

Town of Sudbury

Housing Trust

HousingTrust@sudbury.ma.us

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

www.sudbury.ma.us/housingtrust

AGENDA

Thursday July 18, 2024

8:00 AM

Virtual Meeting

Pursuant to Chapter 2 of the Acts of 2023, 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 conducted during this meeting shall be by remote means only.

Board Operations

- Minutes: Review of outstanding meeting minutes
- Financial update and review of financial transactions if presented

Housing Production Plan

- Review of memo dated 7-11-24 sent by Adam Burney, Director of Planning
- Resume review of Housing Production Plan

Housing Trust Initiatives

- FY25 Community Preservation Act funding request/s – *Applications due 9-6-2024*
- Sudbury Lottery and Monitoring Contracts
- Mortgage Assistance Program – Review and possible update
- 67-73 Nobscot – Update – Possible removal as standing item
- Small Grants Program – Standing item

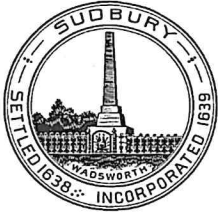
Future meeting schedule

- Housing Trust - Thursday August 8, 2024 8:00 AM
- Housing Production Plan - Additional HPP focused meetings
- Joint meeting of the Housing Trust and Housing Authority

Other or New Business

Public Comment

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

April 11, 2024 AT 8:00 AM

VIRTUAL MEETING

Housing Trust Members Present: Chair Carmine Gentile, Vice Chair Robert Hummel, Jessica Cerullo Merrill, Kelley Cronin, John Riordan, and Jack Ryan

Absent: Cynthia Howe, and Janie Dretler

Others Present: Community Preservation Coordinator Ryan Poteat, and Director of the Regional Housing Services Office (RHSO) Liz Rust

Mr. Gentile began the meeting at 8:02 AM

Minutes - Review meeting minutes of March 14, 2024

Mr. Ryan made a motion to approve the minutes of March 14, 2024. Mr. Riordan seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel - Aye, Ms. Cerullo Merrill - Aye, Ms. Cronin - Aye, Mr. Riordan – Aye, and Mr. Ryan Aye.

Financial Update

Ms. Rust presented the January 2024 financials. There were no abnormal transactions. Ms. Rust suggested more public outreach to promote the Mortgage Assistance Program.

Mr. Ryan made a motion to approve the January 2024 financial transactions. Ms. Cronin seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel - Aye, Ms. Cerullo Merrill - Aye, Ms. Cronin - Aye, Mr. Riordan – Aye, and Mr. Ryan Aye.

Small Grant Program

Applicant 125 is a carryover from 3-14-2024 and was discussed. The applicant qualifies for the Small Grant program but completed the work prior to applying for a grant. Ms. Rust gave a brief summary of the request as well as a situational summary of the applicant. She explained how reimbursement worked and the tax implication of applying after work had been completed.

Mr. Ryan made a motion to approve applicant 125's small grant request in the amount of \$4,700. Ms. Cronin seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel - Aye, Ms. Cerullo Merrill - Aye, Ms. Cronin - Aye, Mr. Riordan – Aye, and Mr. Ryan Aye.

Letter sent to the Governor from a tenant at Cold Brook Crossing

A letter was sent to the governor about the rent increases at Cold Brook Crossing. The Sudbury Housing Trust is the Monitoring Agent for Cold Brook Crossing. Rents are formulated by HUD and rents may be increased to the maximum amount set by HUD. During COVID there was a freeze on rent increases and the following year was limited to 5% and now back to 10%. Tenants are reacting to the larger increase as they adjusted to the smaller rent increases. There was a conversation about the regulatory agreements and contractual agreements between the Town and developer. The Trust recognized that operating costs increase and that developers need to be able to pay these costs.

Mr. Ryan made a motion to send a letter to property owners recommending a 5% rent increase Ms. Cronin seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel - Aye, Ms. Cerullo Merrill - Aye, Ms. Cronin - Aye, Mr. Riordan – Aye, and Mr. Ryan Aye.

