

**Brookside Square  
50 Beherrell Street  
Concord, MA 01742**

**Information and Application for Affordable Housing Lottery**

**4 One-Bedroom Rental Units - \$1,236 per month  
4 Two-Bedroom Rental Units - \$1,374 per month**

This packet contains specific information for the lottery for eight affordable rental units at the Brookside Square development in Concord, MA, including eligibility requirements, the selection process, and a lottery application.

The key milestones for this housing opportunity:

- Application Period opens March 3, 2015
- Information Session March 30, 2015, 7:00 pm, *Concord Town House, 22 Monument Square, Concord MA 01742*
- Application Deadline May, 5, 2015 1 p.m.
- Lottery May 18, 2015, 7pm, *Concord Planning Department, 141 Keyes Road, Concord MA 01742*

This application is a first step in the lottery process and does not assure you an apartment.

Please contact the agent below for any questions or to submit your application.

Karen Margolis  
Sudbury Housing Trust  
278 Old Sudbury Rd  
Sudbury, MA 01776  
(978) 639-3373, [housing@Sudbury.Ma.US](mailto:housing@Sudbury.Ma.US)

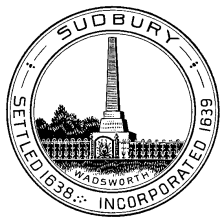
**Project description**

The Brookside Square development, located in the village of West Concord, is under construction on a 5 acre parcel on Beharrell Street, adjoining the main commercial district of the village. This five acre parcel, when completed this summer, will provide a new multi-family mixed-use building with 74 luxury rental units and 36,000 square feet of non-retail commercial space in a three story modern structure with elevators. The apartments are located on the second and third floors with elevator access. Eight rental units, 4 one-bedroom and 4 two-bedroom apartments, will be affordable. The affordable rental units offered in this project are Local Action Units within the Commonwealth's Local Initiative Program (LIP), with DHCD and the Town of Concord as Monitoring Agents. This is the first lottery for this new development, which will provide for the selection of eligible tenant for 8 units.

In accordance with the program guidelines, the initial monthly rent is established so that a household is not required to spend more than thirty percent (30%) of the monthly adjusted income, whose gross income equals eighty percent (80%) of the Boston Area Median Income (AMI) for a family for housing costs, including rent and utilities. The tenant will be responsible for payment of all utilities. Taking into consideration a utility allowance of \$119, the initial rent for the 1 bedroom unit will be set at \$1,236. Taking into consideration a utility allowance of \$151, the initial rent for the 2 bedroom unit will be set at \$1,374. Tenants pay all utilities except water and sewer.

The one-bedroom units will feature one bath, living room, dining room and kitchen in an open floor plan with livable square footage ranging from 675 to 750 square feet. The two-bedroom units will feature two bathrooms, living room, dining room and





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kitchen in an open floor plan with livable square footage ranging from 1015 to 1047 square feet. Two units – a one-bedroom apartments and a two-bedroom apartment will be ADA compliant. Underground parking will be provided, with additional surface parking.

The finishes will be 'high end", that is, granite counters, energy-efficient stainless appliances, wood floors in living areas, tiled master bath, ample storage (including walk-in closets, extra storage rooms), 9 ft ceilings, lots of natural light from generous windows, energy-efficient, individually controlled heating, ventilating and air conditioning; overall healthy, 'green' building materials and furnishings. The ADA units include wider kitchen, larger bathrooms, lower cabinets and ADA appliances.

The following table details the specific units.

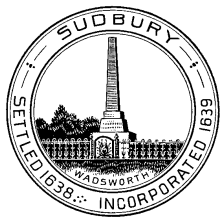
1 Bedroom		2 Bedroom	
Unit#	Comment	Unit#	Comment
203	Local, ADA	232	Local
212	Local	228	Local
322		304	Local
316		311	ADA

This parcel is located near shopping and services, Nashoba Brook and recreational trails, and is a short walk to the MBTA Boston/Fitchburg commuter rail line station in West Concord. The units are planned for occupancy in the summer of 2015.

