



Town of Sudbury

Housing Trust

HousingTrust@sudbury.ma.us

Flynn Building
278 Old Sudbury Road
Sudbury, MA 01776
978-639-3387
Fax: 978-639-3314
www.sudbury.ma.us/housingtrust

AGENDA

Thursday, September 10, 2020

8:00 AM

Virtual Meeting

Here are the meeting details for residents to participate in this meeting.

Please click the link below to join the virtual Housing Trust Meeting:

<https://us02web.zoom.us/j/85164326118>

For audio only, call the number below and enter the Meeting ID on your phone keypad:

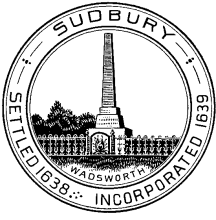
Call In Number: 978-639-3366 or 470-250-9358

Meeting ID: 851 6432 6118

Welcome and Announcements

1. Minutes
 - a. Approve Meeting Minutes of July 9, 2020
2. Finances
 - a. Vote to Ratify the FY20 June and FY21 July Transactions
 - b. Community Preservation Act (CPA) CP-3 Reporting
 - c. FY22 CPA Request – Application due October 9, 2020
3. Emergency Rental Assistance Program
 - a. Update: Six (6) Applicants, \$12,000 Committed, \$8,000 Open
 - b. Discussion on Renewal: October Last Rent for Most. Could Provide Two Months Renewal within Committed Funds.
4. Resale Update
 - a. 18 Pinewood Avenue – Closing Planned for September 30, 2020
5. Other Business
 - a. Sudbury Housing Authority Update
 - b. Master Plan Update
 - c. Town Meeting Update
 - d. Cold Brook Crossing Residential Development
6. Upcoming Meeting Schedule: 2nd Thursday of Each Month at 8:00 AM: October 8, 2020, November 12, 2020, and December 10, 2020

These agenda items are those reasonably anticipated by the Chair which may be discussed at the meeting. Not all items listed may in fact be discussed and other items not listed may also be brought up for discussion to the extent permitted by law.



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DRAFT MINUTES

JULY 9, 2020 AT 8:00 AM

VIRTUAL MEETING

Housing Trust Members Present: Chair Cynthia Howe, Kelley Cronin, Janie Dretler, Carmine Gentile, and John Riordan

Housing Trust Members Absent: None

Sudbury Housing Authority Members Present: Chair Amy Lepak, Sherrill Cline, Steven Swanger, and Tatiana Vitvitsky

Sudbury Housing Authority Members Absent: Theresa Layden

Others Present: Board of Selectmen Member Pat Brown, Executive Director of the Sudbury Housing Authority Sheila Cusolito, Director of Planning and Community Development Adam Duchesneau, Robert Hummel, and Director of the Regional Housing Services Office (RHSO) Elizabeth Rust

Ms. Howe called the Housing Trust meeting to order and Ms. Lepak called the Sudbury Housing Authority meeting to order at 8:03 AM.

5. Other Business

a. Sudbury Housing Authority Update

Mr. Swanger discussed the grant the Sudbury Housing Authority had been awarded from the Sudbury Foundation and how the funding would be used to analyze various Town owned land for possible housing projects. He indicated a number of Town owned lots in the past had moved on to other uses or had not worked out for housing projects. Mr. Swanger stated the Board of Selectmen had agreed they would unanimously support the Sudbury Housing Authority's Sudbury Foundation application if the Broadacres Farm property was dropped from the site analysis consideration. As such, the Sudbury Housing Authority agreed to do this. Mr. Swanger stated the Sudbury Housing Authority was still very interested in the 8 Eddy Street property and hoped it would move forward.

Ms. Rust stated she felt the vacant site at the Frost Farm residential development would be a good location for the Sudbury Housing Authority to explore for a new housing opportunity and perhaps the property adjacent to the Department of Public Works as well. Mr. Swanger indicated it did

look very feasible to construct new housing in both of those locations but they had not spoken with any of the neighbors yet.

Ms. Howe stated the Housing Trust was completely supportive of the Sudbury Housing Authority's efforts regarding the 8 Eddy Street project. She also noted the Housing Trust wanted to be a partner with the Sudbury Housing Authority but in a complementary way. Ms. Howe pointed out how the Sudbury Housing Authority was focused on rental opportunities and the Housing Trust was more focused on ownership dwelling units.

Ms. Cronin recalled her past time on the Sudbury Housing Authority when they were looking at Town owned properties and asked how many units the Sudbury Housing Authority was interested in constructing on the various sites. Mr. Swanger stated their investigation was still very preliminary at this point, but he indicated there was the possibility of six dwelling unit at the property next to the Department of Public Works (three duplexes) and four units in two duplexes at the vacant Frost Farm residential development site. He also mentioned the possibility of adding dwelling units to existing Sudbury Housing Authority properties.

Mr. Riordan asked about money which had been set aside by the developer when the Frost Farm residential development had been constructed. Ms. Rust thought approximately \$380,000 was in the account but believed it needed Town Meeting approval for appropriation.

At this time Mr. Hummel joined the meeting.

There was then discussion regarding using Community Preservation Act (CPA) funds toward affordable housing projects and processes which would be required when CPA funds were being used.

Mr. Gentile asked approximately how many units could be constructed at the 8 Eddy Street property. Ms. Cusolito stated it was not entirely clear, but the current dwelling unit could possibly be split into two units and another building could probably be added to the site as well.

