



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

REVISED AGENDA

Thursday, July 8, 2021

8:00 AM

Virtual Meeting

Pursuant to Chapter 20 of the Acts of 2021, this meeting will be conducted via remote means. Members of the public who wish to access the meeting may do so in the following manner:

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

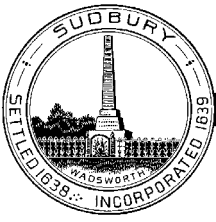
Meeting ID: 851 6432 6118

No in-person attendance of members of the public will be permitted and public participation in any public hearing conducted during this meeting shall be by remote means only.

Welcome and Announcements

1. Minutes: Approve Meeting Minutes of 6/10/21 and 6/17/21, if presented
2. Trust Meetings
 - Regular Meetings: 8:00 AM, August 12, 2021, September 9, 2021
3. Financial Update
 - Vote to Ratify the FY21 March and April Transactions
 - Vote FY22 Budget
 - VOTE to Accept Lottery Contracts, if presented
4. Trust Developed Properties
 - Maynard Road
 - 58 Robbins
5. Small Grant Program
 - No Update
6. Rental Assistance: Schedule a deeper discussion?
7. **Discussion/Update/Financials: 67-73 Nobscot Road**

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

JUNE 10, 2021 AT 8:00 AM

VIRTUAL MEETING

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

Housing Trust Members Absent: None

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 8:04 AM.

1. Minutes: Approve Meeting Minutes of May 13, 2021

Ms. Cronin 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, Mr. Hummel – Absent, Mr. Pops – Aye, and Ms. Scotti – Aye.

3. Financial Update

○ Vote to Ratify the FY21 March Transactions

Ms. Rust indicated the materials for this were not included in the packets so this item would need to be taken up at a future meeting.

○ FY22 Budget Discussion

Ms. Rust provided a summary overview of the budget and some of the specific items. She indicated the Housing Trust would need to determine if they wanted to shift some funding around to support different initiatives such as the 67-73 Nobscot Road property, the Emergency Rental Assistance Program, and the Small Grants Program. Ms. Howe indicated she would like to hold a special meeting at some point in the future to discuss some of these specific financial matters.

4. Discussion/Update/Financial:

○ 67-73 Nobscot Road – Engineering Consultant

Mr. Riordan stated the subcommittee had a recommendation for which engineering consultant should conduct the site feasibility analysis for 67-73 Nobscot Road after an interview process. After considering all factors, the subcommittee arrived at a recommendation that Beals + Thomas be engaged to conduct the site feasibility analysis. Mr. Riordan also noted it was anticipated this site analysis would likely cost up to \$40,000 to conduct this work.

Amy Lepak, Chair of Sudbury Housing Authority, indicated they had approved up to \$25,000 of funding for the site analysis work.

Ms. Rust clarified the total amount the Housing Trust had allocated was \$30,000. She recommended the Housing Trust take a formal vote on the subcommittee's recommendation to engage Beals + Thomas as the preferred consultant.

Hank Rauch, property owner from the Mayflower Council representing the Boy Scouts, noted they had worked with Beals + Thomas in the past.

Ms. Howe noted a Memorandum of Understanding/Agreement would need to be developed with the Sudbury Housing Authority to have a clear understanding as to how the costs for the site feasibility analysis would be covered.

Ms. Scotti asked for a bit more clarification as to why Beals + Thomas was being recommended as the preferred consultant. Mr. Pops indicated all of the firms who submitted proposals were well qualified but Beals + Thomas offered a little more in certain areas of work at one of the most reasonable costs of all of the proposals submitted. Mr. Pops also added if things did not work out with Beals + Thomas he would be comfortable working with Bohler Engineering as well.

At this time Mr. Hummel joined the meeting.

Ms. Dretler made a motion to enter into negotiations with Beals + Thomas to conduct the site feasibility analysis for the 67-73 Nobscot Road property and to have Bohler Engineering as the second choice for a consultant. Ms. Cronin seconded the motion. Roll Call Vote: Ms. Howe – Aye, Mr. Riordan – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Mr. Gentile – Aye, Mr. Hummel – Aye, Mr. Pops – Aye, and Ms. Scotti – Aye.

Mr. Riordan noted the subcommittee would still prefer to be involved to address some items as they might arise along the way leading up to an executed contract. He also provided some comments regarding the current easement situation at the property based upon the research which had been conducted by Town Counsel.

Ms. Dretler was curious to know when the abutters to the property would be contacted to be informed the property was going to be analyzed. Ms. Howe indicated Steven Swanger on the Sudbury Housing Authority had volunteered to discuss with the abutters what would be happening at the 67-73 Nobscot Road property.

There was then discussion regarding the easements to the property and if there were any impediments to using those easements. It was clarified that the southwestern easement and access point provided full and reasonable access to the 67-73 Nobscot Road property, but the northeastern easement and access point may only be feasibly used for some type of secondary access.

2. Trust Meetings:

- **Regular Meetings: 8:00 AM, July 8, 2021, August 12, 2021**
- **Schedule to Move Back to in Person**

There was discussion regarding the Open Meeting Law and the possible need to meet in-person moving forward. Mr. Gentile indicated the state senate would be voting that day on an extension of the Open Meeting Law provisions to allow virtual meetings until at least September of 2021. He also indicated if the next meeting was going to be held in-person, he might not be able to attend on July 8, 2021. Ms. Dretler and Mr. Riordan indicated they would have challenges attending in-person meetings in July and August. The Housing Trust members indicated they were supportive of continuing to conduct virtual meetings for as long as possible.

Mr. Riordan made a motion the Housing Trust Chair be authorized to indicate to the Select Board that the Housing Trust was in favor of continuing with virtual meetings as long as possible, acknowledging that there was pending legislation. Ms. Dretler seconded the motion. Roll Call Vote: Ms. Howe – Aye, Mr. Riordan – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Mr. Gentile – Aye, Mr. Hummel – Aye, Mr. Pops – Aye, and Ms. Scotti – Aye.

- **Special Meeting: Schedule a planning meeting for discussion on FY22 programs including rental assistance, small grants, development, other?**

The Housing Trust determined their next meeting would be held on June 17, 2021 at 8:00 AM and the meeting would cover these various financial topics.

At this time Ms. Howe left the meeting and passed off Chair duties to Mr. Riordan.

4. Discussion/Update/Financial:

- **Update on Habitat For Humanity Unit**

Ms. Rust provided a status update for the dwelling unit. She indicated a pipe had burst in the house and water had been running unnoticed or impeded for four months. Ms. Rust stated the right to access issues had been addressed and Habitat for Humanity was able to get into the unit. She noted the damage and disrepair inside the dwelling unit was extensive and the unit may need to be entirely renovated. Ms. Rust stated Habitat for Humanity was currently assessing the situation to determine what work needed to be done to rehabilitate the unit. Mr. Gentile noted that if the building was not a duplex, it sounded as though the Habitat for Humanity unit might just be a complete demolition. Ms. Rust indicated there was still \$180,000 remaining on the mortgage for the unit.