Mr. Ryan made a second motion that the Sudbury Housing Trust only approve a 5% increase at Cold Brook Crossing. There was no second.

Mr. Ryan made a motion to recommend a 5% rent increase Mr. Gentile seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel - Aye, Ms. Cerullo Merrill - Aye, Ms. Cronin - Aye, Mr. Riordan – Aye, and Mr. Ryan Aye.

Support for Planning Board's Multi-Family Overlay District (MBTA Communities Zoning)

Mr. Hummel expressed his belief that the Town should be rezoning properties for development and that compliance with MBTA is not enough. Mr. Gentile stated that the town is rich in land that is developable. He mentioned that Camp Sewataro had been appraised at \$5M as a summer camp, \$10M if developable for housing, and that the Town paid \$11M to have control of this property and maintain the ability to develop the land in the future if they so choose. There was a conversation about rezoning some of the commercial zoning to mixed used.

Mr. Ryan made a motion that the Housing Trust support Article 32 but encourages the Town to make more land available for housing. Mr. Hummel seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel - Aye, Ms. Cerullo Merrill - Aye, Ms. Cronin - Aye, Mr. Riordan – Aye, and Mr. Ryan Aye.

Mr. Hummel requested that the Planning Department schedule a public forum in the Fall to discuss with residents the possible rezoning of properties. He stated resident feedback should be actively gathered and public participation should be encouraged.

67-73 Nobscot Update

Mr. Riordan stated the Sudbury Housing Authority has met with Beales and Thomas and has asked them to rework the driveway layout and design. Amy Lepak spoke on behalf of the Housing Authority and stated that the rework of the driveway design and earth removal was underway and that there would be more information in the next month or so. Ms. Rust asked

about changes to the billing and payment process. Mr. Poteat stated that bills will now be processed through the Planning Office instead of being paid by the Housing Authority and reimbursed by the Housing Trust. Ms. Lepak stated that additional cost were contingent upon the in process report and we would not know what they may be. The Housing Trust will need to vote on any additional payments each time and any additional payments need to be brought to the Housing Trust before they are incurred.

Status of Housing Production Plan

Mr. Riordan stated that the forum was not well attended but that the consultant (JM Goldson) was compiling the information collected with the surveys and public forums. Ms. Rust stated that the first draft of the HPP was complete and would be distributed to the Trust soon.

New/renewal of committee members

Mr. Gentile stated he wanted to review the committee members in order to make a recommendation to the Select Board suggest Housing Trust members for term renewal. He asked the members with expiring terms if they wanted to stay on.

Jessica Cerullo Merrill - Yes
Kelly Cronin - Yes
Janie Dretler – Assumed yes
Cynthia Howe – Assumed yes
John Riordan - Yes

Mr. Gentile made a motion to request to the Select Board that Jessica Cerullo Merrill, Kelly Cronin, Janie Dretler, Cynthia Howe, and John Riordan be reappointed to the Sudbury Housing Trust. Mr. Ryan seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel - Aye, Ms. Cerullo Merrill - Aye, Ms. Cronin - Aye, Mr. Riordan – Aye, and Mr. Ryan Aye.

Other or New Business

There was no other or new business presented at this meeting.

Administrative Report

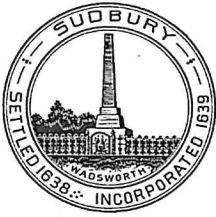
There was no Administrative Report presented at this meeting.

Public Comment

There were no public comments at this meeting.

Mr. Ryan made a motion to adjourn. Ms. Cronin seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel - Aye, Ms. Cerullo Merrill - Aye, Ms. Cronin - Aye, Mr. Riordan – Aye, and Mr. Ryan Aye.