There was then discussion about how the Housing Trust and Sudbury Housing Authority could work together and communicate regarding affordable dwelling units which may become available for resale.

At this time the Sudbury Housing Authority adjourned their meeting and all members left the meeting except for Ms. Cusolito.

1. Minutes

a. Approve Meeting Minutes of June 4, 2020 and June 16, 2020

Mr. Riordan made a motion to approve the meeting minutes of June 4, 2020 and June 16, 2020.

Ms. Dretler seconded the motion. Roll Call Vote: Ms. Howe – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Mr. Gentile – Aye, and Mr. Riordan – Aye.

2. Finances

a. Vote to Ratify the FY20 May Transactions

Ms. Rust provided a brief overview of the transactions for May of FY2020.

Mr. Gentile made a motion to approve the FY2020 May transactions. Ms. Cronin seconded the motion. Roll Call Vote: Ms. Howe – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Mr. Gentile – Aye, and Mr. Riordan – Aye.

3. Emergency Rental Assistance Program (ERAP)

a. Update

Ms. Rust stated she knew there was more interest coming and indicated the program had just been reposted.

Ms. Dretler asked if people could reapply for additional funds. Ms. Rust stated that was up to the Housing Trust to decide. Mr. Riordan felt he would like to spread the money around as much as possible to those in need. Ms. Cronin noted it would be good to help as many new people as possible, but some of the people who had already received funds were in fairly poor financial shape.

Ms. Rust stated the process would now be first come first serve for those who received funding and they will be taking applications until the funding is gone.

The Housing Trust agreed to make no commitments to people who had already received some assistance they would be able to get more funding.

Ms. Cronin made a motion to continue to provide rental assistance through the Emergency Rental Assistance Program (ERAP) to new people as needed. Ms. Dretler seconded the motion. Roll Call Vote: Ms. Howe – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Mr. Gentile – Aye, and Mr. Riordan – Aye.

b. Discussion on Program Expansion

Mr. Riordan inquired about extending the ERAP past the October 2020 rent cycle and to what extent there was ability to expand the criteria for those receiving assistance from the ERAP. Ms. Rust noted the Housing Trust could choose to make adjustments to the ERAP however they would prefer moving forward.

Ms. Howe raised the possibility of expanding the Small Grant Program to provide assistance to more types of household expenses.

Ms. Cronin requested the ERAP and a discussion about what CPA funding should be applied for at the 2021 Annual Town Meeting be added to the next meeting agenda.

Ms. Cusolito indicated the Sudbury Housing Authority would likely not be seeking CPA funding at the 2021 Annual Town Meeting.

There was then discussion about where the CPA housing allocation had been going over the past few years.

5. Other Business

b. Small Grant Exception Request

Ms. Rust noted a Sudbury resident had asked for an exception to the Small Grant Program limit of \$10,000. The household received a \$5,000 grant in FY2017 and another \$5,000 grant in FY2019. Ms. Howe stated it seemed as though there was not a pressing need for the funds but that the person wanted to complete some home improvement projects. She indicated it seemed more information about the request might be needed, but given the current COVID-19 situation in society, perhaps an exception could be made. Ms. Cronin agreed the request did not seem like an emergency situation, such as not having any hot water.

The Housing Trust asked Ms. Rust to reach back out to the resident to ask if there was an urgent need for the work, and if not, the Housing Trust would not be granting the exception. Mr. Riordan advocated for the Housing Trust to establish some type of protocol regarding this type of request for the future. Ms. Howe recommended reexamining long term adjustments to the Small Grant Program in September or October of 2020.

4. Resale Updates

a. 18 Pinewood Avenue – Marketing Underway

Ms. Rust indicated the dwelling unit was now being marketed, the lottery was coming up next week, and there have only been a few inquiries regarding the unit to this point.

6. Upcoming Meeting Schedule: Meeting in August?

The Housing Trust decided not to hold an August 2020 meeting and to hold their next meeting on September 10, 2020 at 8:00 AM.

Mr. Riordan noted an Eviction Moratorium bill was currently in front of the state legislature. He also requested the minutes reflect a thank you and acknowledgement to outgoing Board of Selectmen member Pat Brown for her service to the Town and the work she had done with the Housing Trust over the last several years.

At 9:56 AM, Mr. Gentile made a motion to adjourn the meeting. Mr. Riordan seconded the motion. Roll Call Vote: Roll Call Vote: Ms. Howe – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Mr. Gentile – Aye, and Mr. Riordan – Aye.

