub-total	\$207	\$12,242	\$3,578	(\$10,025)	(\$46,330)	(\$93,658)	
Total Trust Funds	\$158,864	\$391,974	\$389,577	\$954,422	\$1,577,292	\$1,577,292	

Buy-Down Funding Status

\$500k CPA Appropriated, Commit by 04/08, spend by 04/09, no less than 3 units									
	Commit		Close		Source of Funds			Trust	Comment
	Amount	Date	Date	CPC	HOME				
4 Longfellow	\$165,000	Dec-07	Feb-08	\$165,000					Home Preservation
Old County Rd	\$100,000	Jul-06	Oct-08		\$100,000				Additional 40B Unit, 5 years of HOME funds
Villages on Rt 20	\$125,000	Jun-07	TBD				\$125,000		Additional 40B Unit
Sudbury Commons	\$140,000	Jan-08	TBD				\$140,000		Additional 40B Unit
Home Preservation #2	\$200,000	Jul-08	TBD	\$200,000					
Home Preservation #3	\$200,000	Nov-08	TBD	\$135,000			\$65,000		
Total	\$930,000			\$500,000	\$100,000		\$330,000		

From: j.loughry@comcast.net [mailto:j.loughry@comcast.net]
Sent: Wednesday, March 12, 2008 1:45 PM
To: Dineen, Deborah
Subject: Wash Brook Road lot

Hi Debbie,

For the past year or so the abutters and neighbors of the Wash Brook Rd lot have been following the Sudbury Housing Trust's development plans for this lot. One of our concerns with the preliminary plan discussed at the last Conservation Commission meeting on March 3rd pertains to the proximity of the proposed house and septic system to Hop Brook. Based on 20 years of living in this neighborhood, we believe the water level of the river extends beyond the current depictions on the plan presented by the Sudbury Housing Trust. On Sunday several neighbors walked through the lot and made measurements that indicate, for example, that the edge of the planned septic system is within 85 feet of the water's edge. We would like to suggest that you view the lot again to see the current conditions. While these conditions are not constant, in our 20 years in the neighborhood we have occasionally seen even higher water levels in the spring than exist currently. Our hope is that, as you consider the suitability of this lot for the development plans put forward for Conservation Commission review, you will consider the totality of conditions to which this lot has been and will continue to be subjected in the years ahead. We appreciate very much your time and attention to our concern. We are available by e-mail or by phone at 978-443-2799 (h), 978-985-4787 (c-KL) or 978-460-3047 (c-JL) if you would like to contact us.

Best regards,

Kevin & Judy Loughry
and our neighbors on Wash Brook Road

From: Dineen, Deborah
Sent: Wednesday, March 12, 2008 2:18 PM
To: 'j.loughry@comcast.net'
Subject: RE: Wash Brook Road lot

Mr. & Mrs. Loughry,

Thank you for providing the additional information. The extent of the wetland jurisdiction for "river" is defined by the "mean annual" high water, not the highest recorded water level. This mean annual high water is determined by flow and vegetative characteristics more than the lateral extent of stream expansion. Also, the land below the 100-year floodplain (determined by a federally-established elevation) cannot be altered.

From the discussion between the Housing Trust and the Conservation Commission, it is apparent that the Commissioners share the concern for the potential for septic effluent to increase the nutrient levels in Hop Brook.

I will plan to visit the site tomorrow to view current conditions.

Debbie Dineen

Hi Beth,

Abutters to the Washbrook Road parcel suggested the ConCom revisit the site to look at the extent of flooding on the lot. This morning, Commissioner Chris McClure (CC liaison to this project) and I walked the lot again and found that the "river" was very much beyond the area delineated on the Sullivan Connors plan. River extent is defined as "mean annual high water (MAHW)". As previously stated, MAHW is determined by flow and vegetation.

We clearly observed flow very close to today's land/water interface. In addition, the channel of the river is visible through the vegetation and changes in shrubs and grasses are apparent, making identification much more accurate than under the conditions of last summer when the dense vegetation made a definitive identification of MAHW difficult. With the conditions observed today, we would dispute the Sullivan Connors MAHW line based primarily on flow as well the location of the transition between mostly aquatic and mostly terrestrial habitats. From today's observations we believe the house and septic system shown on the July 5, 2007 plan will be located in the inner riparian area. The Wetlands Regulations will not permit the ConCom to permit the project if this is the situation.

Should you decide to pursue development of this lot, we strongly recommend a on-site meeting with the ConCom and Sullivan Connors as soon as possible. Please let me know if you are interested in taking this next step.

Debbie

Washbrook Road

Septic system notes

Conservation Commission is requiring a de-nitrification system, since the septic is within the 200-foot area, as per their policy.

1. The policy is not documented, nor in force. There may be 3 or 4 such systems in Town since they may also have been in Zone II Aquifer areas that also would require de-nitrification by Title 5 depending upon the acreage and design flow. Washbrook is just outside Zone II. Title 5 would not require de-nitrification. Septic system replacements on Washbrook have not included de-nitrification.
2. The installation cost is \$7,000-\$8,000. The annual cost is around \$1,000, which is significant, and would reduce the potential sales price by ~\$12,000. Net project impact \$20,000.
3. Could also use plantings close to the wet that would take up nutrients prior to entering the wet.
4. A number of systems are available, including Presby, which is an Enviro-Septic system, and has no mechanic parts.
5. System trenches in current 4BR design between primary and secondary are too close, and would need a BoH variance. Might be alleviated somewhat for reducing flow to 3BR.
6. System placement uses retaining wall on plan, which is would also need a BoH variance.