The meeting ended at 10:04 AM



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DRAFT MINUTES

June 26, 2024 AT 8:00 AM

VIRTUAL MEETING

Housing Trust Members Present: Chair Carmine Gentile, Vice Chair Robert Hummel, Jessica Cerullo Merrill, Cynthia Howe, John Riordan, and Jack Ryan

Absent: Kelley Cronin, and Janie Dretler

Others Present: Director of Planning and Community Development Adam Burney, Community Preservation Coordinator Ryan Poteat, and Director of the Regional Housing Services Office (RHSO) Liz Rust

Mr. Gentile began the meeting at 8:01 AM

Housing Trust Initiatives

Small Grant Applicant 127

Ms. Rust explained the request is for the replacement of the lining inside the compressor lines of the applicants mini-split unit and recharge the system. There are 4 people living here, ages 42, 14, 11 & 4. Ms. Rust stated that this is an eligible household.

Mr. Ryan made a motion to approve applicant 127 Small Gran application for \$4,800. Ms. Howe seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel - Abstain, Jessica Cerullo Merrill - Aye, Ms. Howe – Aye, Mr. Riordan – Aye, and Mr. Ryan – Aye.

Sudbury Lottery and Monitoring Contract

Mr. Rust explained that a Sudbury Lottery and Monitoring contract has come in for Lexington. This is a revenue line item for the Trust. The project is located on Meriam Street in Lexington MA to create one unit of affordable housing. Mr. Ryan was concerned that there was no named developer but Ms. Rust pointed out this was not uncommon and the Trust has historically

Mr. Ryan made a motion to approve the Meriam Street in Lexington MA dated June 2024 subject to completion of the contract with the contractor's name. Ms. Howe seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel - Aye, Jessica Cerullo Merrill - Aye, Ms. Howe – Aye, Mr. Riordan – Aye, and Mr. Ryan – Aye.

Cold Brook Crossing Rent Increase

Mr. Rust explained the Cold Brook Crossing had requested a 10%. She stated that she believed the Housing Trust had approved a 10% increase. Ms. Rust stated that the RHSO has been recommending a bifurcated rent increase; a 5% increase for existing tenants and a 10% increase for new tenants. Ms. Rust stated that the Trust is the Monitoring Agent and that this decision is due by July 4th.

Mr. Gentile made a motion to approve a bifurcated rent increase; a 5% increase for existing tenants and a 10% increase for new tenants at Cold Brook Crossing. Mr. Hummel seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel - Aye, Jessica Cerullo Merrill - Aye, Ms. Howe – Aye, Mr. Riordan – Aye, and Mr. Ryan – Aye.

Ms. Howe asked what the current income limits for affordability is for a 2-person household. Ms. Rust answered that the income limit is \$104,200 for a 2-person household and the current rent is \$2,374 is current rent, an increase to \$2,650 is proposed.

Housing Production Plan

During this meeting the scheduled focus was on Chapters 1 & 2 for the Housing Production Plan. Mr. Gentile stated that Chapter 1 was a summary and an outline of the process that took place to create the HPP.

Ms. Rust took a moment to acknowledge Mr. Gentile and thanked him for all his work on the Housing Bill.

Mr. Gentile reviewed Chapter 2 of the HPP which illustrates the 5-year goals and strategies to assist the Town in meeting its housing needs. There are 13 strategies identified in the HPP. Mr. Gentile went through the first half of the strategies and offered brief insight into them.

Mr. Riordan had a question about Strategy 4C. He requested clarification of what “A limited definition of family” was. Mr. Burney explained this was restricting the breadth of household types and by broadening the definition it would allow for a more historically traditional family unit. A family unit could include parents, grandparents and other family members that live as a single household; the 1950’s was used as an example of what this might look like.

Mr. Burney spoke about the memo he sent out on June 11th pertaining to Strategy 7, Town owned parcels and how they were selected for this report. He asked the Trust if they believed this was an accurate representation of the conversation had at the last meeting. Multiple members stated they believed the memo to be very accurate and thorough.

Mr. Riordan asked the bullet 2 be reworded. He also asked that addresses be added to the memo. Mr. Burney explained that some of the properties did not have street addresses. More street names and a higher level of descriptors are requested for all parcels without street addresses.

Mr. Ryan asked for a language change from “study parcels” to “parcels under active consideration”. Mr. Ryan expressed a strong conviction not to let the parcels identified in the HPP be ignored or forgotten; he would like to see active movement.

