

SUDBURY HOUSING PRODUCTION PLAN

Draft: 10/1/24

****FOR DISCUSSION PURPOSES ONLY****

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CHAPTER 1: INTRODUCTION

This document describes how the Town of Sudbury plans to create and preserve affordable and mixed-income housing as well as stabilize housing for existing residents and create more housing options in the community. This plan has been prepared per the requirements of the Massachusetts Executive Office of Housing and Livable Communities (EOHLC), formerly the Department of Housing and Community Development, for a Housing Production Plan. This report is intended to serve as the Town of Sudbury's Housing Production Plan (HPP), a state-recognized planning tool that, under certain circumstances, permits municipalities to influence the location, type, and pace of affordable housing development.

ENGAGING THE SUDBURY COMMUNITY IN THIS PLAN COMMUNITY ENGAGEMENT

The consultant team worked in cooperation with the Town of Sudbury to encourage the community to voice their concerns and ideas for housing. Through focus groups, two community forums, and an online survey, the housing planning process garnered 137 participation points: eight focus group participants, twenty-three community forum attendees, and 106 survey respondents.

64%

Sudbury homeowners who took the survey indicated they would not be able to purchase a home in the Town today.

75%

Survey respondents who supported cottage-style housing developments in the Town.

60%

At least 60% of survey respondents supported the development of cottage-style housing, deed-restricted affordable housing, smaller housing units, supportive housing, moderate-income

137

Total participation points from focus groups, community forums, and online survey.



housing, and attached townhouses.

The opportunity to **coordinate housing development along Route 20** was mentioned in the survey, focus groups, and the first community forum.

Key Housing Needs and Opportunities:

- Accessible and affordable housing for seniors
- Accessory units, duplexes, and starter homes.
- Coordinate infrastructure and business development with housing

FOCUS GROUPS

Two focus groups were held where participants were asked to share their thoughts on Sudbury's housing challenges and opportunities. Some key takeaways gleaned from participants during these discussions include the need for more affordable and accessible housing in the Town, as well as the opportunity to leverage undeveloped land. Participants shared that zoning amendments could pave the way for the development of accessory units, duplexes, and denser, mixed-use development in certain areas, building off the success of earlier projects. They also expressed that the Town should consider additional education on the affordability, sustainability, and fiscal benefits of building and zoning for more housing.

COMMUNITY FORUMS

As part of the engagement process, two community forums were held, the first in-person, to share the Housing Needs Assessment (HNA) and garner community input, and the second virtually, with the consultant team presenting the draft goals and strategies, with opportunities for public feedback and comment. Fourteen community members attended the first forum, while nine participated in the virtual activities in the second. Support for accessory dwelling units (ADUs), as well as accessible and affordable housing (with an emphasis on housing for seniors) was expressed by community members in both forums.

COMMUNITY SURVEY

The Sudbury Housing Production Plan Survey was open for public comment for three months, collecting 106 responses from community members. Most respondents were homeowners with long-standing ties to the Town and tended to be White and earn higher than the median household income. A plurality supported the promotion of more diverse housing types in Sudbury, and most homeowners replied that they would consider building an accessory unit on their property.

The top three most-supported housing initiatives were:

1. Cottage-style housing development.
2. Supportive housing for seniors and people with disabilities
3. Deed-restricted affordable housing.

SUMMARY OF SUDBURY'S HOUSING NEEDS

Sudbury is a beautiful town with plentiful historical resources reflecting the patterns of settlement along the Sudbury and Assabet Rivers. Nearly a third of the town is characterized as wetland. These floodplain soils are not suitable for septic systems, which have limited residential development. Zoning has prioritized single-family homes, though the town has adopted several multi-family districts in recent years; most of them have age restrictions.

Over the past twenty years, the number of Sudbury households has grown by approximately 800. The age distribution of household heads has shifted upwards: today there are about 500

fewer households headed by those under age 45 than there were in the year 2000. The proportion of households including children dropped by 16% in these two decades within town and across the state. Today, fewer than half of Sudbury's households have children. About a quarter of the town's households are headed by those at least age 65. In contrast, they represent two-thirds of the households who earn less than \$75,000 per year. Over half of Sudbury's households report an annual income of over \$200,000.

Despite construction over the past decade of several multi-family developments, single-family homes are 94% of Sudbury's housing units. Their median prices rose over 50% from 2019 to 2022, surpassing \$1 million in 2021. Median condominium prices surpassed \$800,000 in 2022. Nearly a quarter of Sudbury's households are cost-burdened, paying more than 30% of household income towards housing. Almost half of them (685 households) are spending at least half their income on housing.

Sudbury has surpassed the threshold of having 10% of the town's housing units on the Subsidized Housing Inventory; that number, recalculated every ten years with the release of new census data, does not represent a goal which meets the need, but rather the minimum number of affordable units required to avoid state-imposed penalties. The Sudbury Housing Authority, Housing Trust, and Community Preservation Committee have been instrumental in the creation of affordable housing. The Town is a member of the Regional Housing Services Office and is eligible for federal housing funding through the WestMetro HOME Consortium.

CHAPTER 2: GOALS & STRATEGIES

A Housing Production Plan is a planning document that helps local decision-makers respond to local housing needs and can help communities shape the location and type of future housing development. It also influences the location, type, and pace of affordable housing development. This plan emphasizes increasing Sudbury's year-round market rate and affordable housing options to meet local and regional needs.

The housing goals and strategies detailed in this report are based on the demographic and housing analysis findings incorporated herein, as well as observations and preferences of community participants gathered through various engagement methods. The housing goals and strategies are intended to guide local housing policies and initiatives.

Types of Goals Required by EOHLC for Housing Production Plans (760 CMR 56)

- 1) *A mix of types of housing, consistent with local and regional needs and feasible within the housing market in which they will be situated, including rental, homeownership, and other occupancy arrangements, if any, for families, individuals, persons with special needs, and the elderly*
- 2) *A numerical goal for annual housing production, pursuant to which there is an increase in the municipality's number of SHI-eligible housing units by at least 0.50 percent of its total units during every calendar year included in the HPP until the overall percentage exceeds the statutory minimum.*

FIVE-YEAR GOALS

The goals of this plan are consistent with the Comprehensive Permit Regulations (760 CMR 56) as required by EOHLC for Housing Production Plans.

1. Meet Mixed Housing Needs

- a. Promote a diversity of housing types to meet the needs of a changing and aging population and promote a more socio-economically and racially inclusive population. This includes homes affordable for middle-income residents, service-enriched, intergenerational, and accessible homes to meet the needs of older adults and individuals with disabilities. In addition to the housing types above this also includes the following housing choices:
 - i. Year-round market-rate rental homes, including Accessory Dwelling Units
 - ii. Affordable year-round rental and ownership homes
 - iii. Multi-family homes, particularly with smaller studio and one-bedroom units

|

2. Promote Housing in Mixed-Use Locations, Preserve Affordable Homes, and Ensure Transportation Access

- a. Increase the mixture of uses in business districts by encouraging the creation of homes in commercial areas, especially to foster walkable neighborhoods. Ensure that future housing development, particularly those with SHI units, includes resources and access to the limited local shuttle services, walking and bicycling amenities, and connections to regional transportation networks in Town.
- b. Preserve affordability restrictions on affordable homes for the longest period allowable under the law, fostering housing stability for low/moderate-income households.
- c. Ensure affordable homes are decent and safe by supporting the physical preservation and maintenance of these properties.

3. Greening Homes

- a. Encourage the greening of existing homes and new construction to minimize the ecological footprint of residential properties by reducing resource consumption, minimizing pollution, and fostering more sustainable living environments.

4. Maintain the Subsidized Housing Inventory (SHI) at ten percent

- a. Continue to increase the Subsidized Housing Inventory (SHI) while maintaining at least 10 percent of the year-round housing stock in compliance with the state requirements of Chapter 40B.

FIVE-YEAR STRATEGIES

Achieving the community’s five-year goals will require various regulatory, programmatic, and policy strategies. This section includes descriptions of local regulatory strategies, local initiatives, and strategies that deal with implementation capacity, education, and outreach. The intent of these strategies is not to suggest that the Town implement them over five years but to offer multiple ways that the community can work to achieve its goals.

Many of these strategies are contingent on factors beyond the municipality's control, including market opportunities, infrastructure systems capacity, and funding availability. All strategies will require local approvals in accordance with all applicable laws and regulations.

The strategies are organized into four categories and are in no specific order:

- a. Planning, Policies, and Zoning Strategies
- b. Local Initiatives
- c. Programmatic Strategies
- d. Capacity, Education, and Outreach

Planning, Policies, and Zoning Strategies

The Town’s authority to update zoning regulations can have powerful effects to encourage private responses to address local housing needs with minimal local expenditure. The following strategies incorporate recommendations for both local planning initiatives and zoning amendments.

Types of Strategies Required by EOHLC for Housing Production Plans (760 CMR 56)

- 1) *The identification of zoning districts or geographic areas in which the municipality proposes to modify current regulations for the purposes of creating SHI Eligible Housing developments to meet its housing production goal;*
- 2) *The identification of specific sites for which the municipality will encourage the filing of Comprehensive Permit applications;*
- 3) *Characteristics of proposed residential or mixed-use developments that would be preferred by the municipality (examples might include cluster developments, adaptive re-use, transit-oriented housing, mixed-use development, inclusionary housing, etc.); and/or*
- 4) *Municipally owned parcels for which the municipality commits to issue requests for proposals to develop SHI Eligible Housing; and/or*
- 5) *Participation in regional collaborations addressing housing development.*

Strategy 1

Pursue regulatory changes and infrastructure investments that will allow for higher-density multifamily housing within the Route 20 Corridor area taking into consideration traffic management.

By optimizing land use, mixed-use developments make more efficient use of existing infrastructure such as roads, utilities, and public services, while more effectively connecting residents to goods and services. This reduces the operational and fiscal stress on public infrastructure, making it more financially sustainable for the Town in the long run. This is especially important considering Sudbury's limited wastewater infrastructure.

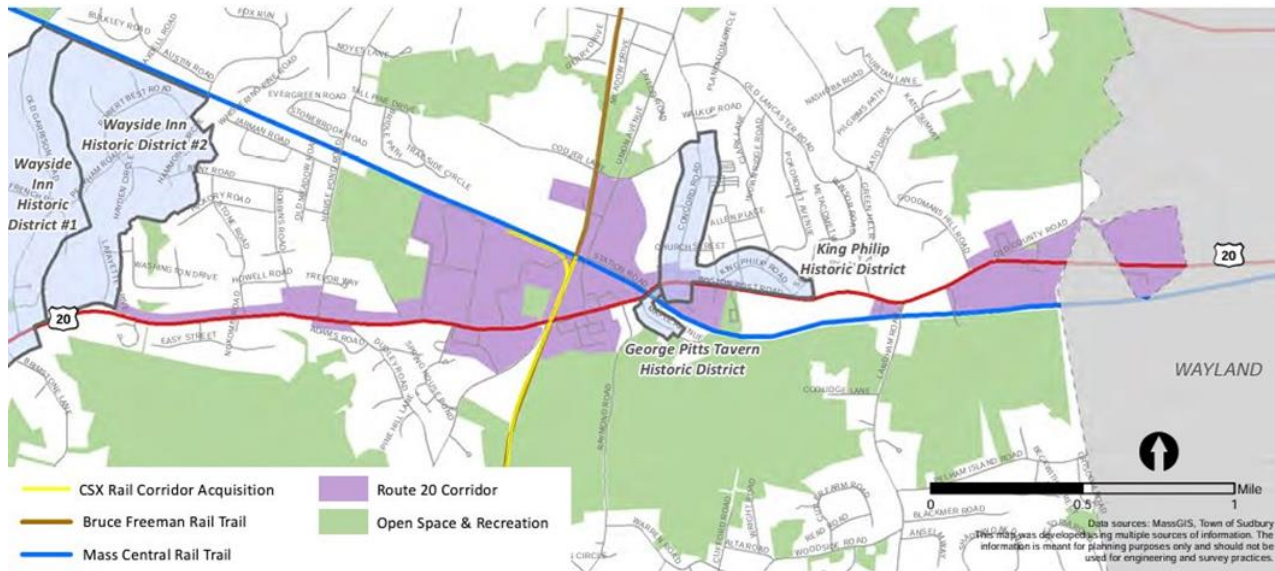
Combining multifamily housing permissions with mixed-use areas adds to these benefits.

Additionally, concentrating higher-density development to mixed-use areas helps preserve green spaces and agricultural land on the fringe. This diversification helps insulate the community from downturns in specific sectors and promotes resilience in the local economy. This coincides with the 2016 Master Plan recommendation: "A.4 Pursue regulatory changes (potentially an overlay district) and infrastructure investments that will allow for higher density housing within the Route 20 Corridor area (see Route 20 Corridor)."

Allowing multifamily housing near mixed-use development can create new housing in walkable neighborhoods, close to goods and services, while having lower per-person impacts on public infrastructure costs. The lack of significant zoning for multi-family housing in Sudbury is a barrier to new housing development. However, the passage of the multi-family overlay district to comply with 3A zoning brings by right development of multi-family housing and the town should continue to pursue regulatory changes in this model.

A UNIQUE OPPORTUNITY

The Route 20 Corridor extends from the boundary of the Wayside Inn Historic District #2 eastward to the town line, as depicted on the map below.



The Route 20 Corridor focuses on commercial areas that extend from the Wayside Inn Historic District #2 east to the Town border with Wayland.

Source: Sudbury Master Plan, page 20

Strategy 2

Expand zoning permissions for additional housing typologies in Sudbury.

Undertake a robust exploration and implementation of zoning amendments to expand the types of housing allowed by-right in Sudbury. These additional types of housing include Accessory Dwelling Units (ADUs) and other "gentle density" housing types: duplexes, co-housing and shared living options, and cottage-style cluster homes.

A mix of housing types within communities offers a range of benefits, including expansion of options, increased potential for affordability, inclusivity, enhanced economic resilience and vibrancy, and greater ecological and fiscal sustainability. By embracing more diverse housing options, communities can create more equitable, livable, and vibrant neighborhoods that cater to the needs and preferences of an inclusive population.

Strategy 2A

Amend the zoning code to comply with EOHLC's ADU regulations following the passage of the Affordable Homes Act.

ADUs, or small apartments built within existing single-family homes or existing accessory structures, are currently allowed by Special Permit through the Board of Appeals in Single Residence District "A," "C," and the Wayside Inn Historic Preservation Zone. The new ADU (Accessory Dwelling Unit) regulations issued by the Massachusetts Executive Office of Housing and Livable Communities (EOHLC) under the Affordable Homes Act simplify and standardize the process for creating ADUs across the state. These regulations promote the development of ADUs by easing zoning restrictions, reducing barriers such as parking requirements, and allowing ADUs to be built by-right in certain residential zones. The goal is to increase affordable housing options by enabling homeowners to add smaller, independent living units to their properties, which can serve as rental units, homes for family members, or affordable housing alternatives.

These smaller housing units can provide additional small-unit options within existing single-family neighborhoods, helping to meet growing regional and local housing needs for younger working professionals, empty-nesters, or older adults looking to downsize without significant changes in the character of these existing neighborhoods.

Strategy 2B

Amend the zoning code to allow Duplexes by-right.

Allowing duplexes can create greater flexibility for developers to meet market demand and create less expensive housing units. Duplexes are a housing configuration that allows for two separate housing units within one structure.

These housing typologies could be allowed by-right in Residential Districts "A" and "C" as well as the Wayside Inn Historic Preservation District and the Village Business District.

Strategy 2C

Amend the zoning code to allow co-housing developments.

These types of housing developments serve to increase the options for residents seeking this type of lifestyle, as well as encourage closer neighborhoods that preserve open space and lower land costs associated with housing units.

Co-housing developments are small groups of homes clustered around a shared space or other shared facilities, like gardens, laundry rooms, or car garages. This housing arrangement could be age-targeted, or unrestricted.

Strategy 2D

Amend the zoning code to allow Cottage-Style Clustered Homes.

These types of housing developments serve to increase the options for residents seeking this type of lifestyle, as well as encourage closer neighborhoods that preserve open space and lower land costs associated with housing units.

Cottage-style housing is typically groups of smaller (1 to 1.5-story) detached structures arranged around a shared court visible from the street. Often, the rear-most buildings can be up to two stories, keeping the profile on the street lower. This housing arrangement could be age-targeted, or unrestricted.

Strategy 3

Maintain compliance with the state-mandated 3A, Multi-family Zoning Districts or "MBTA communities" law.

This new law requires that an MBTA community shall have at least one zoning district of reasonable size in which multi-family housing is permitted as of right and meets other criteria set forth in the statute:¹

- Minimum gross density of 15 units per acre
- Located not more than 0.5 miles from a commuter rail station, subway station, ferry terminal or bus station, if applicable
- No age restrictions and suitable for families with children

In May 2024, during Sudbury's Town Meeting, the zoning changes connected to the new MBTA Communities zoning law were approved. Section 3A requires that municipalities adopt zoning regulations that allow multi-family developments close to transit or in other walkable "smart growth" locations by-right (not requiring a special permit or other discretionary approval process). The law allows flexibility for local regulations that will best fit their local context.

¹ "Multi-Family Zoning Requirement for MBTA Communities." Mass.gov. Accessed April 1, 2024. <https://www.mass.gov/info-details/multi-family-zoning-requirement-for-mbta-communities>.

Housing that may be built under new multifamily zoning can have either a rental or ownership tenure and can vary in size from duplexes to townhomes to larger apartment buildings, as long as the average gross density pencils out to at least 15 units per acre.²

The town created zoning overlay districts to comply with the law that covers the Meadow Walk and Cold Brook Crossing area – both existing dense housing developments along the Boston Post Road and Route 117, respectively. In Sudbury, there are other examples of parcels that meet the units per acre requirement. Based on the "Residency"³ calculator by the Massachusetts Housing Partnership (MHP) in "The Coolidge at Sudbury" the units per acre density is just under 19 units.³ Sudbury falls under the category of an Adjacent Community and is required to zone for 750 multi-family units.



Source: Google Maps, The Coolidge at Sudbury, 192 Boston Post Rd., Sudbury, MA.

Local Initiatives

Local initiatives refer to actions that the Town can undertake to foster the creation of more housing options, especially affordable housing, using local resources. These initiatives are not regulatory in nature - they deal with the allocation of Town resources, including staff time, funding, and property.

Strategy 4

² "MBTA Communities: Show Your Support Toolkit," Metropolitan Area Planning Council, accessed April 5, 2024, <https://www.mapc.org/resource-library/mbta-communities-show-your-support-toolkit/#messaging>

³ "Residency," Massachusetts Housing Partnership, accessed April 5, 2024, <https://residency.mhp.net/>

Support the Sudbury Housing Authority (SHA) achievement of key SHI goals.

The Sudbury Housing Authority is a key resource for affordable housing in the Town. Supporting the programmatic and capital improvement goals of the SHA is an important means of supporting the Authority's effectiveness.

Strategy 4A

Expand Accessibility and Aging in the community, including improvement to public housing units to support the needs of aging residents.

The SHA owns 64 apartments at Musketahquid Village for people over 60 and disabled people.⁴ This strategy includes assisting the SHA to expand access to services for aging residents (e.g., transportation, care, and other services) for SHA senior residents and residents with disabilities. The Affordable Homes Act include \$15 million for accessibility upgrades to public housing throughout the Commonwealth⁵ for which the Town could apply.

This strategy could also include advocating for the creation or reinstatement of programs like the "Accessible Unit Initiative" by the EOHLC. The "Accessible Unit Initiative" provides funding for bringing family and elderly public housing units up to the standards of current Massachusetts Architectural Access Board (MAAB) and the American with Disabilities Act (ADA) as able and feasible as well as the Fair Housing Act and Uniform Federal Accessibility Standards where applicable⁶

⁴ "Sudbury Housing Authority." Town of Sudbury, accessed April 1, 2024. <https://sudbury.ma.us/housingauthority/>.

⁵ "The Affordable Homes Act: Fact Sheet," Mass.gov, accessed April 11, 2024, https://www.mass.gov/doc/affordable-homes-act-fact-sheet/download?_ga=2.142434418.1100113556.1703004628-238076166.1695042993&_gl=1%2A1y7afhd%2A_ga%2AMjM4MDc2MTY2LjE2OTUwNDI5OTM.%2A_ga_MCLPEGW7WM%2AMTcwMzE3NjI3MC40LjAuMTcwMzE3NjI3MC4wLjAuMA..

⁶ Massachusetts Department of Housing and Community Development. "2019-09 Notice of Funding Availability: Accessible Unit Initiative." Accessed April 9, 2024. <https://www.mass.gov/doc/2019-09-notice-of-funding-availability-accessible-unit-initiative/download>.

Strategy 4B

Create affordable duplex units at current single-family SHA-owned properties.

The Sudbury Housing Authority owns, maintains, and manages 28 scattered-site, single-family, and duplex rental houses for low-income families. The SHA is currently working to replace 4 single-family homes with duplexes. This strategy recommends the ongoing conversion of single-family properties to affordable duplexes.

Strategy 4C

Allow a broader definition of family housing to promote multi-generational public housing (with or without children).

A limited definition of family restricts the breadth of household types able to live in housing units. Broadening this definition will allow for greater flexibility in living arrangements.

Strategy 5

Support the Sudbury Housing Trust's (SHT) goal to create new affordable homeownership opportunities.

The Trust implements the recommendations set forth in the Sudbury Housing Production Plan to the purpose of aiding the Town of Sudbury, private enterprises and non-profit organizations, and other public agencies in the speedy and orderly acquisition, rehabilitation, renovation, construction, financing or refinancing of property within the Town of Sudbury so that such property will be substantially available as residential property for low and moderate income persons and to further provide mechanisms to ensure such use.⁷

The Town can continue to support the Trust by providing local funding, town-owned property, and staffing resources so that the Trust can proceed to acquire property to create new homeownership housing units. The Sudbury Housing Trust receives funds through CPA appropriations, external revenue through lottery and monitoring agent services, and interest income on its fund balance, with CPA funds the largest component.

⁷"Sudbury Affordable Housing Trust Fund." Town of Sudbury, accessed April 1, 2024. <https://sudbury.ma.us/housingtrust/>.

In an effort to promote affordable housing development, the Town should conduct a review and assessment of all Town-owned land, updating and following the model used in the 2003 review by the Select Board's Blue Ribbon Housing Site Selection Committee. This process should include site-specific recommendations for the development of affordable rental and homeownership opportunities.

Since its creation in 2007, the Trust has directly created 14 units of housing (8 units through Home Preservation, 2 Habitat for Humanity properties, 3 Maynard Road Homes, 1 buy-down at Old County Road), and assisted the creation of another 70 units (Coolidge and Sudbury Housing Authority).⁸

The Town should also continue to support the Trust in providing funds for the Home Preservation Program. This is an existing program offered by The Sudbury Housing Trust to preserve current housing stock while creating affordable Local Action units. This program offers single-family detached homes with their own yard at affordable prices, preserving them for first time homebuyers. The houses are subject to a Local Initiative Program affordable housing restriction, and the Trust subsidizes the difference between the market price and the affordable price.

The Town also recognizes that initial repairs on the homes may be needed before closing. The Trust completes the required home repairs based on inspection results from licensed local home inspectors. The inspection results and the home repair plan are available for the potential purchaser to review.⁹

⁸ Sudbury, Massachusetts. "2016 Sudbury Housing Production Plan." Sudbury, Massachusetts Official Website, November 2018. <https://cdn.sudbury.ma.us/wp-content/uploads/sites/304/2018/11/Sudbury-Housing-Production-Plan.pdf?version=993bcefe3f97d37c434d9aa19cb9841f>

⁹ Sudbury, Massachusetts. "2016 Sudbury Housing Production Plan." Sudbury, Massachusetts Official Website, November 2018. <https://cdn.sudbury.ma.us/wp-content/uploads/sites/304/2018/11/Sudbury-Housing-Production-Plan.pdf?version=993bcefe3f97d37c434d9aa19cb9841f>

Strategy 6

Encourage the Sudbury Housing Authority (SHA) and Sudbury Housing Trust (SHT) to work collaboratively to acquire private sites and/or utilize existing Town-owned property to create new affordable housing options.

With increasing land value and development costs the collaboration between the SHA and SHT will help to mitigate the costs and get the best use of the land available. Leveraging the federal and state funding that SHA has access to as a public housing authority will add to the financing of projects funded through the SHT. These new units could target populations that need affordable housing and smaller units like older adults looking to downsize and younger families looking to spread roots in Sudbury. Applying for funds provided by the newly passed Affordable Homes Act will provide leverage to develop affordable housing in town. The Affordable Homes Act is a comprehensive package of spending, policy, and programmatic actions aimed at investing in housing while simultaneously affording opportunities to tackle housing unaffordability and making progress on the state's climate goals. Sudbury's Climate Mobilization Action Plan (CMAP) outlines the town's comprehensive strategy to address climate change. This multi-pronged approach includes \$4 billion in capital spending authorizations, 28 substantive policy changes or initiatives, three executive orders, and two targeted tax credits. All are directed at reducing barriers to the production and preservation of housing and giving communities the tools to develop more housing where they need it.

