



Regional Housing Services Office

Serving Acton, Bedford, Burlington, Concord, Lexington, Sudbury and Weston

141 Keyes Road
Concord MA 01742
(978) 287-1090

info@RHSOhousing.org
www.RHSOhousing.org

September 27, 2017

To: Meagen Donoghue
From: Liz Rust and Dan Gaulin
RE: Sudbury SHI Projections for 2020 and beyond

This memo is an update of the estimates from November 2016. At that time, we projected that Sudbury would likely exceed the 10% Subsidized Housing Inventory (SHI) with the approvals of permits for Avalon, Coolidge Phase 2, and Meadow Walk. Since that time, Coolidge Phase 2 approved and added to the SHI and we have obtained updated information on building permits from the Census Bureau which allowed us to refine our projection for the total year round units in 2020.

With the addition of the Coolidge Phase 2 units, Sudbury increased its percentage from 10.27% to 11.21% on the State's Subsidized Housing Inventory (SHI), with 664 affordable units in the numerator and 6,165 year round housing units in the denominator, 47 units over the 10% threshold.

This analysis and our previous analysis estimate that the only other affordable units that Sudbury will add will be 2 units under the Home Preservation program. Therefore our projection of 666 affordable units in 2020 is the same. However, our estimate of year round units is 35 units lower. This is a result of:

1. 30 fewer units reported to the Census Bureau to 7/1/17 than we projected,
2. 5 fewer units projected from 7/17 to 4/20. We continue to project 15/unit/year of organic growth but our projections are better aligned with the calendar year than previously.

The net effect of the update is that Sudbury's projected SHI in 2020 will be 10.14% with a margin of 8 units versus our previous projection of 10.08% with a margin of 5.

	8/1/17	Bal of CY17	CY18	CY19	CY20
Affordable units (numerator)	664				
Coolidge	Inc.				
Home Preservation				1	1
Numerator Total	664	664	664	665	666
Total Housing Units (denominator)	5921				
Interim Census report (through 6/30/16)	6150				
Actual Growth (from 6/30/16)	15				
Project Organic Growth		5	15	15	5
Coolidge				56	
Avalon			250		
Meadow Walk				60	
Denominator Total	6165	6170	6435	6566	6571
SHI% with new units added to denominator	10.77%	10.76%	10.32%	10.13%	10.14%
+/- 10%	47	47	20	8	8

DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT CH40B SUBSIDIZED HOUSING INVENTORY

Sudbury

DHCD ID #	Project Name	Address	Type	Total SHI Units	Affordability Expires	Built w/ Comp. Permit?	Subsidizing Agency
3073	Musketaquid Village	55 Hudson Rd.	Rental	64	Perp	No	DHCD
3074	n/a	Great Rd, Ford Road, Great Lake Dr, Oakwood Ave	Rental	8	Perp	YES	DHCD
3075	n/a	Greenwood Rd, Curry Lane, Beachwood Ave, Richard Ave	Rental	4	Perp	YES	DHCD
3076	n/a	Fairbanks Circle, 45&47 Meadow Rd./62&64 Pine St	Rental	12	Perp	Yes	DHCD
3077	Longfellow Glen	655 Boston Post Road	Rental	120	2071	Yes	DHCD MassHousing
3078	Orchard Hill at Sudbury	761 Boston Post Road	Rental	45	2049	Yes	MassHousing
3079	Landham Road	Landham Road	Rental	3	Perp	YES	DHCD
4015	Carriage Lane	717-729 Boston Post Road	Ownership	4	Perp	Yes	MassHousing
4473	DDS Group Homes	Confidential		0	N/A	No	DDS
7874	Sudbury Meadows	534 North Rd	Ownership	2	Perp	YES	MassHousing
8839	Villages at Old County Road	6 Old County Rd	Ownership	10	Perp	YES	MassHousing
8841	Longfellow Rd	Longfellow Rd	Ownership	1	Perp	NO	DHCD
8982	The Residences at Sudbury Commons	29 Hudson Road	Ownership	0	Perp	YES	MassHousing
8983	Sudbury Villages	275, 289, 295, 303 Boston Post Road	Ownership	0	Perp	YES	MassHousing
9000	Habitat for Humanity--Dutton Road	Dutton Road, Pratts Mill	Ownership	2	Perp	YES	DHCD
9001	Maplewood Ave	Maplewood Ave	Ownership	1	Perp	NO	DHCD

DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT CH40B SUBSIDIZED HOUSING INVENTORY

Sudbury

DHCD ID #	Project Name	Address	Type	Total SHI Units	Affordability Expires	Built w/ Comp. Permit?	Subsidizing Agency
9236	Howell Rd	Howell Rd	Ownership	1	Perp	NO	DHCD
9279	Oakwood Ave	Oakwood Ave	Ownership	1	Perp	NO	DHCD
9298	Maynard Road	Maynard Road	Ownership	3	Perp	YES	MassHousing
9352	The Coolidge at Sudbury	189 Boston Post Road	Rental	64	Perp	YES	DHCD
9366	Pinewood Avenue	Pinewood Avenue	Ownership	1	Perp	NO	DHCD
9508	Landham Crossing	192 Boston Post Road	Ownership	8	Perp	YES	MassHousing
9527	Johnson Farm	189 Landham Road	Rental	0	Perp	YES	MassHousing
9657	Eddy Street	Eddy Street	Ownership	1	Perp	NO	DHCD
9682	Willis Lake Drive	Willis Lake Drive	Rental	1	Perp	NO	DHCD
9773	Pratts Mill Road	Pratts Mill Road	Ownership	1	Perp	NO	DHCD
9885	Robbins Road	Robbins Road	Ownership	1	perp	NO	DHCD
9952	Avalon Sudbury	526-528 Boston Post Road	Rental	250	Perp	YES	Mass Housing Partnership
10045	Coolidge at Sudbury-Phase II	187 Boston Post Road	Rental	56	Perp	YES	DHCD
Sudbury Totals				664	Census 2010 Year Round Housing Units		5,921
					Percent Subsidized		11.21%

**Sudbury
SHI Projections**

Projections						Denominator Units	Jun-16	balance of 2016	to 8-2017	balance of 2017	2018	2019	2020
	CY 2016	CY 2017	CY 2018	CY 2019	CY 2020	Added		8	7	5	15	15	5
Numerator						Lost					0	0	0
Start of Period	358	358	664	664	665	Avalon					250		
Project: Home Preservation				1	1	Coolidge						56	
Project: Coolidge		56				Nat'l Dev AR						60	
Project: Avalon		250				Other							
Project: Large Rental													
Total	358	664	664	665	666								
2010 Census: Total Housing Units	5921	5921	5921	5921	5921	Total	6150	8	7	5	265	131	5
2010 Census: SHI %	6.05%	11.21%	11.21%	11.23%	11.25%								
2010 Census: 10% Requirement	593	593	593	593	593	Cumulative		6158	6165	6170	6435	6566	6571
2010 Census: +/- 10%	-235	71	71	72	73								
New Housing Units													
2020 Census: Total Housing Units	6158	6170	6435	6566	6571								
2020 Census: SHI %	5.81%	10.76%	10.32%	10.13%	10.14%								
2020 Census: 10% Requirement	616	617	644	657	658								
2020 Census: +/- 10%	-258	47	20	8	8								

Blue Shaded from US Census Housing Unit Survey - July 2016

Purple shaded from Census Bureau Building Permit data online

	11/1/16	FY17	FY18	FY19	FY20	FY21
Affordable units (numerator)	608					
Coolidge			56			
Home Preservation				1	1	
Numerator Total	608	608	664	665	666	666
Total Housing Units (denominator)	5921					
Interim Census report (through 6/30/14)		199				
Organic Growth (from 7/1/14)		75	15	15	15	60
Coolidge			56			
Avalon				250		
Meadow Walk					60	
Denominator Total	5921	6195	6266	6531	6606	6666
SHI%	10.27%	9.81%	10.60%	10.18%	10.08%	9.99%
+/- 10%	16	-12	37	12	5	-1