

# 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](http://www.sudbury.ma.us/housingtrust)

### **AGENDA**

#### **Thursday, June 10, 2021**

#### **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

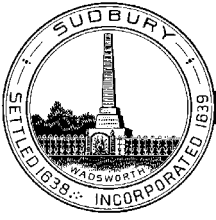
Meeting ID: 851 6432 6118

#### Welcome and Announcements

1. Minutes: Approve Meeting Minutes of May 13, 2021, if presented
2. Trust Meetings:
  - Regular Meetings: 8:00 AM, July 8, 2021, August 12, 2021
  - Schedule to Move Back to in Person
  - Special Meeting: Schedule a planning meeting for discussion on FY22 programs including rental assistance, small grants, development, other?
3. Financial Update
  - Vote to Ratify the FY21 March Transactions
  - FY22 Budget Discussion
4. Discussion/Update/Financial:
  - 67-73 Nobscot Road – Engineering Consultant
  - Update on Habitat For Humanity Unit
  - Monitoring Agent Update: Westford and Maynard Resales, Cold Brook Crossing
5. Small Grant Program:
  - Applicant 100 Review and Possible Vote (from March Grant Cycle)
6. Rental Assistance
7. Board Operations: Member Appointments and Reappointments, Town Meeting

*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**

**MAY 13, 2021 AT 8:00 AM**

### **VIRTUAL MEETING**

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

**Housing Trust Members Absent:** Robert Hummel and Susan Scotti

**Others Present:** Director of Planning and Community Development Adam Duchesneau and Director of the Regional Housing Services Office (RHSO) Liz Rust

Ms. Howe called the meeting to order at 8:03 AM.

#### **1. Minutes: Approve Meeting Minutes of April 8, 2021**

Mr. Riordan made a motion to approve the minutes of April 8, 2021. Ms. Dretler seconded the motion. Roll Call Vote: Ms. Howe – Aye, Mr. Riordan – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Mr. Gentile – Aye, and Mr. Pops – Aye.

#### **2. Financial – Cold Brook Crossing Update**

Ms. Rust provided an update on the project. She noted the Affordable Housing Marketing Plan was under review and the Regional Housing Services Office was working to get the affordable housing unit items for the project squared away.

#### **4. Update on Habitat for Humanity Unit**

Ms. Rust provided a status update regarding the Dutton Road unit where the owner had passed away and left behind a young adult child. She noted the ownership status for the unit was tied up in the court system but Habitat for Humanity, the state, and the Regional Housing Services Office were working together to sort the matter out for resale. Ms. Rust also noted there had been some water damage to the unit which needed to be addressed before the unit could be resold. She indicated the cost of the repairs could come from whatever equity was remaining in the home.

Ms. Howe asked if the young adult child was planning to live in the dwelling unit. Ms. Rust indicated she was not living there now and had no intention to continue to live there moving forward.

Ms. Cronin inquired about the adjacent unit as she noted the property contained two dwelling units in the two-family building. She was curious to know if there was any damage to the other dwelling unit.



Mr. Riordan asked about the insurance on the property. Ms. Rust indicated Habitat for Humanity had maintained the insurance payments on the dwelling unit, so the insurance coverage was still in place.

#### **5. Emergency Rental Assistance Program (ERAP) Review**

Ms. Rust asked if the Housing Trust wished to allocate additional funds to the Emergency Rental Assistance Program. She noted how the program had been funded to this point and where funding might come from in the future should the program be extended. Ms. Rust indicated the Town Social Worker recommended continuing the program.

Ms. Howe indicated state programs seemed to be slow in distributing housing support funding at this point and the nimbleness of this local program was likely very beneficial to landlords in the community.

There was then discussion regarding participants in the Emergency Rental Assistance Program and how people participating should also be seeking assistance from state or federal housing assistance programs.

Mr. Gentile stated he felt the Housing Trust should allocate funds to the program for the next fiscal year and the only real question was how much should be allocated.

Mr. Riordan supported Mr. Gentile's comments and indicated the Housing Trust should continue to fund the Emergency Rental Assistance Program to provide assistance to residents in need of housing support. He did wonder if a limit should be placed on the number of times a household could renew their enrollment/involvement in the program.

Ms. Howe made it clear the Emergency Rental Assistance Program was currently closed because there was no funding left in the program. However, if Town Meeting approved the Housing Trust's Community Preservation Act funding allocation request, additional funds would be forthcoming as of July 1, 2021.

Mr. Riordan supported adding an additional \$21,000 to the Emergency Rental Assistance Program as suggested as a possibility by Ms. Rust and then to re-open the program.

Mr. Riordan made a motion to continue the Emergency Rental Assistance Program and to add an additional \$21,000 from the Housing Trust's unrestricted budget to the program, and to limit program assistance to 12 months (initial period plus two renewals). Ms. Cronin seconded the motion. Roll Call Vote: Ms. Howe – Aye, Mr. Riordan – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Mr. Gentile – Aye, and Mr. Pops – Aye.

#### **6. 67-73 Nobscot Road – Possible Property Acquisition**

Mr. Riordan noted the subcommittee had met a few times recently regarding the responses submitted from five engineering consulting firms. He also noted a sixth firm submitted materials after the deadline and the subcommittee decided not to consider this late submission. Questions



from subcommittee members were sent to Mr. Duchesneau who relayed them to the firms and responses to those questions were received back to the subcommittee and reviewed. Mr. Riordan stated the subcommittee decided to interview the three firms of Allen & Major Associates, Beals + Thomas, and Bohler Engineering. These interviews would be conducted the week of May 17, 2021 by Town staff and two subcommittee members. Mr. Riordan indicated the next subcommittee meeting was on May 27, 2021 where the interviews would be discussed. Mr. Riordan noted additional funds would be needed for this site analysis initiative from both the Housing Trust and Sudbury Housing Authority. He recommended an additional \$10,000 be allocated from each entity for a total of \$20,000 from both the Housing Trust and Sudbury Housing Authority.

Ms. Lepak indicated the Sudbury Housing Authority had met earlier in the week and they had allocated an additional \$15,000 to the site analysis initiative.