5. Small Grant Program

- **Applicant 110 Review and Possible Vote (from March Grant Cycle)**

Ms. Rust indicated an application was received on March 30, 2021 and it was for a request for roof repair funding in the amount of \$5,000. It was noted three estimates had been submitted with the application. Mr. Riordan confirmed the homeowner would pay their money first if any funding was needed up front and that the Applicant could proceed with whichever estimate they preferred.

Mr. Gentile made a motion to award \$5,000 to Applicant 110 for the roof repair. Ms. Cronin seconded the motion. Roll Call Vote: Ms. Howe – Absent, Mr. Riordan – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Mr. Gentile – Aye, Mr. Hummel – Aye, Mr. Pops – Aye, and Ms. Scotti – Aye.

6. Rental Assistance

The Housing Trust members decided they would take this matter up at their June 17, 2021 meeting.

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

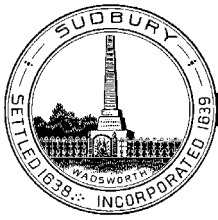
Mr. Riordan noted Articles 32 and 33 were approved at the 2021 Annual Town Meeting which were the funding for the Housing Production Plan and the Town's annual Regional Housing Services Office Membership Fee.

4. Discussion/Update/Financial:

○ Monitoring Agent Update: Westford and Maynard Resales, Cold Brook Crossing

Ms. Rust noted various approvals, findings, and reviews had been occurring for each of these items and she wanted to credit Ms. Howe for continuing to advance these activities behind the scenes.

At 9:40 AM, Mr. Gentile made a motion to adjourn the meeting. Mr. Riordan seconded the motion. Roll Call Vote: Ms. Howe – Absent, Mr. Riordan – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Mr. Gentile – Aye, Mr. Hummel – Aye, Mr. Pops – Aye, and Ms. Scotti – Aye.



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DRAFT MINUTES

JUNE 17, 2021 AT 8:00 AM

VIRTUAL MEETING

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

Housing Trust Members Absent: None

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

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

Cold Brook Crossing Affordable Update

Ms. Rust indicated there were a few remaining issues related to the Affordable Fair Housing Marketing Plan and the Affordable Housing Restriction, and they were working through those in an attempt to close them out. She indicated an internal staff meeting had been held on June 16, 2021 to discuss the matter in more detail.

1. Discussion on FY22 Programs:

o Development

iii. Habitat For Humanity Unit

Ms. Rust indicated she had met with someone from Habitat for Humanity. They were willing to have people monitor the site and work to perform all of the repairs. She indicated the Housing Trust would still need to purchase new materials and items for the dwelling unit. Ms. Rust stated the Housing Trust should look into setting aside some money to ensure they had cash ready to handle ongoing expenses for the project.

Ms. Howe asked if there would be any payment responsibilities for the Housing Trust based upon payment due by the previous owner that were outstanding. Ms. Rust outlined some payments that would need to be made.

At this time Mr. Riordan joined the meeting.

Ms. Cronin raised questions about private mortgage insurance and insurance claims for the dwelling unit. She also inquired if the other unit in the duplex had any damage, and Ms. Rust confirmed there was not and it was in good shape.

Ms. Howe recommended providing a loan to Habitat for Humanity for the work on this project, but to set a cap on what the amount would be. Ms. Rust indicated she would work to obtain a line by line itemized cost for the rehabilitation of the unit in order to work out a services agreement with Habitat for Humanity.

Mr. Gentile indicated he felt there would be ways to alleviate situations such as this in the future. He believed there were conditions at the property which might have allowed the Town or other entities to secure the unit to ensure there would be no damage to the unit, such as what happened to this unit with the extensive amount of water damage. Mr. Gentile noted if this had been a condominium situation, it would have allowed the other unit owner in the duplex to gain access to the vacant unit.

- Rental Assistance
 - i. *Emergency or Not*
 - ii. *Amount per Month*
 - iii. *Number of Months*
 - iv. *Eligibility AMI*
 - v. *Renewal Policy*
 - vi. *Outreach*

Ms. Howe noted the program had been extended for approximately a year by the Housing Trust. Ms. Rust stated people participating in the program had to show their income had been impacted by the COVID pandemic.

Ms. Howe asked how things should proceed with the Town's rental assistance program and its parameters. Mr. Riordan pointed out the state now had a very robust rental assistance program which could handle what the Town's program had been doing for several years. However, he also noted that execution of providing this assistance at the state level could be somewhat challenging or perhaps participants would be subject to application backlogs. Mr. Riordan indicated he felt the program should not accept any new applications, but should allow households who were currently in the program to pursue all of the renewals they were entitled to.

Mr. Gentile noted the recent law that was passed to extend some of the regulations permitted under the pandemic provided continued protection to tenants.

Mr. Riordan inquired as to how much money the Housing Trust had spent on the Emergency Rental Assistance Program. Ms. Rust indicated through the end of March 2021 was \$30,000 approximately and there was approximately another \$10,000 which had been allocated. Mr. Riordan stated he preferred having the rental assistance program in the community, but was a little nervous that if the program were opened up beyond households that were impacted by COVID, they might receive a flood of new applications.

Ms. Howe noted a number of assistance programs were beginning to come to a close. Ms. Scotti noted the enhanced unemployment benefits ended in September of 2021.

Ms. Howe recommended the program be suspended for new applications until the fall of 2021. Mr. Riordan suggested that in the meantime, the Housing Trust look at crafting a new rental assistance program that may not rely upon on any COVID requirements. Ms. Rust noted the Town Social Worker had advocated to have the Emergency Rental Assistance Program continue to remain open, including for new applicants, for the foreseeable future.

Ms. Cronin noted one additional way to provide assistance to low income households would be to provide assistance for security deposits on their rental units.

Mr. Pops felt the rental assistance program had been a huge help in keeping people in their homes during the pandemic.

There was then discussion regarding what level of assistance could be provided to households in any new program.

- Development

- iii. *Maynard Road Units*

Ms. Cronin noted this was a 3-unit affordable dwelling project and the units there needed gutters. She wanted to know how they could obtain funding from the Small Grants Program for this project. Ms. Rust indicated she had been in touch with the unit owners about applying to the program.

There was discussion regarding pictures from one of the dwelling units which displayed cracks around the some of the door frames and windows.

Regarding the gutters, Mr. Gentile recommended the unit owners make a case as to why the gutters would resolve the existing problem. Ms. Howe wondered if a French drain system might be more beneficial to these units.

- ii. *New Home Preservation*

Ms. Rust inquired as to how the Housing Trust wanted to allocate these funds (approximately \$300,000 or so). Ms. Howe stated the Housing Trust could look at buying down a unit in a project at a future point in time. There was consensus to use the money for the 67-73 Nobscot Road project or other development opportunities.

- i. *67-73 Nobscot Road*

Ms. Rust inquired if the Housing Trust wanted to put any specific money into the project budget. Ms. Dretler indicated Select Board Member Dan Carty was interested in having someone come to the Select Board to discuss the project with them when there was a good point to provide an update.

Mr. Duchesneau indicated he would reach out to Beals + Thomas to commence negotiations, but had not had time to do it to this point.

Mr. Riordan wanted everyone to know the subcommittee was aware there needed to be some outreach to the neighbors in the area prior to any site analysis work being performed at the property.

There was discussion regarding neighborhood concerns and objections to new housing projects in various locations in the community.