**Sudbury Housing Trust
FY20Transactions**

Date	Post MO	Amount	Balance	Account	Description	Payer/Payee
7/1/19	Jun-19	\$0.00	\$0.00		Carryover 222,566.41	
8/1/19	Jul-19	\$0.00	-\$42,498.57		Balance to -\$42,498.57	
9/1/18	Aug-19	\$0.00	-\$42,388.01		Balance to -\$42,388.01	
10/1/19	Sep-19	\$0.00	-\$43,373.61		Balance to -\$43,373.61	
11/1/19	Oct-19	\$0.00	-\$49,839.11		Balance to -\$49,839.11	
12/1/19	Nov-19	\$0.00	-\$49,884.11		Balance to -\$49,884.11	
1/1/20	Dec-19	\$0.00	-\$55,671.76		Balance to -\$55,671.76	
2/1/20	Jan-20	\$0.00	-\$36,989.76		Balance to -\$36,989.76	
3/1/20	Feb-20	\$0.00	\$192,873.44		Balance to \$192,873.44	
4/1/20	Mar-20	\$0.00	\$196,823.16		Balance to \$196,823.16	
5/1/20	Apr-20	\$0.00	\$194,895.48		Balance to \$194,895.48	
6/1/20	May-20	\$0.00	\$153,790.67		Balance to \$153,790.67	
6/10/20	Jun-20	\$4,000.00	\$157,790.67	Fee	Postmark Sq	
6/23/20	Jun-20	\$1,625.00	\$159,415.67	Fee	Sherborn	Trask
6/10/20	Jun-20	\$1,000.00	\$160,415.67	Fee	Weston - Brook School	Weston
6/4/20	Jun-20	(\$83.89)	\$160,331.78	Salary	Payroll	Town of Sudbury
6/18/20	Jun-20	(\$83.89)	\$160,247.89	Salary	Payroll	Town of Sudbury
6/30/20	Jun-20	\$0.00	\$160,247.89	Salary	Payroll	Town of Sudbury
6/3/20	Jun-20	(\$100.00)	\$160,147.89	Fee	Excess fee	North Shore
4/30/20	Jun-20	\$682.65	\$160,830.54	Interest	Interest April	Town of Sudbury
4/30/20	Jun-20	\$2,000.34	\$162,830.88	Interest	Interest April	Town of Sudbury
5/31/20	Jun-20	\$0.00	\$162,830.88	Interest	Interest May	Town of Sudbury
5/31/20	Jun-20	\$0.00	\$162,830.88	Interest	Interest May	Town of Sudbury
6/30/20	Jun-20	\$0.00	\$162,830.88	Interest	Interest June	Town of Sudbury
6/30/20	Jun-20	\$0.00	\$162,830.88	Interest	Interest June	Town of Sudbury
7/14/20	Jun-20	(\$5,000.00)	\$157,830.88	Expense	Small Grant	DIF Contractor
7/28/20	Jun-20	(\$200.00)	\$157,630.88	Expense	Lottery Expense	El Mundo
8/11/20	Jun-20	(\$5,000.00)	\$152,630.88	Expense	Small Grant	Huseni
7/2/20	Jul-20	(\$1,000.00)	\$151,630.88	Fee	return deposit from 2014	Whitin
11/1/19	Jun-20	\$0.00	\$151,630.88		Balance to \$	

**Sudbury Housing Trust
FY21Transactions**

Date	Post MO	Amount	Balance	Account	Description	Payer/Payee
7/1/20	Jul-20	\$0.00	\$0.00		Carryover 153,131	
7/16/20	Jul-20	\$2,000.00	\$2,000.00	Fee	Wellington Woods - start marketing	North Shore Development
7/2/20	Jul-20	(\$85.15)	\$1,914.85	Salary	Payroll	Town
7/16/20	Jul-20	(\$85.15)	\$1,829.70	Salary	Payroll	Town
7/30/20	Jul-20	(\$85.15)	\$1,744.55	Salary	Payroll	Town
7/9/19	Jul-20	(\$42,925.00)	-\$41,180.45	Expense	RHSO	Town of Concord
7/16/20	Jul-20	(\$1,600.00)	-\$42,780.45	Expense	ERAP Expense	Jones
7/16/20	Jul-20	(\$500.00)	-\$43,280.45	Expense	ERAP Expense	Avalon
7/23/20	Jul-20	(\$500.00)	-\$43,780.45	Expense	ERAP Expense	Avalon
7/16/20	Jul-20	(\$350.00)	-\$44,130.45	Expense	ERAP Expense	Caldiero
7/23/20	Jul-20	(\$350.00)	-\$44,480.45	Expense	ERAP Expense	Caldiero
7/16/20	Jul-20	(\$350.00)	-\$44,830.45	Expense	ERAP Expense	CCC Post Road
7/16/20	Jul-20	(\$350.00)	-\$45,180.45	Expense	ERAP Expense	CCC Post Road
7/23/20	Jul-20	(\$350.00)	-\$45,530.45	Expense	ERAP Expense	CCC Post Road
7/23/20	Jul-20	(\$350.00)	-\$45,880.45	Expense	ERAP Expense	CCC Post Road
7/30/20	Jul-20	(\$1,300.00)	-\$47,180.45	Expense	ERAP Expense	Avalon
7/30/20	Jul-20	(\$515.00)	-\$47,695.45	Expense	Lottery Expense	Bay State Banner
7/30/20	Jul-20	(\$200.00)	-\$47,895.45	Expense	Lottery Expense	El Mundo
8/1/20	Jul-20	\$0.00	-\$47,895.45		Balance to -\$47,895.45	