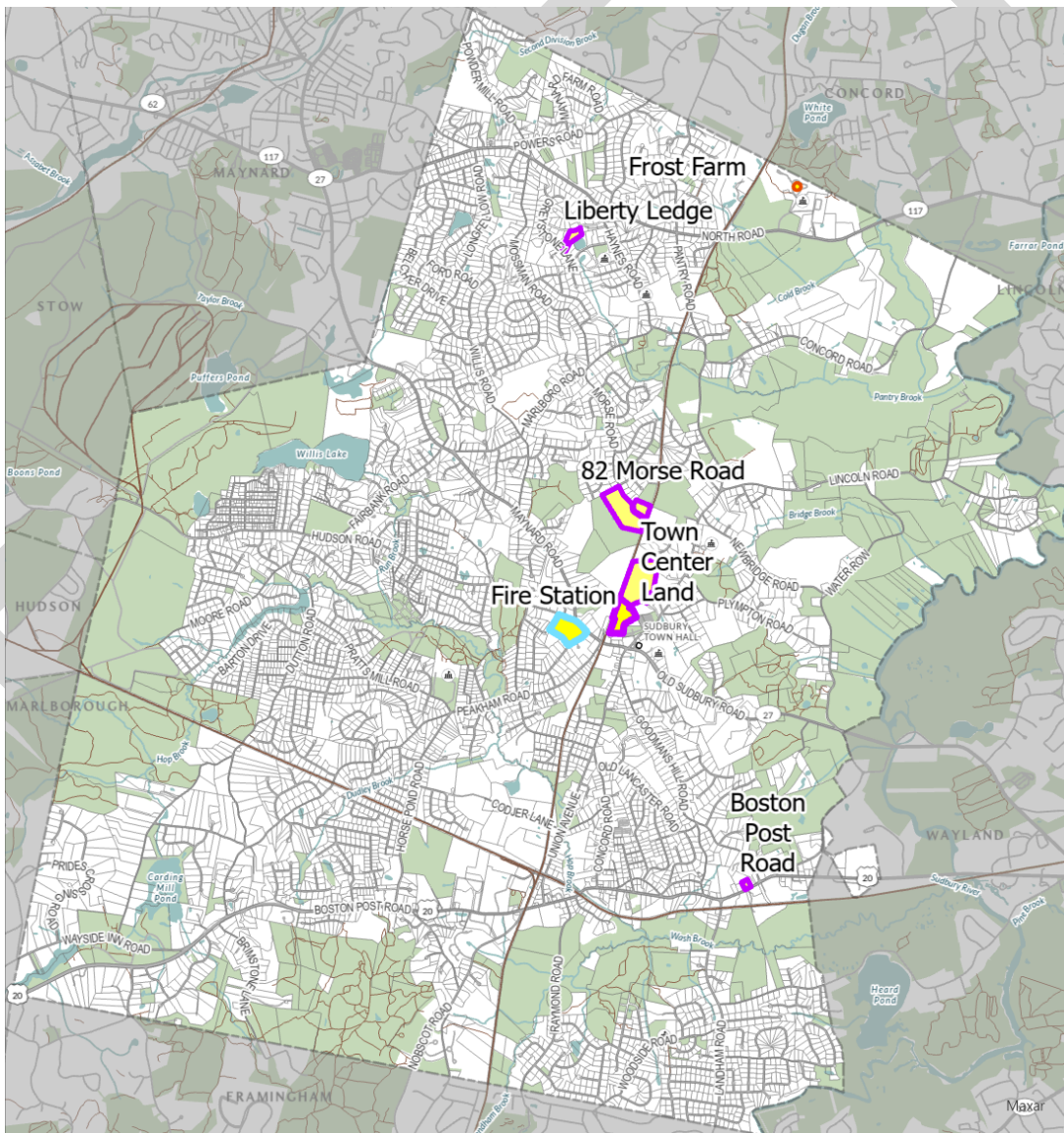
A total of \$1.83 billion would be directed to housing production and preservation in Massachusetts. The Affordable Homes Act would also make the Community Investment Tax Credit Program permanent and increase it from \$12 million to \$15 million per year to support the work of Community Development Corporations. A new Homeownership Tax Credit would be created to spur the production of homes affordable to first-time homebuyers earning not more than 120 percent of the area median income. The University of Massachusetts Donahue Institute estimates that all this activity could create 30,000 new jobs, produce roughly \$800 million in state tax revenue, and generate about \$25 billion of total economic activity over five years.¹⁰

¹⁰ "The Affordable Homes Act: Smart Housing, Livable Communities," Mass.gov, accessed April 10, 2024, <https://www.mass.gov/info-details/the-affordable-homes-act-smart-housing-livable-communities>.

Strategy 7

Utilizing the results of the assessment of all Town-owned land, use the parcels identified to foster affordable housing development on Town-owned property through the Request for Proposals (RFP) and Chapter 30B (Uniform Procurement Act) processes.

Consider offering Town-owned property for affordable housing development. A preliminary review of Town-owned properties has identified several Town-owned sites that could be considered for affordable housing development, perhaps as duplexes or other smaller-scale housing types. These sites vary in their potential and readiness for development, they are categorized into two groups: Developable Land and Study Parcels Needing Further Feasibility Analysis.



7A. Developable Land

The land included under this classification are areas that have been identified as having the potential for development in the short term (1-5 years). The following Town-owned sites have been identified as having immediate potential for affordable housing development:

1. Wooded land adjacent to the former site of Sudbury Fire Station on Hudson Road: Parcel ID number G08-0008. The wooded area next to the former site of the Sudbury Fire Station is about 13 acres and is the only of the three recommendations that has an environmental constraint. About 2 acres of the developable land is in a flood zone with an additional acre sitting on a wetland area. This land is located at the corner of Hudson and Colonial Road to the other side of the Congregation Beth El. It is within walking distance from the Sudbury Housing Authority property on Musketahquid Village Road, as well as goods and services.



■ Wetland Area

■ FEMA Flood Area

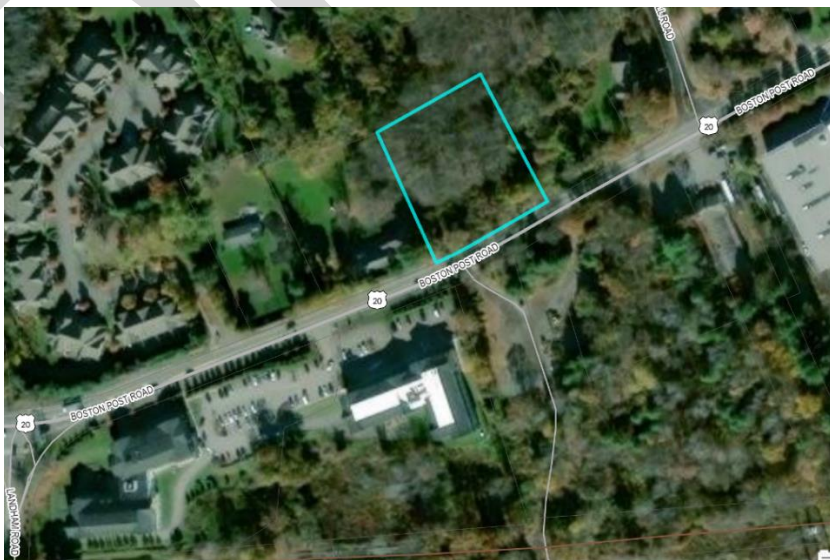


2. Frost Farm: Parcel ID number C11-0301 is a 44-unit age-restricted development where the units are sold to eligible purchasers at prices discounted from the market rate. The area available is the site of an older house that has since been removed. There are no environmental constraints on the area in question, which is +/- 2 acres. The existing development surrounding this potential site is within walking distance of the small commercial/institutional area where the Corwin-Russell School and Sudbury Children's Learning Center are located, as well as close to the Bruce Freeman Rail Trail.



Image: Google Maps

3. Boston Post Road: Parcel ID KI 0-0404. This property is across from the Coolidge at Sudbury, and at walking distance from food establishments, and other commercial spaces, including a childcare center.



4. 82 Morse Road: Parcel ID F09-0002. This property is associated with Broadacre. The property has existing septic and several existing structures which could be restored and renovated for affordable housing. The property is an eleven-minute walk from the Lower Featherland Park and Nixon Elementary School. Sudbury Town Hall, goods and services are a twenty-minute walk from the property.

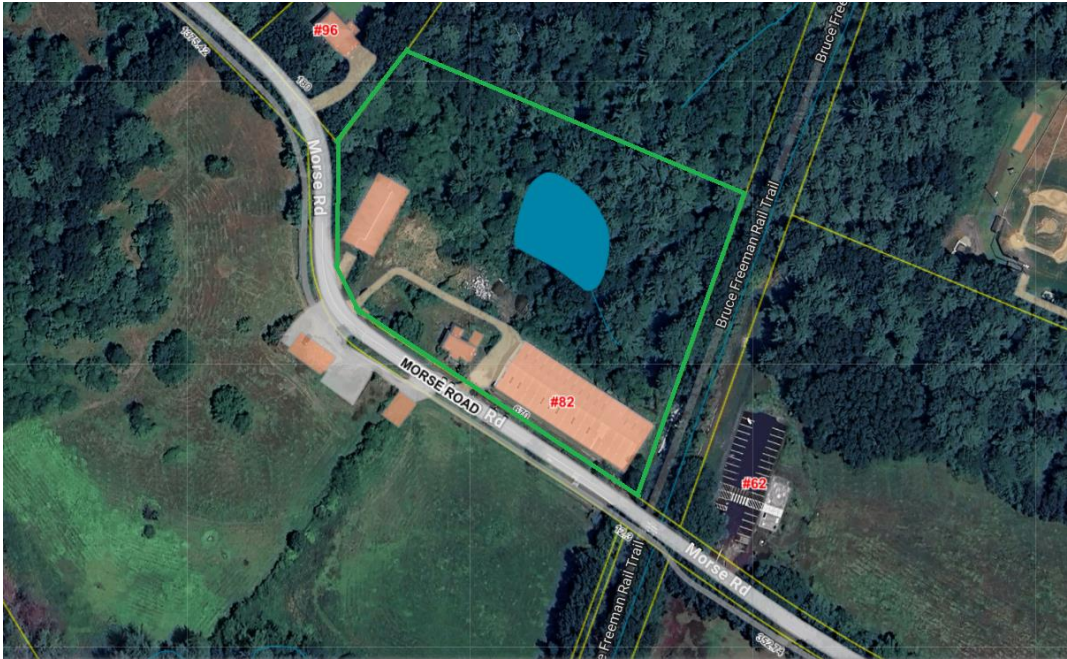


Image: Town of Sudbury

7B. Study Parcels

In addition to the developable land, there are other Town-owned parcels with significant potential for housing development. However, these sites require further feasibility studies to assess their suitability. These studies could focus on factors such as environmental impact, infrastructure needs, and community considerations. Given the importance of these areas, a more extensive public engagement process will be necessary to ensure that the residents of Sudbury can help identify the highest and best use of the land, considering the interests of all stakeholders.

Below are a few parcels that could be considered study parcels. A comprehensive list of parcels for consideration is available in this report in the appendix.

1. Town Center Land Parcel on Peters Way EXT: Parcel ID number G09-0100 and G09-0300. Parcel G09-0100 was previously part of a land swap in 2016 - once a proposed 250-unit Village - swapped for the Melone property, which became The Cold Brook Crossing development at 36 North Road. The parcel measures about 32

acres and does not contain any environmental constraints. This property is nestled in the back of the parcels at 30 and 36 Hudson Rd and First Parish of Sudbury, the Old Town Cemetery, and Mt. Pleasant Cemetery parcels. This land is within walking distance of goods and services.



2. Liberty Ledge: Parcel ID C08-0115. This land currently is host by Camp Sewetaro which is located on 44 acres of woodland. The camp facilities include a swimming pond, four pools, a fishing and boating pond, a zip line, rock climbing wall, tennis courts, an archery range, and ropes courses. The site is at walking distance from the Josiah Haynes Elementary School.



4.3. Include other potential parcels for further analysis and review: Other parcels may be suitable for consideration and should be further analyzed. Lands included in the "Town-Owned Property Review SHA 2017 – Updated" document available in the Appendix can be considered for further analysis and review.

Programmatic Strategies

Programmatic strategies deal with local programs that provide direct assistance to qualifying households to make homes more affordable to buy, rent, and live in and more habitable, healthy, and sustainable.

Strategy 8

Continue to support and promote current local housing assistance programs and introduce new ones including the below.

1. Small Grant Program: This program is designed to assist Sudbury residents in making repairs and alterations to their homes for safety and health reasons. Grants are awarded three times per year, and awards are for up to \$6,000 each. Uses of the money awarded can be used for minor plumbing or electrical work, light carpentry, window repairs, broken or clogged gutters or downspouts, door repairs or replacements, step or porch repairs, and more.¹¹
2. Downpayment and Rental Assistance: Downpayment programs provide financial support to help homebuyers cover the initial costs of purchasing a home, typically focusing on

¹¹ Sudbury Housing Trust, "Small Grant Program Accepting Applications," Sudbury Housing Trust, accessed April 1, 2024, <https://sudbury.ma.us/housingtrust/2024/02/08/small-grant-program-accepting-applications-2/>.

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the down payment and sometimes closing costs. Assistance can come in the form of grants, low-interest loans, or deferred loans that do not need to be repaid until the home is sold or refinanced. Rental assistance programs offer financial aid to individuals or families to help cover the cost of rent. Assistance can be provided through direct subsidies, such as vouchers (e.g., Section 8), or through funds that pay a portion of the rent directly to landlords. These programs are typically aimed at low-income households, with eligibility based on income, family size, and housing needs. Rental assistance can help make housing more affordable and reduce the financial burden on renters.

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Strategy 9

Explore ideas for new programs, including the following:

1. Expand the Home Preservation Program to include First-generation homebuyers in addition to First-time homebuyers.

“First-generation homebuyers” are a subset of “First-time homebuyers”. They are households that neither they nor their parents ever owned a home in their lifetime or lost it due to foreclosure in the US, and their spouse nor their spouse's parents ever owned a home in the US.¹²

First-generation homebuyer programs can serve as an essential mechanism for addressing disparities including the racial wealth gap, addressing issues of housing equity, and enhancing opportunities in homeownership. By providing financial assistance and support, these programs can level the playing field for individuals and families facing systemic barriers, such as Black, Indigenous, and other People of Color (BIPOC) communities and low-income groups. Their focus on affordability makes homeownership more attainable, particularly for buyers struggling with upfront costs. In essence, first-generation homebuyer programs play a multifaceted role in promoting social equity, economic opportunity, and community well-being.

The Town could actively work with the Regional Housing Services Office and the state’s Executive Office of Housing and Livable Communities to promote priority for First-generation homebuyers in its Home Preservation Program and other affordable homebuyer opportunities in Sudbury.

2. Sustainability and renewable energy upgrades for homeowners with lower incomes.

Programs offering sustainability and renewable energy upgrades for lower-income homeowners offer financial relief by reducing utility bills, thereby easing financial strain, and allowing families to allocate resources to other essential needs. Additionally, these programs contribute to environmental protection by curbing carbon emissions and promoting cleaner energy sources, fostering a healthier environment for all residents.

¹² Massachusetts Affordable Housing Alliance. "What is a first-generation homebuyer?" Massachusetts Affordable Housing Alliance. <https://mahahome.org/STASH#:-:text=What%20is%20a%20first%2Dgeneration,a%20home%20in%20the%20US>. (accessed April 8, 2024).

Sudbury could explore local programming that offers energy efficiency initiatives, especially to lower-income residents, that promote energy efficiency in residential buildings. This can include providing incentives for energy-efficient upgrades such as insulation, efficient appliances, and LED lighting. Additionally, offering energy audits and education on energy-saving practices can help residents reduce their energy consumption and lower utility bills.

In addition to the above resources, offering incentives or financing options for residents to install solar panels on their homes, and community solar programs, where residents can subscribe to a shared solar installation, can also make solar energy accessible to residents who may not be able to install panels on their own property. Offering rebates or tax incentives for residents who invest in renewable energy technologies such as solar, wind, or geothermal systems can encourage adoption and help offset the upfront costs.

To get started in offering these local programs to residents Sudbury can leverage the state's environmental and renewable energy programs. In Massachusetts, several programs aim to assist homeowners with lower incomes in implementing sustainability and renewable energy upgrades.

- a. **Massachusetts Clean Energy Center (MassCEC) Residential Programs:** MassCEC offers various residential programs aimed at promoting renewable energy adoption and energy efficiency improvements. These programs may include incentives, rebates, and financing options for homeowners to install solar panels, heat pumps, energy-efficient appliances, and other renewable energy technologies.¹³
- b. **Massachusetts Department of Energy Resources (DOER) Low-Income Solar Programs:** DOER administers low-income solar programs designed to make solar energy more accessible to households with lower incomes. These programs may offer incentives, grants, or financing options specifically tailored to low-income homeowners to help them install solar photovoltaic (PV) systems.¹⁴

¹³ "Clean Energy Solutions," MassCEC, accessed April 1, 2024, https://goclean.masscec.com/clean-energy-solutions/?utm_source=google&utm_medium=cpc&utm_campaign=cleanenergy&utm_adgroup=103734051755&utm_create=658039580082&utm_keyword=clean%20energy&utm_matchtype=p&gad_source=1&gclid=CjwKCAjwTqmwBhBVEiwAL-WAYccnNXgYz31EbfecuFtlq_v6XlCtnCUa-sz1A18l420vgEtkY4AO2xoCwllQAvD_BwE&gclid=aw.ds.

¹⁴ "Solar Massachusetts Renewable Target (SMART)," Mass.gov, accessed April 1, 2024, <https://www.mass.gov/solar-massachusetts-renewable-target-smart>

- c. **Mass Save:** These programs provide energy assessments, weatherization services, insulation upgrades, and incentives for energy-efficient equipment installations.¹⁵
- d. **Community Solar Programs:** Community solar programs allow homeowners to access the benefits of solar energy without installing solar panels on their property. These programs enable participants to subscribe to a shared solar project located off-site and receive credits on their electricity bills for the energy generated.¹⁶

Collaborating with state agencies on environmental and energy initiatives can help Sudbury access resources, expertise, and technical assistance. By aligning local initiatives with state goals and priorities, municipalities can strengthen their competitiveness for state funding and support.

To offer these incentives, the Town would need to identify a funding source and consider administration needs and staff capacity for this type of program. An interdepartmental collaboration between the building department and the Planning and Community Development department may prove helpful when coordinating these programs and expediting decision-making and operations.

3. Offer Micro-loans and other resources for accessibility and adaptive and independent living upgrades to existing homes.

Sudbury is an aging community and there is concern for housing older adults who want to live in the community as they age. Programs offering micro-loans and other resources for accessibility and adaptive and independent living upgrades enable individuals with disabilities and older adults to enhance their quality of life by improving home accessibility and safety.

To provide residents with this benefit, Sudbury could provide local funding and increase staff capacity to operate them. The Town can leverage state funding from the below programs.

- a. **Community Development Block Grants (CDBG):** Massachusetts receives CDBG funds from the U.S. Department of Housing and Urban Development (HUD) to support community development activities. Eligible municipalities can apply for CDBG funding

¹⁵ Mass Save, accessed April 1, 2024, <https://www.masssave.com/>.

¹⁶ "Community Solar," MassCEC Clean Energy Solutions, accessed April 1, 2024, <https://goclean.masscec.com/clean-energy-solutions/community-solar/>.

to finance accessibility improvements for low- and moderate-income individuals, including home modifications and rehabilitation projects.¹⁷

- b. **Massachusetts Rehabilitation Commission (MRC):** The MRC offers various programs and services to support individuals with disabilities, including home modifications and assistive technology. Municipalities can collaborate with the MRC to access funding or resources for accessibility upgrades for town residents. One of the programs is the "Home Modification Loan Program (HMLP)" which provides no-interest loans to modify the homes of adults and children with disabilities.¹⁸
- c. **MassHousing:** MassHousing offers financing options for home improvement modifications for homeowners. Sudbury can partner with MassHousing to provide low-interest loans or grants for accessibility upgrades to eligible town residents.¹⁹
- d. **Massachusetts Assistive Technology Loan Program (ATLP):** The ATLP provides low-interest loans to Massachusetts residents with disabilities to purchase assistive technology devices and services, including home modifications. Sudbury can inform town residents about this program and assist them in accessing loans for adaptive living upgrades.²⁰
- e. **Local Aging Services Access Points (ASAPs):** Aging Services Access Points (ASAPs) in Massachusetts may offer assistance to older adults and individuals with disabilities to help them stay in their homes or communities.²¹ Look at partnering with the local ASAP, "[Springwell](#)", to work on offering these services locally to Sudbury residents.

Overall, these programs empower individuals to remain in their homes comfortably and safely while fostering inclusive and resilient communities.

¹⁷ U.S. Department of Housing and Urban Development, "Community Development Block Grants (CDBG)," accessed April 9, 2024, <https://www.mass.gov/info-details/community-development-block-grant-cdbg#eligible-activities->.

¹⁸ Massachusetts Housing Finance Agency. "Home Modification Loan Program." Accessed April 9, 2024, <https://www.mass.gov/home-modification-loan-program-hmlp>

¹⁹ Massachusetts Housing Finance Agency. "Homeowners." Accessed April 9, 2024. <https://www.masshousing.com/home-ownership/homeowners>.

²⁰ Easterseals Massachusetts. "Loan Programs." Accessed April 9, 2024. <https://www.easterseals.com/ma/programs-and-services/assistive-technology/loan-programs.html>

²¹ "Aging Services Network," Mass.gov, accessed April 1, 2024, <https://www.mass.gov/info-details/aging-services-network>

Capacity, Education, and Outreach

The following strategies are recommendations for expanding local capacity to implement housing initiatives, promote education, and coordinate housing initiatives with other local or regional entities.

Strategy 10

Continued training & education of municipal staff on housing programs and laws.

Continued training and education of municipal staff on housing programs and laws yield numerous benefits. Firstly, it enhances program effectiveness and compliance by ensuring staff are knowledgeable about current regulations. Secondly, it improves service delivery, fosters innovation, and empowers staff to address complex issues confidently. Additionally, it encourages collaboration, enhances community engagement, and ultimately leads to cost savings. Overall, investing in staff education strengthens housing initiatives, promotes compliance, and better serves the diverse needs of communities.

- a. Massachusetts Housing Partnership (MHP): MHP offers training sessions, workshops, and webinars tailored to municipal staff, housing professionals, and local officials. These sessions cover various topics related to affordable housing development, fair housing laws, zoning regulations, and municipal planning.²²
- b. Citizens' Housing and Planning Association (CHAPA): CHAPA organizes training events, conferences, and forums focused on housing policy, advocacy, and best practices. These events provide opportunities for municipal staff to learn about housing programs, regulations, and strategies for addressing housing challenges in their communities.²³
- c. Massachusetts Association of Community Development Corporations (MACDC): MACDC offers capacity-building workshops, training programs, and networking events for municipal staff, community development professionals, and affordable housing advocates. These sessions cover a range of topics related to community development, affordable housing finance, and local planning.²⁴

²² Massachusetts Housing Partnership, accessed April 2, 2024, <https://www.mhp.net/>.

²³ Citizens' Housing and Planning Association, accessed April 2, 2024, <https://www.chapa.org/>.

²⁴ Massachusetts Association of Community Development Corporations, accessed April 2, 2024, <https://www.macdc.org/>.

- d. Massachusetts Executive Office of Housing and Livable Communities (EOHLC): EOHLC provides technical assistance, guidance documents, and online resources to support municipal staff in implementing housing programs and complying with relevant regulations. EOHLC staff may also conduct training sessions or participate in regional workshops to share expertise and answer questions from local officials.²⁵
- e. Regional Planning Agencies (RPAs): RPAs often offer training opportunities and educational resources for municipal staff on housing-related topics, including land use planning, zoning regulations, and affordable housing development strategies. These agencies may organize workshops, conferences, or peer learning groups to facilitate knowledge-sharing and collaboration among municipalities.
- f. Local Housing Authorities and Nonprofit Organizations: Local housing authorities and nonprofit organizations may collaborate with municipalities to offer training and education programs on housing programs and laws. These organizations may provide technical assistance, host informational sessions, or develop resource materials tailored to the specific needs of municipal staff and local communities. One such organization is "Mass Legal Services (MLS)." MLS offers Fair Housing Training Guidance through its partnership with the Fair Housing Justice Center. This Fair Housing Training Guide was produced by the Fair Housing Justice Center (FHJC) to be used in conjunction with FHJC's Fair Housing Training Program. The FHJC is a regional civil rights organization dedicated to eliminating housing discrimination; promoting policies and programs that foster open, accessible, and inclusive communities; and strengthening enforcement of fair housing laws.²⁶
- g. The U.S. Department of Housing and Urban Development (HUD): HUD offers several resources to train municipalities on Fair Housing regulations, including the Affirmatively Furthering Fair Housing rule. In general, the AFFH mandate applies to HUD and its grantees, as well as all executive agencies and departments of the federal government and relates to the administration of any program or activity relating to housing and urban development. For decades, HUD has required recipients of federal financial assistance such as States, local governments, insular areas, and PHAs (program participants) to engage in fair housing planning. Such planning has previously consisted of the Analysis of Impediments to Fair Housing Choice and the Assessment of Fair Housing and was done in connection with other types of planning required by

²⁵ Executive Office of Housing and Livable Communities, accessed April 2, 2024, <https://www.mass.gov/orgs/executive-office-of-housing-and-livable-communities>.

²⁶ "Fair Housing Training Guide," Mass Legal Services, accessed April 2, 2024, <https://www.masslegalservices.org/content/fair-housing-training-guide>.

program requirements, such as the consolidated plan, annual action plan, and PHA plan.

HUD implements the AFFH mandate in other ways, such as through its collection of certifications from program participants, provisions regarding program design in its notices of funding opportunity (NOFOs), affirmative fair housing marketing and advertising requirements, and enforcement of site and neighborhood standards.²⁷ Sudbury should be looking to Affirmatively Further Fair Housing as the law directs, and educate all staff on how this rule plays into their everyday work in Town, as housing is only one part of the rule's focus.