Mr. Riordan also noted there might be a possibility for additional development further to the northwest on the property. He also recommended the Housing Trust allocate an additional \$15,000 to the efforts to match what the Sudbury Housing Authority had additionally allocated.

There was then discussion regarding how much to possibly allocate to the initiative.

Mr. Riordan made a motion for the Housing Trust to allocate an additional \$20,000 to the 67-73 Nobscot Road site analysis initiative. Mr. Gentile seconded the motion. Roll Call Vote: Ms. Howe – Aye, Mr. Riordan – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Mr. Gentile – Aye, and Mr. Pops – Aye.

At this time Ms. Howe and Mr. Duchesneau left the meeting.

### **7. Board Operations: Member Appointments and Reappointments, Town Meeting**

Ms. Rust informed the Housing Trust Mr. Hummel would be starting a new job with the Town of Belmont which might make it difficult for him to attend future Housing Trust meetings. The Housing Trust wished Mr. Hummel well in his new position and encouraged him to work with Mr. Duchesneau on his membership status as a trustee.

Mr. Riordan made a motion for the Housing Trust to recommend to the Select Board the reappointments of Carmine Gentile, Robert Hummel, and Susan Scotti to the Housing Trust for two (2) year terms. Mr. Gentile seconded the motion. Roll Call Vote: Ms. Howe – Absent, Mr. Riordan – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Mr. Gentile – Aye, and Mr. Pops – Aye.

### **3. Small Grant Program Review**

This item was not discussed by the Housing Trust at this meeting.

It was determined the next Housing Trust meeting would be held on Thursday, June 10, 2021 at 8:00 AM.



At 9:20 AM, Mr. Riordan made a motion to adjourn the meeting. Mr. Gentile seconded the motion. Roll Call Vote: Ms. Howe – Absent, Mr. Riordan – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Mr. Gentile – Aye, and Mr. Pops – Aye.



Sudbury Housing Trust  
Financial Projection - Detail

		FY07, FY08	FY18	FY19	FY20	FY21				FY22	Total
Description	Line#	Actual	Actual	Actual	Preliminary	Actual	Remaining	Projected	Planned	Projected	
Housing Unit Creation											
Cumulative #units created	1	2	14	14	14						
Cumulative per unit subsidy of created units	2	\$144,116	\$181,812	\$181,812	\$181,812						
Annual #Trust Created Units	3	2	0	0	0						
Annual \$Trust Created Units	4	\$288,231	\$0	\$0	\$0						
Total subsidy of created units	5	\$288,231	\$2,545,366	\$2,545,366	\$2,545,366						
#Trust Assisted Units	6	0	70	126	126						
\$Trust Assisted Units	7	\$0	\$400,000	\$650,000	\$650,000						
Cumulative per unit subsidy of assisted units	8	\$0	\$5,714	\$5,158.73	\$5,158.73						
Detailed Statement of Revenues and Expenditures											
Carry Forward	10	\$0	\$458,472	\$282,346	\$222,566	\$155,241	\$0	\$155,241	\$69,141	\$69,141	
Fees - 712543/430000	20	\$53,066	\$36,349	\$81,068	\$70,332	\$66,590	\$30,025	\$96,615	\$93,450	\$102,030	\$900,958
Sudbury Resales	25	\$0	\$0	\$1,500.00	\$5,382	\$10,675	\$0	\$10,675		\$5,000	\$25,199
External Contracts (sum of below)	30	\$49,600	\$36,349	\$79,568	\$64,950	\$55,915	\$30,025	\$85,940		\$97,030	\$863,939
Bedford Woods	31			\$2,000			\$2,000	\$2,000		\$12,200	\$16,200
Harvard - Pine Hill Village	32				\$4,200	\$5,000	\$4,500	\$9,500		\$10,500	\$24,200
Lexington Meadows	33					\$1,000	\$1,000	\$2,000		\$8,000	\$10,000
Medford Wellington Woods	34		\$1,000		\$1,000	\$9,000	\$0	\$9,000		\$14,000	\$36,000
Holliston - Holliston Trust	35				\$1,000		\$0	\$0		\$5,000	\$6,000
Holliston - Village Green	36		\$1,000	\$1,000			\$0	\$0		\$11,000	\$13,000
Hopkinton	37			\$1,000			\$0	\$0		\$6,500	\$7,500
Rental Recertification: Messenger, Corey St	38		\$1,000	\$7,650	\$3,750	\$2,050	\$1,600	\$3,650		\$3,750	\$40,800
Monitoring - MassHousing, Cold Brook	39					\$12,990	\$7,800	\$20,790		\$24,080	\$44,870
Harvard - Trail Ridge	40			\$20,000	\$3,500		\$4,500	\$4,500		\$2,000	\$42,500
Acton - PO Crossing	41			\$4,000	\$4,000	\$4,000	\$4,000	\$8,000			\$16,500
Reading - Postmark Sq	42		\$1,000		\$9,000	\$17,000	\$0	\$17,000			\$27,000
Sherborn - Fields	43		\$1,000		\$10,500	\$4,875	\$4,625	\$9,500			\$21,000
Weston Brook School	44		\$4,050	\$2,000	\$1,000		\$0	\$0			\$48,803
Completed	299	\$49,600	\$27,299	\$44,918	\$27,000			\$0			\$592,135
CPA/Financing - 712549/497000	30	\$385,000	\$4,397	\$212,500	\$0	\$0.00	\$0.0	\$0		\$388,500	\$3,153,393
Other	315	\$0	\$4,397	\$0.00	\$0.00	\$0.00	\$0.0	\$0		\$0	\$3,897
CPA	32	\$385,000	\$0	\$212,500	\$0	\$0	\$0.0	\$0		\$388,500	\$3,148,996
Escrow Deposits - 712548/481000	40		-\$20,000	\$0.00	\$0.00	\$0.00	\$0.0	\$0		\$0	\$0
Interest - 712548/482000, 712548/489000	41	\$17,491	\$4,702	\$12,623	\$16,311	\$1,201	\$799	\$2,000	\$2,000	\$2,000	\$69,667
Expenditures - 712557/522100	50	-\$56,136	-\$199,375	-\$365,641	-\$153,032.88	-\$101,451	-\$80,764	-\$182,215	-\$82,000	-\$472,000	-\$4,030,709
Legal/Parcel Feasibility	52		\$0	\$0	\$0	\$0	-\$30,000	-\$30,000		\$0	-\$33,600
RHSO/Other Contract Assistance	54		-\$32,376	-\$37,611	-\$42,416	-\$44,525	\$0	-\$44,525		-\$44,500	-\$261,296
Programs - sum of below	56	-\$48,800	-\$143,176	-\$313,346	-\$97,326	-\$46,426	-\$47,264	-\$93,690		-\$413,500	-\$3,375,267
Undesignated	560	\$0	\$0	\$0	\$0	\$0	\$0	\$0		-\$388,500	-\$388,500
Development/Nobscot	561	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0
Program - Small Grants	562	\$0	-\$31,829	-\$7,000	-\$16,900	-\$6,336	-\$18,664	-\$25,000		-\$25,000	-\$260,840
Program - ERAP	563				\$0	-\$31,400	-\$28,600	-\$60,000		\$0	-\$60,000
Project - H4H,Dutton Road	564	-\$11,920	\$0	\$0	\$0	\$0	\$0	\$0		\$0	-\$48,249
Project - Grant: Coolidge/SHA	565	\$0	\$0	-\$250,000	-\$50,000	\$0	\$0	\$0		\$0	-\$450,000
Project - Home Preservation	566	-\$22,130	-\$2,472	-\$41,634	-\$30,426	-\$8,690	\$0	-\$8,690		\$0	-\$1,298,898
Lottery Expense (sum of below)	57	-\$6,622	-\$11,632	-\$13,083	-\$13,291	-\$10,500	-\$3,500	-\$14,000		-\$14,000	-\$237,809
Advertising/Insurance	571	-\$6,622	-\$11,632	-\$13,083	-\$13,291	-\$10,500	-\$3,500	-\$14,000		-\$14,000	-\$176,881
Trust portion of Salaries - 712551/511100	60	-\$7,306	-\$2,199	-\$2,330.20	-\$934.79	-\$1,718	-\$782	-\$2,500	-\$2,500	-\$2,500	-\$222,009
Ending Balance	70	\$392,115	\$282,346.19	\$220,566.41	\$155,241.43	\$119,863	-\$50,721	\$69,141	\$80,091	\$87,171	