Ms. Cerullo Merrill would like to better engage the community. She stated that better connecting the community to the HPP as well as other needs of the community will have a positive impact on housing. Mr. Burney stated that because Sudbury has safe harbor members of the community are/were less likely to participate. Mr. Ryan suggested having a press release or newsletter illustrating the Trusts review of the HPP to prime members of the community and remove any surprise. This also puts the review on public record. Ms. Cerullo Merrill would also like to see the HPP connect to other Town projects to further increase visibility.

At 8:50 Mr. Hummel left the meeting

At 8:54 Mr. Burney left the meeting.

Mr. Hummel returned to the meeting at 8:56

Mr. Gentile Strategy 6 stated is a non-issue as it did not pass the House or Senate.

Mr. Hummel returned to the meeting at 9:00

Mr. Riordan asked that the word “speedy” be removed from Strategy 5. He also stated that the phrase “well maintained” 2–3-bedroom homes was misleading as many of the deed restricted homes fall into disrepair.

Mr. Gentile stated Strategy 6 will be able to be updated in a few weeks when the Affordable Homes Act is enacted. It will be rewritten at that time.

Under Strategy 6, Mr. Riordan asked to strike “new policy initiatives” and replace with “future policy initiatives” and to replace “that would be include” to “might include”

At 9:04 Ms. Cerullo Merrill left the meeting

Future Meeting Schedule

Mr. Gentile stated the next meeting of the Housing Trust would be on July 18th at 8:00AM

Minutes

Minor grammatical corrections were made to the June 6th 2024 minutes.

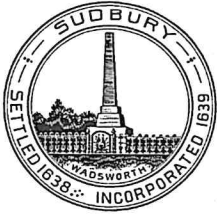
Mr. Gentile made a motion to approve the minutes of June 6th 2024 as amended. Mr. Ryan seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel - Aye, Ms. Howe – Aye, Mr. Riordan – Aye, and Mr. Ryan – Aye.

Public Comment

Amy Lepak suggested setting up a joint Housing Trust and Housing Authority meeting to work on housing funding requests. Mr. Poteat will send a doodle poll out to the Housing Trust and Housing Authority members.

Mr. Riordan made a motion to adjourn. Mr. Ryan seconded the motion. Roll Call Vote:
Mr. Gentile – Aye, Mr. Hummel - Aye, Ms. Howe – Aye, Mr. Riordan – Aye, and Mr.
Ryan – Aye.

The meeting ended at 9:09 AM



Town of Sudbury

Planning & Community Development Department

Adam R. Burney, MPA, Director

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278 Old Sudbury Road
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BurneyA@sudbury.ma.us

MEMORANDUM

To: Carmine Gentile, Chair
Sudbury Housing Trust

From: Adam R. Burney, Director 
Department of Planning & Community Development

Date: 11 July 2024

RE: Parcel Selection Process for the Housing Production Plan

Below please find an updated list of recommendations from the Sudbury Housing Trust to the Housing Production Plan Working Group. These updates reflect the discussion and edits suggested at the Sudbury Housing Trust meeting of 26 June 2024.

1. The SHT recommends the bifurcation of Strategy 7 into two categories. The first category would be Development Parcels and the second would be Study Parcels.
 - a. Development Parcels: The land included under this classification are areas that have been identified as having the potential for development in short-term (1-5 years).
 - b. Parcels Under Active Consideration: These are areas or land that the SHT feels have significant potential for development and will require a more substantial public socialization and discussion process to identify what the residents of Sudbury feel will be the highest and best use to suit all stakeholders.
2. Properties 1 and 3 (Wooded land next to the Fire Station on Hudson Road and the Frost Farm House site) under Strategy 7 (pages 19-21 of the draft HPP) should be classified as Development Parcels in the HPP under the suggested tiered classification described above.
3. The SHT recommends the inclusion of Parcel K10-0404 (Boston Post Road near Goodman's Hill Road) and 82 Morse Road (the house associated with Broadacre) be added to Strategy 7 as Development Parcels.
4. Property 2 (land on Peter's Way Ext.) under Strategy 7 is recommended to be reclassified as a Study Parcel. Furthermore, the SHT feels that both parcel G09-0100 and G09-0300 (land located on Peter's Way Ext.) should be included for consideration. Furthermore, the SHT strongly suggests that this land be referred to as "Town Center Land" and not Sudbury Station. This language change divorces the physical site from the conceptual development of that name and would likely aid in allowing decision makers and the public to see any future proposals or discussions of development for the merits of the