- o Small Grants

- i. *Review Program Guidelines for Possible Revisions*

Ms. Rust indicated the maximum grant available was \$5,000 per grant period and a cap of no more than \$10,000 over 7 years for a household at a given property address. Ms. Howe noted the Housing Trust had raised questions in the past regarding the amount of these grants, their frequency, and scope of the assistance being provided under the program.

Ms. Rust stated Community Preservation Act funds could not be used for this program so the Housing Trust had to keep this in mind when looking to provide funding to the program.

Mr. Pops recommended some of the parameters be reviewed and the expectations of the grant recipients in how they used the money should be considered.

The Housing Trust determined their next meeting would be on Thursday, July 8, 2021 at 8:00 AM.

At 9:55 AM, Ms. Howe made a motion to adjourn the meeting. Mr. Riordan seconded the motion. Roll Call Vote: Ms. Howe – Aye, Mr. Riordan – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Mr. Gentile – Aye, Mr. Hummel – Aye, Mr. Pops – Aye, and Ms. Scotti – Aye.

**Sudbury Housing Trust
FY21 Transactions**

7/1/20	Jul-20	\$0.00	\$0.00	Carryover 155,241.43		
3/1/21	Feb-21	\$0.00	\$109,183.55	Balance to \$109,183.55		
3/1/21	Mar-21	\$1,200.00	\$110,383.55	Fee	Postmark 4001	Harris & Murphy
3/24/21	Mar-21	\$1,200.00	\$111,583.55	Fee	Postmark 1002	Carter
3/24/21	Mar-21	\$4,150.00	\$115,733.55	Fee	Avalon Annual Monitoring	Avalon
3/31/21	Mar-21	\$242.01	\$115,975.56	Interest	Interest Feb	Town of Sudbury
3/31/21	Mar-21	(\$344.18)	\$115,631.38	Interest	Interest Feb	Town of Sudbury
3/11/21	Mar-21	(\$97.01)	\$115,534.37	Salary	Payroll	Town of Sudbury
3/25/21	Mar-21	(\$88.48)	\$115,445.89	Salary	Payroll	Town of Sudbury
3/4/21	Mar-21	(\$800.00)	\$114,645.89	Expense	ERAP Expense	Jones
3/4/21	Mar-21	(\$500.00)	\$114,145.89	Expense	ERAP Expense	Avalon
3/4/21	Mar-21	(\$650.00)	\$113,495.89	Expense	ERAP Expense	Avalon
3/4/21	Mar-21	(\$350.00)	\$113,145.89	Expense	ERAP Expense	CCC Post Road
3/4/21	Mar-21	(\$350.00)	\$112,795.89	Expense	ERAP Expense	CCC Post Road
3/4/21	Mar-21	(\$350.00)	\$112,445.89	Expense	ERAP Expense	CCC Post Road
3/4/21	Mar-21	(\$350.00)	\$112,095.89	Expense	ERAP Expense	CCC Post Road
2/25/21	Mar-21	(\$1,600.00)	\$110,495.89	Expense	SHT Audit	Borrgatti Harrison
3/11/21	Mar-21	(\$257.50)	\$110,238.39	Expense	Lottery Ad	Bay State Banner
3/18/21	Mar-21	(\$218.00)	\$110,020.39	Expense	Lottery Ad	Bay State Banner
3/18/21	Mar-21	(\$157.50)	\$109,862.89	Expense	Lottery Ad	Bay State Banner
3/18/21	Mar-21	(\$150.00)	\$109,712.89	Expense	Lottery Ad	Bay State Banner
3/31/21	Mar-21	\$150.00	\$109,862.89		PO Encumbrance/ME release	
4/1/21	Mar-21	\$0.00	\$109,862.89	Balance to \$109,862.89		
4/2/21	Apr-21	\$7,800.00	\$117,662.89	Fee	Fee	Cold Brook Monitoring
4/2/21	Apr-21	\$1,625.00	\$119,287.89	Fee	Sherborn Closing	Trask
4/2/21	Apr-21	\$4,000.00	\$123,287.89	Fee	PO Crossing sale	
4/16/21	Apr-21	\$1,600.00	\$124,887.89	Fee	Corey St cert	
3/31/21	Apr-21	\$128.40	\$125,016.29	Interest	Interest Mar	Town of Sudbury
3/31/21	Apr-21	(\$280.84)	\$124,735.45	Interest	Interest Mar	Town of Sudbury
4/8/21	Apr-21	(\$88.48)	\$124,646.97	Salary	Payroll	Town of Sudbury
4/22/21	Apr-21	(\$88.48)	\$124,558.49	Salary	Payroll	Town of Sudbury
4/15/21	Apr-21	(\$650.00)	\$123,908.49	Expense	ERAP Expense	Avalon
4/15/21	Apr-21	(\$500.00)	\$123,408.49	Expense	ERAP Expense	Avalon
4/15/21	Apr-21	(\$350.00)	\$123,058.49	Expense	ERAP Expense	CCC Post Road
4/15/21	Apr-21	(\$350.00)	\$122,708.49	Expense	ERAP Expense	CCC Post Road
4/15/21	Apr-21	(\$350.00)	\$122,358.49	Expense	ERAP Expense	CCC Post Road
4/15/21	Apr-21	(\$350.00)	\$122,008.49	Expense	ERAP Expense	CCC Post Road
4/15/21	Apr-21	(\$800.00)	\$121,208.49	Expense	ERAP Expense	Jones
4/15/21	Apr-21	(\$650.00)	\$120,558.49	Expense	ERAP Expense	Avalon
4/15/21	Apr-21	(\$500.00)	\$120,058.49	Expense	ERAP Expense	Avalon
4/15/21	Apr-21	(\$350.00)	\$119,708.49	Expense	ERAP Expense	CCC Post Road
4/29/21	Apr-21	(\$350.00)	\$119,358.49	Expense	ERAP Expense	CCC Post Road
4/29/21	Apr-21	(\$800.00)	\$118,558.49	Expense	ERAP Expense	Jones
4/29/21	Apr-21	(\$160.00)	\$118,398.49	Expense	Lottery expense	Harvard Press
4/29/21	Apr-21	(\$395.00)	\$118,003.49	Expense	Lottery expense	Lowell Publishing
4/29/21	Apr-21	(\$150.00)	\$117,853.49	Expense	Lottery expense	Gatehouse Media
4/30/21	Apr-21	\$2,050.00	\$119,903.49	Expense	Lottery expense/refund	
4/30/21	Apr-21	\$3,950.00	\$123,853.49		PO Encumbrance/ME release	
5/1/21	Apr-21	\$0.00	\$123,853.49	Balance to \$123,853.49		