Firm	Total Expected Cost	Base Fee	Additional Fees Expected	Timing to Complete	# of Meetings included	# of Scenarios	Site Survey (Y/N)	Boundary Survey (Y/N)	Wetland Delineation, Flagging (Y/N)	Assessment of Current Structures (Y/N)	Soil Testing (Y/N)	Excavation Contractor (Y/N)	Conceptual Site Plan (Y/N)	Preliminary Development Budget (Y/N)	Final Report (Y/N)	Other
Allen & Major Associates	\$44,100	\$30,100	\$1,000 (2nd Conceptual Site Plan), \$2,000-\$3,000 (Wetland delineation and flagging), ~\$3,000 (5 meetings w/ 4h billable time for senior project manager), \$5,000 (excavator assumption, not by A&M)	6-8 weeks per interview (11 per email)	0 (can provide 4 meetings + existing structures site meeting for added cost)	1 Conceptual Site Plan to be reviewed and revised (can do 1 more for \$1,000)	Yes (including all surface features on the site, limits of pavement, building corners, sidewalks surrounding the site, and all utilities situated on or adjacent to the site)	No	No (would be added cost of \$2,000 to \$3,000)	Yes (Structural engineer to provide a preliminary structural assessment of the existing buildings based on observations made during a site visit)	Yes (1 day of onsite soil test pits)	No (No estimate provided, would need to be hired by client)	Yes	Yes (based on RS Means cost data and Mass Highway Weighted Bid Prices)	Yes	There is no estimate for excavation contractor, who will need to be hired by the client. The \$5,000 is to match Bohler's assumption, who also requires the client to hire the contractor.
Beals + Thomas	\$37,000	\$25,000	\$2,000 (excavation allowance), \$2,500 (home inspection services), \$2,500 (max estimated reimbursables), potentially added \$2,500-\$5,000 (to swap home inspector with structural engineer)	4-6 weeks from commencement date	2 (initial scope meeting and final conclusion meeting to report), w/ informal calls throughout )	3 development studies: 1) maintain existing + add additional units; 2) raze existing and add mix of single-family and two-family units; 3) raze existing and combination of single- and two-family structures.	Yes (will include the location of buildings, wetlands, areas of significant rock outcrops, pavement, curbing, signage, utility poles, manholes, water and gas gates, utility covers and major trees.)	No (would be additional service)	Yes	Yes. (Home inspector to review age and condition of the roof, plumbing and electrical systems, foundation, siding, windows, doors and general interior conditions)	Yes (6 test pits, 3 perc tests)	Yes (\$2,000 allowance for 1 day of testing; hired by B+T)	Yes	Yes (sitework related to earthwork/grading, utilities, driveways and parking areas, stormwater management and landscape improvements)	Yes	Reimbursable expenses include transportation, soil and water testing, printing and presentation costs, estimated at 10% of labor budget but unlikely to be that much. Excavation contractor would be subcontracted by Beals+Thomas. Can provide architectural plans for additional \$5,000-\$7,000 if desired.
Bohler Engineering	\$38,900	\$33,900	5000 (excavation contractor rough estimate)	3-5 months (can do quicker)	3 (one at report completion , one at concept plan completion and one at Site plan completion )	2 (conceptual sketches, with one to be developed further into preliminary site plan)	Yes (including 1' contours, visible surface features, the location of drainage structures and sanitary sewers within the above mentioned survey area with rim and grate elevations, inverts, pipe sizes and flow directions.)	No (would be \$10,000 extra)	Yes	Yes (Architect to verify existing conditions, document with pictures and review the current structures for potential reuse)	Yes (4-6 test pits)	No (\$5,000 estimated cost)	Yes	Yes	Yes	\$5,000 rough estimate for excavation contractor (needs to be hired by client)





April 12, 2021

Adam L. Duchesneau, AICP  
Director of Planning & Community Development  
Town of Sudbury  
Flynn Building, 278 Old Sudbury Road  
Sudbury, MA 01776

Via: Email to *DuchesneauA@sudbury.ma.us*

Reference: Proposal for Professional Services  
Sudbury Property Development Analysis  
67-73 Nobscot Road  
Sudbury, Massachusetts  
B+T Project No. M5346.21

Dear Mr. Duchesneau:

Beal and Thomas, Inc. (B+T) is pleased to submit this proposal to perform a development analysis of the approximately 5.4-acre parcel located on Nobscot Road for affordable housing use. We understand that the intent is to evaluate the property to determine the number of single-family and/or two-family dwelling units that could be located on the property.