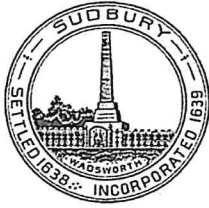
proposal and without the baggage of the previous comprehensive permit filing. The SHT feels that the reclassification of this property is warranted based on the ground swell of opposition to the previous proposal, the valid concerns relative to access, traffic, the environment, etc. that were discussed in the previous project's review, and the fact that the Town has not adequately assessed what might be the highest and best use for such a substantial parcel of land in such a critical location.

5. SHT Recommends that the property currently known as Sewataro be included as a Study Parcel under Strategy 7 in the HPP. Additionally, as with the Town Center Land the SHT suggests using Liberty Ledge as the identifying name for this land to create space from the legacy of Sewataro. This space is not intended to wipe away the merits and memories of the former camp, rather it is to permit stakeholders to view the land through an objective lens.

The property is currently under a management agreement and is host to numerous homes. The SHT recognizes the existing benefit of the facilities and that the continuation of the camp use may be one outcome of any planning process or study. The SHT also recognizes that there is a significant amount of land that may be superfluous to the operation of a camp or other use of the site that would be well served as a location for affordable home ownership units.

Please review and discuss this as a group and let me know if there are additional changes or alterations you would like made.

I look forward to discussing this further with the members of the Housing Trust.



Town of Sudbury

Planning & Community Development Department


Adam R. Burney, MPA, Director

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MEMORANDUM

To: Carmine Gentile, Chair
Sudbury Housing Trust

From: Adam R. Burney, Director 
Department of Planning & Community Development

Date: 23 May 2024

RE: Parcel Selection Process for the Housing Production Plan

At its meeting of 18 April 2024, the Sudbury Housing Trust (SHT) discussed the draft Housing Production Plan (HPP) and questioned the process used to select the parcels included in Strategy 7 of Chapter 2. At this meeting it was suggested that a comprehensive review of Town owned parcels should be performed and that it would be beneficial for additional time to be allocated for the SHT to review and comment on the draft HPP.

I discussed the SHT's request with staff and JM Goldson (the Consultant) to ensure that the parties involved had the capacity to extend the project schedule and confirm what might be a reasonable approach. I presented the options that resulted from these conversations to the SHT at their 9 May 2024, meeting. This conversation resulted in a request for an accounting of the process that was used to determine the parcels put forth in Strategy 7 mentioned above. I will outline the process used below.

After the December public forum held at Town Hall, to outline the housing statics that the HPP will be based on and to illicit general input from the public, the Consultant went about preparing draft goals and strategies for discussion with the HPP Working Group. One of the items required by the Commonwealth to be included in all approved HPPs is the identification of Town owned parcels that may be suitable for the development of affordable housing. The Consultant requested that Town staff provide them with a parcel or parcels that would meet this criterion.

Ryan Poteat and I reviewed the parcels owned by the Town with the intent of removing those that were under the care and custody of the Conservation Commission, Parks Commission, and School Department, as the parcels under the care and custody of these entities are not readily available for the development of affordable housing.

From there Ryan and I reviewed the remaining parcels to exclude those that were occupied by Town buildings, didn't meet dimensional requirements, had wetlands or other constraints. This review resulted in a short list of parcels.

The Consultant, RHSO staff, and Town staff met to discuss the short list of parcels. After this discussion at the next HPP Working Group meeting the short list of parcels was presented to the Working Group for comment. At this meeting that a member of the Working Group suggested that the former Sudbury Station parcel be included in the plan and the majority of the membership agreed. At this same meeting the majority of the Working Group also agreed that the parcels proposed were a reasonable collection of those parcels that would potentially be readily available for the development of affordable housing.