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	\$181,406	\$98,989	
Fees - 712543/430000	20	\$53,066	\$36,349	\$81,068	\$70,332	\$81,615	\$15,000	\$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	\$70,940	\$15,000	\$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	\$3,650	\$0	\$3,650		\$3,750	\$40,800
Monitoring - MassHousing, Cold Brook	39					\$20,790	\$0	\$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	\$8,000	\$0	\$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	\$6,500	\$3,000	\$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	\$220,000	\$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	\$220,000	\$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	\$1,049	\$799	\$1,848	\$11,000	\$2,000	\$69,514
Expenditures - 712557/522100	50	-\$56,136	-\$199,375	-\$365,641	-\$153,032.88	-\$108,156	-\$44,059	-\$152,215	-\$332,000	-\$502,500	-\$4,031,209
Legal/Parcel Feasibility	52		\$0	\$0	\$0	\$0	\$0	\$0		-\$30,000	-\$33,600
RHSO/Other Contract Assistance	54		-\$32,376	-\$37,611	-\$42,416	-\$44,525	\$0	-\$44,525		-\$45,000	-\$261,796
Programs - sum of below	56	-\$48,800	-\$143,176	-\$313,346	-\$97,326	-\$50,826	-\$42,864	-\$93,690		-\$413,500	-\$3,375,267
Undesignated	560	\$0	\$0	\$0	\$0	\$0	\$0	\$0		\$0	\$0
Development/Nobscot	561	\$0	\$0	\$0	\$0	\$0	\$0	\$0		-\$288,500	-\$288,500
Program - Small Grants	562	\$0	-\$31,829	-\$7,000	-\$16,900	-\$4,286	-\$20,714	-\$25,000		-\$25,000	-\$260,840
Program - ERAP	563				\$0	-\$37,850	-\$22,150	-\$60,000		-\$100,000	-\$160,000
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	-\$12,805	-\$1,195	-\$14,000		-\$14,000	-\$237,809
Advertising/Insurance	571	-\$6,622	-\$11,632	-\$13,083	-\$13,291	-\$12,805	-\$1,195	-\$14,000		-\$14,000	-\$176,881
Trust portion of Salaries - 712551/511100	60	-\$7,306	-\$2,199	-\$2,330.20	-\$934.79	-\$1,895	-\$605	-\$2,500	-\$2,500	-\$2,500	-\$222,009
Ending Balance	70	\$392,115	\$282,346.19	\$220,566.41	\$155,241.43	\$127,853	-\$28,865	\$98,989	\$171,356	\$86,519	



Town of Sudbury

Sudbury Housing Trust

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

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

July 8, 2021

Sudbury Select Board
278 Old Sudbury Road
Sudbury, MA 01776

RE: Sudbury Housing Trust, FY 2022 Budget Review

Dear Members of the Board:

This memo informs the Board of Selectmen of the Fiscal Year 2022 budget of the Sudbury Housing Trust, as voted by the Sudbury Housing Trust at their July 8, 2021 meeting.

The overall financial process for the Sudbury Housing Trust is defined in the Trust charter which requires the yearly approved budget to be recorded by the Town Treasurer/Collector. The Trustees approved this budget on March 5, 2020, and are providing it for informational purposes to the Select Board.

Fiscal Year 2022 will be the 14th full fiscal year of the Trust, chartered in February 2007.

To date, the Trust has created 14 units of housing at an average subsidy of ~\$182,000 per unit. All the units created with Trust funds are registered on the State Subsidized Housing Inventory, and have perpetual deed restrictions. Additionally the Trust has provided important gap funding to financially assist in creating 120 additional units of housing at the Coolidge at Sudbury (64, 56) and Sudbury Housing Authority projects (6). This gap funding came from CPA funds appropriated at Town Meeting. The Trust depends on CPA funds for housing unit creation, and received approval at Town Meeting for CPA funds in FY22.

The FY22 budget summary for the Sudbury Housing Trust reflects a continuation of the Trust Small Grant Program, Rental Assistance Program and work towards creation of at least one new housing unit, funded with the CPA appropriation. The plan includes continued revenue from the lottery and monitoring agent services contracts, funding the Small Grants Program as well as staff assistance from the RHSO.

Cynthia Howe
Chair, Sudbury Housing Trust

**Sudbury Housing Trust
FY22 Budget**

	FY21 - ESTIMATES					FY22 Projection	
Description	Budget (3/20)	Planned	Difference	Comments		Budget	Comments
Beginning Balance	\$181,406	\$155,241	-\$26,165			\$98,989	Estimated
Revenue							
Fees	\$93,450	\$96,615	\$3,165			\$102,030	
CPA/Other revenue	\$220,000	\$0	-\$220,000	Did not apply as originally planned		\$388,500	Appropriated
Other Revenue	\$11,000	\$1,848	-\$9,152	Change in conditions		\$2,000	
Expenses							
Expenditures	-\$332,000	-\$152,215	\$179,785	No unit created, Rental Assistance Program added		-\$502,500	E/RAP (\$100k), Development (\$318.5k), Small Grants (\$25k), Lottery Expense (\$14k), Admin/RHSO (\$45k)
Salaries	-\$2,500	-\$2,500	\$0			-\$2,500	
Ending Balance	\$171,356	\$98,989	-\$72,367			\$86,519	