These programs and resources play a crucial role in building the capacity of municipal staff, promoting compliance with housing laws, and supporting effective housing policy and planning at the local level in Massachusetts.

Strategy 11

Leverage Community Preservation Act and Affordable Housing Trust funds.

Municipal Affordable Housing Trusts, per MGL c.44 s.55C, the state's Municipal Affordable Housing Trust Law, may generate revenue through a variety of funding mechanisms, including the Community Preservation Act (CPA) funds, Inclusionary Zoning in-lieu payments, negotiated developer payments, short-term rental tax, other taxes, general funds, sale of tax foreclosed properties, bonding CPA or general funds, private donations, among other sources.

To fund the Sudbury Housing Trust and Housing Authority to further local housing initiatives and help support the implementation of this HPP, consider the following:

- a. Continue to use CPA funds to acquire property on which to create affordable housing, including through the reuse of existing developed properties and conversion of existing market-rate homes to affordable homes.
- b. If state legislation enables, adopt a real estate transfer tax, and allocate revenue to the Trust.
- c. Secure funding from the local meal tax (set at 0.75 percent as of 1/1/2011).²⁸

²⁷ "Local Options Tax," Massachusetts Department of Revenue, accessed April 2, 2024, https://dls.gateway.dor.state.ma.us/reports/rdPage.aspx?rdReport=LocalOptions.Local_Options_Tax&tblLocalOptionsTax-PageNr=6&rdDataCache=3987720199&rdShowModes=&rdSort=tblLocalOptionsTax%7eCUR_MEAL_TAX%7eNumber%7e%7e&rdNewPageNr=True1&rdRequestForwarding=Form

²⁸ "Local Options Tax," Massachusetts Department of Revenue, accessed April 2, 2024, https://dls.gateway.dor.state.ma.us/reports/rdPage.aspx?rdReport=LocalOptions.Local_Options_Tax&tblLocalOptionsTax-PageNr=6&rdDataCache=3987720199&rdShowModes=&rdSort=tblLocalOptionsTax%7eCUR_MEAL_TAX%7eNumber%7e%7e&rdNewPageNr=True1&rdRequestForwarding=Form

Strategy 12

Work with local lenders to offer training to promote first-time, first-generation, and low-income homeownership programs such as down payment assistance or affordable rental to homeownership.

Collaborating with local lenders to offer training for homeownership programs offer residents the benefit of tailored financial guidance, expanded access to mortgage products, and streamlined application processes. Leveraging local market expertise, these partnerships build trust and confidence while promoting financial literacy and sustainable homeownership. Ultimately, such initiatives empower individuals to navigate the homebuying process successfully and contribute to the stability and vitality of their communities.

In Massachusetts, several programs and resources facilitate training opportunities for local lenders to promote first-time and first-generation homeownership programs. Some of these programs include:

- a. Massachusetts Housing Partnership (MHP): MHP offers training sessions and workshops for lenders, real estate professionals, and housing counselors on topics related to affordable mortgage products, down payment assistance programs, and homeownership readiness. These sessions provide valuable insights and resources to help lenders effectively support first-time and first-generation homebuyers.²⁹
- b. Massachusetts Affordable Housing Alliance (MAHA): MAHA hosts training events and seminars focused on homeownership education and financial literacy for lenders, homebuyers, and community stakeholders. These programs cover various aspects of the home buying process, including mortgage financing, credit management, and budgeting, to empower individuals with the knowledge and skills needed to achieve successful homeownership.³⁰
- c. Massachusetts Association of Community Development Corporations (MACDC): MACDC offers capacity-building workshops and training programs for lenders and community development professionals involved in affordable housing initiatives. These sessions provide insights into innovative financing strategies, partnership opportunities,

²⁹ Massachusetts Housing Partnership, accessed April 2, 2024, <https://www.mhp.net/>.

³⁰ Massachusetts Affordable Housing Alliance, accessed April 2, 2024, <https://mahahome.org/>.

and best practices for promoting homeownership opportunities among underserved populations.³¹

- d. Local Housing Authorities and Community Development Agencies: Many local housing authorities and community development agencies collaborate with lenders to offer homeownership training programs tailored to the needs of their communities. These programs may include homebuyer education courses, financial counseling services, and down payment assistance programs to help first-time and first-generation homebuyers overcome barriers to homeownership.
- e. HUD-Approved Housing Counseling Agencies: HUD-approved housing counseling agencies in Massachusetts provide training and certification programs for lenders and housing counselors on HUD guidelines, fair lending practices, and homeownership counseling standards. These agencies play a crucial role in supporting lenders and borrowers throughout the homebuying process.³²
- f. Local Chambers of Commerce and Trade Associations: Local chambers of commerce and trade associations often collaborate with lenders to organize networking events, seminars, and training sessions for professionals in the real estate and mortgage industries. These platforms provide opportunities for lenders to exchange knowledge, share best practices, and stay informed about industry trends and regulatory changes affecting homeownership programs. Partner with the Sudbury Chamber of Commerce to coordinate homeownership learning sessions led by local lenders.

Strategy 13

Work with the Regional Housing Services Office (RHSO) to organize & manage local housing programs.

The Regional Housing Services Office provides the member communities of Acton, Bedford, Concord, Lexington, Lincoln, Maynard, Natick, Sudbury, Wayland, and Weston with affordable housing support and information. The RHSO was formed in 2011 through an Inter-Municipal Agreement assisted by the Metropolitan Area Planning Council (MAPC), the regional planning agency for Greater Boston. The RHSO works with its member towns to offer training that is important to the affordable housing work that the towns do. In recent years, the RHSO has focused its training on fair housing issues. The RHSO serves its member

³¹ Massachusetts Association of Community Development Corporations, accessed April 2, 2024, <https://www.macdc.org/>.

³² U.S. Department of Housing and Urban Development. "HUD Approved Housing Counseling Agencies," accessed April 2, 2024, <https://apps.hud.gov/offices/hsg/sfh/hcc/hcs.cfm>.

towns by assisting with the municipal function of affordable housing, including proactive monitoring, program administration, project development, and resident assistance.³³

Strategy 14

Continue to host and support membership in the Regional Housing Services Office.

The Regional Housing Services Office (RHSO) is a collaboration between the nine-member towns of Acton, Bedford, Concord, Lexington, Lincoln, Maynard, Sudbury, Wayland, and Weston. The RHSO was formed in 2011 through an Inter-Municipal Agreement (later amended), assisted by the Metropolitan Area Planning Council (MAPC) which is the regional planning agency for Greater Boston. The RHSO serves its member towns by assisting with the municipal function of affordable housing, including proactive monitoring, program administration, project development, and resident assistance. Because of the RHSO staff's expertise and the intermittent nature of affordable housing work, the monitoring, administration, development, and assistance are delivered more efficiently and effectively. The Town of Concord, which is the Lead Community, hosts the RHSO at its office and employs RHSO staff. The RHSO currently supports the SHT through part-time staff support. Sustaining a level of professional capacity is critical to the effectiveness of the Town's efforts to implement community priorities as established through this planning effort.

Strategy 15

Continue to participate in the WestMetro HOME Consortium.

The HOME Investment Partnerships Program is the largest federal block grant to state and local governments, and it was designed exclusively to create affordable housing for low-income households. The WestMetro HOME Consortium includes the following 13 municipalities: Bedford, Belmont, Brookline, Concord, Framingham, Lexington, Natick, Needham, Newton, Sudbury, Waltham, Watertown, and Wayland. Sudbury has access to pooled HOME funds awarded through an annual RFP process.

Strategy 16

Initiate a Sudbury housing roundtable and establish roles and responsibilities for Housing Production Plan implementation.

³³ "Regional Housing Services Office," accessed April 2, 2024, <https://www.rhsohousing.org/>

To strengthen coordination and collaboration among Sudbury's municipal housing entities, it is proposed that a Sudbury Housing Roundtable be established. This new initiative would bring together the Sudbury Housing Authority, Sudbury Housing Trust, and other relevant groups quarterly to discuss local housing challenges and develop strategic solutions. The Community Preservation Committee, another key local housing research group, should be included in these meetings to ensure a comprehensive approach. As part of this effort, the roles and responsibilities for implementing the Housing Production Plan should be clearly defined, including the necessary staffing and professional support required. This strategy could also lead to discussions around the future formation of a 501(c)(3) non-profit organization dedicated to advancing housing affordability initiatives in Sudbury.

ACTION PLAN MATRIX

#	Housing Strategies		FY2025	FY2026	FY2027	FY2028	FY2029	Lead Entity	Supporting Entities
1	Pursue regulatory changes and infrastructure investments that will allow for higher-density housing within the Route 20 Corridor area taking into consideration traffic management.						X	Planning & Community Development	Town Meeting, Planning Board, Sudbury Housing Trust, Sudbury Housing Authority
2	Expand zoning permissions for additional housing typologies in Sudbury.		X	X	X			Planning & Community Development	Town Meeting, Planning Board, Sudbury Housing Trust, Building Department
	2A	Amend the zoning code to comply with EOHLC's ADU regulations following the passage of the Affordable Homes Act.	X					Planning & Community Development	Town Meeting, Planning Board, Sudbury Housing Trust, Building Department
#	Housing Strategies		FY2025	FY2026	FY2027	FY2028	FY2029	Lead Entity	Supporting Entities
	2B	Amend the zoning code to allow ADUs and duplexes by-right.			X			Planning & Community Development	Town Meeting, Planning Board, Sudbury Housing Trust, Building Department

	2C	Amend the zoning code to allow co-housing developments.		X					Planning & Community Development	Town Meeting, Planning Board, Sudbury Housing Trust, Building Department
	2D	Amend the zoning code to allow cottage-style clustered homes.		X					Planning & Community Development	Town Meeting, Planning Board, Sudbury Housing Trust, Building Department
3		Maintain compliance with the state-mandated 3A, Multi-family Zoning Districts or "MBTA communities" law.	X	X	X	X	X		Planning & Community Development	Town Meeting, ZBA, Planning Board
4		Support the Sudbury Housing Authority (SHA) goals	X	X	X	X	X		Planning & Community Development	Town Meeting, ZBA, Planning Board, Sudbury Housing Authority
	4A	Expand Accessibility and Aging in the community, including improvement to public housing units to support the needs of aging residents.	X	X	X	X	X		Planning & Community Development	Town Meeting, ZBA, Planning Board, Sudbury Housing Authority
	4B	Create affordable duplex units at current single-family SHA-owned properties.	X	X	X				Planning & Community Development	Town Meeting, ZBA, Planning Board, Sudbury Housing Authority
	4C	Allow a broader definition of family housing to promote multi-generational public housing (with or without children).					X		Planning & Community Development	Town Meeting, ZBA, Planning Board, Sudbury Housing Authority
5		Support the Sudbury Housing Trust's (SHT) goal to create new affordable homeownership opportunities.	X	X	X	X	X		Planning & Community Development	Select Board, Planning Board
#	Housing Strategies		FY2025	FY2026	FY2027	FY2028	FY2029		Lead Entity	Supporting Entities
6		Encourage the Sudbury Housing Authority (SHA) and Sudbury Housing Trust (SHT) to work collaboratively to acquire private sites and/or utilize existing town property to create new affordable housing options.	X	X	X	X	X		Planning & Community Development	Sudbury Housing Authority, Select Board, Sudbury Housing Trust

7	Utilizing the results of the assessment of all Town-owned land, use the parcels identified to foster affordable housing development on Town-owned property through the Request for Proposals (RFP) and Chapter 30B (Uniform Procurement Act) processes.	X	X	X	X	X	Planning & Community Development	Sudbury Housing Authority, ZBA, Select Board, Planning Board, Sudbury Housing Trust,
7A	Developable Land- Areas that have been identified as having the potential for development in the short term (1-5 years).	X	X	X	X	X	Planning & Community Development	ZBA, Select Board, Planning Board, Sudbury Housing Trust
7B	Study Parcels - Town-owned parcels with significant potential for housing development require further feasibility studies to assess their suitability.			X	X	X	Planning & Community Development	ZBA, Select Board, Planning Board, Sudbury Housing Trust
8	Continue to support and promote current local housing assistance programs and introduce new ones.				X		Planning & Community Development	Sudbury Housing Trust, Sudbury Housing Authority
9	Explore ideas for new programs		X				Planning & Community Development	Sudbury Housing Trust, Sudbury Housing Authority
10	Continued training & education of municipal staff on housing programs and laws.		X		X		Planning & Community Development	Town Manager, Planning Board, Sudbury Housing Trust, CPC
11	Leverage Community Preservation Act and Affordable Housing Trust funds.	X	X	X	X	X	Planning & Community Development	Planning Board, Sudbury Housing Trust
12	Work with local lenders to offer training to promote first-time, and first-generation, and low-income homeownership programs such as down payment assistance or affordable rental to homeownership.				X		Planning & Community Development	Select Board, Sudbury Housing Trust
#	Housing Strategies	FY2025	FY2026	FY2027	FY2028	FY2029	Lead Entity	Supporting Entities
13	Work with the Regional Housing Services Office (RHSO) to organize & manage local housing programs.	X	X	X	X	X	Planning & Community Development	Select Board, Sudbury Housing Trust, CPC

14	Continue to host and support membership in the Regional Housing Services Office (RHSO).	X	X	X	X	X	Planning & Community Development	Select Board, Sudbury Housing Trust, CPC
15	Continue to participate in the WestMetro HOME Consortium.	X	X	X	X	X	Planning & Community Development	Sudbury Housing Trust
16	Initiate a Sudbury housing roundtable and establish roles and responsibilities for Housing Production Plan implementation.	X	X	X	X	X	Planning & Community Development	Planning Board, Sudbury Housing Trust, Sudbury Housing Authority, CPC

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GOALS AND STRATEGIES MATRIX

#	Strategy	Overarching Goals			
		Meet Mixed Housing Needs	Promote Housing in Mixed-Use Locations, Preserve Affordable Homes, and Ensure Transportation Access	Greening Homes	Maintain the Subsidized Housing Inventory (SHI) at ten percent
		G1	G2	G3	G4
1	Pursue regulatory changes and infrastructure investments that will allow for higher density housing within the Route 20 Corridor area taking into consideration traffic management.		X		
2	Expand zoning permissions for additional housing typologies in Sudbury.	X	X	X	X
3	Maintain compliance with the state- mandated 3A, Multi-family Zoning Districts or "MBTA communities" law.	X	X		X
4	Support the Sudbury Housing Authority (SHA) goals	X			
5	Support the Sudbury Housing Trust's (SHT) goal to create new affordable homeownership opportunities.	X			X

#	Strategy	Overarching Goals			
		Meet Mixed Housing Needs	Promote Housing in Mixed-Use Locations, Preserve Affordable Homes, and Ensure Transportation Access	Greening Homes	Maintain the Subsidized Housing Inventory (SHI) at ten percent
		G1	G2	G3	G4
6	Encourage the Sudbury Housing Authority (SHA) and Sudbury Housing Trust (SHT) to work collaboratively to acquire private sites and/or utilize existing town property to create new affordable housing options, including duplexes.	X	X		X
7	Utilizing the results of the assessment of all Town-owned land, use the parcels identified to foster affordable housing development on Town-owned property through the Request for Proposals (RFP) and Chapter 30B (Uniform Procurement Act) processes.	X	X		X
8	Continue to support and promote current local housing assistance program and introduce new ones.	X	X		X
9	Explore ideas for new programs	X	X	X	X
10	Continued training & education of municipal staff on housing programs and laws.	X	X		

11	Leverage Community Preservation Act and Affordable Housing Trust funds.	X	X		
12	Work with local lenders to offer training to promote first-time, and first-generation, and low-income homeownership programs such as down payment assistance or affordable rental to homeownership.	X	X		
		Overarching Goals			
#	Strategy	Meet Mixed Housing Needs	Promote Housing in Mixed-Use Locations, Preserve Affordable Homes, and Ensure Transportation Access	Greening Homes	Maintain the Subsidized Housing Inventory (SHI) at ten percent
		G1	G2	G3	G4
13	Work with the Regional Housing Services Office (RHSO) to organize & manage local housing programs.				X
14	Continue to host and support membership in the Regional Housing Services Office (RHSO).				X
15	Continue to participate in the WestMetro HOME Consortium.		X		X
16	Initiate a Sudbury housing roundtable and establish roles and responsibilities for Housing Production Plan implementation.	X	X	X	X

CHAPTER 3: DEMOGRAPHIC PROFILE

An analysis of local demographic data and housing stock reveals key characteristics and trends in Sudbury that help explain housing need and demand. To understand how the town compares to its neighbors, Sudbury data is compared to other municipalities in the RHSO region (Acton, Bedford, Lexington, Lincoln, Maynard, Natick, Sudbury, Wayland, and Weston), Middlesex County, and Massachusetts. The information in this section provides the framework for the housing production goals and strategies crafted to address local housing concerns.

This Housing Production Plan is grounded in a thorough examination of Sudbury's demographic makeup. An analysis of the current population, household composition, and income levels provides insight into existing housing needs and demands.

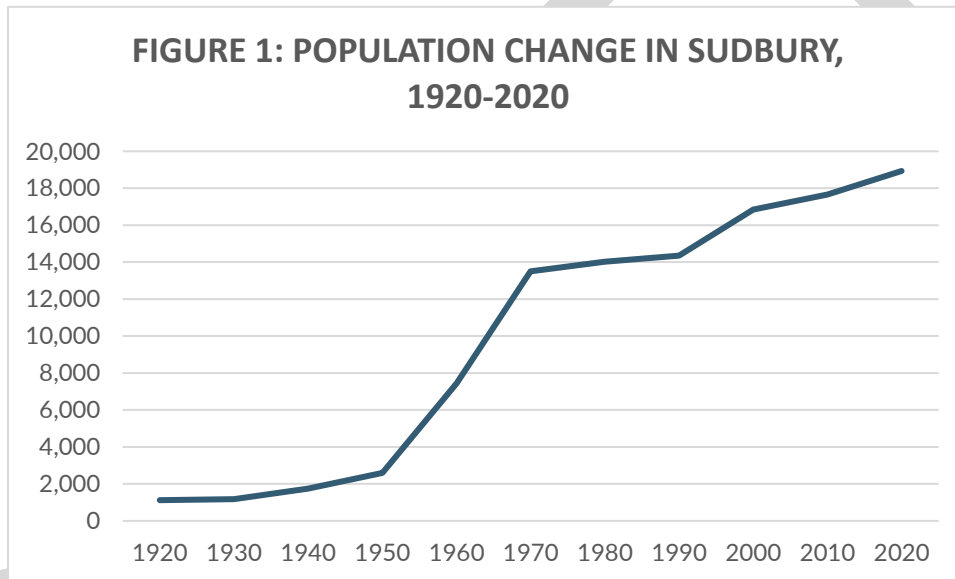
KEY FINDINGS

- Several measures confirm that Sudbury is aging: more households headed by those over age 55, fewer households with children, and fewer children overall
- The average household size continues to be approximately 3 people, despite the increasing home sizes described in the Housing chapter
- The town's population has become more diverse, with increasing numbers of Hispanic/Latine, Asian, and mixed-race individuals
- Over half of Sudbury's households report annual earnings over \$200,000
- Households headed by folks over the age of 65 represent one-quarter of Sudbury's housing units but two-thirds of households earning under \$75,000

DEMOGRAPHICS

POPULATION

The town of Sudbury saw remarkable population growth in the decades following World War II. The population nearly doubled in the 1950s, then almost doubled again during the 1960s. Growth has continued more slowly since then, with a 7% increase in the decade leading up to 2020 (See Figure #1). That number is consistent with the state average over the past decade, though many rural and Western Mass municipalities lost population.³⁴



Source: Decennial Census

The age distribution of Sudbury residents remained remarkably steady between 2012 and 2022. At the town, county, and state levels, there was a 3% increase in the proportion of the population aged 65 and above. The proportion of the population that is 20- to 44-year-olds in Sudbury (21%) remains significantly smaller than in Middlesex County and Massachusetts (36% and 34% respectively).³⁵

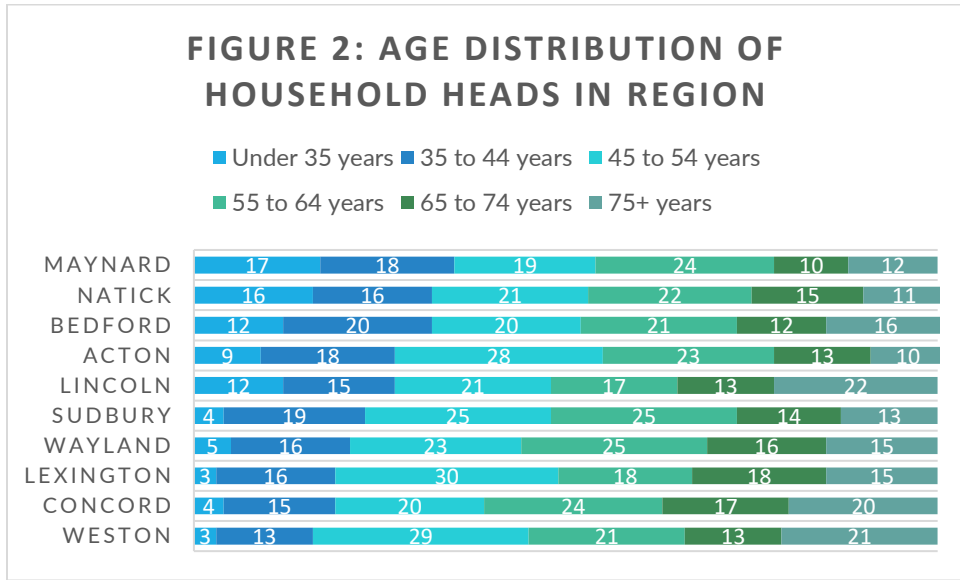
Sudbury has 6,301 households. That is a 10% increase since 2010, slightly ahead of the state's 7% increase in housing units.³⁶ Only about a quarter (24%) of heads of household in Sudbury are under the age of 45. That puts Sudbury in the middle of the pack when compared to the region, where the proportion ranges from 35% in Maynard to 16% in

³⁴ UMass Donahue Institute's Municipal Summary for Sudbury

³⁵ American Community Survey (ACS), Table DP05

³⁶ UMass Donahue Institute's Municipal Summary for Sudbury

Weston (See Figure #2). Clearly, housing prices are an important factor in determining where young families can put down roots as homeowners or renters.

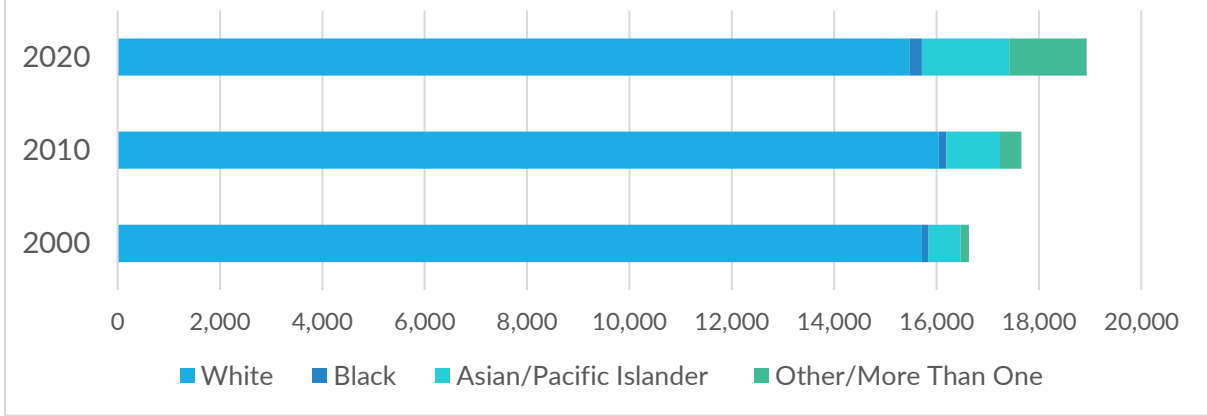


Source: 2020 American Community Survey (ACS), Table S2502

RACE & ETHNICITY

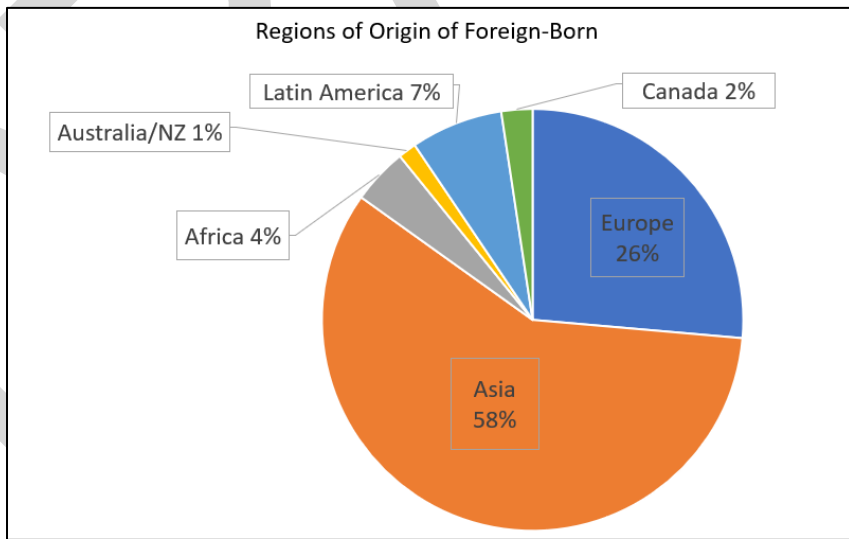
In some ways, Sudbury has become much more diverse over the past twenty years. The town’s Hispanic/Latine population has more than tripled, from about 200 to 700 people. The Asian population has nearly tripled, from about 600 to 1,700 people. While the Black population has grown, it still hovers at about 1% of the overall population. That stubborn statistic is as worthy of attention as the other remarkable story: those identifying as more than one race or something other than Asian, White, or Black have grown from 1% to 8% of Sudbury’s population (See Figure #3).