The aforementioned parcels were crafted into Strategy 7 and included in the presentation at the second HPP public forum. The focus of the public forum was to discuss the goals and strategies while also soliciting public input and reaction. The information provided and comments gathered that evening were used to compile the draft of the HPP that was circulated for review.

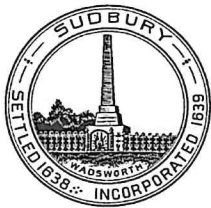
The SHT has requested an additional 120 days to review the HPP and perform a review of Town owned parcels to determine if there are parcels that were not included in the original Strategy 7. I am amenable to this and I am working to extend the Consultant's contract as well.

I would propose a schedule similar to the table below to keep on track for the requested 120 extension. Based on the request of the SHT, comments on the HPP would be due by 6 September 2024 (120 day from 9 May 2024).

Meeting	Topic	Document Chapter
Meeting 1	Parcels – Meeting 1	
Meeting2	Parcels – Meeting 2	Strategy 7, page 18
Meeting3	Goals and strategies	Chapter 2
Meeting4	Strategies, cont	Chapter 2
Meeting5	Demographics and Housing Conditions	Chapters 3 and 4
Meeting6	Development Constraints, Capacity and Resources	Chapters 5 and 6
Meeting7	Final Review once all changes have been made	Maybe not needed

Attached to this memorandum is a list of all the Town owned properties including factors that will or may exclude them from development, a document with comments on Town owned parcels from the RHSO, a list of Sudbury Housing Authority owned parcels, and a document that outlines properties identified as potential sites for Sudbury Housing Authority developments as identified by the Blue-Ribbon Housing Site Selection Committee.

I look forward to the opportunity to discuss this matter further.



Town of Sudbury

Community Preservation Committee

cpc@sudbury.ma.us

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278 Old Sudbury Road
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www.sudbury.ma.us/cpc

PROJECT SUBMISSION FORM

Applicant:

Submission Date:

Group or Committee Affiliation (if any):

Applicant Address:

Purpose (please select all that apply):

Applicant Email:

☐ Open Space & Recreation

Applicant Phone:

☐ Community Housing

Project Manager Email:

☐ Historic Resource

Project Manager Phone:

Project Name:

Project Description:

Costs:

Fiscal Year	Total Project Cost	CPC Funds Requested	Other Funding Sources (Amount and Source)
2025			
2026			
2027			
2028			
2029			
Total			

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

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

For Community Preservation Committee Use:

Form Received On: _____

Project Presented to CPC On: _____

Reviewed By: _____

Determination: _____

TOWN OF SUDBURY COMMUNITY PRESERVATION COMMITTEE

Guidelines for Project Submission

- 1) Each project request must be submitted to the Community Preservation Committee using the Project Submission Form as a cover sheet. Applications should be submitted in four (4) multiple copies and as an electronic PDF file.
- 2) Requests must include a statement of need and be documented with appropriate supporting information. The use of maps, visual aids, and other supplemental information is encouraged.
- 3) Obtain written proposals, estimates, quotes, and such other evidence to document project scope and cost.
- 4) If the request is part of a multi-year project, include the total project cost and allocations.
- 5) Describe the endorsement, support, or other recommendations, if any, by other Town Boards, Committees, Commissions, and Departments.
- 6) Provide examples of similar project proposals in other communities, if any, including examples of project scope, project cost, and status of completion.
- 7) For Applicants that have multiple project requests, please prioritize projects.
- 8) Requests must be received by **12:30 PM, Friday, September 6, 2024** to be considered for recommendation at the May 2025 Annual Town Meeting.
- 9) Applicants must be present at a Community Preservation Committee meeting to answer questions. The Community Preservation Committee meeting schedule has been announced and is posted on the Town's website.