**Sudbury Housing Trust
Financial Projection - Detail**

Description	Line#	FY07, FY08	FY17	FY18	FY19	FY20	FY21				FY22	FY23+	Total
		Actual	Actual	Actual	Actual	Preliminary	Actual	Remaining	Projected	Planned	Projected	Projected	
Housing Unit Creation													
Cumulative #units created	1	2	14	14	14	14							
Cumulative per unit subsidy of created units	2	\$144,116	\$181,812	\$181,812	\$181,812	\$181,812							
Annual #Trust Created Units	3	2	0	0	0	0							
Annual \$Trust Created Units	4	\$288,231	\$0	\$0	\$0	\$0							
Total subsidy of created units	5	\$288,231	\$2,545,366	\$2,545,366	\$2,545,366	\$2,545,366							
#Trust Assisted Units	6	0	70	70	126	126							
\$Trust Assisted Units	7	\$0	\$400,000	\$400,000	\$650,000	\$650,000							
Cumulative per unit subsidy of assisted units	8	\$0	\$5,714	\$5,714	\$5,158.73	\$5,158.73							
Detailed Statement of Revenues and Expenditures													
Carry Forward	10	\$0	\$271,435	\$458,472	\$458,472	\$282,346		\$153,131	\$153,131	\$163,394	\$163,394	\$142,084	
Fees - 712543/430000	20	\$53,066	\$63,095	\$36,349	\$83,068	\$70,332	\$2,000	\$99,443	\$101,443	\$72,190	\$72,190	\$0	\$864,947
Sudbury Resales	25	\$0	\$0	\$0	\$1,500.00	\$5,382		\$8,493	\$8,493		\$5,000		\$23,017
External Contracts (sum of below)	26	\$49,600	\$63,095	\$36,349	\$81,568	\$64,950	\$2,000	\$90,950	\$92,950		\$67,190	\$0	\$830,110
<i>Weston Brook School</i>	261		\$16,900	\$4,050	\$2,000	\$1,000		\$5,000	\$5,000		\$0		\$53,803
<i>Acton - PO Crossing</i>	262				\$4,000	\$4,000		\$8,000	\$8,000				\$16,500
<i>Bedford Woods</i>	263				\$2,000			\$7,200	\$7,200		\$7,000		\$16,200
<i>Harvard - Pine Hill Village</i>	264					\$4,200		\$10,000	\$10,000		\$10,000		\$24,200
<i>Harvard - Trail Ridge</i>	265				\$20,000	\$3,500		\$3,500	\$3,500				\$39,500
<i>Holliston - Holliston Trust</i>	266					\$1,000		\$5,000	\$5,000				\$6,000
<i>Medford Wellington Woods</i>	267			\$1,000			\$2,000	\$16,000	\$18,000		\$16,000		\$35,000
<i>Reading - Postmark Sq</i>	268			\$1,000				\$17,000	\$17,000				\$27,000
<i>Sherborn - Fields</i>	269			\$1,000				\$9,500	\$9,500				\$21,000
<i>Holliston - Village Green</i>	270			\$1,000				\$6,000	\$6,000		\$6,000		\$13,000
<i>Hopkinton</i>	271				\$1,000				\$0		\$6,500		\$7,500
<i>Rental Recertification: Messenger, Corey St</i>	272		\$1,000	\$1,000	\$7,650	\$3,750		\$3,750	\$3,750		\$3,750		\$40,900
<i>MassHousing Monitoring</i>	273								\$0		\$17,940		\$17,940
Completed	299	\$49,600	\$45,195	\$27,299	\$44,918	\$28,000			\$0				\$593,135
CPA/Financing - 712549/497000	30	\$385,000	\$202,600	\$4,397	\$212,500	\$0	\$0.00	\$0.0	\$0		\$0	\$225,000	\$2,989,893
Other	315	\$0	\$0	\$4,397	\$0.00	\$0.00	\$0.00	\$0.0	\$0		\$0	\$0	\$3,897
CPA	32	\$385,000	\$202,600	\$0	\$212,500	\$0	\$0	\$0.0	\$0		\$0	\$225,000	\$2,985,496
Escrow Deposits - 712548/481000	40		\$19,100	-\$20,000	\$0.00	\$0.00	\$0.00	\$0.0	\$0		\$0	\$0	\$0
Interest - 712548/482000, 712548/489000	41	\$17,491	\$2,356	\$4,702	\$12,623	\$15,000	\$0	\$11,000	\$11,000	\$11,000	\$11,000	\$11,000	\$95,356
Expenditures - 712557/522100	50	-\$56,136	-\$96,805	-\$199,375	-\$365,641	-\$155,299	-\$49,640	-\$52,285	-\$101,925	-\$101,000	-\$102,000	-\$306,000	-\$3,582,686
RHSO	54		-\$29,350	-\$32,376	-\$36,571	-\$42,416	-\$42,925	\$0	-\$42,925		-\$43,000	-\$42,000	-\$258,196
Programs - sum of below	56	-\$48,800	-\$46,565	-\$143,176	-\$313,346	-\$97,326	-\$6,000	-\$39,000	-\$45,000		-\$45,000	-\$250,000	-\$2,958,077
<i>Program - Small Grants</i>	561	\$0	-\$20,671	-\$31,829	-\$7,000	-\$16,900	\$0	-\$25,000	-\$25,000		-\$25,000	-\$25,000	-\$260,840
<i>Program - ERAP</i>	562					\$0	-\$6,000	-\$14,000	-\$20,000		-\$20,000	\$0	-\$40,000
<i>Project - Grant: Coolidge/SHA</i>	564	\$0	\$0	\$0	-\$250,000	-\$50,000	\$0	\$0	\$0		\$0	\$0	-\$450,000
<i>Project - Home Preservation</i>	566	-\$22,130	-\$4,216	-\$2,472	-\$41,634	-\$30,426	\$0	\$0	\$0		\$0	-\$225,000	-\$1,290,208
Lottery Expense (sum of below)	57	-\$6,622	-\$10,785	-\$11,632	-\$13,083	-\$15,557	-\$715	-\$13,285	-\$14,000		-\$14,000	-\$14,000	-\$240,076
<i>Advertising/Insurance</i>	571	-\$6,622	-\$10,785	-\$11,632	-\$13,083	-\$15,557	-\$715	-\$13,285	-\$14,000		-\$14,000	-\$14,000	-\$179,147
Trust portion of Salaries - 712551/511100	60	-\$7,306	-\$3,308	-\$2,199	-\$2,330.20	-\$2,330.20	-\$255	\$0	-\$255	-\$2,500	-\$2,500	-\$2,500	-\$221,160
Ending Balance	70	\$392,115	\$458,472	\$282,346.19	\$398,692.31	\$210,048.71	-\$47,895	\$211,289	\$163,394	\$162,084	\$142,084	\$69,584	