FIGURE 3: CHANGE IN RACIAL BACKGROUNDS IN SUDBURY, 2000-2020



NATIVITY

The share of Sudbury’s population born outside the United States has edged up from 9 percent of the town in 2000 to 12 percent in 2022.³⁷ Nearly three-quarters (72 percent) have become U.S. citizens. Over half of the foreign-born (58 percent) came from Asia, a quarter (26 percent) from Europe, and the remaining 14 percent from around the globe (See Figure #4).



Source: 2022 American Community Survey (ACS), Table B05002

³⁷ 2022 American Community Survey (ACS), Table B05001; 2000 Decennial Census, Table DP2

DISABILITY

The U.S. Census Bureau defines a disability as a long-lasting physical, mental, or emotional condition. Residents with one or more disabilities can face housing challenges if there is a shortage of housing in a community that is affordable, physically accessible, and/or provides the supportive services that people with disabilities may need.

The 2022 American Community Survey (ACS) estimated that 368 Sudbury residents have an ambulatory disability, defined as serious difficulty walking or climbing stairs. Unsurprisingly, there is a strong correlation with age. While only 1 percent of the population under 65 has an ambulatory disability, the rate jumps to 4 percent of those between 65 and 74, and 17 percent of those at least 75 years of age.³⁸ Only a quarter (24 percent) of seniors in New England report single-floor living, far fewer than in other regions of the country. HUD last reported on the prevalence of no-step entries and hallways/doorways wide enough for a wheelchair along with single-floor living in 2011, when only 4 percent of American homes had all three features.³⁹ The 2016 Housing Production Plan reported 19 rentals accessible to residents with mobility issues on the town's Subsidized Housing Inventory. Since then, Sudbury has added 56 one-bedroom apartments for older adults at The Coolidge, all of them accessible by elevator and handicap-adaptable.

Just shy of 400 residents were estimated as having a cognitive disability, meaning serious difficulty concentrating, remembering, or making decisions because of a physical, mental, or emotional condition. These individuals were distributed more evenly between the age groups of under 18 years, 18 to 34 years, 35 to 64 years, and 65 years and older.⁴⁰ Residential options for senior memory care are becoming more plentiful, for example, the 48 suites at Bridges by EPOCH that opened in 2018 as part of the Meadow Walk development along Route 20. The cost of residential elder care still leaves the services out of reach for many families. Finding supported housing for folks with intellectual or developmental disabilities is extraordinarily difficult across the age span.⁴¹ The MA Department of Developmental Services supports only 10 residents through the shared living situations listed on Sudbury's Subsidized Housing Inventory.

HOUSEHOLDS

³⁸ American Community Survey (ACS), Table S1810

³⁹ *Housing America's Older Adults 2023*, Joint Center for Housing Studies of Harvard University, p. 22

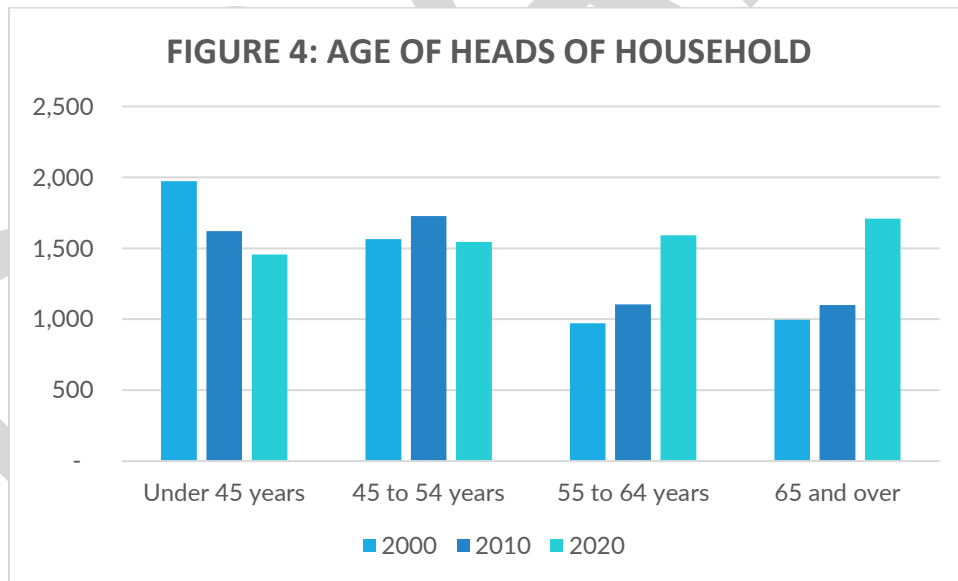
⁴⁰ American Community Survey (ACS), Table S1810

⁴¹ "Thousands of Mass. children diagnosed with autism are becoming adults. Many families find the state unprepared to help" (*Boston Globe*, 29 December 2023)

Different household types often have different housing needs or preferences. For example, a single senior will prefer a smaller dwelling unit than a family with children. A municipality's composition of household types can indicate how well suited the existing housing inventory is to current and future residents.

The average size of owner-occupied households has grown slightly from 3.06 to 3.14 people per unit over the past twenty years. Renter-occupied homes have seen a decrease of greater magnitude, from an average of 2.61 to 1.85 people, but rentals are such a small share of the housing market that the overall average has remained steady at about 3 people per household. At the state level, the average size of renter households (2.21 people) is higher than in Sudbury, while the owner households have a smaller average size (2.68 people) than in Sudbury.⁴²

The age distribution of Sudbury's heads of household has shifted upwards. The number of households headed by people under the age of 45 has shrunk by more than 500 households while the overall number of households has grown by 800 households. Households headed by those between 45 and 54 years grew between the years 2000 to 2010, then dropped back again. The real growth has been among household heads over 55 years old (See Figure #4).



Sources: 2010 and 2020 American Community Survey (ACS), Table S2502; 2000 Decennial Census, Table HO14

During this period, the proportion of households with children dropped by 16 percent in both Sudbury and statewide. The change may carry more symbolic meaning for Sudbury, as the town went from 54 percent to 47 percent of households having members under age 18; that's now

⁴² 2020 and 2010 American Community Survey (ACS), Table B25010; 2000 Decennial Census, Table DP1

fewer than half of households. By contrast, only a third of households in Massachusetts and Middlesex County included children in 2000 and the numbers have decreased since then.⁴³

The Sudbury K-8 district enrollment dropped from nearly 3,000 students in AY2012-13 to under 2,500 students during AY2020-21 and still hovers there.⁴⁴ Sudbury's portion of the Lincoln-Sudbury High School enrollment is predicted to drop from 1,315 students in AY2019-20 to 1,100 students in AY2026-27.⁴⁵

Over the past ten years, the American Community Survey (ACS) has been estimating that between two and four percent of households include a grandparent living with their grandchildren under the age of 18. Data about the characteristics of these families jump around from year to year, likely because it's very difficult to capture a representative sample of such a small (but important) part of the population. Learning more about them would help the town assess whether the current housing stock is serving this group well. For instance, when asked about owner versus renter status in the surveys from 2012 to 2014, all families were in owner-occupied homes. It would be important to know if landlord regulations and apartment sizes have made gaining custody of grandchildren difficult for renters when that unfortunate situation arises. Or perhaps skyrocketing housing costs throughout the region have led elders to share their long-time homes with grown children who now have families of their own?

A different grandparent question generated very confusing results across the years 2012 to 2022. When asked about grandparents' language ability, the average was 36 percent who speak English less than very well. However, there was a perplexing range across the years from 2% and 4 percent on the low end to 64 percent and 65 percent on the high end who answered that they do not speak English very well.⁴⁶ Are these entire households of immigrants whose language skills are improving over the years? Are grandparent green card holders living with extended family members for six months of the year but not always present when the survey is given? If the latter, perhaps the Accessory Dwelling Units ("in-law" apartments) discussed later in the report would be particularly appealing for this household type.

ECONOMIC CHARACTERISTICS

Household income is an important determinant of how much a household can afford to pay for their dwelling unit, either to rent or own, and whether that household is eligible for housing

⁴³ 2020 and 2010 American Community Survey (ACS), Table DP02; 2000 Decennial Census, Table DP1

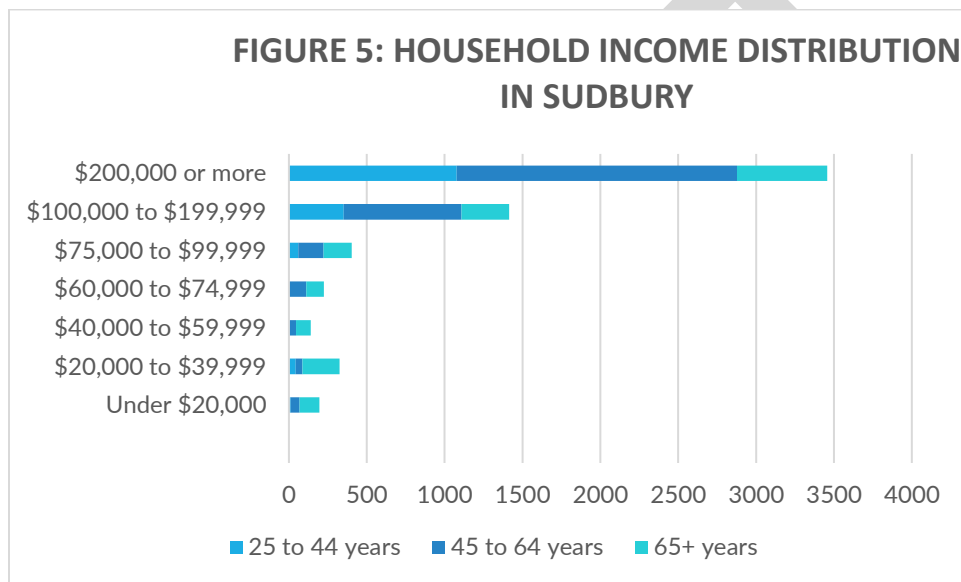
⁴⁴ New England School Development Council's *Sudbury Public Schools 2022-23 Enrollment Projection Report*

⁴⁵ *Lincoln-Sudbury Regional High School Proposed FY 22 Budget Town Meeting Slides*, May 2021

⁴⁶ American Community Survey (ACS), Table S1002

assistance. It is important to note that not all eligible households receive the housing assistance to which they are entitled since the supply of affordable housing does not meet their needs.

884 households (14 percent) have annual incomes less than \$75,000. Two-thirds (65 percent) of those at lower income levels are headed by someone at least 65 years old, despite those senior-headed households making up only a quarter (26 percent) of the town's residences. At the other end of the spectrum, over half (56 percent) of households have incomes of at least \$200,000 per year (See Figure #5).



Source: 2021 American Community Survey (ACS), Table B19037

SUMMARY

A meaningful shift has taken place in Sudbury in recent years: today fewer than half of households include a child under the age of 18. Households headed by those under age 45 have become a smaller share of the town's population, while less expensive neighboring towns continue to attract young families.

This change has important implications for the town. There are many in town who would like to age in place but will need home modifications to do so. Others would like to downsize to smaller-sized affordable rental or ownership units. While their needs are important, the town also must consider the housing needs of younger households.

Income levels are another area where there is a disconnect. Over half of Sudbury's households report an annual income over \$200,000 while 14 percent have incomes under \$75,000 per year.

Left to its own devices, the current sellers' housing market will continue to reward buyers who can make all-cash and non-contingent home offers. These new homeowners will be building a community with many retirees and moderate-earning workers who bought their homes over a decade ago at much lower prices. While Asian, Hispanic/Latine and mixed-race households have a larger presence in Sudbury today, historical policies and practices have made it difficult for black families to generate wealth. Their continuing exclusion from suburbs where home values are skyrocketing means that the wealth gap will continue to grow.

DRAFT

CHAPTER 4: HOUSING CONDITIONS

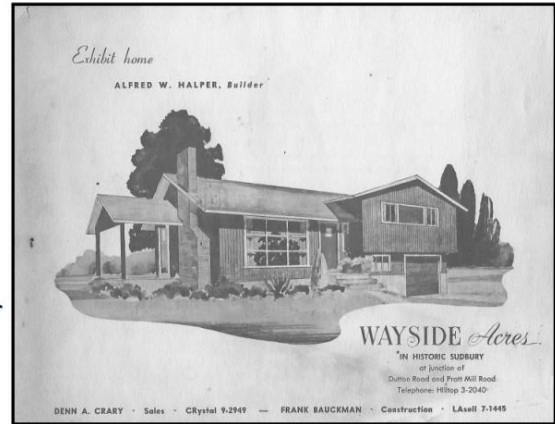
The following section examines Sudbury’s current housing supply and how it has changed over time. Understanding housing type, age, tenure, and recent development will contribute to an understanding of current needs and demands in Sudbury and thereby help inform future housing production planning.

KEY FINDINGS

- Despite the recent addition of several multi-family developments, 94 percent of Sudbury’s housing units are single-family homes; that is the highest rate among its neighbors.
- 92 percent of Sudbury housing units are owner-occupied as compared to 62 percent statewide.
- Median single-family home prices rose over 50 percent from 2019 to 2022, surpassing \$1 million in 2021.
- Median condominium prices surpassed \$800,000 in 2022. Median condo fees associated with units sold during each of the past ten years ranged from \$425 to \$525 per month.
- Nearly 1,500 households, or 23 percent of Sudbury’s households, are cost-burdened, paying more than 30 percent of household income towards housing. Almost half of them (685 households) are spending more than half their income on housing.

HOUSING SUPPLY AND TRENDS

Until the 1940s, Sudbury primarily consisted of small farms. Though the USDA still characterizes Sudbury as rural, the town underwent dramatic growth after World War II. Throughout the country, large numbers of veterans were able to take advantage of low-interest mortgages to help finance a home. Unfortunately, though the GI Bill's language was race-neutral, the program disproportionately benefited white veterans and their families.



Courtesy of the Sudbury Historical Society

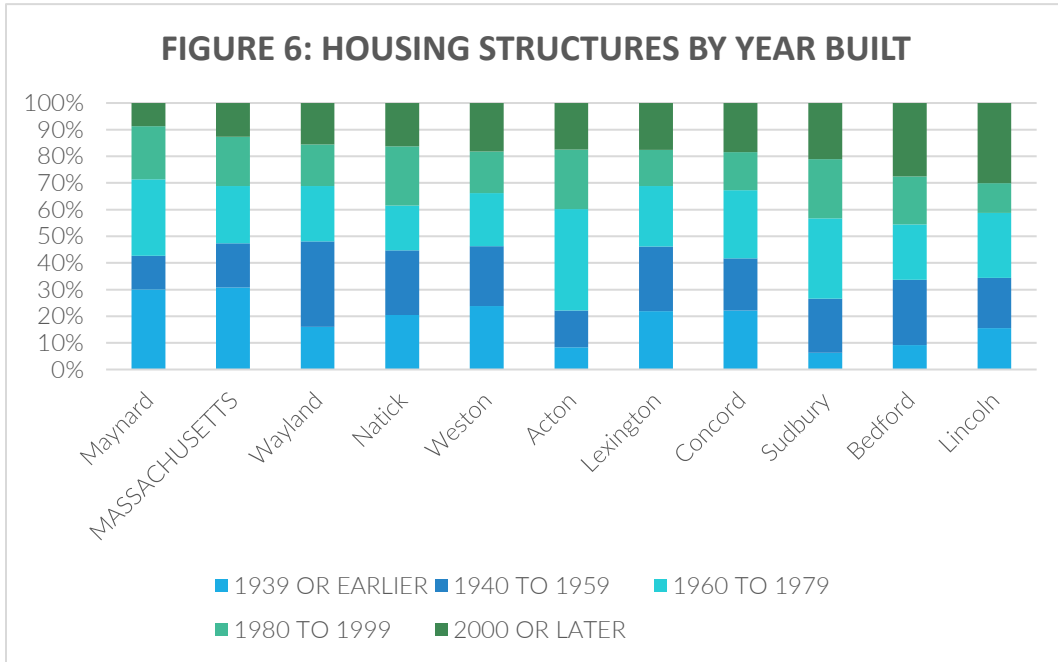
When looking at the current median value of Sudbury's homes by decade of construction, these postwar homes of the 1940s and 1950s have the lowest values. Older structures may lack heating and energy efficiencies and may not be code-compliant, which adds to the monthly utility and maintenance costs. Older units may also have lead paint which can be costly to remediate, but which is unsafe for children. These additional costs have an impact on the affordability of older units for both owners and renters. Among the homes built before 1940 are some historical buildings of high value. Single-family home values in the years since 2000 reflect a larger share of condominiums than in prior decades.

Median Home Value	
Overall Median	\$892,700
Built 2010 to 2019	\$939,400
Built 2000 to 2009	\$913,000
Built 1990 to 1999	\$1,139,200
Built 1980 to 1989	\$1,044,100
Built 1970 to 1979	\$950,000
Built 1960 to 1969	\$844,600
Built 1950 to 1959	\$686,300
Built 1940 to 1949	\$598,500
Built 1939 or earlier	\$790,900

Source: 2022 American Community Survey (ACS), Table B25107

TYPE & AGE

Given the town’s agrarian roots, it’s not surprising that structures built before 1940 make up the smallest percentage of Sudbury’s homes when compared to the rest of the Regional Housing Services Office area. Relatedly, it has seen the third largest growth proportionally since 2000.



Source: 2022 American Community Survey (ACS), Table S2504

Despite the addition over recent years of multi-family developments including Avalon, Cold Brook Crossing, and The Coolidge, 94 percent of Sudbury’s 6,323 housing units are single-family homes. Sudbury has the highest proportion of single-family homes in the Regional Housing Services Office region. Across Massachusetts, 57 percent of housing units are single-family dwellings.

Proportion of housing units in single-family dwellings	
Sudbury	94%
Wayland	91%
Weston	90%
Lexington	82%
Lincoln	78%
Concord & Maynard	73%
Acton	72%
Bedford	71%
Natick	61%
MASSACHUSETTS	57%

Source: 2022 American Community Survey (ACS), Table S2504

TENURE

In both Sudbury and Wayland, 92 percent of housing units are owner-occupied rather than rented. That is the highest proportion across the Regional Housing Services Office area. The state average is 62 percent ownership versus 38 percent rental. Neighboring Lincoln's numbers very closely reflect the state's, in large part because of the presence of Hanscom Air Force Base.

Percent of Housing Units That Are Owner-Occupied	
Sudbury & Wayland	92%
Weston	87%
Lexington	83%
Maynard	78%
Concord	76%
Acton	76%
Bedford	70%
Natick	68%
Lincoln	64%
MASSACHUSETTS	62%

Source: 2022 American Community Survey (ACS), Table S2502

While Sudbury's households across the board are vastly more likely to own than rent, households headed by the oldest and youngest are the most likely to be renters. 27 percent of households led by someone under 35 years old are renting, as are 18 percent of households headed by someone at least 75 years old. Each of the 10-year age brackets in between has only 3 to 6 percent renting rather than owning.⁴⁷

HOUSING MARKET

Housing costs within a community reflect numerous factors, including demand and supply. If the former exceeds the latter, then prices and rents tend to rise. Depending on the income levels of the population, these factors can significantly reduce affordability for both existing residents and those seeking to move in.

⁴⁷ 2022 American Community Survey (ACS), Table B25007

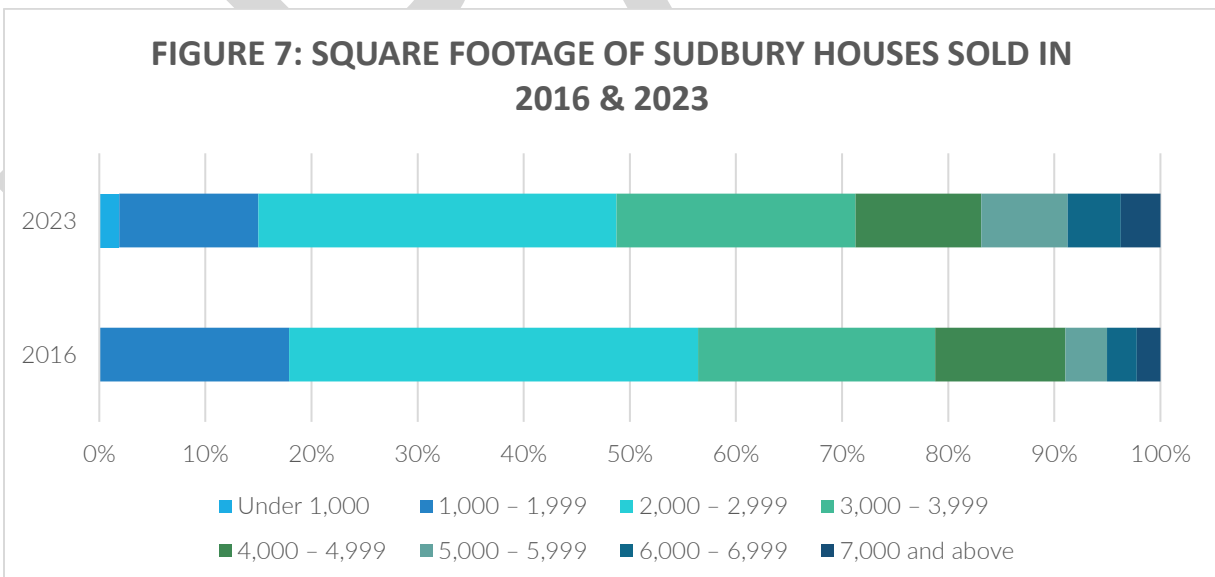
LAND PRICES

Neighborhood, wetlands/topography, easements, overall lot size, and other factors influence exactly how much the land in any given property is worth. For FY2024, the value for a generic 40,000 square feet of land (not including any structures on the property nor considering variables like presence of wetlands) ranges from \$369,000 to \$686,400 across nine different neighborhood types in Sudbury. In FY2016, the last time the Housing Production Plan was written, the range was from \$300,800 to \$614,800 per 40,000 square feet.⁴⁸ That's an increase of 23 percent at the lowest end and 12 percent at the highest end of the range. As the value of the land increases, maintaining or building a modest home on top of it becomes more difficult to justify.

HOME SIZES

As mentioned in the prior section, demand has driven up the value of land in Sudbury and the surrounding region. With land at such a premium, market forces have pushed for larger homes atop the property.

Based on MLS Multiple Listing Service data, only 15 percent of single-family houses sold in Sudbury in 2023 were under 2,000 square feet. Just half (49 percent) were under 3,000 square feet. Nearly one in three (29 percent) were larger than 4,000 square feet. Warren Group data cited in the next section about sales volumes captured more home transactions, but we have no reason to believe that any home sizes were systematically undercounted in the MLS.

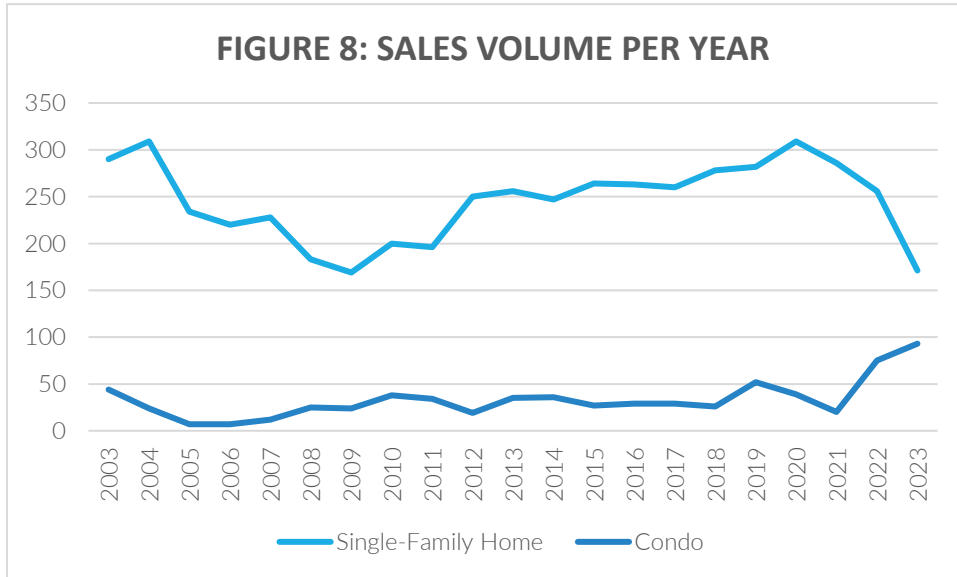


Source: MLS

⁴⁸ Email from Sudbury Assessor Cynthia Gerry

VOLUME OF SALES

The year 2023 was record-setting for condos in Sudbury and nearly so for single-family homes. The number of condominiums in town has been growing. Other than a dip in 2020 and 2021, sales have been rising significantly since 2018 and reached their highest point to date in 2023.



Single-family homes are another story altogether. The 171 home sales in 2023 nearly tied the lowest sales of the past two decades, when only 169 homes changed hands in 2009. The borrowing side of the equation is a common thread between then and now. In 2009, the real estate market was reeling from the subprime mortgage crisis. In 2023, the annual average 30-year mortgage rate was almost 7 percent. The number was a sharp contrast from the historically low interest rates of 2020 and 2021. In those years, first-time buyers had an easier time getting into the market and many existing homeowners refinanced to take advantage of those low rates. Those fortunate enough to have those favorable mortgage rates are reluctant to put their homes on the market and take on a more expensive new mortgage. If starter homes are feeling too tight, these families are much more likely to ponder a home addition than a move, putting even more upward pressure on home sizes.