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

Please submit the Project Submission Form and accompanying documentation to:

Ryan Poteat, Community Preservation Coordinator
c/o Planning and Community Development Department
Flynn Building
278 Old Sudbury Road
Sudbury, MA 01776
PoteatR@sudbury.ma.us

TOWN OF SUDBURY COMMUNITY PRESERVATION COMMITTEE

General Criteria

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

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

Category Specific Criteria

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

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

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

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

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

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

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

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

APPLICATION MUST INCLUDE THE FOLLOWING DOCUMENTATION:

- ☐ **Mortgage Information:** Current Mortgage, Home Equity Line of Credit, other lien Statement, on bank letterhead showing outstanding amount
- ☐ **Current Income:** For example, recent paystubs, unemployment statement, explanation of bank deposits, social security or other government assistance, child support, alimony, etc.
- ☐ **Pre-Pandemic Income:** Provide brief description of pre-pandemic job and how income was lost (reduction of hours, laid off, etc.) Provide prior paystub or 2019 tax return showing annual gross income.
- ☐ **Bank Statements:** Copies of last 2 statements all pages on bank letterhead from all bank accounts (Checking, savings, IRA, Investment, Retirement, Pensions, Annuities, etc.)

The Sudbury Housing Trust and/or the Regional Housing Services Office may request additional information if necessary to make a determination of eligibility.

V. Signatures/Certification of True and Correct Information

Please be sure you have completed the application. All completed applications will be reviewed for eligibility to receive mortgage assistance under the program guidelines. If it is determined that your household is eligible you will be asked to obtain the W9 form from the bank and sign a Participation Agreement with the Town.

By signing below, you certify the following:

Certification of application: I/We hereby affirm that the answers to the foregoing questions are true and correct, and that I/we have not knowingly withheld any fact or circumstances which would, if disclosed, affect this application unfavorably. I/We hereby authorize inquiries to be made to verify the information given in this application. **Assistance will be cancelled and/or application will be rejected if any information or statements given are found to be false or information has been withheld.**

Release of Information: I/We agree to and authorize the information obtained with this application may be given to and used to administer and enforce program rules and policies in compliance with guidelines.

I/We understand that all decisions made by the Regional Housing Service Office are final and that any appeals must be submitted in writing to the Trust which has authority over the program funding.

I/We give consent to speak with the below regarding my application as needed:

Name: _____, Agency/Relationship: _____

Phone: _____ email: _____

The parties acknowledge and agree that this application may be executed by electronic signature, which shall be considered as an original signature for all purposes and shall have the same force and effect as an original signature. Without limitation, "electronic signature" shall include faxed versions of an original signature or electronically scanned and transmitted versions (e.g., via pdf) of an original signature.

(Owner Signature)

(Date)

(Co-Owner Signature)

(Date)

SUDBURY MORTGAGE ASSISTANCE PROGRAM (MAP)

The Sudbury Housing Trust recognizes that people are struggling to pay their mortgages, made worse by the COVID pandemic. The Mortgage Assistance Program is funded by federal ARPA funds to help residents maintain housing. If eligible the Program will provide mortgage assistance in the form of a grant to be paid directly to lenders.

Funding will be provided to owners who meet the eligibility requirements and complete this application process, including ALL ATTACHMENTS. Funding is available on a first-come, first-served basis **until funds are exhausted**.

Grant Amount:

Up to \$3,000 of assistance, in monthly payments payable to the holder of first mortgage, towards arrears of outstanding principal (since April 2020) or upcoming payment. Other housing costs (e.g., condo fees, escrowed insurance or taxes, home equity line of credit, or second mortgages, etc.) are not covered expenses.

Eligible Properties and Owners:

- Properties must be located in Sudbury and be occupied by Owners.
- Owners must have a reduction of income due to COVID-19
- Household* income cannot exceed HUD's 100% Area Median Income (AMI).

	100% AMI Income Limits, 2023					
Household	1 person	2 person	3 person	4 person	5 person	6 person
Income Limit	\$104,230	\$119,120	\$134,010	\$148,900	\$160,812	\$172,724

* Household is defined as an individual or two or more persons who will live regularly in the property as their principal residence and who are related by blood, marriage, law or who have otherwise evidenced a stable inter-dependent relationship.