MUNICIPAL AFFORDABLE HOUSING TRUST

Annual Report to the Community Preservation Committee (CPC)

Municipal Affordable Housing Trusts (MAHT) created under MGL Chapter 44, section 55c are required to report Community Preservation Act (CPA) expenditures to the CPC on an annual basis. This form can be used to list CPA expenditures and should be filed with the municipal official responsible for completing the CPA Projects Report (CP-3). *Since the CP-3 is due to the Department of Revenue by September 15, this form should be submitted to the CPC by September 1 or another agreed upon date.*

TRUST NAME: Sudbury Housing Trust **FISCAL YEAR:** FY20

YOUR NAME: Elizabeth Rust **EMAIL:** Liz@RHSohousing.org

PHONE NUMBER: 978-208-2035

PROJECT #1	
Project name	Home Preservation – 8 Eddy, project ID 48197
Project address	8 Eddy
Approval date	FY2018
Project status	Completed
Description	Completion of post-closing repairs

Does this phase of the project include acquiring real property (such as ownership of land or buildings) or acquiring a real property interest (a legal interest in land such as an affordable restriction)? FY16

HOUSING UNITS ANTICIPATED or CREATED	
Number of new units created	0
Number of units supported	0
LAND	
Number of acres acquired for housing	.46
AFFORDABLE PROJECT RESTRICTIONS FOR THIS PROJECT	
Entity holding restriction	DHCD
Date recorded	7/15/2013
Book and page of restriction	62244/257
Registry of Deeds	Middlesex County
<i>If no restriction, please explain why.</i>	<i>If no restriction, please explain why.</i>

CPA PROJECT FUNDS FROM MAHT = \$30,426 (FY20 only)

Other Municipal Funds = \$14,639 (FY19)

Private Donations = Enter dollar amount.

State Funds = Enter dollar amount.

Federal Funds = Enter dollar amount.

Other Funds = Enter dollar amount. Please describe other funding: Enter other funding sources.

TOTAL PROJECT COST = \$45,065

Created by MHP with support from The Kuehn Charitable Foundation.



PROJECT # Enter project number.	
Project name	The Coolidge at Sudbury Phase 2, project ID 4853
Project address	189 Boston Post Road
Approval date	FY19
Project status	In progress
Description	Coolidge Phase 2 – Trust Grant

Does this phase of the project include acquiring real property (such as ownership of land or buildings) or acquiring a real property interest (a legal interest in land such as an affordable restriction)? FY15

HOUSING UNITS ANTICIPATED or CREATED	
Number of new units created	56
Number of units supported	56
LAND	
Number of acres acquired for housing	6
AFFORDABLE PROJECT RESTRICTIONS FOR THIS PROJECT	
Entity holding restriction	DHCD
Date recorded	4/26/2019
Book and page of restriction	62244/257
Registry of Deeds	Middlesex County
<i>If no restriction, please explain why.</i>	If no restriction, please explain why.

CPA PROJECT FUNDS FROM MAHT = \$50,000 (FY20 only, from Trust)

Other Municipal Funds = Enter dollar amount.

Private Donations = Enter dollar amount.

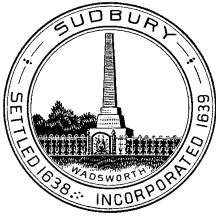
State Funds = Enter dollar amount.

Federal Funds: Enter dollar amount.

Other Funds = Enter dollar amount. Please describe other funding: Enter other funding sources.

TOTAL PROJECT COST = \$20,340,658





Town of Sudbury

Community Preservation Committee

Flynn Building
278 Old Sudbury Road
Sudbury, MA 01776
978-639-3387
Fax: 978-639-3314

cpc@sudbury.ma.us

www.sudbury.ma.us/cpc

PROJECT SUBMISSION FORM

Applicant:

Submission Date:

Group or Committee Affiliation (if any):

Applicant Address:

Purpose (please select all that apply):

Open Space & Recreation

Community Housing

Historic Resource

Applicant Email & Phone Number:

Project Manager Email & Phone Number:

Project Name:

Project Description:

Costs:

Fiscal Year	Total Project Cost	CPC Funds Requested	Other Funding Sources (Amount and Source)
2022			
2023			
2024			
2025			
2026			
Total			

How does this project meet the General Criteria and Category Specific Criteria for Community Preservation Committee projects (see attached)?