As you may be aware, B+T performed a land planning study of the approximately 450-acre Nobscot Boy Scout Reservation in Framingham and Sudbury, of which this parcel is a part of, to determine the development potential in order to establish a valuation for the Sudbury Valley Trustees in 2005. At that time, we did not evaluate this parcel in detail as it is believed that the existing residential structures were in use and there was not an interest in modifying the structures or redeveloping this portion of the property. However, we are familiar with this site and its surroundings.

B+T is a multidisciplinary consulting firm providing professional services that support the development and conservation of land and water resources throughout New England. We have significant experience designing, permitting, and implementing complex real estate developments and redevelopments for public and private clients in urban and suburban environments. Our staff integrates the expertise of land surveyors, civil engineers, landscape architects, environmental planners and permitting specialists into a comprehensive project approach. We look forward to assisting with this interesting project.

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Southborough, MA 01772

Regional Office: Plymouth, MA

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Specifically, we propose the following scope of services:

## 1.0 SCOPE OF SERVICES

### 1.1 Data Gathering

#### 1.1.1 Site Visit

We will perform a site visit to observe the physical and environmental features of the site. The major emphasis of our visit will be to identify the environmental attributes of the site which will support or constrain the development program. Site planning issues such as access, surrounding land use patterns, visibility and infrastructure conditions will also be observed and documented during this reconnaissance survey. We will take digital photographs of the site and neighborhood for documentation purposes and to assist with future design studies and for supplemental inserts within project reports and/or deliverables.

#### 1.1.2 Environmental Research

We will perform a review of available information pertaining to environmental constraints on the site and will prepare exhibits depicting environmental constraints/considerations (including MassGIS wetlands, perennial streams, flood zones, vernal pools, state and federal rare species, soils, and other pertinent environmental data).

#### 1.1.3 Property Research

We will perform online research at the Sudbury town offices and other available online resources to obtain copies of available topographic information and assessor's records as well as the record deed and plan from the registry of deeds. We will obtain relevant information from the Planning Department, Building Department, Board of Health and other municipal departments with regard to existing site features such as existing underground utilities including water, sewer, drain and surface structures as well as water supply wells and septic systems if applicable.

#### 1.1.4 Regulatory Research

We will perform on-line research and research at the municipal offices to obtain and confirm current local land use regulations. We anticipate that these will include regulations of the Planning Board, Board of Health, Conservation Commission and other relevant local regulations identified during the course of our research.



1.1.5 Regulatory Analysis

We will perform a regulatory analysis to identify potential land use and environmental permits/approvals associated with the proposed Project. We will include local, state and federal regulatory reviews in this analysis. This will include the review of the Sudbury Zoning Bylaw, Subdivision Rules and Regulations and other applicable municipal, state, and federal permits and processes. We will prepare a memorandum summarizing this regulatory research.

1.1.6 Municipal Utility Capacity Research

We will perform research at the municipal offices to confirm the ability of the municipality to satisfy anticipated Project demands. We will focus this research on the municipal water supply, sanitary sewerage, and drainage systems adjacent to the site.

1.1.7 Soils Research

We will research soils information available from the USDA Natural Resources Conservation Service (NRCS) and other sources to ascertain the soil types at the property and identify subsurface soil issues which could affect the site development capacity and construction costs. The soil types will be evaluated as to the location of potential gravel deposits, the estimated depth to bedrock which may be unsuitable for road, utility or building construction, and groundwater conditions. The ability to design and construct subsurface sewage disposal systems will also be evaluated.

1.1.8 Soil Evaluation

We will perform a preliminary subsurface soil investigation by excavating test pits for the purpose of identifying suitable locations for new sewage disposal systems and stormwater structures. We will prepare test pit logs and Soil Evaluation reports in accordance with the requirements of Title 5. We have included an allowance in the fee section for an excavation contractor.

1.1.9 Site Analysis

We will analyze the site conditions with regard to topography, readily-available easement data, environmental resources, dimensional zoning constraints, regulatory constraints, traffic circulation and access, sight lines and screening, pedestrian corridors and trail linkages, utility availability, open space accessibility and other constraints and opportunities for property development. We will prepare a Site Analysis Plan to identify the location of existing site resources, and constraints and opportunities for development of the property.



#### 1.1.10 Existing Structures

In order to evaluate the four (4) existing residential structures on the property with regard to their suitability for use and the identification of necessary repairs, we will engage the services of a residential home inspector to review the houses. We anticipate that the home inspection will include review of the age and condition of the roof, plumbing and electrical systems, foundation, siding, windows, doors and general interior conditions. We have included an allowance in the fee section for the home inspection services.

### 1.2 Topographic Survey

#### 1.2.1 Wetlands Delineation

We will delineate and flag the boundary of bordering vegetated wetland (BBVW) on the subject property, as well as other identified resource areas. The BBVW will be determined by analysis of the plant communities and soils and located in accordance with the guidelines of the Massachusetts Wetland Protection Act with sequentially numbered flags. We will perform hand soil augers and transects at select locations within the BBVW resource area and prepare a summary memorandum of the resource area boundaries identified on the Project site. For the purposes of this proposal, we have estimated that approximately 600 linear feet of resource area will need to be identified and flagged on the Project site. If the site or portions of the site have been identified as FEMA designated flood hazard zones, our study will identify these limits. The limit of these various resource areas will be surveyed by total station methods for inclusion on the Topographic Plan.