Sudbury Lottery and Monitoring Contracts

<i>Project Name</i>	<i>Contracting Entity</i>	<i>Project Location</i>	<i>Type</i>	<i>Program</i>	<i># Units</i>	<i>Per Unit</i>	<i>Gross</i>	<i>Mktg Expenses</i>	<i>Net</i>	<i>Status</i>	<i>Marketing Start Date</i>	<i>Completion Date</i>
Leland Farms	Other Town	Sherborn	Lottery - Resale	Local	2	\$3,500	\$7,000	\$0	\$7,000	1 - Proposed		
Graystone Lane	Private Developer	Natick	Lottery - Initial Sale	DHCD/LIP	3	\$2,500	\$9,500	\$2,000	\$7,500	1 - Proposed		
Holliston Housing Trust	Other Town	Holliston	Lottery - Initial Sale	DHCD/LIP	2	\$3,000	\$6,000	\$1,000	\$5,000	2 - AFHMP		
Village on the Green	Private Developer	Holliston	Lottery - Initial Sale	MH 40B	4	\$3,000	\$12,000	\$2,000	\$10,000	2 - AFHMP		
Village at Bedford Woods	RHSO Town	Bedford	Lottery - Initial Sale	MH 40B	6	\$2,500	\$15,000	\$2,000	\$13,000	3 - Active	May-21	
Pine Hill Village	Private Developer	Harvard	Lottery - Initial Sale	MH 40B	6	\$3,800	\$22,800	\$2,000	\$20,800	3 - Active	May-20	
Lexington - Lexington Meadows	RHSO Town	Lexington	Lottery - Initial Sale	LIP LAU	1	\$10,000	\$10,000	\$2,000	\$8,000	3 - Active	May-21	
Medford - Wellington Woods	Private Developer	Medford	Lottery - Initial Sale	LIP LAU	20	\$1,750	\$35,000	\$2,500	\$32,500	3 - Active	May-20	
Trail Ridge2	Private Developer	Harvard	Lottery - Initial Sale	MH 40B - CHAPA	6	\$4,000	\$27,000	\$2,000	\$25,000	3 - Active	Aug-18	
Cold Brook Crossing	Private Developer	Sudbury	Monitoring	DHCD 40R	26	\$300	\$7,800	\$0	\$7,800	3 - Active		Perpetuity
MassHousing Monitoring	State Agency	Various	Monitoring	MH 40B	68	\$130	\$8,840	\$0	\$8,840	3 - Active		FY25
Corey street	Private Developer	Melrose	Monitoring	Recertification	4	\$500	\$2,000	\$0	\$2,000	4 - Annual		Annual
Messenger Woods	Private Developer	Plainville	Monitoring		6	\$250	\$1,750	\$0	\$1,750	4 - Annual		Annual
High Meadows	Private Developer	Westwood	Lottery - Initial Sale	LIP LAU	3	\$4,000	\$12,000	\$1,500	\$10,500	5 -On Hold		
Chamberlain St	Private Developer	Hopkinton	Lottery - Initial Sale	LIP LAU	3	\$2,500	\$7,500	\$1,500	\$6,000	5 -On Hold		
Pleasant Street	Private Developer	Ipswich	Lottery - Initial Sale	MH 40B - MWCD	2	\$3,000	\$6,000	\$2,000	\$4,000	5 -On Hold		
Landham Crossing	RHSO Town	Sudbury	Monitoring		8	\$1,500	\$12,000	\$0	\$12,000	Complete	Aug-14	Perpetuity
Snowberry Lane	RHSO Town	Sudbury	Monitoring		2	\$6,500	\$13,000	\$1,500	\$11,500	Complete	Nov-06	Perpetuity
Villages at Old County Rd	RHSO Town	Sudbury	Monitoring		10	\$1,400	\$14,000	\$3,000	\$11,000	Complete	Dec-08	Perpetuity
Post Office Crossing	RHSO Town	Acton	Lottery - Initial Sale	LIP 40B	3	\$5,500	\$16,500	\$2,000	\$14,500	Complete	Jun-18	FY21
Pine Hill Crossing	RHSO Town	Bedford	Lottery - Initial Sale	LIP LAU	4	\$3,000	\$12,000	\$2,000	\$10,000	Complete	Feb-19	FY20
Black Birch II	RHSO Town	Concord	Lottery - Initial Sale	LIP LAU - AR	2	\$3,000	\$6,000	\$2,000	\$4,000	Complete	Aug-19	FY20
Willowdale Estates	Private Developer	Mansfield	Lottery - Initial Sale	LIP LAU	3	\$2,500	\$7,500	\$1,500	\$6,000	Complete	Jun-19	FY20
Postmark Square	Private Developer	Reading	Lottery - Initial Sale	40R	10	\$2,500	\$25,000	\$2,000	\$23,000	Complete	Mar-20	FY20
Evergreen	RHSO Town	Bedford	Lottery - Initial Sale	LIP LAU	3	\$2,500	\$7,500	\$2,000	\$5,500	Complete	Feb-18	FY19
Lexington - Jefferson Drive	RHSO Town	Lexington	Lottery - Initial Sale		3	\$3,000	\$9,000	\$2,500	\$6,500	Complete	Jun-19	FY19
Manor House	RHSO Town	Lexington	Lottery - Initial Sale	LIP LAU	6	\$2,500	\$15,000	\$2,500	\$12,500	Complete	Aug-17	FY19
Corey street	Private Developer	Melrose	Lottery - Initial Sale	LIP LAU- Rental	4	\$3,000	\$14,000	\$2,000	\$12,000	Complete	Feb-18	FY19
Fields at Sherborn	Private Developer	Sherborn	Lottery - Initial Sale	MH 40B - MWCD	8	\$2,500	\$20,000	\$2,000	\$18,000	Complete	May-19	FY19
Carriage Lane	RHSO Town	Sudbury	Lottery - Resale		1	\$1,800	\$1,800	\$300	\$1,500	Complete	Aug-18	FY19
5 Repton Circle	Private Developer	Watertown	Lottery - Resale		1	\$3,918	\$3,918	\$500	\$3,418	Complete	Oct-18	FY19
Fox Run	RHSO Town	Bedford	Lottery - Initial Sale	LIP LAU	1	\$5,000	\$5,000	\$2,000	\$3,000	Complete	Mar-17	FY18
Cottages at Depot Crossing	RHSO Town	Bedford	Lottery - Initial Sale	LIP LAU	1	\$5,000	\$5,000	\$2,000	\$3,000	Complete	Mar-17	FY18
Brookside Square	RHSO Town	Concord	Monitoring		8	\$100	\$1,000	\$0	\$1,000	Complete	Aug-16	FY18
Wedgewood	Other Town	Holliston	Lottery - Initial Sale	DHCD/LIP	2	\$3,000	\$6,000	\$2,000	\$4,000	Complete	Feb-16	FY18
212 Central	RHSO Town	Acton	Lottery - Resale		1	\$3,367	\$3,367	\$0	\$3,367	Complete	Apr-17	FY17
442 Mass Ave #1	RHSO Town	Acton	Lottery - Resale		1	\$5,600	\$5,600	\$0	\$5,600	Complete	Oct-16	FY17
Black Birch I	RHSO Town	Concord	Lottery - Initial Sale	AR	3	\$6,000	\$18,000	\$2,500	\$15,500	Complete	Mar-16	FY17
Millstone Concord	RHSO Town	Concord	Lottery - Initial Sale	LIP LAU	1	\$5,000	\$5,000	\$1,500	\$3,500	Complete	Dec-15	FY17
Messenger Woods	Private Developer	Plainville	Lottery - Initial Lease		6	\$2,000	\$12,000	\$2,500	\$9,500	Complete	Jan-16	FY17
278 Maynard Road	RHSO Town	Sudbury	Lottery - Initial Sale		3	\$0	\$0	\$2,500	-\$2,500	Complete	Jun-15	FY17
Faulkner Mills	RHSO Town	Acton	Lottery - Resale	DHCD LIP	1	\$3,600	\$3,600	\$0	\$3,600	Complete	Sep-15	FY16
Montage/Danforth Farm	Private Developer	Framingham	Lottery - Initial Sale	LIP LAU	17	\$2,500	\$42,500	\$7,500	\$35,000	Complete	Oct-14	FY16
Bedford Woods	RHSO Town	Bedford	Lottery - Resale		1	\$2,500	\$2,500	\$150	\$2,350	Complete	May-14	FY15
Brookside Square	RHSO Town	Concord	Lottery - Initial Lease	LIP LAU	8	\$2,250	\$18,000	\$1,500	\$16,500	Complete	Oct-14	FY15
Trail Ridge1	Private Developer	Harvard	Lottery - Initial Sale	MH 40B - CHAPA	3	\$4,000	\$12,500	\$2,000	\$10,500	Complete	Aug-14	FY15