Does this project fall within the jurisdiction or interest of other Town Boards, Committees, Commissions, or Departments? If so, please list the boards, committees, commissions, or departments, whether applications and/or presentations have been made, and what input or recommendations have been given.

For Community Preservation Committee Use:

Form Received On: _____

Project Presented to CPC On: _____

Reviewed By: _____

Determination: _____

TOWN OF SUDBURY COMMUNITY PRESERVATION COMMITTEE

Guidelines for Project Submission

- 1) Each project request must be submitted to the Community Preservation Committee using the Project Submission Form as a cover sheet. Applications should be submitted in twelve (12) multiple copies and as an electronic PDF file.
- 2) Requests must include a statement of need and be documented with appropriate supporting information. The use of maps, visual aids, and other supplemental information is encouraged.
- 3) Obtain written proposals, estimates, quotes, and such other evidence to document project scope and cost.
- 4) If the request is part of a multi-year project, include the total project cost and allocations.
- 5) Describe the endorsement, support, or other recommendations, if any, by other Town Boards, Committees, Commissions, and Departments.
- 6) Provide examples of similar project proposals in other communities, if any, including examples of project scope, project cost, and status of completion.
- 7) For Applicants that have multiple project requests, please prioritize projects.
- 8) Requests must be received by **12:30 PM Friday, October 9, 2020** to be considered for recommendation at the May 2021 Annual Town Meeting.
- 9) Applicants must be present at a Community Preservation Committee meeting to answer questions. The Community Preservation Committee meeting schedule has been announced and is posted on the Town's website.

Please keep in mind there are legal limitations on the use of Community Preservation Act funds. Additional information on the Community Preservation Act and the Community Preservation Committee can be found on the Town's website at www.sudbury.ma.us, under Committees. The Community Preservation Committee can be reached by email at cpc@sudbury.ma.us. If you are in doubt about your project's eligibility after consulting these resources, you are encouraged to submit an application so the Community Preservation Committee can determine eligibility.

Please submit the Project Submission Form and accompanying documentation to:

Community Preservation Committee
c/o Planning and Community Development Department
Flynn Building
278 Old Sudbury Road
Sudbury, MA 01776
cpc@sudbury.ma.us

TOWN OF SUDBURY COMMUNITY PRESERVATION COMMITTEE

General Criteria

The Sudbury Community Preservation Committee will give preference to proposals that address as many of the following general criteria as possible:

- Are eligible for Community Preservation Act (CPA) funding according to the requirements described in the CPA legislation;
- Are consistent with the Town's Master Plan, Open Space and Recreation Plan, Land Use Priorities Committee Report, Town-wide Comprehensive Facility Study, Community Housing Plan, and other planning documents that have received wide scrutiny and input and have been adopted by the Town;
- Receive endorsement by other municipal boards, committees, commissions, or departments.
- Preserve the essential character of the town as described in the Master Plan;
- Save resources that would otherwise be threatened and/or serve a currently under-served population;
- Either serve more than one CPA purpose (especially in linking open space, recreation, and community housing) or demonstrate why serving multiple needs is not feasible;
- Demonstrate practicality, feasibility, urgency;
- Demonstrate that the project can be implemented expeditiously and within budget;
- Demonstrate that project alternatives, and alternative funding mechanisms, have been fully explored;
- Produce an advantageous cost/benefit value;
- Leverage additional public and/or private funds; and
- Preserve or utilize currently owned Town assets.

Category Specific Criteria

Open Space proposals that address as many of the following specific criteria as possible will receive preference:

- Permanently protect important wildlife habitat, including areas that:
 - are of local significance for biodiversity;
 - contain a variety of habitats, with a diversity of geologic features and types of vegetation;
 - contain a habitat type that is in danger of vanishing from Sudbury; or
 - preserve habitat for threatened or endangered species of plants or animals;
- Preserve Sudbury's rural and agricultural character;
- Provide opportunities for passive recreation and environmental education;
- Protect or enhance wildlife corridors, promote connectivity of habitat or prevent fragmentation of habitats;
- Provide connections with existing trails or potential trail linkages;
- Preserve scenic views;
- Border a scenic road;
- Protect drinking water quantity and quality;
- Provide flood control/storage;
- Preserve important surface water bodies, including wetlands, vernal pools or riparian zones; and
- Preserve a parcel identified in the 2009-2013 Open Space and Recreation Plan.

Recreation proposals that address as many of the following criteria as possible will receive preference:

- Support multiple recreation uses;
- Serve a significant number of residents;
- Expand the range of recreational opportunities available to Sudbury residents of all ages;
- Jointly benefit Conservation Commission and Park and Recreation Commission initiatives by promoting passive recreation, such as hiking, biking, and cross-country skiing, on town owned property;
- Maximize the utility of land already owned by Sudbury (e.g. school property); and
- Promote the creative use of railway and other corridors to create safe and healthful non-motorized transportation opportunities.

Community Housing proposals that address as many of the following criteria as possible will receive preference:

- Contribute to the goal of 10% affordability;
- Conform to the Town's Housing Production Plan;
- Promote a socioeconomic environment that encourages a diversity of income;
- Provide housing that is harmonious in design and scale with the surrounding community;
- Intermingle affordable and market rate housing at levels that exceed state requirements for percentage of affordable units;
- Ensure long-term affordability;
- Promote use of existing buildings or construction on previously-developed or Town-owned sites;
- Convert market rate to affordable units; and
- Give priority to local residents, Town employees, and participants in the Sudbury METCO program.