#### 1.2.2 Field Survey

We will perform topographic field survey of the site and adjacent street in accordance with 250 CMR 6.0. This survey will include the location of site improvements and sufficient spot elevations to establish the contours on the subject property at a one-foot interval. The location of tree lines and features such as stone walls will be located along with utilities adjacent to the property in Nobscot Road. The survey will include the location of buildings, wetlands, areas of significant rock outcrops, pavement, curbing, signage, utility poles, manholes, water and gas gates, utility covers and major trees. The survey will extend 20 feet beyond the site boundary where accessible and will include topographic detail within the limits of Nobscot Road.



1.2.3 Datum and Benchmarks

The topographic survey will be referenced to an established datum. A minimum of two benchmarks on the subject property will be established and indicated on the Topographic Plan.

1.2.4 Topographic Plan

We will prepare a Topographic Plan of the property at a scale of 1 inch = 20 feet. The plan will show the one-foot contour intervals, pertinent spot elevations, and the results of our topographic, utility and site detail data collection survey. The property boundary and other relevant information will be shown on the plan.

1.3 Development Analysis

1.3.1 Development Studies

We will assess the available information, results of our field work and land use regulations research to determine the opportunities and constraints for development of the site. We will prepare conceptual development studies for the property. The development studies will be prepared utilizing information gathered as part of the site analysis work. At this time we anticipate that program elements for consideration would include multi-family residential use. The Conceptual Development Plans will address the following elements, in a general manner:

- a. Site arrangement of buildings, parking areas, drives and pedestrian linkages
- b. Preliminary grading, drainage and utility design
- c. Preliminary location of stormwater management facilities

1.3.2 Preliminary Sitework Cost Estimate

We will prepare a preliminary cost estimate that includes sitework related to earthwork/grading, utilities, driveways and parking areas, stormwater management and landscape improvements.

1.3.3 Summary Report

We will prepare a report summarizing our findings and will participate in a (virtual) meeting to review the results of the study.



## 2.0 ADDITIONAL SERVICES

The following are some of the services that are not included in this proposal. We would be pleased to provide these and other additional services that may become necessary as the project proceeds.

- 2.1 Boundary survey and/or preparation of subdivision plans
- 2.2 Design development or preparation of construction documents
- 2.3 Permitting

## 3.0 SCHEDULE OF SERVICES

We will commence services upon receipt of an executed copy of this proposal. We anticipate that the services outlined in Section 1.0 can be completed within four to six weeks of the commencement date.

## 4.0 FEES FOR SERVICES

All fees will be billed on a time and materials basis in accordance with the attached fee schedule.

- 4.1 The following is the estimated labor budget for the services outlined in Section 1.0, Scope of Services.

Total Estimated Labor Budget:	\$25,000
Allowance for excavation contractor	\$ 2,000
Allowance for home inspection services	\$ 2,500

- 4.2 Reimbursable expenses of approximately 10 percent of the estimated labor budget should be anticipated.
- 4.3 External reimbursable expenses such as permit application fees, soil and water testing special consultants or subcontractors, if incurred, will be in addition to the estimate of reimbursable expenses described above.
- 4.4 Additional Services will be provided for additional mutually satisfactory compensation.



Adam L. Duchesneau, AICP  
Director of Planning & Community Development  
Town of Sudbury  
April 12, 2021  
Page 7

As authorization to proceed and as approval of the estimated budget, please execute and return one copy of this proposal for our records.

We thank you for the opportunity to submit this proposal and look forward to providing services to the Town of Sudbury for this project.

Very truly yours,

BEALS AND THOMAS, INC.



David J. LaPointe, RLA, LEED AP  
Principal

Enclosure: Fee Schedule

AGREED AND ACCEPTED FOR  
TOWN OF SUDBURY

SIGNATURE \_\_\_\_\_

NAME/TITLE \_\_\_\_\_  
(print)

DATE \_\_\_\_\_

DJL/dmf/ggp/aak/M534621PR001



## FEE SCHEDULE

Effective January 1, 2021

Fees for Beals and Thomas, Inc. are based on the following time charges plus expense schedule. Invoices are due upon receipt. Beals and Thomas, Inc. retains all right, title and ownership interest in any and all plans, maps, charts, diagrams, models, specifications, studies, consultations, technical drawings, electronic files, and any other work products prepared on behalf of its clients ("Instruments of Service"). Beals and Thomas, Inc. grants to its clients a nontransferable and non-exclusive royalty-free license to use the Instruments of Service provided that payment for services rendered and expenses incurred is received in a timely manner. For all accounts remaining unpaid by the first of the month following the invoice date, Beals and Thomas, Inc. reserves the right to add a late charge of 1.50 percent per month or 18 percent per annum to each overdue invoice. This fee schedule may be revised periodically.

### Time Charges

<u>Rate Category</u>	<u>Hourly Rate</u>
Senior Professional Staff I	\$225.00
Senior Professional Staff II	\$200.00
Senior Professional Staff III	\$175.00
Senior Professional Staff IV	\$165.00
Senior Professional Staff V	\$145.00
Professional Staff I	\$125.00
Professional Staff II	\$110.00
Professional Staff III	\$95.00
Administrative/Technical Staff I	\$70.00
Administrative/Technical Staff II	\$50.00

Expert testimony in support of litigation and court appearances will be billed at a rate of \$225.00 per hour.

Projects requiring OSHA trained personnel will be billed with a supplemental rate of \$25.00 per hour in addition to the standard rate category.

Reimbursable expenses include transportation, delivery, printing costs, presentation materials, computer and field equipment, permit application fees, soil and water testing, police detail, special consultants, or subcontractors and similar costs directly applicable to the individual project. Reimbursable expenses shall be billed at the cost plus an accounting service fee of 10 percent, unless arranged otherwise. Permit application fees that are paid in advance by Beals and Thomas, Inc. will be billed at cost plus an accounting fee of 20%.

FeeSched-January 2021

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144 Turnpike Road  
Southborough, MA 01772

Regional Office: Plymouth, MA

T 508.366.0560 | [www.bealsandthomas.com](http://www.bealsandthomas.com) | F 508.366.4391



## Duchesneau, Adam

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**From:** David LaPointe <dlapointe@bealsandthomas.com>  
**Sent:** Friday, April 23, 2021 9:30 AM  
**To:** Duchesneau, Adam  
**Subject:** RE: 67-73 Nobscot Road Proposal - Follow Up Questions

Adam,

Please see our responses to the requested clarifications below. Please let me know if you need additional information.