The Groves	Private Developer	Lincoln	Monitoring	Special Permit	8	\$750	\$6,000	\$0	\$6,000	Complete	Sep-11	FY15
Needham Place	Private Developer	Needham	Lottery - Initial Lease		1	\$5,000	\$5,000	\$1,500	\$3,500	Complete	Aug-14	FY15
Landham Crossing	RHSO Town	Sudbury	Lottery - Initial Sale	MH 40B	8	\$2,500	\$20,000	\$3,000	\$17,000	Complete	Nov-12	FY15
14 Wampus Ave #22	RHSO Town	Acton	Lottery - Resale	DHCD LIP	1	\$2,940	\$2,940	\$0	\$2,940	Complete	May-15	FY14
Blanchard Place	RHSO Town	Acton	Lottery - Resale	DHCD LIP	1	\$3,600	\$3,600	\$0	\$3,600	Complete	May-14	FY14
Parker Village	RHSO Town	Acton	Lottery - Resale	DHCD LIP	1	\$1,000	\$1,000	\$0	\$1,000	Complete	May-14	FY14
Robbins Brook	RHSO Town	Acton	Lottery - Resale	DHCD LIP	1	\$3,000	\$3,000	\$0	\$3,000	Complete	May-13	FY14
1249 Elm Street	RHSO Town	Concord	Lottery - Resale	DHCD LIP	1	\$2,945	\$2,945	\$0	\$2,945	Complete	Sep-13	FY14
329 Walden Street	RHSO Town	Concord	Lottery - Resale	DHCD LIP	1	\$3,638	\$3,638	\$0	\$3,638	Complete	Jun-13	FY14
333 Walden Street	RHSO Town	Concord	Lottery - Resale	DHCD LIP	2	\$3,600	\$7,200	\$0	\$7,200	Complete	Feb-14	FY14
95 Conant Street #205	RHSO Town	Concord	Lottery - Resale	DHCD LIP	2	\$3,320	\$6,640	\$0	\$6,640	Complete	Mar-14	FY14
95 Conant Street #319	RHSO Town	Concord	Lottery - Resale	DHCD LIP	2	\$3,000	\$6,000	\$0	\$6,000	Complete	Dec-13	FY14
329 Walden Street	RHSO Town	Concord	Lottery - Resale	DHCD LIP	1	\$3,600	\$3,600	\$0	\$3,600	Complete	Feb-17	FY14
1284 Elm Street	RHSO Town	Concord	Lottery - Resale	DHCD LIP	1	\$3,000	\$3,000	\$0	\$3,000	Complete	TBD	FY14
Elm Court	RHSO Town	Concord	Monitoring	MassHousing NEF 40B	2	\$1,050	\$8,400	\$0	\$8,400	Complete	Aug-08	FY14
Emerson Green	Other Town	Devens	Lottery - Initial Sale	DHCD LIP	1	\$5,000	\$5,000	\$2,000	\$3,000	Complete	Oct-16	FY14
Battle Road Farm (3)	Other Town	Lincoln	Lottery - Resale		2	\$4,700	\$9,400	\$0	\$9,400	Complete	Jun-13	FY14
Battle Road Farm (4)	Other Town	Lincoln	Lottery - Resale		2	\$5,000	\$10,000	\$0	\$10,000	Complete	Apr-14	FY14
Battle Road Farm (5)	Other Town	Lincoln	Lottery - Resale		1	\$5,000	\$5,000	\$0	\$5,000	Complete	May-16	FY14
Battle Road Farm (5)	Other Town	Lincoln	Lottery - Resale	Special Permit	1	\$5,000	\$5,000	\$0	\$5,000	Complete	Apr-15	FY14
Carriage Lane	RHSO Town	Sudbury	Lottery - Resale		1	\$1,500	\$1,500	\$0	\$1,500	Complete	Apr-13	FY14
89 OxBow	Other Town	Wayland	Monitoring	Other financing	16	\$563	\$9,000	\$0	\$9,000	Complete	Apr-09	FY14
Oakley Neighborhood	Private Developer	Belmont	Lottery - Initial Sale	40R	3	\$3,000	\$9,000	\$1,000	\$8,000	Complete	Apr-11	FY13
Trail Ridge	Private Developer	Harvard	Lottery - Initial Sale	MH 40B - CHAPA	2	\$4,000	\$8,000	\$2,000	\$6,000	Complete	Jul-14	FY13
Holliston Housing Dev Corp	Other Town	Holliston	Lottery - Initial Sale	DHCD/LIP	1	\$5,000	\$5,000	\$1,000	\$4,000	Complete	Jun-12	FY13
Holliston Housing Trust	Other Town	Holliston	Lottery - Initial Sale	DHCD/LIP	1	\$4,000	\$4,000	\$1,000	\$3,000	Complete	Jul-14	FY13
Battle Road Farm (1)	Other Town	Lincoln	Lottery - Resale		5	\$4,700	\$23,500	\$0	\$23,500	Complete	Jul-09	FY13
Battle Road Farm (2)	Other Town	Lincoln	Lottery - Resale		1	\$2,300	\$2,300	\$0	\$2,300	Complete	Mar-13	FY13
Walnut Street	Other Town	Newton	Lottery - Resale	DHCD LIP	1	\$3,000	\$3,000	\$0	\$3,000	Complete	Nov-12	FY13
Andover Estates	Private Developer	Tewksbury	Lottery - Initial Sale	MH 40B	5	\$3,000	\$15,000	\$2,000	\$13,000	Complete	Aug-11	FY13
Wayland Commons	Private Developer	Wayland	Lottery - Initial Sale	FHLB 40B	12	\$2,500	\$30,000	\$2,000	\$28,000	Complete	Oct-10	FY13
Highland Meadows	Private Developer	Weston	Lottery - Initial Sale	LIP LAU - AR	6	\$2,750	\$18,000	\$4,000	\$14,000	Complete	Nov-09	FY13
6 Upham Way	RHSO Town	Weston	Lottery - Resale	DHCD LIP	1	\$3,000	\$3,000	\$0	\$3,000	Complete	Feb-13	FY13
Finigan's Way	RHSO Town	Concord	Lottery - Initial Sale	LIP LAU	6	\$2,500	\$16,000	\$1,000	\$15,000	Complete	Oct-09	FY12
Riverwalk	RHSO Town	Concord	Lottery - Initial Sale	Special Permit	1	\$5,000	\$5,000	\$0	\$5,000	Complete	Sep-11	FY12
10 Emerson Annex	RHSO Town	Concord	Lottery - Resale	DHCD LIP	1	\$2,500	\$2,500	\$0	\$2,500	Complete	May-11	FY12
The Groves	Private Developer	Lincoln	Lottery - Initial Lease	LIP 40B - AR	8	\$1,250	\$10,000	\$0	\$10,000	Complete	Jun-10	FY12
Fulton Residences	Private Developer	Medford	Lottery - Initial Sale		1	\$4,000	\$4,000	\$1,000	\$3,000	Complete	Aug-11	FY12
Gumps	Other Town	Norfolk	Lottery - Initial Sale	DHCD LIP	5	\$2,500	\$12,500	\$1,000	\$11,500	Complete	Aug-11	FY12
Villages at Old County Rd	RHSO Town	Sudbury	Lottery - Initial Sale	MH 40B	10	\$4,000	\$39,900	\$3,000	\$36,900	Complete	Nov-08	FY12
Sage Hill	Private Developer	Wayland	Lottery - Initial Sale	DHCD LIP/Special Perm	1	\$5,400	\$5,400	\$1,000	\$4,400	Complete	Apr-11	FY12
815B Boston Post Rd	RHSO Town	Weston	Lottery - Resale	DHCD LIP	1	\$2,500	\$2,500	\$0	\$2,500	Complete	May-11	FY12
Lalli Woods	RHSO Town	Concord	Lottery - Initial Sale	DHCD LIP	6	\$2,500	\$16,890	\$1,000	\$15,890	Complete	Jun-10	FY11
7 Emerson Annex	RHSO Town	Concord	Lottery - Resale	DHCD LIP	1	\$2,500	\$2,500	\$0	\$2,500	Complete	May-10	FY11
Assessor Contract	RHSO Town	Concord	Other		0	\$2,625	\$2,625	\$0	\$2,625	Complete	Jan-11	FY11
Ellis Heights	Private Developer	Newton	Lottery - Initial Sale	DHCD LIP	1	\$4,500	\$4,500	\$0	\$4,500	Complete	May-10	FY11
307 Trout Brook (Oxbow)	Other Town	Wayland	Lottery - Resale	DHCD 40B	1	\$2,500	\$2,500	\$0	\$2,500	Complete	Nov-10	FY11
WHDC	Other Town	Wellesley	Lottery - Initial Sale	DHCD LIP	3	\$2,500	\$7,500	\$1,000	\$6,500	Complete	Sep-10	FY11
8 Emerson Annex	RHSO Town	Concord	Lottery - Resale	DHCD LIP	1	\$3,000	\$3,000	\$0	\$3,000	Complete	Sep-09	FY10