Historic Resource proposals that address as many of the following criteria as possible will receive preference:

- Protect, preserve, enhance, restore, and/or rehabilitate historic, cultural, architectural, or archaeological resources of significance, especially those that are threatened; and in the case of proposals on private property, the proposal and/or proponent meet certain economic criteria as may be required by the Community Preservation Committee;
- Protect, preserve, enhance, restore and/or rehabilitate Town-owned properties, features or resources of historical significance;
- Protect, preserve, enhance, restore, and/or rehabilitate the historical function of a property or site;
- Project is within a Sudbury Historic District, on a State or National Historic Register, or eligible for placement on such registers, or on the Sudbury Historic Properties Survey;
- Project demonstrates a public benefit; and
- Project demonstrates the ability to provide permanent protection for maintaining the historic resource; and in the case of proposals on private property, the proposal and/or proponent have demonstrated additional protective measures and have met additional criteria, as may be imposed by the Community Preservation Committee, to ensure the continued permanent protection of the historic resource.

Sudbury ERAP Tracker

Landlord	Household size, and ages	Job Description	Current Estimated Annual Income	Prior Annual Income	\$ chg	% Chg income	Client Eligible (Y/N?)	Unit Size	Montly Rent	Arears Requested Y/N	Monthly Assistance	Assistance to date	Total Assistance
Coolidge	1	Self Employed /Massage	\$ 36,382	\$ 61,086	\$ (24,704)	-40%	Y	1 BR	\$ 1,065.00	N	\$350	\$1,050	\$1,400
Private - ADU	1	Self-employed/ Law-firm	\$ 34,529	\$ 70,000	\$ (35,471)	-51%	Y	1 BR	\$ 1,750.00	N	\$350	\$1,050	\$1,400
Avalon	2 (1 ad, 1 chld)	Pre-school teacher	\$ 33,016	\$ 58,272	\$ (25,256)	-43%	Y	2 BR	\$ 1,625.00	N	\$500	\$1,500	\$2,000
Coolidge	1	Grocery Store	\$ 40,551	\$ 44,358	\$ (3,808)	-9%	Y	1 BR	\$ 1,034.00	N	\$350	\$1,050	\$1,400
Private SF	4 (1 ad, 3 ch)	After school/teaching assistant	\$ 76,438	\$ 79,191	\$ (2,753)	-3%	Y	4 BR	\$ 2,100.00	N	\$800	\$2,400	\$3,200
Avalon	3(1/2 ch 18+)	Tutor/ full time students	\$ 31,511	\$ 75,600	\$ (44,089)	-58%	Y	3 BR	\$ 1,776.00	Y	\$650	\$1,950	\$2,600
Number eligible								6			\$3,000	\$9,000	\$12,000

40B Monitoring Redesign

Overview for NEF development community stakeholders

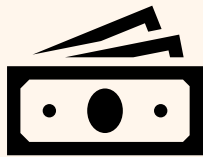
June 2020



MassHousing + 40B

- Chapter 40B was enacted in 1969 to **remove local zoning barriers** to the kind of affordable developments we finance.
- **MassHousing is one of four subsidizing agencies** responsible for administering 40B developments, along with DHCD, MassDevelopment and MHP.
- Today, most 40B projects are financed by private banks through the Federal Home Loan Bank of Boston's New England Fund. Since 2003, **MassHousing has administered all privately-financed developments.**

MassHousing's 40B team works to ensure:



Affordable units are marketed, sold and leased consistent with Fair Housing rules.



Income-eligible residents live in affordable units



Developers operate within statutory limits on profits and limited dividends

40B Affordability Monitoring

2,300

Affordable homeownership units monitored by external agents on behalf of MassHousing

2,500

Affordable rental units monitored directly by MassHousing

Affordability restrictions on many units extend in perpetuity

Affordability monitoring:



Ensuring **income-eligibility** of homebuyers and renters



Overseeing the **resale** of existing affordable units



Setting unit **resale prices**, approving and documenting **capital improvements**



Affordable **deed rider education**

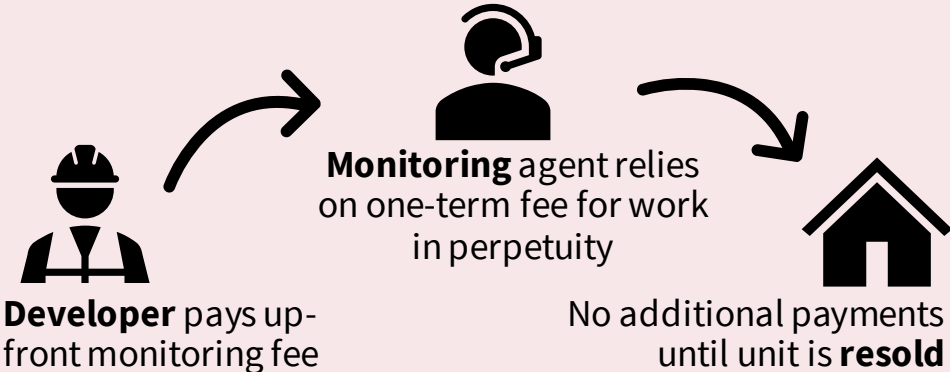


Enforcing **compliance** + protecting against **unauthorized sales**, refinancing, and lines of credit.