Thank you,

**David J. LaPointe, RLA, LEED AP, CPSI**  
Principal



**BEALS + THOMAS**

144 Turnpike Road, Southborough, MA 01772  
32 Court Street, Plymouth, MA 02360  
t: 508.366.0560 ext.4857 f: 508.366.4391  
[dlapointe@bealsandthomas.com](mailto:dlapointe@bealsandthomas.com) | [www.bealsandthomas.com](http://www.bealsandthomas.com)

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**From:** Duchesneau, Adam <[DuchesneauA@sudbury.ma.us](mailto:DuchesneauA@sudbury.ma.us)>  
**Sent:** Tuesday, April 20, 2021 11:22 PM  
**To:** David LaPointe <[dlapointe@bealsandthomas.com](mailto:dlapointe@bealsandthomas.com)>  
**Subject:** 67-73 Nobscot Road Proposal - Follow Up Questions

Hello David,

The 67-73 Nobscot Road Subcommittee members have been reviewing the submitted proposals and have the following questions. Some questions were for all of the firms who submitted a proposal and others were specifically related to your proposal.

The questions are listed below. Please respond with answers to these questions **by 5:00 PM on Monday, April 26, 2021.**

Please let me know if you have any questions. Thank you.

Adam

---

### All Firms

- Above and beyond your cost estimate, what additional costs are we more or less likely to incur? **See below.**
- The information about meeting with us differs from proposal to proposal, so it would be helpful to get a schedule showing how many meetings are anticipated (and budgeted) and at what junctions in the process they will occur. **We anticipate an initial meeting early on in the project to review the scope and overall intent of the**



study, with informal correspondence and phone calls throughout the duration of the project to answer questions and provide updates, and a final meeting at the conclusion to review our findings and report.

- Please provide a task-by-task timetable or at least an estimate of project duration. Section 3.0 of our proposal states that we anticipate the project can be completed within 4-6 weeks from the commencement date.
- We would like a maximum number of bedrooms calculation for the property included as part of the work. Based upon the results of the soil testing and conceptual development studies, an approximate number of bedrooms that could be accommodated on the site can be prepared.

#### Beals + Thomas

- How many development studies will you provide? We anticipate preparing three (3) development studies: one study that maintains the existing structures and adds additional residential structures, a second study that razes the existing structures and utilizes a residential development consisting of single-family (or two-family) homes, and a third study that razes the existing structures and utilizes a combination of single family and two-family structures.
- While you include the cost of an excavation contractor in your budget, you specify that special consultants or subcontractors will be extra.
  - Under what conditions would such additional help be needed? We have not included the services of an architect for this study. If an architect is required to prepare preliminary designs and cost estimates, that would be an additional cost.
  - How likely is this? Other than the potential need for an architect, we would not anticipate additional consultants or subcontractors.
  - What would be the cost? We have reviewed the Project with an architect and to prepare basic floor plans and preliminary construction cost estimates for single-family and two-family (duplex) units would be approximately \$5,000-\$7,000. If more advanced designs were requested including 3D models/renderings, the architect's fee would be approximately \$10,000-\$15,000.
  - What are "bordering vegetated wetland data sheets" – what are they, why is this extra, and what is the cost? Will you provide them after flagging? MassDEP Bordering Vegetated Wetland (310 CMR 10.55) Delineation Field Data Forms are used to document the wetland plant communities to support the wetland line (delineation) in the field. We anticipated preparing these as part of the delineation, as a result it is unclear why it is interpreted as an additional cost in our proposal. These would be provided to the Town.
- Will there be witnessed soil testing? As this is intended to be a study to evaluate the development potential of the site, we were not anticipating witnessed testing by the Board of Health. If the project advanced to a definitive design to be permitted and constructed, at that time witnessed soil testing in the specific location(s) of the proposed septic systems could be performed as an additional service.
- Does "conceptual development studies" mean just site arrangement, grading and stormwater, or will there be more than one site arrangement? We prefer two plans which include the siting and size of buildings, and have mixed single and two-family buildings. A preliminary development budget is needed, though possibly not until there is a preferred site arrangement plan. We anticipate preparing three (3) development studies.
- Will the field survey result in a CAD file made available to the Town? Yes
- How many "Conceptual Development Plans" or options are included in the proposal? We anticipate preparing three (3) development studies.
- Does the proposal include a meeting with the Town prior to starting the Development Studies described in 1.3.1? Yes, we will attend a virtual or in-person meeting with town representatives to review the scope and intent of the study.
- The Preliminary Sitework Cost Estimate does not mention buildings - will it be possible to include a preliminary cost for all elements (including buildings) described in the Development Studies? We have not included the services of an architect for this study. If an architect is required to prepare preliminary designs and cost estimates, that would be an additional cost (see above).
- How many test pits anticipated (item 1.18)? We have anticipated and budgeted for one day of soil testing. We would anticipate that approximately six (6) test pits and three (3) percolation tests could be performed in one day.



Applicant 110:

New roof (leaking)

Number in Household: 4 – ages 45, 43, 11, 8

Income: \$60,000, 58% AMI

Senior Household: No

Minority: No

Disabled: No

Deed Restricted; No

Assessed Value of House: \$420,700, Mortgage: \$258,000, Equity of \$116,443

Amount Requested: \$5,000

Estimates Received:

Farmer Construction	\$ 14,700
LaBelle Roofing	\$ 10,650
Brothers	\$ 5,900





## Town of Sudbury

Sudbury Housing Trust

MAR 30 2021

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

<http://www.sudbury.ma.us>  
[SudburyHousingTrust@sudbury.ma.us](mailto:SudburyHousingTrust@sudbury.ma.us)

### SMALL GRANT PROGRAM APPLICATION

Any person in the household\* (optional):

Veteran: ☒ No ☐ Yes Disabled: ☒ No ☐ Yes

Deed Restricted Property: ☒ No ☐ Yes

#### 2. Property Information (optional)

Is there a mortgage on the property?