Sudbury Lottery and Monitoring Contracts

<i>Project Name</i>	<i>Contracting Entity</i>	<i>Project Location</i>	<i>Type</i>	<i>Program</i>	<i># Units</i>	<i>Per Unit</i>	<i>Gross</i>	<i>Mktg Expenses</i>	<i>Net</i>	<i>Status</i>	<i>Marketing Start Date</i>	<i>Completion Date</i>
Wayland Gardens	Private Developer	Wayland	Lottery - Initial Sale	FHLB 40B	3	\$2,500	\$7,500	\$1,000	\$6,500	Complete	Jul-09	FY10
308 Willow Brook	Other Town	Wayland	Lottery - Resale	DHCD LIP	1	\$2,500	\$2,500	\$0	\$2,500	Complete	Aug-09	FY10
294 Codman Hill Rd	Other Town	Boxborough	Lottery - Resale	DHCD LIP	1	\$1,800	\$1,800	\$125	\$1,675	Complete	Jul-08	FY09
14 Dunbar Way	RHSO Town	Concord	Lottery - Resale	DHCD LIP	1	\$4,000	\$4,000	\$0	\$4,000	Complete	Dec-07	FY08
4 Emerson Annex	RHSO Town	Concord	Lottery - Resale	DHCD LIP	1	\$500	\$500	\$0	\$500	Complete	Jan-08	FY08
87 Elm Brook	RHSO Town	Concord	Lottery - Resale	Special Permit	1	\$4,000	\$4,000	\$0	\$4,000	Complete	Mar-08	FY08
Home Preservation	RHSO Town	Sudbury	Lottery - Initial Sale	MH 40B	6	\$0	\$0	\$1,000	-\$1,000	Complete	Feb-08	FY08
Snowberry Lane	RHSO Town	Sudbury	Lottery - Initial Sale	MH 40B	2	\$7,500	\$15,000	\$1,900	\$13,100	Complete	Nov-06	FY07
Derby Street	Private Developer	Newton	Monitoring	MassHousing NEF 40B	0	\$0	\$0	\$0	\$0	Terminated	Mar-13	Perpetuity
Dover Farms	Private Developer	Dover	Lottery - Initial Sale	FHLB 40B	0	\$0	\$0	\$0	\$0	Terminated	May-13	FY14
176 Swanson Rd	Other Town	Boxborough	Lottery - Resale	DHCD LIP	0	\$0	\$0	\$0	\$0	Terminated	Dec-12	FY13
Holliston Housing Trust	Other Town	Holliston	Lottery - Initial Sale	DHCD/LIP	0	\$0	\$0	\$0	\$0	Terminated	Jun-12	FY13
Angell Brook	Private Developer	West Boylston	Lottery - Initial Sale	DHCD LIP	0	\$0	\$0	\$0	\$0	Terminated	Jan-11	FY11
Summerfields	Other Town	Boxborough	Lottery - Resale	MassHousing NEF 40B	0	\$0	\$0	\$0	\$0	Terminated	Dec-08	FY09
Lalli Terrace	RHSO Town	Action	Lottery - Initial Lease	DHCD 40B	0	\$0	\$0	\$0	\$0	Terminated	Dec-14	
Whitin Reservoir Estates	Private Developer	Douglas	Lottery - Initial Sale	On Hold	0	\$0	\$0	\$0	\$0	Terminated		
Northside Meadow	Private Developer	Framingham	Lottery - Initial Sale	LIP LAU - AR	0	\$0	\$0	\$0	\$0	Terminated		
Brook School	RHSO Town	Weston	Lottery - Initial Sale	LIP LAU	0	\$0	\$0	\$0	\$0	Terminated		
			Total contracted		445	\$2,087	\$928,753	\$104,975	\$823,778			
		46	Lottery - Initial Sale		217	\$543,590	\$2,505	Private	\$352,168	186	\$1,893	43%
		38	Lottery - Resale		47	\$158,773	\$3,378	Other Town	\$117,875	49	\$2,406	14%
		8	Monitoring		158	\$79,290	\$502	RHSO Town	\$344,895	142	\$2,429	42%
		5	Lottery - Initial Lease		23	\$39,500	\$1,717	State Agency	\$8,840	68	\$130	1%
		1	Other		0	\$2,625						
					445	\$823,778			\$823,778	445		



Leonardi Aray Architects

June 22, 2021
c/o Kelley Cronin
Sudbury Housing Trust (the Client)
278 Old Sudbury Road
Sudbury, MA 01776

Architectural Services: Perform Site Visit and prepare report of findings and recommendations.

Project Name/Address: 280, 278, 276 Maynard Road, Sudbury, MA

Property/ Building Type: Residential Condominium/ Wood frame.

Scope & Work area: n/a.

Scope of Services:

1. Task #1, Site Visit/ Information gathering.

- Perform site visit to observe areas of concern, take field measurements, as needed, and photo survey;
- (1) Meeting with trust and condominium representatives;
- Review project files and other pertinent information.

2. Task #2, Report of Findings. Prepare a report to describe deficiencies observed and outline specs to address needed repairs. Subject to level of deficiencies further investigation may be needed and specs may only be preliminary.

Fees for Services:

Tasks #1-2 \$3,000

Proposed Fee: \$3,000

Estimated reimbursable \$100(c)

Estimated contract time: +/- 6 weeks, subject to Client's meeting schedule

a. Additional services will be billed at a rate of \$170/Hour (Terms and Conditions, Article 2).

b. Validity: 30 days from the date of this proposal.

c. 12% mark-up applies to reimbursable and consultants fee.

d. LAA will obtain quotes from consultants during the course of the project as needed. Subject to Client's approval and fee agreement, LAA will directly hire and manage other consultants.



Leonardi Aray Architects

TERMS AND CONDITIONS:

Leonardi Aray Architects LLC shall perform the services outlined in this Agreement. Services not set forth on this Agreement are specifically excluded from the scope of services.

1. Access to Site: Unless otherwise stated, *Leonardi Aray Architects LLC* will have access to the site for activities necessary for the performance of the services.