### Lottery description:

1. The applications for these housing opportunities will be generally available, including on-line, in hardcopy at Sudbury Department of Planning and Community Development, the Concord Department of Planning and Land Management and Concord Free Public Library, or will be sent to anyone interested in the lottery. Notice of the lottery will be advertised, and communicated widely through local, regional and state channels.
2. Applications must be received in hardcopy and will be checked for completion of all required components. An application will be considered complete when all required items on the checklist have been provided. Applicants are encouraged to complete the checklist as an aide to the process. Email or fax submission of applications are not accepted. .
3. The applicant's household size will be determined from the application, and required number of bedrooms as indicated on the application. Within the lottery pools, priority shall be given to households requiring at least the number of bedrooms for that unit. Smaller households are encouraged to apply.
4. The applicant's income will be verified and compared to the income limits published by HUD for the Boston Metropolitan Statistical Area. Income includes all income prior to any deductions from all adult household members, and are determined using the method as in the HUD Section 8 program defined at 24 CFR 5.609. An imputed income amount of 2% of assets will be added to income for assets over \$5,000. The 2015 limits will be used:  
 1 person household - \$48,800, 2 person household- \$55,800,  
 3 person household- \$62,750, 4 person household - \$69,700
5. If any household member owns a residential property, the property must be sold before the household enters into a lease.
6. It is the policy of the leasing office's that the applicant have sufficient income for the rent. No more than 35% of an applicant's gross income can be spent on rent. This translates to minimum incomes of \$42,377 for the 1BR units, and \$47,109 for the 2BR units. Applicants may make less than the minimum incomes if they have sufficient savings to contribute to their rent so as to meet the required ratio for twelve months. Applicants who have receive a housing subsidy (like Section 8) are not subject to the minimum income requirements. Applicants will be considered ineligible for the lottery if they make less than the incomes.
7. All applicants will be screened for eligibility. Applicants who have been deemed ineligible will be notified in writing of the decision and given time to contact the lottery agent in writing to disagree with the determination.





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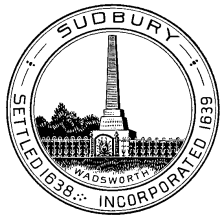
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8. Applicants that qualify for a local preference will be placed in the local pools. Three of the two-bedroom units are available for local residents, and two of the one-bedroom units are available for local residents. Applicants will be entered into all the pools for which they qualify; so a local resident will be included in both general and local pools. Local resident includes:
  - Current Concord residents
  - Families with children enrolled in the Town of Concord's schools;
  - Concord municipal employees, school system employees or Concord-Carlisle Regional High School employees; or
  - Household member employed in the Town of Concord
9. Once the Lottery Agent has verified the information contained in the application and confirmed eligibility, a lottery number or numbers and lottery form will be issued, and the applicant will move forward to the lottery. There will be four lottery pools created for these opportunities.
  - 1) One-Bedroom Local Pool (2 units) – one is ADA compliant
  - 2) One-Bedroom General Pool (2 units)
  - 3) Two-Bedroom Local Pool (3 units)
  - 4) Two-Bedroom General Pool (1 unit) - one is ADA compliant
10. A final lottery eligibility letter will be mailed to each applicant indicating their final eligibility determination and the lottery specifics (date/time).
11. The lottery numbers will be pulled randomly by an independent third party in a public setting. Lottery numbers will be assigned a number in the sequence in which they are drawn and recorded in the order of selection on the Lottery Drawing Lists. The list of numbers drawn will be posted and letters will be mailed within three business days to the winners.
12. Once the tickets have been randomly drawn and listed on the drawn order, the top ranked household with a member documenting the need of the design features of the ADA accessible unit, will be offered the opportunity to lease that specific unit ahead of a household where no member of the household needs the ADA design feature. This preference is done ahead of the household size ranking.
13. After the ADA preferences have been taken into consideration, the lottery list will be re-ranked based on need/qualification for bedroom size within each lottery pool. The top ranked households needing and qualified for two bedrooms will be offered the opportunity to lease the offered two-bedroom unit, until all the two bedroom units have been offered. Then the top ranked households needing and qualifying for a one bedroom will be offered the opportunity to lease the offered one-bedroom unit. The household size preference is based on the following criteria.
  - There is at least one occupant and no more than two occupants per bedroom.
  - A husband and wife, or those in a similar living arrangement, shall be required to share a bedroom.
  - Other household members may share but shall not be required to share a bedroom.
14. The lottery agent shall maintain the Lottery Drawing Lists. In the event that any of the applicants withdraw for any other reason, or do not comply with guidelines, the next qualified applicant, taking into consideration household size preference, will be offered the unit. If any applicant is offered the unit and opts not to proceed, they will be moved to the bottom of the list, unless there are extenuating circumstances related to hardship.
15. Winning households will attend an interview with the owner/manager and complete a Rental Application. If the winning household does not sign a lease or is otherwise disqualified, the next qualified applicant will be selected. All winning applicant households will be subject to landlord screening and final approval. Screening is provided by Core Logic Safe Screening which includes a review of such factors such as employment history, credit score/reports, former lease history, criminal background screening and sufficient income are considered. Note that co-signers and/or guarantors are not allowed.
16. Tenants are required to recertify annually. Annual income must be below 140% of the 80% income limits to remain eligible. Ineligible tenants may be required to pay market rent.