☐ No

☒ Yes, Balance: \$208,218.37 Mortgage

Please attached tax bill showing assessed value, and statement showing mortgage/lien balance

\$49,445.68 Home Equity  
Line of Credit

Is the property your primary residence?

☐ No

☒ Yes

Do you own additional real estate?

☒ No

☐ Yes, Address: \_\_\_\_\_

Please attached tax bill showing assessed value, and statement showing mortgage/lien balance

#### 3. House Repair Needed

Indicate the amount requested, and which estimate you are requesting:

\$ 5000.00

Please describe the work needed. Is completion of this work item related to preserving the structural integrity of the dwelling or health/safety/welfare of its occupants? Describe the urgency of need.

We have a 20+ year old roof with a single layer of asphalt shingles, no ice and water shield, and minimal insulation in the roof. As a result the roof has developed a leak which this winter leaked so significantly we had water pooling in our basement as it drained through the exterior wall.

We are concerned that future drainage will lead to rot and mold. We are looking to replace the roof shingles with rubber and the raised back roof and 2 inches of insulation and will ice and water shield with asphalt.

shingles on the front slope.



# Proposal

Page No. 1

of 1

Pages

## FARMER CONSTRUCTION

1 Colonial Drive  
Tyngsboro, MA 01879  
(978) 649-4349  
Lic. No. 006732

PR S C A	PHONE	617-970-0632	DATE	March 17, 2021
	JOB NAME	Roof		
	JOB LOCATION	Same		
	- CONTRACT -			JOB PHONE

We hereby submit specifications and estimates for:

1. Strip 1-layer of shingles from house roof (front + rear)
2. Supply + install Grace ice + water shield to all areas of roof front + back including rear shed dormer
3. Supply + install 8" aluminum drip edge to eaves + back areas of roof-front areas.
4. Supply + install GAF Timberline HD architectural roof shingles to all roof areas front, back + shed dormer.
5. Cut 1" air slot on each side of ridge, supply + install con-vent ridge vent along full length of ridge cap ridge with cap shingles.
6. Remove job related debris.
7. NOTE! Building Permit fee NOT INCLUDED + will be additional cost.

NOTE! If we find rotten wood it will be removed + new material installed at additional cost.

We Propose hereby to furnish material and labor — complete in accordance with above specifications, for the sum of:

Fourteen Thousand, Seven hundred 00/100 dollars (\$ 14,700)

Payment to be made as follows:

\$5000 down, \$5,000 when front roof is done + \$4,700 on completion of work listed in this contract.

All material is guaranteed to be as specified. All work to be completed in a workmanlike manner according to standard practices. Any alteration or deviation from above specifications involving extra costs will be executed only upon written orders, and will become an extra charge over and above the estimate. All agreements contingent upon strikes, accidents or delays beyond our control. Owner to carry fire, tornado and other necessary insurance. Our workers are fully covered by Workman's Compensation Insurance.

Authorized Signature

Heim Farmer

Note: This proposal may be withdrawn by us if not accepted within

5

days.

**Acceptance of Proposal**—The above prices, specifications and conditions are satisfactory and are hereby accepted. You are authorized to do the work as specified. Payment will be made as outlined above.

Date of Acceptance: X

Signature

X

Signature

X





LaBelle Roofing, Inc.  
304 Boston Post Road, Wayland, MA 01778  
Phone: (508) 358-7663  
Fax: (508) 358-7662

Company Representative  
Matt LaBelle  
Phone: (978) 870-3320  
matt@labelleroofing.com

### Strip & Re-roof

Obtain and post permit in accordance with local law.

Ensure proper safety precautions for steep slope roofing.

Cover/tarp house and remove all layers of roofing material. Re-nail and secure existing decking, (wood). If necessary, rotted wood will be replaced at \$75.00 per sheet for plywood and \$5.00 per linear foot for plank decking.

Install Grace Ice and Water Shield to entire roof area.

Install 8" aluminum drip edge around entire perimeter of roof.

Install Owens Corning Tru-Def Duration, lifetime architectural shingles. Includes starter shingles, field shingles and hip and ridge. Includes all pipe boot flashings. Install ridge vent as required along roof peaks, ensure proper air gap at ridge beam.

Install fully adhered .060 EPDM membrane on rear shed dormer. 2" poly-iso insulation is included.

Install new lead flashing - Grind mortar joints clean, install ice and water shield at base of chimney, install aluminum step flashing.  
Install new lead counter flashing, seal with siliconized mortar.

Dispose of all job related material, magnetically sweep job site and clean out gutters.

TOTAL

\$10,650.03



# BROTHER S CONSTRUCTION INC

BROTHER S CONSTRUCTION INC  
406 PLEASANT ST  
FRAMINGHAM, MA 01701  
+1 (508) 250-2480  
[asgeneralconstruction@hotmail.com](mailto:asgeneralconstruction@hotmail.com)

## PROPOSAL

Proposal #:	0000727
Date:	March 13, 2021

### REMOVE OLD ROOF AND INSTALL NEW ROOF \$5,900.00

- INCLUDE BACK W/ RUBBER ROOF

**TOTAL COST:** \$5,900.00 (five thousand nine hundred dollars)

#### Warranty

The Contractor undertakes that: any patent defect or other faults which may appear within 10 years of completion of the Works due to materials or workmanship not in accordance with this Contract, shall within a reasonable time after receipt of the Owner's written instruction be made good by the Contractor and unless otherwise mutually agreed upon, at his own cost.