GROWING PROPORTION OF ALL-CASH SALES

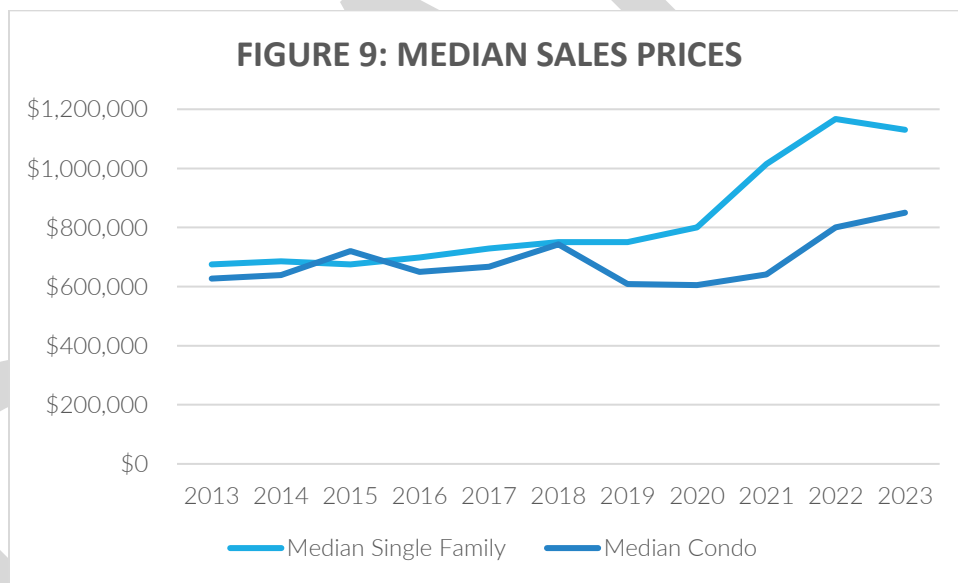
A recent study by the Metropolitan Area Planning Council (MAPC) found a striking increase in the share of residential transactions in Massachusetts completed in all-cash sales over the past twenty years. Cash sales rose from 15 percent of residential sales between 2000 and 2006 to over 30 percent in the years immediately following the 2008 housing crisis, then leveled off around 20 percent in the years since 2012. For Sudbury specifically, cash sales made up 14.4 percent of residential sales in the study period from 2004 to 2018. These cash buyers can crowd out first-time homebuyers who need a traditional mortgage, or even current homeowners who

need a contingent offer allowing them time to sell their own home before completing the sale. Sellers often prefer the security of cash to the potential complications that can arise during a longer process.⁴⁹

MEDIAN SALES PRICES

Over the past decade, median condominium prices have fluctuated quite a bit between \$600,000 and \$750,000. For the first time, the median surpassed \$800,000 in 2022 and continued rising in 2023. According to the MLS, the median monthly condo association fees associated with these listings have bounced between \$425 and \$525 during the 10-year period.

Median single-family home prices were less volatile through the 2010s. Prices gradually rose between 2013 and 2020, then jumped drastically. Between 2019 and 2022, prices grew by over 50 percent, from \$750,000 to nearly \$1.2 million. There was a \$40,000 drop in the median single-family home price by 2023, but the median still remained well above \$1 million.



Source: Warren Group

⁴⁹ *Homes for Profit: Speculation and Investment in Greater Boston*

RENT

As noted above, only about 6 percent of housing units in Sudbury are rentals. Since 2016, three new apartment developments have been completed. B’Nai B’Rith Housing added 56 affordable units at The Coolidge at Sudbury for seniors and older adults (age 55 and above). In addition, Avalon and Cold Brook Crossing developments came online, with 250 and 101 apartments respectively. In both projects, 25 percent of the units were set aside at rates affordable to households earning up to 80 percent of the Area Median Income. As of February 2024, market rents in those developments started around \$2,800 for one-bedroom and \$3,600 for two-bedroom units, not including utilities.

Starting Market Rents at Sudbury’s Newest Developments (Feb. 2024)

	The Avalon	Cold Brook Crossing
One-Bedroom	\$2,800	\$2,871
Two-Bedroom	\$3,630	\$3,585

HOUSING AFFORDABILITY

In the previous sections, Sudbury’s population and housing stock were examined. The intersection of these previously examined areas—demand (people) and supply (housing units)—as well as policy, planning, and funding, ultimately determines housing affordability in a given community. In this section, the affordability of Sudbury’s housing stock to town residents and potential town residents is assessed.

HOUSEHOLDS ELIGIBLE FOR HOUSING ASSISTANCE

One measure of affordable housing needs is the number of households that may be eligible for housing assistance based on estimated household income. Federal and state programs use Area Median Income (AMI), along with household size, to identify these households. Sudbury is in the Boston-Cambridge-Quincy Metropolitan Statistical Area. The table below shows U.S. Department of Housing and Urban Development income limits for extremely-low (below 30 percent of AMI), very-low (30-50 percent of AMI), low-income (50-80 percent of AMI), and moderate-income (80-100 percent AMI) by household size. Typically, households at 80 percent of AMI and below may qualify for housing assistance, though there are some exceptions based on household size and assets.

HUD Income Limits by Household Size

	1 person	2 people	3 people	4 people	5 people	6 people
30% AMI	\$31,150	\$35,600	\$40,050	\$44,500	\$48,100	\$51,650
50% AMI	\$51,950	\$59,400	\$66,800	\$74,200	\$80,150	\$86,100
80% AMI	\$82,950	\$94,800	\$106,650	\$118,450	\$127,950	\$137,450
AMI	\$104,510	\$119,440	\$134,370	\$149,300	\$161,250	\$173,190

HUD’s Comprehensive Affordability Strategy (CHAS) data reports that 4.8 percent of households in Sudbury are extremely low-income, 5.2 percent are very low-income, and 8.8 percent are low-income. This means that about a fifth (19 percent) of all households, or approximately 1,185 households, may qualify for affordable housing programs based on income, but are unlikely to actually access them due to scarcity.

FAIR MARKET RENTS

Another measure of housing affordability is whether local rent exceeds HUD-determined Fair Market Rents (FMR) which were established as guidelines for Section 8 voucher holders. The FMR represents the 40th percentile of the range of rents in the local area; that is, 40 percent of units of that size would rent for less and 60 percent would rent for more. The FMR is the gross rent amount, including utilities like heat and electricity but not phones. HUD does not permit voucher holders to rent apartment units above the FMR because HUD has determined the FMR to be a fair and reasonable price for the geographic area. An upward trend in Fair Market Rent amounts, particularly over the last few years, point to the need for more rental housing at multiple price points. For Fiscal Year 2024, FMRs for the Boston-Cambridge-Quincy Metropolitan Area are \$2,377 for a one-bedroom; \$2,827 for a two-bedroom; and \$3,418 for a three-bedroom.

Although HUD determines a certain level of rent in an area to be fair, FMRs do not take into account household income, so even an apartment at the FMR is not necessarily affordable to people at all levels of income. As stated in the previous section, one-fifth of Sudbury's households have incomes at or below 80 percent of Area Median Income. As this document will discuss below, income is a major determinant of housing affordability. It is important to consider whether Sudbury's housing stock meets the needs of its current households and households hoping to move to Sudbury at all income levels.

The limited rental listings at any given time make it difficult to calculate a typical Sudbury rent. With so few rental units available, even a handful of large one-family homes on the market to rent can swing the average drastically. Because more than nine in ten Sudbury households are owners, we are not confident that the Census Bureau's rent estimates reflect a representative sample of renters or capture what rents would be for new tenants, as landlords often are more cautious with increases for existing tenants than when a unit is vacant. While we do not have a clear answer to how Sudbury rentals overall compare to Fair Market Rents, we can say that the newest developments are charging rents exclusive of utilities for one- and two-bedroom units that are more comparable to the FMRs including utilities for two- and three-bedroom apartments respectively.

CURRENT M.G.L. CHAPTER 40B SUBSIDIZED HOUSING INVENTORY

Under M.G.L. Chapter 40B, affordable housing units are defined as housing that is developed or operated by a public or private entity and reserved by deed restriction for income-eligible households earning at or below 80 percent of the AMI. In addition, all marketing and placement efforts follow Affirmative Fair Housing Marketing guidelines per the Executive Office of Housing and Livable Communities (EOHLC). These requirements are regulated at 760 CMR 56 and administered by the EOHLC.

Housing that meets these requirements, if approved by EOHLIC, is added to the subsidized housing inventory (SHI). Chapter 40B allows developers of low- and moderate-income housing to obtain a comprehensive permit to override local zoning and other restrictions if less than 10 percent of a community's housing is included on the SHI.

Communities above the 10 percent requirement have greater local control over affordable housing developments by requiring local zoning. When a community is above the 10 percent requirement, the decisions on comprehensive permit applications by the Zoning Board of Appeals (ZBA) to deny or approve with conditions will be deemed "consistent with local needs" under MGL Chapter 40B. In practical terms, since the town can deny a 40B permit (and be upheld at the Housing Appeals Court), developers only submit 40B applications that have the full support of the town (such as a Local Initiative Project or a 'friendly' 40B).

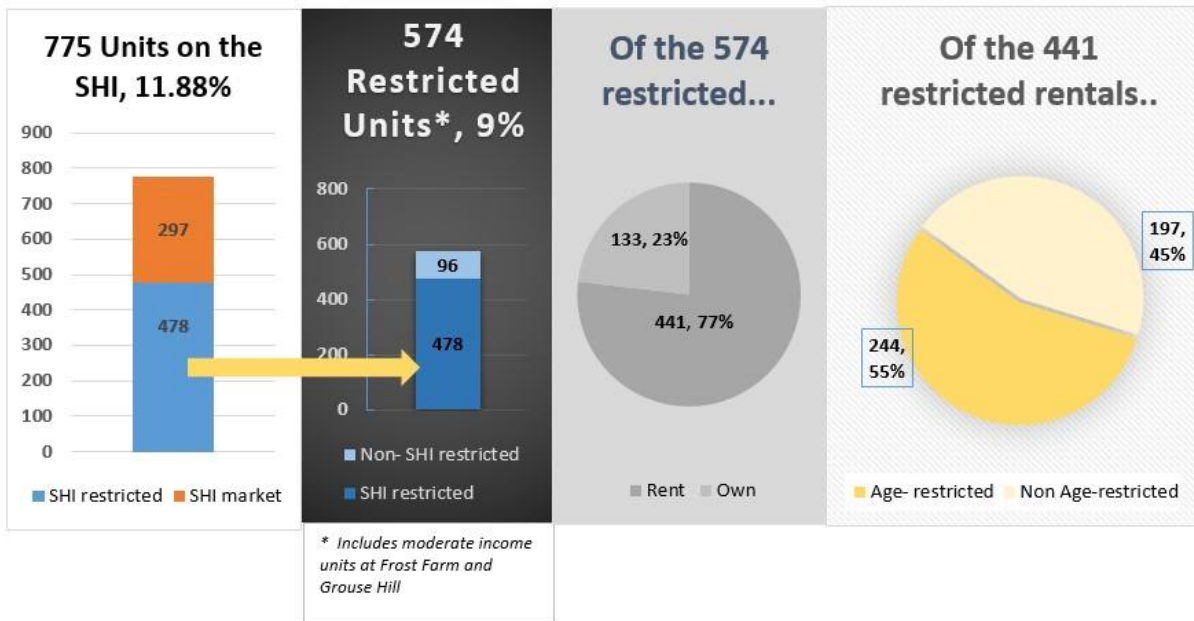
A municipality's SHI fluctuates with new development of both affordable and market-rate housing. The percentage is determined by dividing the number of affordable units by the total number of year-round housing units according to the most recent decennial Census. As the denominator increases, or if affordable units are lost, more affordable units must be produced to reach, maintain, or exceed the 10 percent threshold.

Sudbury has made great progress in adding affordable units to the SHI. Sudbury has gone from having 4.75 percent of its housing on the Subsidized Housing Inventory in 2011 to 11.88 percent in 2023. That pace of growth was sixth highest of all the state's municipalities over that period.⁵⁰ Achieving 10 percent affordability is a terrific accomplishment, but it is not a permanent status. As mentioned earlier, adding market-rate construction will mean that the affordable units make up a smaller share of total housing in Sudbury. New affordable units are added to the formula very early in the process, but the total number of year-round housing units in town is only updated with the decennial census. For instance, Cold Brook Crossing's 101 apartments are counted as affordable now, but the buildings were not occupied in April 2020 when the last decennial census was taken. Those 101 units will not be added to the denominator until the release of 2030 census data.

Due to state eligibility policies under M.G.L. 40B, the actual number of affordable units in Sudbury or any community is much lower than the inventory indicates. Per state policy, the only ownership units included on the SHI are affordable deed-restricted properties. However, all rental units (regardless of the cost of rent) in a development are counted as long as a minimum of 20 percent of units are affordable at 50 percent AMI or below, or 25 percent of units are affordable at 80 percent AMI or below.

⁵⁰ 2023 Greater Boston Housing Report Card, page 56

As the following chart demonstrates, only 62 percent of the units on the SHI (478 units) are restricted per state requirements. Another 96 units in Sudbury are restricted, but they are affordable to households with higher, moderate incomes or have other factors that make them ineligible for the SHI. The remaining SHI units are market rate units that are not affordable to low-income households. Three-quarters (441) of restricted units are rental units, and one-quarter (133 units) are affordable homeownership units. Of the 441 restricted rental units, just over half (55 percent) are limited to households headed by someone aged 55 or above.

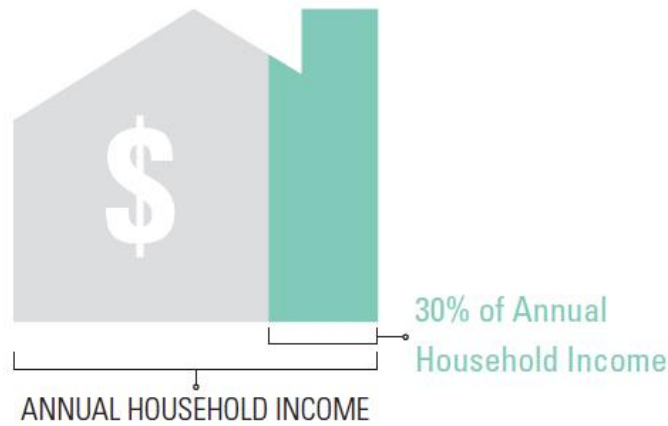


The total of 574 restricted units is not nearly enough for the 1,185 households who are at 80 percent AMI or below. These numbers exhibit that there must be a significant number of low-income households who are paying more for their housing than they can actually afford. These households are considered cost burdened.

HOUSING COST BURDEN

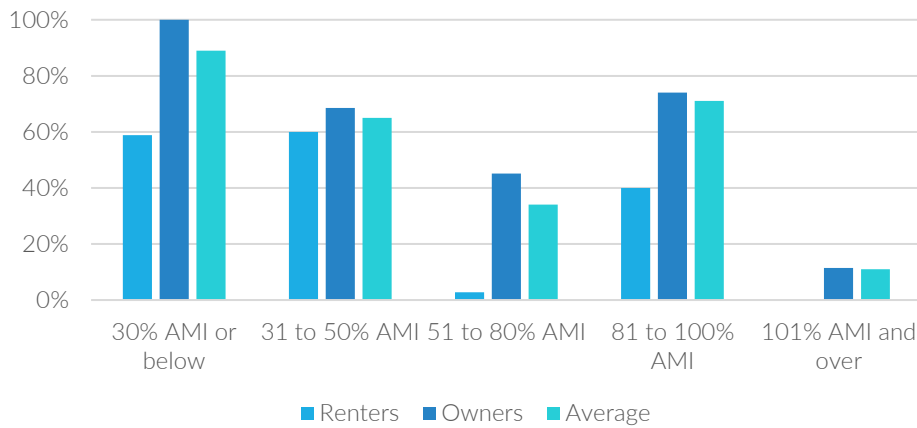
Another method to determine whether housing is affordable to a community's population is to evaluate households' ability to pay their housing costs based on their gross household income. Households who spend more than 30 percent of their gross income on housing are considered housing cost burdened, and those who spend more than 50 percent are considered severely cost burdened.

The 30 Percent Rule for Housing Affordability



HUD’s Comprehensive Housing Affordability Strategy (CHAS) data reports that nearly a quarter (23 percent) of households in Sudbury (or 1,470 households) are cost burdened; almost half of them (685 households) are severely cost-burdened, spending more than half their income on housing. All 220 extremely low-income ownership households are cost-burdened, as are 525 owner households earning at or above the area median. Remarkably, there are no renter households earning at or above the area median income.

FIGURE 10: SPENDING OVER 30% OF INCOME ON HOUSING



Source: CHAS data, 2020

AFFORDABILITY GAP

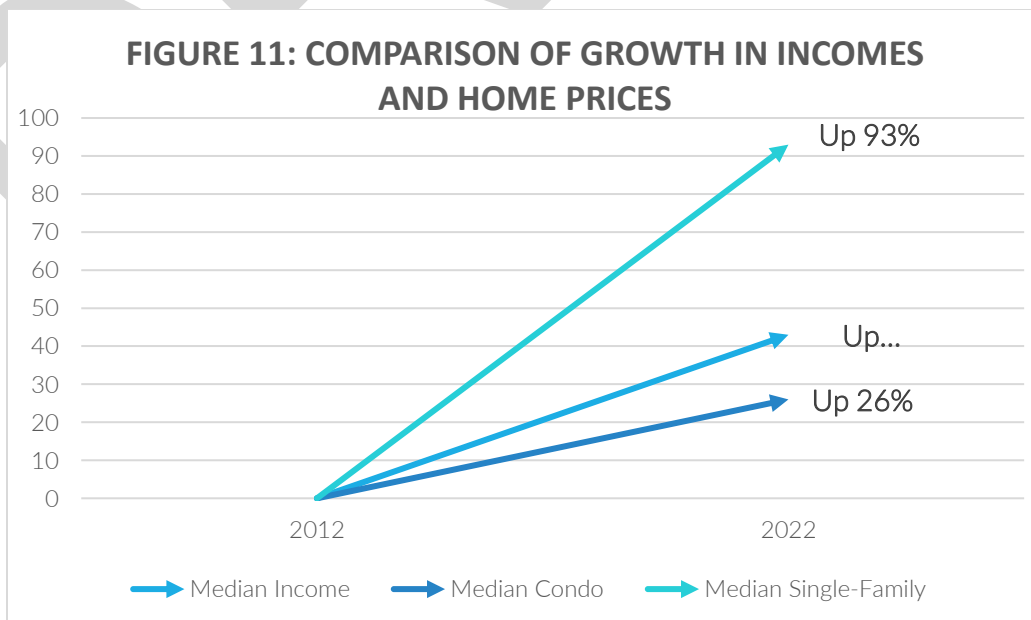
The large percentage of low-income households in Sudbury who are cost-burdened indicates that there is a gap between the number of households at or below 80 percent of AMI and the number of housing units affordable to households at this income level.

OWNERSHIP

The Executive Office of Housing and Livable Communities makes an affordability calculator available to determine the income necessary to keep housing costs at or below 30 percent of a household's income. Assuming a 20 percent down payment and 6.5 percent interest, a household earning Sudbury's 2022 median of \$234,427 could afford a home sales price of \$874,250. That is just a bit higher than the median price for condos (\$850,000) in Sudbury in 2023. For the 2023 median single-family home price of \$1.13 million, a household would need to earn \$303,023 per year.

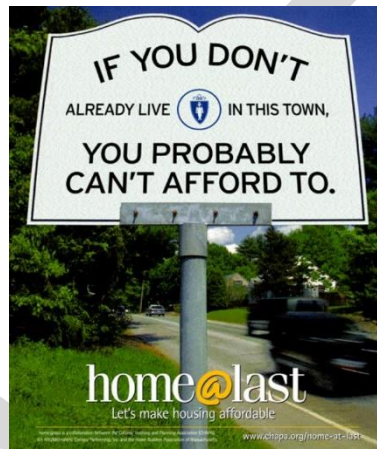
Given the competition with all-cash offers mentioned earlier, we wanted to include a 20 percent down payment in the affordability model. However, that aggressive goal for savings may not be realistic. A median-income household in Sudbury could only afford the mortgage on a \$874,250 home by paying \$174,850 up front, which represents three-quarters of a year's income. A smaller down payment would necessitate a lower-priced home in order to keep the monthly payments in an affordable range.

The mismatch between incomes and home prices is especially visible when comparing their rates of change over the past decade. Single-family home prices have nearly doubled, from \$605,500 to \$1,167,000, while household incomes increased by a quarter, from \$164,337 to \$234,427.



Sources: American Community Survey (ACS), Table S1901; Warren Group

Long-time Sudbury households are not the only ones who would struggle to purchase a single-family home in today's housing market. According to 2022 American Community Survey (ACS) data, the median household income in Middlesex County was \$118,800, about half of Sudbury's, so a median income household in the area who is looking to move to Sudbury would also not be able to do so. Materials from a public education campaign by the Citizens Housing and Planning Association (CHAPA)⁵¹ clarifies the situation in many communities in Massachusetts, including Sudbury:



RENTAL

As discussed earlier, 80 percent of AMI for a 4-person household is \$118,450. In order to keep housing costs from exceeding 30 percent of that income, the maximum affordable rent would be \$2,961 per month with all of the utility costs included. If utilities were not included, deducting the Utility Allowance would set an affordable charged rent at \$2,719. This 4-person household would be about \$100 behind at the end of every month for the starting rents in Sudbury's newest developments for a one-bedroom apartment. The two-bedroom units would create a \$900 deficit each month.

The gap between the actual cost of housing units in Sudbury that are available to buy or rent and the housing cost that would be affordable to low-income families is substantial. This affordability gap indicates a clear need for more rental and homeownership units that would be affordable for households earning 80 percent or less of AMI.

⁵¹ Citizens' Housing and Planning Association (CHAPA)'s mission is to encourage the production and preservation of housing that is affordable to low and moderate-income families and individuals and to foster diverse and sustainable communities through planning and community development – www.chapa.org

SUMMARY

This overview of Sudbury's housing conditions indicates that despite recent rental developments, Sudbury still has a lower proportion of rentals than its neighbors. 94 percent of Sudbury's current housing supply consists of single-family homes.

The slow pace of housing production throughout the region means that the current housing supply does not satisfy the demand. As a result, both developed and undeveloped land has become more valuable, incentivizing larger homes that exceed the value of the land underneath them, thus squeezing the supply of more modest homes even further. When smaller homes do become available, households who need to make offers contingent on receiving a mortgage are at a disadvantage to investors and others who can make cash offers. Current homeowners with low interest rates are resistant to putting their homes on the market, which provides more upward pressure on home prices.

Many older town residents with fixed incomes find themselves in a situation where they cannot afford to move from their current homes. The median condominium price in Sudbury last year was \$850,000, which is higher than census estimates for the median value of Sudbury homes built in the 1960s, 1950s, 1940s, and earlier. In addition, if older residents have refinanced their homes at favorable interest rates, they likely would pay double the rate if they moved.

Together these factors point to the same housing needs as the previous demographic chapter – smaller size affordable housing units for Sudbury's current residents, and more affordable housing options, particularly homeownership options, for families who would like to move to Sudbury.

Sudbury may also consider the implications for diversity, equity, and inclusion (DEI) as it plans for future affordable housing development. The exclusionary effects of a history of discriminatory zoning, redlining, and other housing policies can be seen in Sudbury and many other communities throughout Massachusetts. When looking at the historical racial composition of Sudbury, the exclusion is clear. Racial minorities were not only historically excluded from housing opportunities, but also from educational and economic opportunities. The combination of these factors created a vicious cycle where certain minority groups are now economically disadvantaged and not able to break into elite communities like Sudbury due to the continuing high cost of housing. Supporting new affordable housing in Town is a step towards inclusion and ensuring that all demographic groups have the opportunity to live in the wonderful community of Sudbury.

CHAPTER 5: DEVELOPMENT CONSTRAINTS

Sudbury is a desirable residential community because of its natural beauty, good schools, and rich history. Extensive floodplains, wetlands, unsuitable soils, and protected open spaces have resulted in both a scarcity of land and high prices for developable land. High land prices contribute to ever-increasing housing costs, while high expectations around excellent public education drive real estate tax increases. These combine to make the town unaffordable for many who currently reside in Sudbury and those who would like to move into the community. Zoning is a significant constraint in diversifying Sudbury's housing efforts because while over 90 percent of the town is zoned for residential use, the development patterns over the past half century have been primarily single-family housing construction, with few other options.

Many factors influence the feasibility of housing production, from physical limitations to regulations that shape development and land use. This chapter reviews environmental constraints, infrastructure constraints, and regulatory barriers and considerations. This analysis relies on the Town of Sudbury Open Space & Recreation Plan (2009-2013) and the 2021 Sudbury Master Plan.

KEY FINDINGS

ENVIRONMENTAL CONSTRAINTS

- According to the 2013 Open Space & Recreation Plan (OSRP), over 30 percent of Sudbury's total land area is considered open space, including properties that are owned by public, private, and non-profit entities, and have different levels of legal protection from future development.
- Approximately 35 percent of the town contains soils that are unsuitable for the installation of septic systems, including wetlands and flood plains.

INFRASTRUCTURE CAPACITY

- The entire town is reliant on groundwater wells that are vulnerable to contamination.
- Wastewater treatment is a constraint to development throughout the Town, in both residential and commercial sectors.