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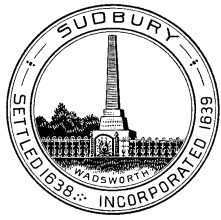
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17. The Fair Housing Act and other federal and state laws and regulations prohibit discrimination on the basis of race, creed, color, sex, age, disability, marital status, religion, familial status, veteran status, sexual orientation, and/or national origin, or any other basis prohibited by law and which is specifically prohibited. An applicant who believes that they have been discriminated against in the selection process may contact: the Massachusetts Commission Against Discrimination; and/or the United States Department of Housing and Urban Development.
  18. Qualified persons with disabilities are entitled to request reasonable accommodation of rules, policies, or services, or reasonable modification of housing, when accommodation is necessary to ensure equal access to the building and individual unit, amenities and services.





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## AFFORDABLE HOUSING APPLICATION

Must Be Completed and Returned to Sudbury Housing Trust Office By **May 5, 2015 1:00PM**

Applicant Legal Name \_\_\_\_\_ Phone Number \_\_\_\_\_ E-mail \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State/Zip \_\_\_\_\_

Co-Applicant Legal Name \_\_\_\_\_ Phone Number \_\_\_\_\_ E-mail \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State/Zip \_\_\_\_\_

I learned of this lottery from (check all that applies):

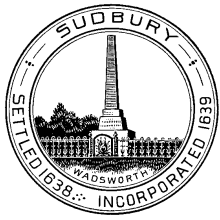
Website: \_\_\_\_\_ Letter: \_\_\_\_\_

Advertisement: \_\_\_\_\_ Other: \_\_\_\_\_

### THIS APPLICATION IS NOT COMPLETE IF NOT SUBMITTED WITH:

- \_\_\_\_\_ Completed application signed by all individuals over the age of 18
- \_\_\_\_\_ Copy of 2012 and 2013 Federal tax returns (and 2014 if filed), as filed, with 1099 and W-2 forms for 2014 tax return, for every current person living in the household over the age of 18.
- \_\_\_\_\_ Copy of three consecutive months pay stubs (minimum of 5 most recent), for salaried employed household members over 18, longer for seasonal and hourly workers.
- \_\_\_\_\_ Evidence of full-time matriculation for students age 18 or older with more than \$480/year income, if applicable.
- \_\_\_\_\_ Current statements and documents that indicate the payment amounts from all other sources of income of all members listed on the application, such as alimony, child support, Social Security benefits, pensions, unemployment compensation, workman's compensation, disability and any other form of income
- \_\_\_\_\_ Current statements of all assets (all pages), on financial institution letterhead, showing current value including all bank accounts, investment accounts, cash life insurance policies, retirement accounts. Include copy of last three months of each asset statement. Provide explanation for non-income deposits.
- \_\_\_\_\_ Documentation regarding current interest in real estate, if applicable.
- \_\_\_\_\_ Documentation regarding Rental Assistance, if applicable.
- \_\_\_\_\_ Documentation regarding need for Accessible Unit, if applicable.
- \_\_\_\_\_ No Income Statement, signed and notarized, for any household member over 18 with no source of income, if applicable, containing the language "Under penalties of Perjury"
- \_\_\_\_\_ No Child Support Statement, signed and notarized, if applicable, containing the language "Under penalties of Perjury"





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Household Information – List all members of your household including yourself

Number of Bedrooms Needed: \_\_\_\_\_

Names of all Persons to Reside in Dwelling (First Name, Middle Initial, Last Name)	Relation to Head	Age	Date of Birth	Minority Category * (Optional)
HEAD				
2				
3				
4				

\*Minority preference categories include only Native American or Alaskan Native, Black or African American, Asian, Native Hawaiian or Pacific Islander; or other (non-White); and the ethnic classification Hispanic or Latino. Requires a separate self-declaration document.