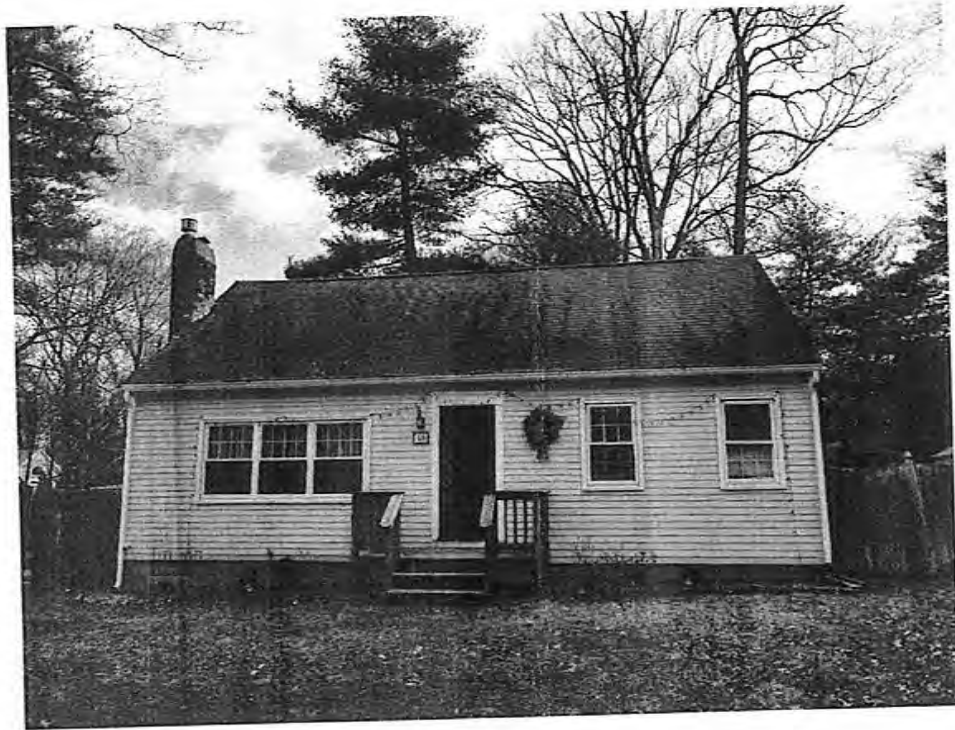
#### Disclaimer

We propose to provide all material, labor, equipment, and proper insurance to complete the job outlined below at the above listed address.

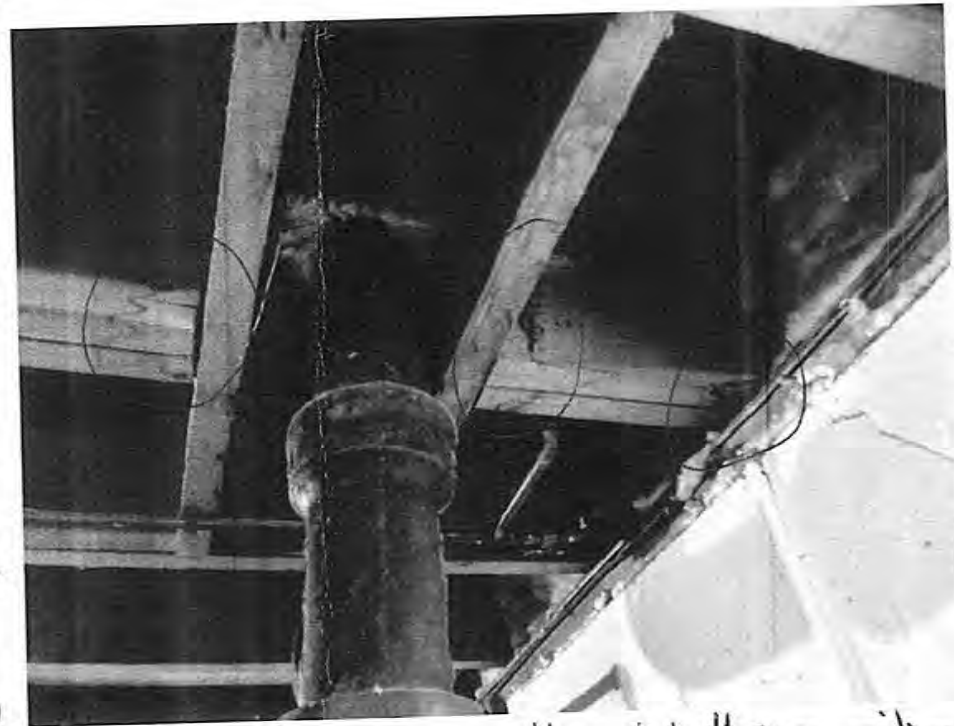
1. We will apply for, obtain, and pay for a Building Permit from The Town
2. We will protect the house and landscaping for the duration of the job.
3. We will strip off all existing roof shingles down to the original deck and dispose of off-site.
4. We will inspect the integrity of the roof deck and if any defects are found the client will be notified immediately before repairing.
5. We will 6 ft of Ice & Water Shield
6. We will install new color coordinated 8-inch aluminum drip edge on the entire perimeter of the roof including the rake board edge.
7. On all areas without Ice & Water Shield we roof vapor barrier.
8. Starter course of shingles will extend 3/4 of an inch beyond the drip edge.
9. We will install new LANDMARK Lifetime roof shingles on the entire roof, color of the customer's choice.
10. We will counter flash the chimney and any other areas that are needed.
11. We will install all new aluminum and neoprene pipe flanges where all pipes protrude through the roof.
12. We will cut open the ridge, if it is not cut already, and install "Cobra" vent ridge vent continuously on all ridges.
13. We will clean up and remove all debris and excess material from the site upon completion.
14. CLEAN UP GUTTER

By signing below, you understand and agree to this proposal, the price quoted, and to honor all contract obligations.





↑  
 Note: Staining = moss, lichen, and snow + ice dam damage  
 Raised roof assessed to have shingle damaged + lifting. Source of leak.



Visible water stains with additional in the attic caused by this winter's leak. Water also came through bathroom ceiling. Can + lights just above this area.



- Item 4.3 External reimbursable expenses - how likely are these (e.g., soil and water testing special consultants)?  
**Special consultants are not likely required for this study.**
  - Is it correct to assume the proposed cost plan includes the cost of an excavation contractor? **A \$2,000 allowance for an excavation contractor to perform the test pits has been included in our proposal.**
- 

Adam L. Duchesneau, AICP  
Director of Planning & Community Development  
Town of Sudbury | Flynn Building, 278 Old Sudbury Road | Sudbury, MA 01776  
t 978-639-3398 | f 978-639-3314 | [DuchesneauA@Sudbury.MA.us](mailto:DuchesneauA@Sudbury.MA.us)  
[www.sudbury.ma.us](http://www.sudbury.ma.us)