Monitoring Undercapitalization:

MassHousing has not made substantial changes to 40B homeownership monitoring since the Agency inherited responsibility in 2003.

The system is not adequately capitalized:



Most third-party monitoring agents we contract with are not currently accepting new projects because of inadequate funding.

40B Monitoring Redesign

- MassHousing is working to **remake and reform** our 40B affordability monitoring system.
- The redesign will set **qualification and performance standards** for our third-party monitoring partners.
- Reform efforts will improve **consistency** and **comprehensiveness** of homeownership and rental monitoring.
- These changes are necessary to ensure the **long-term sustainability** of 40B development under the New England Fund.

New Payment System

- MassHousing will set a new **payment standard** for homeownership monitoring agents and play an active role in administering payments to third-party affordability monitors.
- **Enhanced 40B development fees** will help cover the cost of the new monitoring system.
- MassHousing has invested substantially in affordability monitoring reform.

Other Ongoing 40B Compliance Efforts

- **Monitoring handbook rewrite:** Standardizing forms, reporting and data collection for homeownership monitoring agents. Instituting uniform compliance and enforcement protocols.
- **Enhanced homebuyer education:** Creating a new educational module to prepare first-time homebuyers for deed-restricted homeownership. Clear expectation-setting and understanding of deed rider protocols will create long-term compliance benefits.
- **Updated New England Fund program guidelines:** Increasing clarity and program user-friendliness for 40B NEF developers, and driving greater compliance through program transparency.
- Online Site Approval (PEL) application.

NEF 40B Fee Modernization Overview

- As part of MassHousing's work to strengthen the 40B program, the Agency is overhauling fees paid by NEF developers.
- Enhanced fees will help MassHousing drive stronger compliance outcomes and instill greater trust and transparency in the 40B program.
- Changes apply only to projects financed through the Federal Home Loan Bank of Boston's New England Fund. Fee changes do not apply to projects financed directly through MassHousing.
- Fee changes will be phased, with new Site Approval fees taking effect in September 2020, and Final Approval fees taking effect in January 2021.
- The NEF 40B fee structure will shift from flat fees at Final Approval, to per-unit fees that are proportional to projects' development costs. Fees will adjust for inflation annually.
- There are currently no changes proposed to the technical assistance fund, which is administered by MHP.

NEF 40B Fee Schedule – Site Approval

Current

- \$2,500 per project

Effective September 1, 2020

- \$7,500 per project

Site Approval fees apply to both homeownership and rental projects proposed to be permitted under the NEF program.

40B fees will adjust for inflation at a rate of 2% per year, beginning July 1, 2021

NEF 40B Homeownership Fee Schedule – Final Approval

Current

- \$2,500 application processing fee
- \$5,000 cost examination fee
- Additional affordability monitoring fees, negotiated directly with and paid directly to third-party monitoring agents

Effective January 1, 2021

- \$3,500 per affordable unit.
- Fee is inclusive of affordability monitoring and cost examination.
- All fees paid directly to MassHousing. MassHousing assumes responsibility for selecting affordability monitoring agent. Developer collaborates with monitoring agent on AFHMP, lottery, and deed-restricted initial sales.
- Fees are effective January 1, 2021, but process changes to monitoring agent selection will take effect Q4 2020. MassHousing will communicate monitoring transition to developers in the FA pipeline at this time.

40B fees will adjust for inflation at a rate of 2% per year, beginning July 1, 2021

NEF 40B Rental Fee Schedule – Final Approval

Current

- \$2,500 application fee
- \$5,000 cost certification fee
- \$7,500 initial affordability monitoring fee
- Annual monitoring fee of \$200 per unit

Effective January 1, 2021

- \$900 per affordable unit. Fee is inclusive of initial lease-up monitoring and cost examination.
- Annual monitoring fee of \$260 per affordable unit.

40B fees will adjust for inflation at a rate of 2% per year, beginning July 1, 2021

40B FEE SCHEDULE

SITE APPROVAL - OWNERSHIP AND RENTAL New England Fund/MassHousing Financing Programs Effective September 1, 2020		
PURPOSE	AMOUNT	PAYABLE
Application Processing	\$7,500	Upon Submission
Technical Assistance	\$2,500 + \$50/Unit	Upon Submission – to Massachusetts Housing Partnership
Appraisal	TBD	Upon Commission

FINAL APPROVAL – OWNERSHIP New England Fund Program Effective January 1, 2020		
PURPOSE	AMOUNT	PAYABLE
Application Processing	\$3,500/Affordable Unit	Upon Submission
Cost Certification		
Affordability Monitoring		
Revised Appraisal (if necessary)	TBD	Upon Commission

FINAL APPROVAL – RENTAL New England Fund Program Effective January 1, 2020		
PURPOSE	AMOUNT	PAYABLE
Application Processing	\$900/Affordable Unit	To MassHousing Upon Submission of a Final Approval Application
Cost Certification		
Affordability Monitoring		
Annual Monitoring Fee	\$260/Affordable Unit	Per the terms of the Regulatory Agreement

**40B fees will adjust for inflation at a rate of 2% per year, beginning July 1, 2021*

**A separate fee schedule for Final Approval of MassHousing financed Projects will be released at a later date.*