Local Preference – Check all that apply, and attach documentation showing this preference:

- 1) current Concord resident, address: \_\_\_\_\_
- 2) Families with children enrolled in the Town of Concord's schools, school/grade: \_\_\_\_\_
- 3) Concord municipal or school system employees or Concord-Carlisle Regional High employees /  
Title and place of employment: \_\_\_\_\_
- 4) Employee of businesses located in the Town of Concord / Business Name: \_\_\_\_\_

Property - Do you own or have an interest in any real estate, land and/or mobile home? Yes ( ) No ( )

Address: \_\_\_\_\_ Current Value: \_\_\_\_\_

[Provide current assessment information, and current mortgage statement]

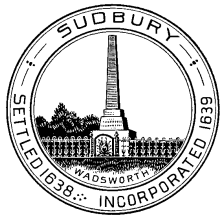
Have you sold real estate or other property in the past three years? Yes ( ) No ( ) If yes, attach settlement statement

When: \_\_\_\_\_ Address: \_\_\_\_\_ Sales Price: \_\_\_\_\_

Do you require Accessible Unit? Yes ( ) No ( ) If yes, attach note from physician

Do you have any rental assistance (ie. Section 8)? Yes ( ) No ( ) If yes, attach benefit statement





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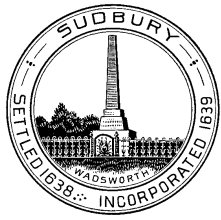
Income - List all income of all members over the age of 18 listed on application to reside in the unit, such as wages, child support, Social Security benefits, all types of pensions, employment, Unemployment Compensation, Workman's Compensation, alimony, disability or death benefits and any other form of income; including rental income from property. Adults with no income are required to submit a notarized statement. If additional space is needed, please attach another sheet.

#	Source of Income	Address/Phone# of Source	Amount per Year
1			
2			
3			
4			
5			
<b>TOTAL</b>			

Assets - List all checking, savings accounts, CD's, stocks, bonds, retirement accounts, savings bonds and any other investments below. If additional space is needed, please attach another sheet. Household assets do not include necessary personal property.

#	Type of Asset	Account No	Value, Balance
1	Checking account		
2	Savings account		
3	Retirement account		
4	Other: _____		
5	Other: _____		
6	Other: _____		
7	Other: _____		
<b>TOTAL</b>			





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## APPLICANT(S) CERTIFICATION

I/We understand that this lottery application is not an offer of housing and does not guarantee housing.

I/We understand that additional information and verifications will be necessary to complete the standard application process.

I/We certify that our household size is \_\_\_\_\_ persons, as documented herein.

I/We certify that our total household income equals \$\_\_\_\_\_, as documented herein.

I/We certify that our household has assets totaling \$\_\_\_\_\_, as documented herein.

I/We certify that no member of the household owns a home, including in Trust.

I/We certify that the information in this lottery application and in support of this application is true and complete to the best of my/our knowledge and belief under full penalty of perjury. I/We understand that false or incomplete information may result in disqualification from further consideration.

I/We certify that I am/we, or our family, are not related to the Developer of the Brookside Square property, the Lottery Agent, the Monitoring Agent or any party of this project.

I/We agree to provide additional information on request to verify the accuracy of all statements in this application.

I/We consent to the disclosure of such information for the purpose of income, asset and any other verification related to my/our application. I/We grant permission for all of the above information to be verified by the owner/agent.

No lottery application will be considered complete unless signed and dated by the Applicant/Co-Applicant.

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Applicant Signature

Date

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Co-Applicant Signature

Date

THIS IS APPLICATION IS ONLY FOR THIS SPECIFIC DEVELOPMENT.