- Property is either a single-family home or condominium.
 - Property must be assessed under 110% of the FY24 median assessment of \$1,090,100.
- Property cannot be in foreclosure, or forbearance, and Owner cannot be in current bankruptcy.
- Owner cannot be receiving other state or federal assistance; such as RAFT or ERMA. (Owners can be receiving local or private funding; such as HOPEsudbury, SWAN, St. Vincent de Paul, etc.)

Program Details:

- Applications are accepted on a rolling basis, and eligibility is determined.
- If approved, Owner provides Lender's W9, and Owner and Trust sign Participation Agreement.
- Town issues payment/s payable to the Lender, forwarded by Owner to Lender. Owner is responsible for remaining amounts for taxes and insurance portion of payment.

Application Assistance:

- Questions? Email info@RHSOhousing.org or call 978-287-1092
- Need assistance filling out the application? Contact the Town Social Work Office at socialworker@sudbury.ma.us or call 978-440-5476
- Favor de comunicarse en 978-287-1092 para ayuda gratis con el idioma.

SUDBURY MORTGAGE ASSISTANCE (MAP) APPLICATION

Return electronically to: info@RHSOhousing.org (in a PDF legible format)
Mail or Drop-off hard copy to: RHSO, 37 Knox Trail, Acton MA 01720 (Black mail box in front)

Please use fillable form to complete electronically or print clearly and complete all information requested. Do not leave blanks or we may be unable to process your application. NOTE that funding will be provided to owners who are able to meet the eligibility requirements and complete the application process. Funding will be available on a first-come, first-served basis, until funds are exhausted.

I. OWNER AND PROPERTY INFORMATION

Applicant Name: _____ **Last 4 SS#:** _____

Address: _____

Telephone: _____ **Email:** _____

Current monthly Income (List total amount from all sources): _____

Average Monthly Income for pre- April 2020 (or 2019 gross annual income): _____

Brief summary of loss of income and job description: _____

Co-Applicant Name: _____ **Last 4 SS#:** _____

Telephone: _____ **Email:** _____

Current monthly Income (List total amount from all sources): _____

Average Monthly Income for pre- April 2020 (or 2019 gross annual income): _____

Brief summary of loss of income: _____

Other members of the household (names, relationship to applicant(s), and whether over 18):

II. MORTGAGE INFORMATION

Primary Mortgage Balance: \$ _____ **Loan #:** _____

Balance(s) of Other Mortgages, Home Equity Lines of Credit, Property Liens: \$ _____

Current monthly mortgage payment: \$ _____

- **Principal and Interest: \$** _____
- **Taxes: \$** _____
- **Insurance: \$** _____

Do you owe past mortgage payments? _____ (Y/N)

- **If yes, how many months and starting when?** _____

☐ If yes, how much in arrears? \$ _____

Is your mortgage currently under forbearance or under a loan modification? ____ (Y/N)

☐ If yes, provide details. Use a separate sheet if needed: _____

Lender's Contact Information:

Name: _____

Street Address: _____

City/Town: _____ State: _____ Zip Code: _____

Best Phone Number: _____ Email: _____

III. HOUSEHOLD INCOME:

Include all forms of income for all adult household members (over 18 years of age), including but not limited to: Employment Income, Self-Employment Income, Unemployment Compensation, Social Security, TANF, Disability Income, Child Support, Pensions, Baby-Sitting Income, etc. See application checklist for required documentation.

Household Member Name	Income Source:	Current Gross Amount	Frequency i.e. every week, month, year
	Employer Name:		
	Employer Name:		
	Unemployment Assistance:		
	Unemployment Assistance:		
	Child Support		
	SSI/SSDI		
	Pensions/Retirement:		
	Other: Please specify		
	Other: Please specify		

IV. HOUSEHOLD ASSETS

Please provide all information on assets accounts held by all family members

Household Member Name	Account (Bank Name)	Current Balance
	Checking:	
	Checking:	
	Savings:	
	Savings:	
	IRA, 401K, specify:	
	Investment/retirement/trust, etc, specify	

APPLICATION MUST INCLUDE THE FOLLOWING DOCUMENTATION:

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(Owner Signature)

(Date)

(Co-Owner Signature)

(Date)