- No residential properties are served by centralized sewer systems. All single-family residential properties utilize on-site septic systems to treat wastewater. Only multi-family developments utilize shared wastewater systems.
- There is no centralized sewer system serving the commercial properties in the Town.
- With the exception of specialized transportation provided by the Council on Aging, Sudbury has no public transportation; parking space for commuter rail in adjoining towns is limited; and, there are few pedestrian-friendly routes from residences to likely destinations (e.g., town buildings, library, houses of worship, etc.).
- The nearest MBTA Commuter Rail stations are located in Framingham and Action and are greater than 6 miles from the center of Town.

REGULATORY BARRIERS

- Zoning is a significant constraint in diversifying Sudbury's housing efforts because over 92 percent of the town is zoned for single-family residential use. Commercial and industrial land uses comprise 2.4 percent of the Town's land. Agricultural, horticultural, forestry and recreation lands enrolled in M.G.L Chapter 61 make up 6.5 percent of land in the town.
- Over the past 10 years multi-family zoning has been approved in extremely limited areas of Sudbury (Mixed Use Overlay District along Route 20 and North Road Residential Overlay District and Melone 40R District along Route 117), totaling just under 200 acres, or 1.2 percent of the total land area in town.
- Accessory Dwelling Units (ADUs) are allowed only by special permit in all Residential Districts when certain criteria are met.
- The Village Business District is the only zoning district that allows the creation of apartments over commercial businesses.
- Other zoning and general bylaws create obstacles for housing production, including Wetlands Administration bylaw, Board of Health Regulations, Flood Plain Overlay bylaw, Water Resource Protection Overlay bylaw, Stormwater Management bylaw, Historic Districts bylaws and the Demolition Delay bylaw.

ENVIRONMENTAL CONSTRAINTS

Residents have committed significant resources towards conserving lands that are considered ecologically or culturally important. While Sudbury's abundant natural resources and historic asset protection is something to celebrate, vigorous efforts to preserve the rural, historic character of the town also limit development. Land conservation efforts have concentrated on developable land and properties that are highly visible and quintessential in Sudbury, effectively removing them from any possibility of development.

WATERSHED

Sudbury is within the Sudbury-Assabet-Concord (SuAsCo) watershed, consisting of the Sudbury, Assabet, and Concord River sub-watersheds. The entire watershed drains roughly 377 square miles of land, affecting 36 municipalities and approximately 365,000 people. The Sudbury River enters Sudbury at its southeastern border after originating in the Great Cedar Swamp in the town of Westborough and flowing north into Great Meadows Wildlife Refuge. The Assabet River also originates in Westborough and enters the Town at the southwestern corner. Both the Sudbury and Assabet Rivers continue north and join to form the Concord River in the Town of Concord. The Concord River continues north for approximately 16 miles before flowing into the Merrimack River in Lowell. These watersheds comprise over 750 acres (or 5 percent of the total land area) in the Town. Much of the land immediately adjacent to the watershed is also not considered developable due to soil conditions.

WETLANDS AND VERNAL POOLS

Wetlands are protected by federal, state, and local laws. Approximately 45 percent of the town is under the Conservation Commission's jurisdiction per the Wetland Protections Act (WPA) and the Sudbury Wetlands Administration Bylaw (30 percent wetland areas and an additional 15 percent adjacent lands). Filling and draining wetlands, altering the soil, cutting vegetation, and developing land within 100 feet of wetlands or within 200 feet of a perennial stream are regulated and require approval from the Sudbury Conservation Commission. The Sudbury Wetlands Administration Bylaw was adopted in 1994 to further the protections under the state law in providing both long-term, improved protection of these valuable resources and the ability to levy fines.

Sudbury is rich in vernal pools, with approximately 68 Certified Vernal Pools and over 150 Potential Vernal Pools, identified by the MA Natural Heritage and Endangered Species Program. Vernal pools occur across the landscape where small woodland depressions, swales, or kettle holes collect spring runoff or intercept seasonally high groundwater tables. Some species of

wildlife, such as wood frogs, spotted salamanders, and fairy shrimp, are dependent on vernal pools for their breeding and survival. Vernal pools also support rich and diverse invertebrate fauna. Beginning in 1987, vernal pools were also given some protection under the State's Wetlands Protection Act (WPA).

SCENIC AND HISTORIC RESOURCES

Sudbury is well-known for the extent, quantity, diversity, and quality of its historical and cultural resources. Four historic districts, many isolated National Register structures, the Town Center, the Wayside Inn, Great Meadows National Wildlife Refuge, the Assabet River National Wildlife Refuge, historic stone walls, large agricultural areas, and the abundant protected areas help define the town's special character.

Historical resources have been effectively managed by the Town government through the Sudbury Historical Commission (SHC) and the Historic Districts Commission (HDC) and by independent organizations such as the Sudbury Historical Society, the Wayside Inn, and the Goodnow Library.

The Town's 2004 Demolition Delay Bylaw covers buildings outside of the Local Historic Districts built before 1940, buildings on the National Register of Historic Places or the State Register of Historic Places, buildings within 200 feet of any federal, state, or local historic district, buildings included in the Inventory of the Historic and Prehistoric Assets of the Commonwealth, or buildings designated by the SHC for inclusion in said Inventory and homes listed in the "Old Homes Survey".

The Scenic Road Bylaw regulates the removal of stone walls and trees within the Town road rights-of-way.

Outside of the established historic districts, large numbers of historic homes are unprotected from alteration or demolition. There is concern that these homes will undergo small or incremental changes, or even be replaced by much larger homes that disregard local context, which will gradually erode town character.

The Massachusetts Cultural Resource Information System (MACRIS) data maintained by the Massachusetts Historical Commission (MHC) lists many historic resource records for Sudbury, of which 19 are multi-building areas such as farms and railroad corridors, 446 are individual buildings, and 66 are "structures," such as bridges, mausoleums, fences, walls, gates, road/path systems, fields, etc. There are currently 3 National Register Districts and 3 other individual sites on the National Register.

In 1999, Congress specifically designated the Sudbury-Assabet-Concord rivers for their “outstanding ecology, history, scenery, recreation values, and place in American literature”, and awarded portions of these rivers Wild and Scenic River status. The designation describes the rivers as historic and cultural resources. It is the only river system in the country to be designated for literature and history!

INFRASTRUCTURE CAPACITY

WATER AND SEWER

Sudbury's water system is managed and operated by the Sudbury Water District, a quasi-public agency. The system consists of 9 groundwater supply wells, pumping stations, 2 storage reservoirs with 7.6 million gallons of capacity, and approximately 121 miles of water main providing drinking water to approximately 95 percent of Sudbury residents, as well as the State Fire Training Academy in Hudson. Depending on the season, all available production facilities may be called upon to satisfy system demands that fluctuate from 1.5 million gallons per day in the winter to over 4 million gallons per day in the summer.

Most wells produce good quality water, with a variety of treatments taking place in various wells as needed. The 2022 Water Quality Report includes details on Sudbury's water quality in comparison to State and Federal standards. Sudbury generally has conditions suitable for public drinking water supply wells. However, 5 of the 9 water supply wells (generating 58 percent of the total Sudbury water supply) are located in aquifers with a high vulnerability to contamination. Several of these well fields are adjacent to the Route 20 business district and are vulnerable to contamination from commercial and industrial uses. Additionally, well #5 in North Sudbury is susceptible to contamination from adjacent agricultural uses due to the absence of hydrogeologic barriers (i.e., clay) that can prevent contaminant migration.

The Sudbury Water District's water withdrawal permit is authorized by MassDEP under the Water Management Act (WMA). The most recent Water Management Regulations, 310 CMR 36.00, include guidelines under the 2018 Water Conservation Standards. These regulations and standards include water policy that supports ecological needs while meeting the needs of economic growth to ensure prudent and sustainable use of water, maintain healthy watersheds and gradually improve degraded ones, and ensure sustained water supply to meet increasing demand while protecting the environment. Any requests to increase water withdrawal must be approved by MassDEP.

Sudbury has no centralized sewer system and is served by septic systems governed under Title 5 of the State Sanitary Code. Sudbury has taken on a Sewer Expansion Project which aims to improve wastewater infrastructure, supporting sustainable development and enhancing water quality.⁵² Since Sudbury is served only by septic systems, the types of soils are an important factor in the growth rate of the town. Approximately 40 percent of the town is glacial outwash plain which is characterized as sandy soils with rapid percolation rates. Systems in these soils must be designed to compensate for the fast percolation rate of the soils so the leachate achieves the purification necessary to protect the groundwater. Approximately 20 percent of the town is glacial till/moraine soils which present the opposite problem with slow percolation rates.

Sudbury has its own local Board of Health Regulations which define design requirements more stringently than state Title 5 requirements for septic systems in these marginal soils. Floodplain soils and hydric soils are found in wetlands and river/stream systems and are not suitable for septic systems under Title 5. Local regulations or the Wetland Protection Act, account for over 45 percent of Sudbury's land area. Since a sizable portion of the town is not suitable for the installation of septic systems, there is added pressure for development in those areas of town with suitable soil.

The Route 20 business corridor is also served by individual septic systems. This area is substantially located in areas of gravel, sand, and silt. These types of soils, and the density and types of businesses, pose a potential threat to the groundwater. Since much of this high-density business area is just north of many of the town wells, the Town is very concerned about the threat of groundwater pollution and protecting the wells. The Town has identified the need to create a municipal sewer collection system for the business district along Route 20 as the current conditions make it difficult to maintain the current septic systems. The Town has instituted an aquifer protection Bylaw which provides additional protection and regulates land uses within the town aquifers.

Many of the recently constructed multi-family developments treat their wastewater through individual small treatment plants. This option is not available or cost-effective to the typical Sudbury single-family residential property.

From a development perspective, general guidelines are that a private septic system can support a maximum of 90 bedrooms. For developments larger than 90 bedrooms, the only option for wastewater disposal is a privately owned treatment plan.

⁵² Sudbury Department of Public Works, "Phase 1 & 1A Sewer Expansion Project," accessed September 24, 2024, <https://sudbury.ma.us/dpw/phase-1-1a/>.

TRANSPORTATION

Roads: Sudbury's 160-mile road network consists of mainly local roads. No major highways run through Sudbury, however, the old coach roads remain the major auto-routes. Sudbury lies equidistant from Route 128 to the east and Route 495 to the west, connected by Route 20 (Boston Post Road) and Route 117. Route 20 has been the traditional commercial byway since the 17th century when mills and stores were located there. Route 27 carries traffic into the center of town from Wayland, turning north toward Maynard, with a branch continuing west toward Hudson as Hudson Road. Nobscot Road is another major route, running south from Route 20 to Framingham.

As of the last ownership status report in 1997, there are 5.3 miles of state road, 18.6 miles of county road, 102.9 miles of town roads, and 15.4 miles of private roads. Build-out projections increase the total length of new roads by 43 miles.

Transit: Sudbury has no rail service. The nearest MBTA commuter lines are located in Framingham (south) and Action (north). Both of these stations are over 6 miles from the center of town.

Sidewalks and Bikeways: Sudbury is working to provide a network of pedestrian walkways and trails. The existing walkways provide opportunities for students to walk safely to school. Trails are mostly located in conservation areas and provide safe and serene recreational opportunities. Construction on two new rail trails is in progress, which will increase the ability to traverse Sudbury without a car and increase the connectivity of pedestrian and bicycle travel. Those neighborhoods without pedestrian walkways are not suitable for roadside bicycle lanes or walkways due to their narrow layout. Securing easements to construct pedestrian walkways is needed for most of the remaining areas where none are currently located.

Council-on-Aging Vans: The Council on Aging (COA) shuttle service is available for residents who are 60 years old or above for medical and shopping destinations, as well as COA programs and activities. The service is available by appointment only from Monday through Friday. There is a minimal suggested donation for trips with a recommendation to make appointments early since times can be booked months in advance.

Ride-sharing: Ride-sharing services and the prevalence of access to smartphone apps will be an important factor in future transportation services. However, any reduction of overall traffic and congestion from single-occupancy vehicles is preferable both for quality of life and the Town's sustainability goals.

Heavy dependence on privately owned vehicles imposes hardships on people who cannot afford cars or do not drive (e.g., students, seniors, lower-income individuals, and disabled individuals). People with limited access to cars may also be disadvantaged because of resulting limits on access to services, food, and jobs.

REGULATORY BARRIERS AND CONSIDERATIONS

In addition to environmental and infrastructure factors that affect development, local policies and regulations directly impact the location and physical attributes of development opportunities. Local zoning and land use policies are the two primary regulatory tools that can affect housing production in addition to other local regulations including local wetlands and flood plain ordinances, local historic districts, and the like. The Sudbury Zoning Bylaw and the Town’s General Bylaws contain regulations that are applied to parcels of land and direct property owners on what can and cannot be done with their land. Zoning regulates which uses are permitted on the parcel, where a structure can be placed on a parcel, how tall a structure can be, how much parking is required, how much open space must be provided, and signage. General Bylaws are becoming increasingly important as towns seek to regulate other aspects of development, such as Demolition Delay for historic properties, Scenic Roads, Wetlands Administration, and Stormwater Management. These protocols shape the built environment and the mixture of uses across the community.

ZONING REGULATIONS

Most of the town is composed of residential (mainly single-family) uses. Less than two percent of the land area in Sudbury allows for more dense, multi-family housing, with the exception of attached senior housing.

Land Area Distribution by Land Use and Zoning

Land Use	%	Acres	Zoning	%	Acres
Residential – Single-family	43%	6,778		92%	14,500
Residential – Multifamily	4%	622		1.2%	<200
Open Space/Tax Exempt	31%	4,869		4.6%	725
Commercial/Industrial/Research	2.4%	378		3%	475
Chapter 61 Lanes – Forestry, Recreation, Agriculture	6.5%	1,019			
Residential- vacant	4.75%	750			
Roadways	6%	1,000			
Other	2.2%	347			
Total	100%	15,763			

Sudbury adopted its first zoning bylaw in 1931 which included three districts: Business, General Residence, and Single Residence. Sudbury's zoning regulations have had regular amendments in the last several decades to address a variety of concerns. Amendments since the last Housing Production Plan in 2015 have responded to the need for smaller homes and apartments, rental housing, a desire for mixed-use redevelopment, and other types of development near the commercial centers.

The Zoning Bylaw now includes eleven different zoning districts: three Residential districts, Business, Limited Business, Village Business, Industrial, Limited Industrial, Research, and Open Space. There are many housing forms allowed in Sudbury across most of the districts, few by right but most by special permit and/or Town Meeting vote. The following provides a description of the residential zoning district and the major zoning bylaws relating to housing production.

RESIDENTIAL DISTRICTS

The residential zoning districts in Sudbury consist of three districts which require varying lot sizes from 40,000 sq. ft. to 5 acres. Zone A occupies most of the Town and requires 40,000 sq. ft. of lot area and 180 linear feet of frontage per lot. Zone C occupies a smaller portion of the Town and requires 60,000 sq. ft. of lot area and 210 feet of frontage per lot. The Wayside Inn Historic Preservation Zone covers approximately 1,200 acres that were originally held in ownership by Henry Ford and requires 5 acres of lot area and 210 feet of frontage per lot.

Major Bylaws Relating to Housing Production

Besides single-family home construction, Sudbury's zoning bylaw also allows a variety of alternative residential development styles by special permit in all the residential and several commercial districts.

The **Cluster Development** bylaw allows for more compact development of single-family dwellings on tracts of land over 10 acres, with the preservation of a significant percentage of open space. However, this bylaw does not allow for greater density of housing units, or multi-family units.

The **Flexible Development** bylaw allows for different size lots due to the presence of natural features on the property. There is no open space requirement, no density bonus, nor allowance of multi-family units. Qualifying parcels must be at least 10 acres in size.

The **Senior Residential Community (SRC)** bylaw was the first multi-family housing bylaw approved in Sudbury in 1997. It can be used only on lots 10 acres or greater, requires one person at least 55 years of age to occupy a unit, and does allow for multi-family structures.

The **Incentive Senior Development** bylaw followed the SRC bylaw with similar provisions for tract size, age requirement, and multi-family structures, but it also placed a price cap on the units by allowing greater density of units in the development. The price cap is not technically “affordable” but it does create units of varying style and price in the otherwise homogeneous housing market in Sudbury.

The **Mixed Use Overlay District (MUOD)** was adopted in 2016 and was created to redevelop the 50-acre former Raytheon property on Route 20. Only age-restricted housing is allowed in the MUOD however, and inclusion of additional properties into the district requires a Town Meeting vote. A separate development under MGL Chapter 40B was constructed within the approved district, however as a stand-alone development and not part of the MUOD.

The **North Road Residential Overlay District (NRROD)** was adopted in 2018 and was created to redevelop the town-owned former gravel pit property on Route 117. This district allows a variety of residential styles, including single-family, two-family and multi-family units, Assisted Living, Nursing Homes and Continuing Care Retirement Communities. Density is determined by the Planning Board by a Special Permit. Inclusion of additional properties into this district is limited to those properties in the existing Research District and requires a Town Meeting vote.

The **Melone Smart Growth Overlay District** was adopted in 2019 and was created under Massachusetts General Laws Chapter 40R to encourage the construction of dense residential development, including 25 percent of the units dedicated as affordable. Homes in this district can be either rental or homeownership and qualifies the Town for incentive payments from the state. The current district is 5.95 acres in total.

The Inclusion of **Affordable Housing** bylaw is relatively new, adopted in 2020, and requires the set aside of at least 10 percent of the units created for affordable housing whenever a development of greater than 3 units is approved. Housing can be within the development, or outside the development, or funds placed into a dedicated fund for use in creating affordable housing.

The **Accessory Dwelling Units** bylaw allows the creation of 1 accessory dwelling in all residential districts by special permit of the Planning Board.

OTHER REGULATIONS AFFECTING DEVELOPMENT OF HOUSING

The **Water Resource Protection Overlay District** was adopted to protect, preserve, and maintain the existing and potential water supply and groundwater recharge areas within the Town. Its provisions are administered by the Planning Board and include a limitation on impervious surfaces within residential developments to no more than fifteen percent (15%) of a building lot.

The **Flood Plain Overlay District** was adopted to preserve and protect the streams and watercourses and adjoining lands; to protect against the hazards of flooding; to preserve and maintain the groundwater table for water supply purposes; to protect the community against the detrimental use and development of lands adjoining such water courses and to conserve the watershed areas. Its provisions are administered by the Zoning Board of Appeals and prohibit the construction of any structures within the overlay district.

The **Wetlands Administration Bylaw** is a General Bylaw whose purpose is to protect additional resource areas beyond those that the state Wetlands Protection Act governs. This bylaw is administered by the local Conservation Commission and may limit additional land for development.

The **Stormwater Management Bylaw** is a General Bylaw whose purpose is to control the adverse effects of soil erosion, sedimentation, and construction site runoff and can require costly improvements on development proposals by Special Permit of the Planning Board.

The Town has approved four **Historic Districts** – the George Pitts Tavern District, the King Philip District, the Old Sudbury and Hudson Road District, and the Wayside Inn Historic District which allow housing but enable the local Historic District Commission to place conditions on the construction.

Local **Board of Health** regulations on wastewater disposal systems have been adopted which require more stringent standards beyond those that the state Title 5 law governs.

CHAPTER 6: IMPLEMENTATION CAPACITY AND RESOURCES

The Town of Sudbury has a number of local resources that assist with the creation of affordable housing in Sudbury, including the Regional Housing Services Office, the Sudbury Housing Trust, the Sudbury Housing Authority, the Community Preservation Act, private developers, WestMetro HOME Consortium, zoning tools, and a variety of plans and strategies.

LOCAL CAPACITY AND RESOURCES

SUDBURY HOUSING AUTHORITY

In 1969, MGL Chapter 121B, Section 3, was passed to allow the creation of housing authorities by cities and towns, and shortly thereafter, in 1971, Town Meeting voted to establish the Sudbury Housing Authority. It was the 204th housing authority formed in the Commonwealth and the original 5 members were appointed by the Select Board.

Since its establishment, the Sudbury Housing Authority has been enthusiastically active in creating and maintaining affordable housing in Sudbury, creating 70 units of housing in its first 10 years of operation, and 15 units in the next 10 years.

Musketahquid Village, consisting of 64 apartments and a community building for seniors, is the largest SHA property, and the SHA also manages 28 units of family rental housing in duplexes and single-family homes across town. These properties were developed with State grants and Town donated land, and include the successful duplex redevelopment program, where the Sudbury Housing Authority converted four larger single-family homes to duplexes.

The SHA has provided leadership over the years in bringing other affordable housing mechanisms to Town Meeting for consideration. These included advocating for zoning for handicapped and physically disabled persons (defeated 1979), participation in town commissioned committees and task forces for parcel suitability, inclusionary zoning, long-range planning, and other housing-related studies. The housing authority is continually active in pursuing opportunities for expanding housing opportunities for lower-income households in Sudbury.

The Sudbury Housing Authority Board of Commissioners is comprised of one state appointee and three elected representatives, and one SHA resident appointed by the Select Board.

SUDBURY HOUSING TRUST

The Sudbury Housing Trust was formed by the April 2006 Town Meeting accepting MGL Chapter 44, Section 55C. The Housing Trust was formed specifically to focus on affordable homeownership and preservation opportunities.

The Housing Trust charter was developed with the Town's interests in mind. The charter allows a range of powers through the Select Board approval for certain transactions. The Town Treasurer is the custodian of the funds. The purpose of the Housing Trust is to provide for the preservation and creation of affordable housing in the Town of Sudbury for the benefit of low and moderate-income households. The Housing Trust feels it has taken several positive steps toward those goals and hopes to build on those successes.

In the years since the Housing Trust was chartered in 2007, the Housing Trust has directly created 14 units of housing (8 units through Home Preservation, 2 Habitat for Humanity, 3 Maynard Road Homes, and 1 buy-down on Old County Road) and assisted in the creation of another 126 units (Coolidge Phase I and II, and Sudbury Housing Authority). The Trust is actively looking to create new housing opportunities.

The Housing Trust performs lottery, resale, and monitoring agent services for Sudbury and other neighboring communities. This provides a revenue stream for the Housing Trust Small Grant Program and local opportunities for eligible buyers with connections to Sudbury and others looking for affordable housing in the area. The Sudbury Housing Trust is one of the seven monitoring agents for MassHousing 40B ownership program.

The Housing Trust continues to sponsor the Small Grant Program to help seniors and other moderate income homeowners fund health and safety repairs to their homes. These repairs include window replacements, accessibility modifications, and plumbing and heating replacements. The Program accepts grant applications on a rolling process, and applications are reviewed and potentially funded on a first-come, first-served basis. Through December 31, 2023, the Program has awarded 79 grants for almost \$300,000, with 58 percent of the grantees being senior households. The Town contributed \$75,000 of ARPA funds for this program. The easy-to-submit application can be found on the Town's website.

The Housing Trust also sponsors a Mortgage Assistance Program to income eligible households generously funded by \$75,000 of State ARPA funds, with up to \$3,000 of benefit payable to the mortgage holder. The Program continues to accept new applications through FY24.

The Sudbury Housing Trust has just completed (January 2024) its Rental Assistance programs by providing rental assistance to income eligible tenants. Over the last 3 years, the Trust helped 195 households with \$430,000 towards their rent. This program was funded with \$200,000 of ARPA funds, and the balance from CPA.

The Sudbury Housing Trust is supported by the staff of the Planning and Community Development Department.

CPA

Sudbury Town Meeting accepted the Community Preservation Act (CPA or Act, MGL Chapter 44B) in 2002. Sudbury had the foresight to adopt the plan at the highest level and assessed a 3 percent surcharge to our real estate taxes. Since then, Sudbury has therefore received the highest possible allocation of state matching funds to combine with local taxes to appropriate for the allowable purposes. Under the Act, funds may be used for the acquisition, creation, and preservation of open space; acquisition, preservation, rehabilitation, and restoration of historic resources; acquisition, creation, preservation, rehabilitation, and restoration of land for recreational use; acquisition, creation, preservation, and support of community housing; and the rehabilitation or restoration of open space and community housing that is acquired or created through the CPA. The Community Preservation Committee (CPC) includes nine standing members, with representatives from the Town's Conservation Commission, Finance Committee, Historical Commission, Housing Authority, Park and Recreation Commission, Planning Board, Select Board, and two at-large citizen members appointed by the Select Board. The CPC is supported by the staff of the Planning and Community Development Department.

From FY03 through June FY24, Sudbury has received \$15,610,894 from the State in matching funds. The local surcharge raised was \$32,611,932. Sudbury Town Meeting has approved the use of these funds to conserve 574 acres of open space including the acquisition of fee ownership or restriction interests in six farms and the Nobscot Mountain. As required, Town Meeting has approved or reserved for future projects the mandatory 10 percent of estimated annual revenue each year for community housing, open space and recreation, and historic preservation. Through the life of the CPA in Sudbury, the Town has appropriated \$7,516,900 for affordable housing to fund local projects. The CPC is mindful of its obligation to the taxpayers when considering and recommending projects to Town Meeting for approval. The Committee uses as its annual budget guide for expenditure the estimated annual revenue minus fixed expenses. The CPA strives to stay within that limit each year. When there is a large or compelling project, reserved funds may be used.

SUDBURY DEPARTMENT OF PLANNING AND COMMUNITY DEVELOPMENT

The Department provides planning support, technical assistance, coordination, and advisory services to town officials, boards, committees, and all residents on issues involving land use planning, zoning, economic development, open space land preservation, smart growth, and historic preservation.

The Planning and Community Development Department staffs the following boards, committees, and commissions with its staff of five:

- Planning Board
- Zoning Board of Appeals
- Design Review Board
- Housing Trust
- Community Preservation Committee
- Historical Commission
- Historic Districts Commission
- Earth Removal Board
- Land Acquisition Review Committee
- Rail Trails Advisory Committee

PLANNING BOARD

The Sudbury Planning Board enforces the rules and regulations governing the subdivision of land within Sudbury in accordance with M.G.L. Ch. 41, Sec 81. The Planning Board also makes recommendations to Town Meeting with respect to zoning amendments. Below are some specific bylaws that can create market discount housing.