2. Fee: The Client agrees to pay *Leonardi Aray Architects LLC* for all services performed and all cost incurred as per this agreement. Prior to providing services, the Client shall deposit the retainer with the Architect. The proposed fee for each task shall be understood to be an estimate, based upon the scope of services described above and shall not be exceeded by more than fifteen (15) percent, without written approval by the Client.

Additional services, upon written approval by the Client, would be billed on an hourly basis at a rate of \$170/hr. Additional services may include but are not limited to investigation of existing conditions, changes due to change in the program and changes after the completion of Task #1. Additional services may apply, if, by causes beyond the control of the Architect, the work extends forty-five (45) calendar days beyond the estimated contract time. Additional fees may apply if the estimated construction budget is increased by 15%.

3. Payments: Invoices shall be due upon receipt. If any invoice is not paid within 15 days, *Leonardi Aray Architects LLC* may, without having any claim or right against the Client, and without liability whatsoever to the Client suspend or terminate the performance of services. Accounts unpaid 30 days after the invoice date may be subject to a monthly service charge of \$50. In the event any portion of an account remains unpaid 90 days after the billing, the Architect may institute collection action, and the

Client shall pay all cost of collection, including reasonable attorneys' fee.

4. Hidden Conditions and Hazardous Materials: A condition is hidden if concealed by existing finishes or is not capable of investigation by reasonable visual observation. *Leonardi Aray Architects LLC* shall not be responsible for the existing conditions nor any resulting damages to persons or property. *Leonardi Aray Architects LLC* shall have no responsibility for the discovery, presence, handling, removal, disposal or exposure of persons to hazardous materials of any form.

5. Certifications, Guarantees and Warranties: *Leonardi Aray Architects LLC* shall not be required to execute any document that would result in the Architect certifying, guaranteeing or warranting the existence of any conditions.

6. Limitation of Liability: In recognition of the relative risks and benefits of the Project to both the Client and the Architect, the risks have been allocated such that the Client agrees that, to the fullest extent permitted by law, the Architect's total liability to the Client for any and all injuries, damages, claims, losses, or claim expenses arising out of this Agreement from any cause or causes, shall not exceed \$5,000. This limitation shall apply regardless of the cause of action or legal theory pled or asserted.

7. Indemnifications: The Client agrees, to the fullest extent permitted by law, to indemnify and hold harmless the Architect, his agent and sub-consultants from any and all damages, liabilities or costs, including reasonable attorneys' fees and defense costs, arising out of or in any way connected with the Architect's services under this Agreement, excepting only those damages, liabilities or costs arising directly from the sole negligence or willful misconduct of the Architect. Neither party is obligated to indemnify the other in any manner



Leonardi Array Architects

whatsoever for the other's own negligence.

8. Information for the Sole Use and Benefit of the Client: All opinions and conclusions of the Architect, whether written or oral, and any plans, specifications or other documents and services provided by the Architect are for the sole use and benefit of the Client and are not to be provided to any other person or entity without the prior written consent of *Leonardi Array Architects LLC*. Nothing contained in this Agreement shall create a contractual relationship with or a cause of action in favor of any third party against either the Architect or the Client.

9. Design Coordination: Architect shall coordinate the construction documents or reports from the General Contractor and other consultants engaged by the Client but only for conformance with the design concepts and information as expressed in the documents prepared by the Architect. The Client agrees to require all other consultants and General Contractor (GC) engaged by the Client to cooperate fully with the Architect in the resolution of any conflicts or inconsistencies discovered.

10. Design Intent: The Client and the GC shall notify the Architect of any deviation from the original drawings and design intent prior to the performance of any work. The Architect's decision on matters relating to aesthetic effect will be final if

consistent with the intent expressed in the drawings.

11. Ownership of Documents: All documents produced by *Leonardi Array Architects LLC* under this Agreement shall remain the property of *Leonardi Array Architects LLC* and may not be used by the Client for any purpose without the written consent of the Architect.

All drawings will be submitted on PDF format only, unless otherwise agreed upon. Additional fees may apply for other file types.

12. Job Site Sign & Publications: *Leonardi Array Architects LLC* is allowed to display a marketing sign at a reasonable and visible location within the job site or property.

The Client shall credit *Leonardi Array Architects LLC* for their work in any promotional or informational material the Client may publicize related to the project itself.

13. Termination of Services: This Agreement may be terminated at anytime by either party should the other fail to perform their obligations hereunder.

14. Dispute Resolution: Any claim or dispute between the Client and *Leonardi Array Architects LLC* shall be submitted to non-binding mediation. Unless otherwise specified, this Agreement shall be governed by the laws of the Commonwealth of Massachusetts.

Leonardi Array, AIA, NCARB
Managing Principal
Leonardi Array Architects LLC
leonardi@larayarchitects.com

(Signature)
AGREED AND ACCEPTED
Client/Owner Name:
Address:
Date:

MEMORANDUM OF AGREEMENT

67-73 Nobscot Road, Sudbury, MA

This Memorandum of Agreement (“MOA”) is dated as of the ____ day of July, 2021 and is by and between the Trustees of the Sudbury Housing Trust, a municipal housing trust established pursuant to G.L. c. 44, s. 55C, having an address of 278 Old Sudbury Road, Sudbury, MA 01776 (the “Trust”), and the Sudbury Housing Authority, established pursuant to G.L. c. 121B, having an address of 55 Hudson Road, Sudbury, MA 01776 (the “Authority”). The Trust and the Authority shall be together referred to herein as the “Parties”.

WHEREAS, the Parties have been made aware of a potential opportunity to acquire real property known and numbered as 67-73 Nobscot Road, Sudbury (the “Property”) for affordable housing purposes; and

WHEREAS, in connection with the potential acquisition of the Property, the Parties desire to conduct certain investigations and due diligence on the Property; and

WHEREAS, the Trust and the Authority desire to share the costs of such investigations and due diligence on the Property and desire to set forth herein the agreement between the Parties with respect to such cost sharing,

NOW THEREFORE, the Parties agree as follows:

1. Subject to the mutual agreement of the Parties, the Trust or the Authority may contract with such parties as may be qualified in order to have performed site feasibility and analysis, environmental investigation and analysis, title examinations, and such other investigation and due diligence on the Property, including legal services, as may be necessary or appropriate in order to evaluate whether to acquire the Property (collectively, the “Due Diligence”). Due diligence shall include legal fees reasonably incurred by the Town of Sudbury in connection with the Property.
2. The Trust agrees to be responsible for 50% of the cost of the Due Diligence up to a maximum amount of \$25,000.00.
3. The Authority agrees to be responsible for 50% of the cost of the Due Diligence up to a maximum amount of \$25,000.00.
4. The Trust and the Authority each agree to remit or otherwise make available to the other (or to the Town of Sudbury in the case of legal fees), its proportionate share of the cost of the Due Diligence performed within 30 days of receipt of an invoice for the services rendered.

(Signature page follows.)

SUDBURY HOUSING TRUST
By Its Trustees:

Cynthia Howe, Chair

John Riordan, Vice Chair

Kelley Cronin

Janie Dretler

Carmine Gentile

Robert Hummel

Karl Pops

Susan Scotti

SUDBURY HOUSING AUTHORITY
By Its Executive Director:

Sheila M. Cusolito