Sudbury implemented an **Inclusionary Affordable Housing Bylaw** in 2020, which requires the creation of affordable units in sub-divisions with three (3) or more dwelling units. See section 5600 of the Sudbury Zoning Bylaw.

The **Incentive Senior Development** was adopted in 1998 to provide discounted housing development opportunities for seniors. It allows for up to four (4) dwelling units per buildable lot in exchange for dedicated open space, occupancy requirements (aged 55+), and unit resale and price restrictions. Since its inception, 96 units have been approved. See section 5400 of the Sudbury Zoning Bylaw.

The **Village Business District bylaw** is a mixed-use zoning district bylaw adopted in 1994 which allows apartments over stores by right. This district encompasses an approximately 0.5 stretch along Route 20. No units have been produced under this bylaw due to the lack of sewage facilities on Route 20. See section 2230 of the Sudbury Zoning Bylaw.

The **Accessory Dwelling Unit** bylaw was initially adopted in 1994 and significantly revised in 2009. It allows the creation of an accessory unit in any district in Town. They can be either within the structure of the main house or in a detached structure. Since the recent revisions, 14 accessory apartments have been approved. See section 5500 of the Sudbury Zoning Bylaw.

PREVIOUS LOCAL PLANS AND STRATEGIES

Sudbury has invested significant resources - staff; consultants; and volunteers - in developing and publishing strategic and important land use plans to help guide development for the future.

The **2021 Sudbury Master Plan** – The Sudbury Master Plan was adopted by the Planning Board on April 28, 2021. The Sudbury Master Plan expresses our aspirations as a community to protect and support what we love about living in Sudbury and lays out a roadmap for the future.

The **2016 Housing Production Plan** provides the framework for the housing program in Sudbury and offers a comprehensive analysis for the benefit of the Town residents. The plan played an important role in educating the community and providing data that will formulate future plans and strategies.

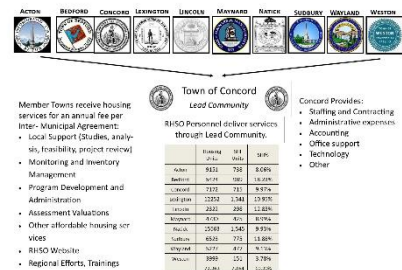
The **2015 Analysis of Impediments to Fair Housing Choice** is a HUD-required report that reviews the local laws, regulations, and administrative policies, procedures, and practices affecting the housing for persons identified as a protected class.

REGIONAL CAPACITY AND RESOURCES

REGIONAL HOUSING SERVICES OFFICE (RHSO)

The Regional Housing Services Office (RHSO) is a regional collaboration structured through an Intermunicipal Agreement (IMA) to provide the member towns of Acton, Bedford, Burlington, Concord, Lexington, Lincoln, Maynard, Natick, Sudbury, Wayland, and Weston with technical assistance in affordable housing matters. Concord is the host and lead community.

REGIONAL HOUSING SERVICES OFFICE, ESTABLISHED 2011



The RHSO performs housing-related activities for the Sudbury Housing Trust and the Town such as monitoring services, inventory management, HOME Program administration, and local support for community-specific initiatives.

The RHSO also provides regional support to individuals searching for or residing in affordable housing, and property managers leasing units of affordable housing. The RHSO website, www.RHSOhousing.org, has information for the above groups including information on resident services, housing inventories, and contact information for new opportunities.

WESTMETRO HOME CONSORTIUM

The HOME Program is a federal housing program administered by the U.S. Department of Housing and Urban Development (HUD). HUD distributes funds to groups of adjacent communities who create a local consortium. The WestMetro HOME Consortium is administered by the City of Newton and currently has thirteen members: Newton, Bedford, Belmont, Brookline, Concord, Framingham, Lexington, Natick, Needham, Sudbury, Watertown, Waltham, and Wayland.

The allocation amount varies according to HUD formulas based on entitlement parameters of population, rental housing units occupied by the poor, poverty households living in rental housing units built before 1950, families in poverty, and rental housing units with problems.

The Consortium also brings each community into a local housing network. The network provides both informal contacts among housing professionals and opportunities for more formal exchanges of information and technical assistance.

The Town of Sudbury joined the Consortium in 2005, and has since received HOME program and administrative funds annually. Sudbury has been able to utilize \$375,970 of HOME funds over the years: FY09 \$101,101 buy-down of a unit at the Villages at Old County Road, creating an additional affordable unit; FY14 \$96,666 support Coolidge at Sudbury Phase 1 project for 56 units of very low income age-restricted housing, and FY21 \$178,203 to support Coolidge at Sudbury Phase 2 for 64 units of very low income age-restricted housing.

METROPOLITAN AREA PLANNING COUNCIL (MAPC)

The Metropolitan Area Planning Council (MAPC) is the regional planning agency serving the people who live and work in the 101 cities and towns of Metropolitan Boston. It was established in 1963, MAPC is a public agency created under Massachusetts General Law Chapter 40B Section 24. Sudbury is one of the 21 municipalities that make up the Inner Core Committee (ICC) within the MAPC. The ICC is a forum to explore issues of mutual concern and foster joint action. The ICC is MAPC's largest subregion, representing the largest number of municipalities of any subregion: about 51 percent of the MAPC region's population - over 1.6 million residents. As some of the most urban and populous communities within the MAPC planning area, ICC cities and towns deal with a host of unique challenges, such as finite developable land, issues of neighborhood change and gentrification, limited affordability, congestion, and public transit capacity limitations, to name a few. The ICC meets regularly to discuss these and other topics, share best planning practices, and explore opportunities for regional collaboration.⁵³

⁵³ Metropolitan Area Planning Council, Inner Core Committee, Accessed 11/22/23, <https://www.mapc.org/get-involved/subregions/icc/>

EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES – ARPA

In May 2023, Governor Maura Healey and Lieutenant Governor Kim Driscoll announced \$246 million in direct subsidies and state and federal housing tax credits to build and preserve affordable mixed-income housing units. The funding for this initiative leverages substantial state and federal resources, with \$105 million in direct subsidies, \$60 million from federal American Rescue Plan Act (ARPA) funding, and \$81 million in state and federal tax credits.⁵⁴ Passed in 2021 to spur pandemic recovery, ARPA is a one-time source of funding.

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⁵⁴ Karissa Hand, Healey-Driscoll Administration Announces \$246 Million to Build and Preserve 1,600 Affordable and Mixed-Income Housing Units, Commonwealth of Massachusetts Press Release, May 18, 2023, <https://www.mass.gov/news/healey-driscoll-administration-announces-246-million-to-build-and-preserve-1600-affordable-and-mixed-income-housing-units#:~:text=Lowell%20%E2%80%94%20Today%2C%20the%20Healey%2D,1%2C600%20affordable%20homes%20throughout%20Massachusetts.>

SUMMARY

Sudbury has a stable, capable infrastructure that can support housing for community members. The Sudbury Housing Trust and the Sudbury Housing Authority continue to exhibit strong leadership in the town. The Community Preservation Act (CPA) surcharge remains a vibrant source of funding for the selected community initiatives. Over the years, CPA funds have assisted Sudbury in accomplishing many important developments.

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ACRONYMS

ACS	US Census Bureau's American Community Survey, Five-Year Estimates
ADA	Americans with Disabilities Act
ADU	Accessory Dwelling Unit
AMI/AMFI	Areawide Median Family Income set by HUD (household of four)
ARPA	American Rescue Plan Act
BIPOC	Black, Indigenous, and People of Color
CHAPA	Citizens' Housing and Planning Association
CHAS	Comprehensive Housing Affordability Strategy
COA	Council on Aging
CPA	State of Massachusetts Community Preservation Act (MGL Chapter 44B)
CPC	Community Preservation Committee
CMR	Code of Massachusetts Regulations
ELI	Extremely Low Income
EOHLC	Executive Office of Housing and Livable Communities
DHCD	Department of Housing and Community Development
DEI	Diversity, Equity, and Inclusion
FMR	Fair Market Rent
FY	Fiscal Year(s) (July 1-June 30)
HDC	Historic Districts Commission
HPP	Housing Production Plan
HOME	Home Investment Partnerships Program
HUD	United States Department of Housing and Urban Development
IMA	Intermunicipal Agreement
LMI	Low/Moderate- Income (at or below 80 percent AMI)
MAAB	Massachusetts Architectural Access Board
MACDC	Massachusetts Association of Community Development Corporations
MAHA	Massachusetts Affordable Housing Alliance
MACRIS	Massachusetts Cultural Resources Information System
MAPC	Metropolitan Area Planning Council
MassDEP	Massachusetts Department of Environmental Protection
MassGIS	Massachusetts Bureau of Geographic Information
MBTA	Massachusetts Bay Transportation Authority
MGL	Massachusetts General Laws
MHC	Massachusetts Historical Commission
MHP	Massachusetts Housing Partnership
MLS	Multiple Listings Service (central real estate database)
MSA	Metropolitan Statistical Area

MUOD	Mixed Use Overlay District
NRROD	North Road Residential Overlay District
OSRP	Open Space & Recreation Plan
RFP	Request for Proposal
RHSO	Regional Housing Services Office
SHA	Sudbury Housing Authority
SHC	Sudbury Historical Commission
SHT	Sudbury Housing Trust
SHI	Massachusetts Subsidized Housing Inventory
SRC	Senior Residential Community
USDA	United States Department of Agriculture
VLI	Very Low Income
WPA	Water Management Act
ZBA	Zoning Board of Appeals
30B	Chapter 30b is known as the Uniform Procurement Act
40B	Comprehensive Permit, per MGL Chapter 40B, §20-23
40R	Smart Growth Overlay District Act, per MGL Chapter 40R

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KEY DEFINITIONS

This list of key definitions is intended to assist the reader and is not intended to replace applicable legal definitions of these terms. The following definitions are for key terms used throughout the document, many of which are based on definitions in statutes and regulations.

Areawide Median Income (AMI) – the median gross income for a person or family as calculated by the United States Department of Housing and Urban Development, based on the median income for the Metropolitan Statistical Area. For FY2024, the HUD area median family income (AMFI) for the Boston-Cambridge-Quincy MA HUD Metro FMR Area was \$ 148,900.⁵⁵ AMI is also referred to in the document as median family income (AMFI).

Black, Indigenous, and People of Color (BIPOC) – Pronounced “bye-pock,” this is a term specific to the United States, intended to center the experiences of Black and Indigenous groups and demonstrate solidarity between communities of color. It acknowledges that people of color face varying types of discrimination and prejudice. Additionally, it emphasizes that systemic racism continues to oppress, invalidate, and deeply affect the lives of Black and Indigenous people in ways other people of color may not necessarily experience. Lastly and significantly, Black, and Indigenous individuals and communities still bear the impact of slavery and genocide.⁵⁶

Cost-Burdened Household – a household that spends 30 percent or more of its income on housing-related costs (such as rent or mortgage payments). Severely cost-burdened households spend 50 percent or more of their income on housing-related costs.

Diversity, Equity, and Inclusion – is a conceptual framework that seeks to promote the fair treatment and full participation of all people, particularly groups who have historically been underrepresented or subject to discrimination based on identity or disability.⁵⁷ Housing and Urban development (HUD) individually defines each component of DEI as the below:

Diversity: The practice of including the many communities, identities, races, ethnicities, backgrounds, abilities, cultures, and beliefs of the American people, including underserved communities.⁵⁸

⁵⁵ U.S. Department of Housing and Urban Development. FY 2024 Income Limits Summary. <https://www.huduser.gov/portal/datasets/il/2021/2021summary.odn> (accessed April 9, 2024).

⁵⁶ BIPOC definition from Seattle YWCA <https://www.ywcaworks.org/blogs/ywca/wed-04062022-0913/why-we-use-bipoc#:~:text=BIPOC%20stands%20for%20Black%2C%20Indigenous,solidarity%20between%20communities%20of%20color>.

⁵⁷ "DEI," Dictionary.com, accessed April 8, 2024, <https://www.dictionary.com/browse/dei>

⁵⁸ U.S. Department of Housing and Urban Development, "Definitions," accessed April 8, 2024, https://www.hud.gov/program_offices/administration/admbout/diversity_inclusion/definitions

Equity: The consistent and systematic fair, just, and impartial treatment of all individuals, including individuals who belong to underserved communities that have been denied such treatment.

Inclusion:

Household – all the people, related or unrelated, who occupy a housing unit. It can also include a person living alone in a housing unit or a group of unrelated people sharing a housing unit as partners or roommates. Family households consist of two or more individuals who are related by birth, marriage, or adoption, although they also may include other unrelated people. Nonfamily households consist of people who live alone or who share their residence with unrelated individuals.

Family Household – Family households consist of two or more individuals related by birth, marriage, or adoption, although they also may include other unrelated people.

Non-Family Household – Non-family households consist of individuals living alone and individuals living with roommates who are not related by birth, marriage, or adoption.

Income Thresholds – the U.S. Department of Housing and Urban Development (HUD) establishes income thresholds that apply to various housing assistance programs. These thresholds are updated annually and are categorized by household size. Sudbury is part of the Boston-Cambridge-Quincy, MA-NH HUD Metro FMR Area.

Extremely Low-Income (ELI) – the FY 2014 Consolidated Appropriations Act changed the definition of extremely low-income to an individual or family whose annual gross income is the greater of 30/50ths (60 percent) of the Section 8 very low-income limit or the poverty guideline. The FY2024 ELI income limit for a household of one is \$34,300 and for a household of four is \$48,950.

Very Low-Income (VLI) – an individual or family whose annual gross income is at or below 50 percent AMI. The FY2024 VLI income limit for a household of one is \$57,100 and for a household of four is \$81,600.

Low/Moderate income (LMI) – an individual or family whose gross annual income is at or below 80 percent of the Area Median Income (AMI).⁵⁹ The FY2024 AMI income limit for a household of one is \$91,200 and for a household of four is \$130,250. **Missing-Middle** – a term coined by planner and architect Daniel Parolek, describing small and moderately-sized housing types (such as accessory units, duplexes, triplexes, townhomes, and cottage courts) that blend well with neighborhoods that primarily consist of single-family homes.

Open Space – land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh and saltwater marshes and

⁵⁹ For purposes of MGL c.40B, moderate income is defined as up to 80 percent AMI.

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other wetlands, oceans, rivers, streams, lake and pond frontage, beaches, dunes and other coastal lands, lands to protect scenic vistas, land for wildlife or nature preserve, and/or land for recreational use.

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APPENDICES

SUBSIDIZED HOUSING INVENTORY



EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES CH40B SUBSIDIZED HOUSING INVENTORY

Sudbury

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

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This data is derived from information provided to the Executive Office of Housing and Livable Communities (EOHLC) by individual communities and is subject to change as new information is obtained and use restrictions expire.



EXECUTIVE OFFICE OF HOUSING AND LIVABLE COMMUNITIES 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	EOHLC
9279	Oakwood Ave	Oakwood Ave	Ownership	1	Perp	NO	EOHLC
9298	Maynard Road	Maynard Road	Ownership	3	Perp	YES	MassHousing
9352	The Coolidge at Sudbury	189 Boston Post Road	Rental	64	Perp	YES	EOHLC
9366	Pinewood Avenue	Pinewood Avenue	Ownership	1	Perp	NO	EOHLC
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	EOHLC
9682	Willis Lake Drive	Willis Lake Drive	Rental	1	Perp	NO	EOHLC
9773	Pratts Mill Road	Pratts Mill Road	Ownership	1	Perp	NO	EOHLC
9885	Robbins Road	Robbins Road	Ownership	1	perp	NO	EOHLC
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	EOHLC
10670	Cold Brook Crossing	Cold Brook Drive	Rental	101	2051	NO	EOHLC
Sudbury Totals				775	Census 2020 Year Round Housing Units		6,523
					Percent Subsidized		11.88%

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This data is derived from information provided to the Executive Office of Housing and Livable Communities (EOHLC) by individual communities and is subject to change as new information is obtained and use restrictions expire.



TOWN-OWNED PROPERTY REVIEW SHA 2017 – UPDATED

Parcel	Location	LUC	Area	Assessed Value	Cost/Acre A	Sale Year	Sale Price	Cost/Acre S	Owner	BRHSSC	Notes
F04-0419	Elmwood	936	0.25	\$267,300		1977	\$1	\$4.00	Town Tax Taking	BRHSSC	wetlands
F04-0422	Elmwood	936	0.23	\$4,600		2007	\$1	\$4.35	Town Tax Title vacant		
F04-0423	Elmwood	936	0.29	\$5,800		2007	\$1	\$3.45	Town Tax Title vacant		
F06-0632	August	937	0.50	\$259,600		2014	\$1	\$2.00	#11 Town Improved TT		no structure
F04-0516	Great Lake	936	0.73	\$14,600	\$20,000	1940	\$1	\$1	Town Tax Title vacant	BRHSSC	wetlands
K06-0036	Horse Pond	970	2.04	\$358,400	\$175,686	1956	\$1	\$0	SHA (Old Meadow Rd access)		SHA
F08-0409	Minebrook	936	0.93	\$500	\$538	2011	\$1	\$1	#19 Town Tax Title vacant		yes
F08-0408	Minebrook	936	0.93	\$18,600	\$20,000	2007	\$1	\$1	#27 Town Tax Title vacant		yes
E08-0341	Thunder	936	1.50	\$18,700	\$12,467	2013	\$1	\$1	#41 Town Tax Title vacant	brook	
E08-0345	Thunder	936	1.48	\$700	\$473	2010	\$1	\$1	#50 Town Tax Title vacant	brook	
M08-0126	Warren	936	0.921	\$18,500	\$20,087	2007	\$1	\$1	#82 Town Tax Title vacant		
C08-0055	North	936	1.05	\$266,000	\$253,333	2007	\$1	\$1	#466 Town Tax Title vacant		yes
C08-0051	North	936	1.05	\$18,500	\$17,619	2010	\$1	\$1	#468 Town Tax Title vacant		yes
M11-0003	Stock Farm	936	0.95	\$19,000	\$20,000	2011	\$1	\$1	Town Tax Title vacant		yes
M11-0007	Stock Farm	936	0.99	\$10,200	\$10,303	1955	\$1	\$1	Town Tax Title vacant		inaccessible
H03-0625	Surry	936	1.45	\$346,500	\$238,966	1981	\$1	\$1	Town Tax Title vacant		yes
G12-0015	Water Row	936	12.10	\$6,100	\$504	2009	\$1	\$0	Town Tax Title vacant		access?
G12-0013	Water Row	936	5.00	\$2,500	\$500	1977	\$1	\$0	Town Tax Title vacant		BRHSSC restriction?
B08-0502	Powers	936	2.05	\$1,000	\$488	2011	\$1	\$0	Town Tax Title vacant		
Powers several others not fully identified											
H07-0238	Blueberry Hill	934	0.61	\$342,500	\$561,475	1953	\$1	\$2	Town Education	BRHSSC	wetlands
J08-0001	Wash Brook	930	4.03	\$20,000	\$4,963	2001	\$1	\$0	Selectmen from Water	BRHSSC	yes05-0515
F05-0515	Intervale	936	0.68	\$13,600	\$20,000	2007	\$1	\$1	Town Tax Title vacant		access?
F04-0410	Elmwood	936	0.23	\$4,600	\$20,000	2012	\$1	\$4	Town Tax Title vacant		has water
H06-0400	Pratts Mill	936	0.25	\$5,000	\$20,000	2007	\$1	\$4	Town Tax Title vacant		narrow
K10-0404	Boston Post Rd	936	2.36	\$313,500	\$132,839	1988	\$1	\$0	Town Tax Title vacant		nr goodman's hill
J06-0500	Tall Pine	936	4.31	\$8,200	\$1,903	2007	\$1	\$0	Town Tax Title vacant		narrow
C09-0361	Cedar Creek	930	1.60	\$18,700	\$11,688	2005	\$1	\$1	Selectmen from Private		
E12-0107	Concord	930	2.57	\$396,000	\$154,086	2006	\$1	\$0	Selectmen from Selectmen		
F05-0140	Willis Lake	936	0.11	\$2,200	\$20,000	1959	\$1	\$9	Town Tax Title vacant	BRHSSC	deemed too small
F05-0117	Willis Lake	936	0.57	\$289,100	\$507,193	1977	\$1	\$2	Town Tax Title vacant		yes
G04-0437	Middle	930	1.028	\$20,600	\$20,039	1972	\$1	\$1	Selectmen Park & Rec	BRHSSC	wetlands
F04-0516	Great Lake	936	0.73	\$14,600	\$20,000	1940	\$1	\$1	Town Tax Title vacant	BRHSSC	wetlands
L07-0015	Nobscot	930	1.94	\$18,900	\$9,742	2001	\$1	\$1	Selectmen	BRHSSC	wetlands
H11-0305	Water Row	930	2.39	\$47,800	\$20,000	2003	\$1	\$0	Selectmen from Selectmen	BRHSSC	CPA deed restr
G08-0014	Maynard	936	6.58	\$338,800	\$51,489	1980	\$1	\$0	Town Tax Title vacant	BRHSSC	wetlands
H10-0020	Old Sudbury	934	3.30	\$270,000	\$81,818	1968	\$1	\$0	Town Education	BRHSSC	no bldg wetlar BRHSSC?
Boston Post Road to be researched											
E08-0602	Marlboro	930	55.36	\$1,509,200	\$27,262	1999	\$4,050,000	\$73,158	Selectmen Conservation	BRHSSC per Con Com restr	
K03-0400	Dutton	931	43.10	\$2,126,800	\$49,346	1989	\$1	\$0	Selectmen Cons. Impr.		barn #102 BRHSSC per Con Com restr
B07-0030	Powder Mill	930	1.56	\$31,200	\$20,000	1933	\$1	\$1	Vacant selectmen	BRHSSC per Con Com restr	

Gray-shaded = seems promising



COMMUNITY FORUM #1 SUMMARY

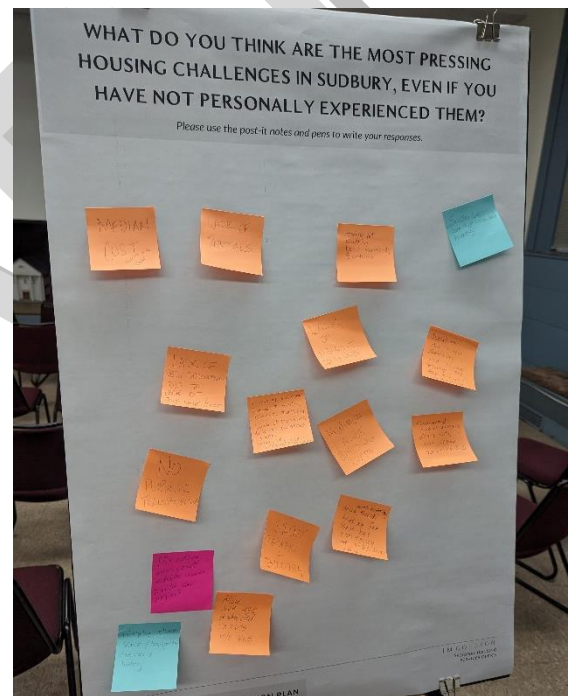
Prepared by JM Goldson LLC, April 2024

OVERVIEW

On December 13, 2023, JM Goldson, the Regional Housing Services Office (RHSO), and the Town of Sudbury hosted an Open House for Sudbury's Housing Production Plan update. The event took place in Sudbury Town Hall and began with a short presentation by the Town, RHSO, and JM Goldson. This was followed by question and answers. Attendees were invited to participate with the interactive boards. This Open House was the first forum/open house for Sudbury's engagement planning process for this plan.

Key Findings

- The most engagement was with attendees who had a connection to Sudbury.
- All board participants lived in Sudbury.
- 54% were 65+.
- 85% were homeowners.
- 62% had lived in Sudbury for 20+ years.
- Issues raised on the boards included: costs, lack of infrastructure (both wastewater and transportation), accessible and affordable housing for seniors, and moderate-income housing for families.
- Highlights of participants' hopes for the housing plan were: collaboration between transportation, housing, and water and sewer development, proposals for new housing options, and housing for residents to age in place.
- Participants were asked to share ideas and opportunities for housing in Sudbury. Key ideas were coordinating growth with business development and transportation as well as zoning changes that would allow for duplexes and accessory units by right.



PARTICIPANTS

- A sign-in sheet for this event; there were 14 participants.
- Participants were most likely to be homeowners, live in Sudbury, be between the ages of 65 and older, and have been affiliated with Sudbury for over 20 years. Those under 18 were underrepresented, and those over 65 were overrepresented.

DRAFT

FORMAT



The Open House focused on introducing the project team and an overview of the Housing Production Planning process, asking for perspectives about what community members saw as the top housing issues in Sudbury, gaining insight on what are the things that community members believe are housing opportunities in Sudbury, and reading what other engagement opportunities the Housing

Production Planning process offers.

The JM Goldson project team, including the Housing Production Plan working group members, facilitated community interaction using the interactive boards designed to either share or collect information. Informational boards shared data about the Housing Production Planning process, statistics about how housing and demographics in Sudbury changed between 2010 and 2020, and an outline of the Engagement Roadmap for the Sudbury Housing Production Plan. Interactive stations invited participants to share demographic information about themselves, what creative ideas they had for housing in town, what they hoped this Housing Production Plan would include, and what questions they had about the Housing Production Planning process. Participants were provided either sticky dots or sticky notes, as well as writing instruments to make their responses, depending on whether the question was open-response or quantitative.

EVENT SUMMARY

What Do You Think Are the Most Pressing Housing Challenges in Sudbury?

When asked *"What do you think are the most pressing housing challenges in Sudbury, even if you have not personally experienced them?"* participants highlighted a diversity of issues: the lack of affordable housing stock was well-represented, as well as the lack of public transportation service in the Town. Multiple attendees also mentioned large minimum lot sizes as a key constraint. The lack of sewers and limited availability of rentals was also mentioned.

Housing Issues: Key Themes	Mentions
Affordability	3
Lack of Public Transportation	3
Large Minimum Lot Sizes	2

What Do You Hope This Housing Production Plan Will Include?

Hopes: Key Themes	Mentions
Affordable Housing for Seniors and People with Disabilities	4
Accessory Dwelling Units	2
Revised Zoning	2

When asked "What do you hope this HPP will include?" participants accessible, and affordable housing in Sudbury. These comments were consolidated into themes recorded to the right.

Generally, these included hopes for discussion of accessory dwelling units, accessible and affordable housing, and coordinating these initiatives with zoning revisions.

DRAFT

What Do You Think Are The Biggest Housing Opportunities In Sudbury? What Creative Ideas Do You Have For Housing In The Town?

Finally, attendees were asked to share thoughts via notes on opportunities and creative initiatives the town could undertake to improve housing conditions. These included three (3) suggestions for encouraging smaller starter homes (with smaller minimum lot sizes), and the promotion of accessory dwelling units and duplexes.

Opportunities & Ideas: Key Themes	Mentions
Zoning For Smaller Starter Homes	3
Promoting Accessory Units	3
By-Right Duplexes	2

APPENDIX

The following tables quantify responses from the open house participants for each question. %ages are based on the number of responses to each question, which are different depending on the question.

What Is Your Connection To Sudbury?

Connection	Open House Participants	%
I live in Sudbury	13	100%
I don't live in Sudbury, but I work here	0	0%
I don't live in Sudbury, but I own property here	0	0%
I have a different connection to Sudbury than those listed here	0	0%
Total	13	

How Old Are You?⁶⁰

Age Group	Open House Participants	%	Sudbury Population
Under 18	0	0%	30%
18-34	1	8%	10%
35-64	5	38%	44%
65+	7	54%	16%
Total	13		

⁶⁰ Sudbury Population by age group taken from 2018-2022 ACS (B01001).

What Is Your Housing Status?⁶¹

Housing Status	Open House Participants	%	Sudbury Tenure
I/my household owns our place of residence	11	85%	91%
I/my household rents our place of residence	2	15%	9%
I/my household is currently experiencing housing instability	0	0%	N/A
Other	0	0%	
Total	13		

How Long Have You Been Affiliated with Sudbury?

Years Affiliated	Open House Participants	%
Less than Five Years	1	8%
5-10 Years	3	23%
11-19 Years	1	8%
20+ Years	8	62%
Total	13	

Precincts Represented

Precinct	Open House Participants	%
1	2	17%
2	2	17%
3	2	17%
4	4	33%
5	2	17%
6	0	0%
I Don't Live in Sudbury	0	0%
Total	12	

Sudbury's Housing Issues

Median cost (rent or own)
Lack of rentals
Housing not built with basic accessibility features

⁶¹ Housing insecurity is not compared due to the lack of a credible data source.

Smaller (1500-2000 Sqft.) affordable homes
Lack of new developments due to lack of town water/sewer
Lack of incentive to build
Isolation due to low density and no easy transportation especially for seniors and disabled
Lack of sewer, lack of public transportation, lack of housing to keep seniors here, lack of affordable housing
No public transportation
Minimum 1 acre lots
Concerned about staying above 10% SHI after the 2030 census
Need more affordable rental housing for those not qualifying for subsidized units
Silent racism and bigotry
Providing housing that moderate-income families can afford
Allow non-age restricted condos without 40B
Interplay between sewer/transportation/services and housing

Hopes For The HPP

Affordable housing, set aside for disabled, accessory dwelling units
Housing that is elderly friendly
What about sewers
Accessory dwelling units
Housing that allows residents to age in place
Communal spaces for residents that are inclusive and accessible
Enable construction of smaller, less expensive, and therefore more affordable homes e.g. ch 40Y
Zoning for in-law dwelling units same for single-family
A plan to stay above 10% SHI after the 2030 census
Public transportation. We had it. We had a bus pre-covid.
Propose collaboration among transportation, housing, water planning
More housing options (including affordable) for seniors
Employ inclusive design in all planning
Implementable solutions (e.g. zoning). Context of state-wide issues

Housing Opportunities And Creative Ideas

Redo conservation guidelines
Updated ADU bylaws. Zoning to preserve "starter homes" from redevelopment into McMansions
Accessible housing that meets the needs of residents with disabilities

Coordinate housing growth with business development and transportation development
Layer 2 nd and 3 rd floor units above existing commercial development
Open more opportunities for accessory dwelling units through zoning changes
Enable construction of smaller, less expensive, and therefore more affordable homes e.g. ch 40Y
Perhaps reconsider Rte. 20 bus to transit in conjunction with housing on Rte. 20
Enable duplexes by right on all single-family lots
Enable more accessory dwelling units
Clusters of smaller (1500-2000 Sqft.) homes (takes up less land per units)
Housing near Rte. 20 helps our “downtown” and businesses to thrive
Housing (including affordable) to keep seniors in Sudbury
Allow by right duplexes

Questions About The Planning Process

None posted to the board

Interactive Boards

Virtual copies of the informational boards presented at this open house are shared in the appendix of this document.

COMMUNITY FORUM #2 SUMMARY

Prepared by JM Goldson LLC April 2024

OVERVIEW

On Thursday, March 21, 2024, JM Goldson and the Town of Sudbury hosted the second open house for Sudbury's Housing Production Plan update. The event was entirely virtual, hosted via Zoom's webinar platform in conjunction with the Town, and aired on SudburyTV. In addition to staff, Town officials, and the consultant team, nine individuals participated in the virtual activities, which were designed to gauge community support for the draft goals and strategies for the plan.

KEY FINDINGS

- The second community forum was broadcast via Zoom and Sudbury TV. In the interactive portion.
- Attendees were broadly in favor of the goals and strategies presented.
- ADUs, tiny homes, and cottage-style development could be better emphasized in the plan's goals and strategies.

PARTICIPANTS

- Nine (9) individuals participated in the event.
- The webinar was aired live via Zoom and SudburyTV, with a recording available for residents who did not attend to watch asynchronously.

FORMAT

The event consisted of a presentation by consultant Jennifer Goldson, who explained the draft goals and strategies to the public. There were then live polling and feedback activities to gather community input. After the presentation, a brief discussion was held between attendees, the consultant team, and Town officials.

EVENT SUMMARY

The event consisted of a preliminary activity led by the consultant, followed by a presentation recapping Sudbury's housing planning process thus far. The goals and strategies that had been developed were assessed by community & stakeholder engagement. Attendees were broadly in favor of the proposals, with a particular emphasis on a "gentle density" approach: well-designed auxiliary dwelling units (ADUs), smaller homes, duplexes and triplexes, and cottage clusters.

Opportunities For Input

Prior to sharing the draft goals and strategies, the consultant asked participants to share their age, race, tenure, and connection to Sudbury. They were also asked if they had attended the first community forum in December of 2023. All attendee responses are shared in the appendix of this section.

Engagement Thus Far

The consultant explained the results from the project engagement; the community survey, and two focus groups that shared there was a need for affordable senior housing, accessory dwelling units, and smaller home sizes. This was repeatedly mentioned by participants.

Draft Goals

The consultant then presented the draft goals for Sudbury's Housing Production Plan:

1. Meeting Housing Needs
2. Promote Housing in Mixed-Use Locations and Ensure Transportation Access
3. Preserve Affordable Homes
4. Green Existing & New Homes
5. Maintain SHI at 10%+

After the draft goals were explained, attendees were invited to respond to a poll gauging their reactions. Two participants responded, indicating positive reactions to the draft goals. Their comments included the need to focus more on ADUs, and the housing needs of seniors.

Draft Strategies

The consultant then shared the Planning & Zoning strategies, Local Initiatives, Programs, and Capacity & Outreach:

1. Planning & Zoning Strategies
 - Housing types: co-housing and shared living options
2. Local Initiatives
 - Support the Sudbury Housing Authority's goals to expand accessibility, including units and features to support the needs of residents.
 - Support the Sudbury Housing Trust & Authority initiatives to create affordable duplex units at current single-family properties.

- Support the Sudbury Housing Trust & Authority's goals to promote a broader definition of family housing to promote multi-generational public housing (with or without children)
- Support the Sudbury Housing Trust's continued efforts to create new affordable homeownership opportunities.
- Support the Sudbury Housing Trust & Housing Authority collaboratively working together. Encourage acquisition of private sites and/or utilize existing town property to create new affordable housing options.

3. Programs

- Continue to support and promote current local housing assistance programs.
- Explore new programs:
 - First-generation homebuyers: Rent to own, downpayment, etc.
 - Sustainability and renewable energy upgrades for homeowners with lower incomes
 - Micro loans for accessibility and age-in-place upgrades to existing residents

4. Capacity & Outreach

- Continued training & education of municipal staff
- Leverage Community Preservation Act and Trust funds.
- Work with local lenders to offer training to promote first-time and first-generation homeownership.
- Work with the Regional Housing Services Office to organize & manage local housing programs.

To glean community reactions, a similar activity was then conducted; it received either uniformly positive or “somewhat positive” reactions via PollEverywhere.

There were two comments. The first was that all the strategies should be considered. The second was about tax impacts from a growing population, particularly families, on revenue. The consultant replied that it was context-dependent but was happy to share a few studies that had shown that mixed-income, multi-family type housing was tax-positive.

Following the presentation, an attendee asked if the strategies were successful, how would that affect the Town's income, and whether there were federal funds to incentivize or assist with a new use of services. After the consultant's response, the attendee stated that emphasizing how impacts would be net positive may help the community understand the benefit. At the conclusion of the meeting, there was a brief discussion on Accessory Dwelling Units (ADUs), the Town Planner mentioned the state's current plan for legislation that would allow them by-right in all residential districts.

APPENDIX

The following tables quantify responses from the open house participants for each question.

Summary			
	10		Activity count
	9		Participant count
	3.9		Average responses
<i>Did you attend the HPP Forum in December?</i>	Multiple choice		Activity type
	4		Total responses
	4		Unique participants
	Count	%	Response options
	4	100	Yes
	0	0	No
	0	0	I can't recall!
<i>Are you a</i>	Multiple choice		Activity type
	6		Total responses
	4		Unique participants
	Count	%	Response options
	3	50	Sudbury resident
	1	16.67	Employed in Sudbury
	1	16.67	Sudbury business owner
	0	0	Represent an local/regional organization or service provider
	1	16.67	Serve as a town official
	0	0	Other
<i>What is your age?</i>	Multiple choice		Activity type
	5		Total responses
	5		Unique participants
	Count	%	Response options
	0	0	17 years old or under
	0	0	18-34 years

	1	20	35-44
	2	40	45-54
	0	0	55-64
	1	20	65-74
	1	20	75 years or over
<i>If you are a Sudbury resident, do you currently</i>	Multiple choice		Activity type
	4		Total responses
	4		Unique participants
	Count	%	Response options
	0	0	Rent your home
	4	100	Own your home
	0	0	Live with family or friends
	0	0	Live in Group Home or Long-Term Care/Assisted Living (rent or own)
	0	0	Not have a home/live in emergency shelter (Unhoused)
	0	0	Other
<i>How would you describe your racial/ethnic identity? (select all that apply)</i>	Multiple choice		Activity type
	7		Total responses
	6		Unique participants
	Count	%	Response options
	0	0	Asian
	0	0	Black/African American
	0	0	Hispanic/Latino/Spanish
	1	14.29	Native American/Alaska Native
	0	0	Native Hawaiian or Pacific Islander
	6	85.71	White
	0	0	Prefer not to answer/other not listed

<i>How do you feel about the draft goals overall?</i>	Multiple choice		Activity type
	2		Total responses
	2		Unique participants
	Count	%	Response options
	0	0	Positively
	2	100	Somewhat Positively
	0	0	Somewhat Negatively
	0	0	Negatively
<i>Explain what you like and what should change about the goals</i>	Open ended		Activity type
	4		Total responses
	3		Unique participants
			Responses
			Add a goal for examining the concept of "tiny homes" both for aging populations and also for creating homes (first time buyers in particular) for e
			Generally positive reaction to goals but need to acknowledge changing work environments e.g. working from home.
			If I could see a bit more about what the substeps are to reach the goals, I'd probably feel all in
			Additional focus on Accessory Dwelling Units
<i>How do you generally feel about these strategy ideas?</i>	Multiple choice		Activity type
	3		Total responses
	3		Unique participants
	Count	%	Response options
	2	66.67	Positively
	1	33.33	Somewhat Positively
	0	0	Somewhat Negatively

	0	0	Negatively
<i>Explain your feelings about these strategy ideas</i>	Open ended		Activity type
	1		Total responses
	1		Unique participants
			Responses
			Like them especially cottage communities approach
<i>What other strategies you hope the plan will consider?</i>	Open ended		Activity type
	3		Total responses
	3		Unique participants
			Responses
			Tiny home strategy tied to gentle density development and other goals: first time home buying, cottage community (e.g., some of development in West Concord, real estate transfer taxation to provide subsidy funding.
			Tiny House strategy should be added. Can be melded with ADU and cottage communities strategies. Tiny Housing approaches also address the first time homeowners issue.
			Cottage style is good. Low heights for duplexes and triplexes to fit the community culture

FOCUS GROUPS SUMMARY

Prepared by JM Goldson LLC December 2022

OVERVIEW

The following focus groups took place on November 13, 2023. The consultant team from JM Goldson conducted two focus groups with Sudbury residents, employees, and other parties interested in housing in the Town, engaging eight people. Each of the focus groups were held virtually, with morning and evening sessions. Participants identified strengths and opportunities to leverage as well as challenges or issues to recognize/overcome regarding housing. The raw notes from each focus group are displayed in the subsequent pages. The focus group summaries are not labeled and are in no order, to anonymize the results and participants involved.

KEY FINDINGS

- There is a need for more affordable and accessible housing in the Town of Sudbury, as well as the opportunity to leverage available land.
- Zoning amendments could encourage development of accessory dwelling units, duplexes, and denser, mixed-use development in certain areas, building off the success of earlier projects.
- Education on the affordability, sustainability, and fiscal benefits of building and zoning for more housing should be provided and available

FOCUS GROUP HIGHLIGHTS

Leveraging Land in Sudbury for Housing

Participants mentioned the abundant land in Sudbury, citing it as an opportunity for addressing housing needs in the Town.

The Route 20 corridor was mentioned as an opportunity area. A respondent emphasized highlighting recent developments. Cold Brook Crossing/Meadow Walk, Frost Farm and Avalon are all examples of successful new housing development in the Town.

Participants shared that some landowners and residents might prefer conserving land over developing it into housing. This could be an opportunity itself why denser development can help to preserve land for conservation, while also creating more sustainable and energy efficient housing.

Aligning Town Regulations With Housing Needs

Participants shared that current zoning regulations in the Town prohibited the development of more affordable housing; accessory dwelling units (ADUs) were used as an example.

Rezoning the Route 20 corridor or other priority areas to allow for denser and/or mixed-use development could benefit the community

Participants shared that some community members have been resistant to new housing proposals, with one characterizing it as "panic or reluctance". This could be rectified with an education. Understanding the benefits of new housing development in the Town could increase support.

High Costs And Infrastructure Constraints Serve As Barriers

Participants expressed the general high costs of living in Sudbury--for housing, groceries, and other expenses. Limited public transportation availability can also exacerbate issues for low and moderate-income residents.

In addition to potential community resistance, new housing development in Sudbury will face challenges, such as the lack of Town-wide wastewater treatment infrastructure.

Opportunities For Community Education

While participants felt that there would likely be community pushback to new housing initiatives, they expressed that it could be an opportunity for education. Demonstrating how new housing can benefit the Town, for seniors, for residents with disabilities, for working families is vital. An emphasis on the sustainability, affordability, and accessibility elements in this education work could be effective in successfully conveying the message.

FOCUS GROUP 1

Opportunities or strengths to leverage				Challenges or issues to recognize/overcome			
<p>We have spaces to make things happen. Redwood space under consideration at the CFC. May be able to leverage multi-use spaces into a tiny home concept. It's becoming a hot issue.</p>	<p>CFA funds are maxed out. Have been using them wisely. Open space and land are things new comers like.</p>	<p>Land. A lot of land in Sudbury. We need more housing. Being so far from a large urban center (5000 ft) is a huge barrier. Owners and users of the business district need about more development. Use of the land is not being used properly. Use of the land is not being used properly. Use of the land is not being used properly.</p>	<p>Existing Structures proactively working - gives a way to getting things done.</p>	<p>Infrastructure and utility. The current utility system is antiquated. We need to update the water and sewer systems. The current utility system is antiquated. We need to update the water and sewer systems. The current utility system is antiquated. We need to update the water and sewer systems.</p>	<p>Take all of the large commercial buildings on RT 20 and add a second story for apartments. Parking lots aren't used at night. Activate the area, add to the streetscape, etc.</p>	<p>NIMBYism (example of traffic from a new 4 unit development from a resident 1 mile away).</p>	<p>Accessibility and aging features don't cover everything that people need. As an example, there are no grab bars in the showers at Coolidge II and I. Aging in place. Programs to educate and support this would be needed.</p>
<p>Meadow Walk housing, and Coalbrook crossing (but has no light, and created traffic) has been great for Sudbury, and has turned awareness to development and housing.</p>	<p>Engage the planning board consultants who helped this community. Mullen brothers, for the master plan-the previous plan before this latest one)</p>	<p>Small housing. 20% of housing in Management Center has been small housing. 80% of the time, housing has been developed in this. The housing is not being used properly. Use of the land is not being used properly. Use of the land is not being used properly.</p>	<p>Positive angle to use when discussing housing is the conversation about sustainability (talking specifically about the idea of tiny homes)</p>	<p>Need to educate the community. There are other things besides single family and condos that can house people in wonderful ways. Our housing is very old fashioned and restrictive. Raising housing for example, joint living options, in-law apartments, etc. Transportation of the future. Keeping in mind sections of the land for housing.</p>			
<p>More awareness on the committees and selectboards. Get more newcomers engaged, they are more likely to be a part of this conversation.</p>		<p>Mentioning Meadow Walk and others is helpful to bring up during conversations.</p>		<p>if intersections are improved as well as transportation, housing can be increased. Traffic patterns, and infrastructure is interrelated to so many things. How do we need to bring all of these needs to the community?</p>			

Summary

The focus group discussion consisted of attendees' thoughts on opportunities or strengths to leverage, as well as challenges or issues to overcome with regards to housing in the Town.

Participants shared that the Town faces challenges in understanding and accepting the need for affordable housing, highlighting an opportunity for education on the topic. Resistance has included concerns about limited infrastructure, as well as potential traffic impacts. However, there are also opportunities for the Town to creatively leverage past developments (such as Meadow Walk) to demonstrate the feasibility of density. The sustainability benefits of such projects could help to sway those with conservation and preservation concerns.

The following table is a transcription of the feedback recorded on the board during the first focus group.

Opportunities or Strengths to Leverage	Challenges or Issues to Recognize/Overcome
<p>Land. A lot of land in Sudbury. We need more housing. Ability to borrow a large amount ~\$50M for waste water treatment and sewer the business district which allows more development. Use MBTA communities and maybe use Chapter 40Y to create overlay zoning for starter homes. Have to choose to proceed with 40Y and will get homes to be built for firefighters, teachers, DPW staff, etc. and lower the cost.</p>	<p>Infrastructure and zoning. Be careful utilizing sewer, transportation, etc. We can't offer affordable housing unless they have access to shopping centers, hospitals, etc. Reluctance by the community to deliver mandate-type opportunities. They were concerned 40B laws, and taking RT20 and making it into a housing area. The opportunities are there, it's a matter of educating the community to help them understand what is being asked. Change my word from the introduction to "under-educated," people don't understand the definition of affordable housing. It's a challenge to educate the community. Know your audience when reaching out. Sometimes people feel like they are being talked over, glazed over because of jargon used in these conversations. Engage people responsible for getting educated on the topics. You can't under-educate anyone enough.</p>
<p>Existing Structures proactively working - gives a way to getting things done.</p>	<p>Take all of the large commercial buildings on RT 20 and add a second story for apartments. Parking lots aren't used at night. Activate the area, add to the streetscape, etc.</p>
<p>We have spaces to make things happen. Nobscott space under consideration at the CPC. May be able to leverage smaller spaces</p>	<p>NIMBYism (example of traffic from a new 4-unit development from a resident 1 mile away).</p>

<p>into a tiny home concept. It's becoming a hot issue.</p>	
<p>CPA funds are maxed out. Have been using them wisely. Open space and land are things new comers like.</p>	<p>Accessibility and aging features don't cover everything that people need. As an example, there are no grab bars in the showers at Coolidge II and I. Aging in place. Programs to educate and support this would be needed.</p>
<p>Social Housing. 25% of housing in Montgomery County has been social housing. 60% of Vienna, Austria has been developed like this. The municipality partners with developers to offer financing to include a mix of different income level units. Could be a way for private developers to offer affordable housing. Affordable unit in Sudbury costs more to rent than Framingham. Put something in the Bond Bill.</p>	<p>Efforts to educate the community and for people to learn? - Sense of panic or reluctance by neighborhoods, "bringing in an element" (response from people when asked if they know what affordable housing is.) Have a cheat sheet to give people because they don't understand it. - Advocacy groups from different sectors diffuse awareness of the need for increased housing opportunities and housing vulnerability. Unaware of groups narrowly focused on educating the community on housing issues. - CHAPA (state advocacy group that advocates for housing), municipal engagement initiative helps with this kind of effort. The group decided to wait until after the HPP was complete in order to approach this program, discussions held last year.</p>
<p>Meadow Walk housing, and Cold Brook Crossing (but has no light, and created traffic) has been great for Sudbury, and has turned awareness to development and housing.</p>	<p>Need to educate the community: There are other things besides single-family and condos that can house people in wonderful ways. Our housing is very old fashioned and restrictive. Rooming housing for example, joint living options, in-law apartments, etc. Transportation of the future, keeping linear sections of the land for housing.</p>
<p>Engage the planning board (consultants who helped the community, Mullen brothers, for the master plan-the previous plan before this latest one)</p>	<p>Building a critical mass of people to talk about equity, inclusion. It is a general benefit to have a diverse community. Build a base of knowledge and appreciation to bring those people forward in those discussions.</p>

<p>Positive angle to use when discussing housing is the conversation about sustainability (talking specifically about the idea of tiny homes)</p>	<p>If intersections are improved as well as transportation, housing can be increased. Traffic patterns, and infrastructure is interrelated to so many things. How do we need to bring all of these needs to the community?</p>
<p>Mentioning Meadow Walk and others is helpful to bring up during conversations.</p>	
<p>More awareness on the committees and selectboards. Get more newcomers engaged, they are more likely to be a part of this conversation.</p>	

FOCUS GROUP 2

What are the greatest opportunities and challenges related to this topic area in your community?

Opportunities or strengths to leverage

- Work with existing land parcels, optimize the land to expand mixed-use. Specifically multi-unit housing and other uses. Gender density is an option.
- Invest or work with the town for package specific solutions. Shrink lots so that homes can be handled on a 1/2 acre.
- Access: There are existing trails that have been developed. Additionally, there are existing trails that are being developed. What is changing. This also adds to the connectivity and the quality of the outdoor spaces, which is a common argument.
- Can we combine housing with other uses? Higher potential. 1 acre with less buildings.
- Opportunity to enhance zoning regulations to encourage more density. A duplex is a great example of a low-impact form of densification. There is the single unit that can be converted into a duplex or a triplex.
- One of the few towns that doesn't have an opportunity to do this? Remaining positive with the town's growth. There is a lot of potential for development in 10-20 years.
- long standing transportation committee trying to resolve transportation issues in town. Has the eyes and ears of the selectboard.
- Has a lot of money within government programs, and money received from the state
- Strong school system
- Meadow Walk is the whole development. Austin is not connected to Meadow Walk. There was a proposal made and when folks asked to address it, Austin said they don't want that land parcel.
- Raytheon is still active. Gate that can be opened and closed.
- Habitat for Humanity house is a duplex.

Challenges or issues to recognize/overcome

- Bias in town to conserve land rather than make it available for housing development. No shortage of people with large plots of land and want to use it for land conservation instead of development.
- Transportation: long standing transportation committee trying to resolve transportation issues in town. We don't have great transportation systems in place. Limited on space where we can build new housing. How to make them affordable, multi-family, etc.
- Lack of public transportation. Especially limited cab rides. No dependable scheduled transit
- local jobs, attracting people to live in Sudbury. Need a job within reasonable proximity.
- We have to follow the lead of the owner of the land. We are into preserving the Sudbury history and value of Sudbury. Assabet River Bluff in Concord is a successful project Concord Land Trust and Town of Concord.
- Disbelief that this could have been successful because they are getting density. Some families that live there, they are coming into the neighborhoods. It's all around town. 2-2 bedroom units.
- Sudbury is an expensive place to live: groceries, transportation, housing, etc.

Summary

Attendees were encouraged to share their thoughts on housing opportunities and challenges for the Town. Two participants identified a bias toward conservation (rather than development) in the Town. Multiple attendees shared interest in the promotion of revising the Town's land use regulations to promote low-impact forms of densification, such as accessory units and duplexes. Transportation limitations were mentioned twice; the lack of public transit options being cited as a key barrier. There were many suggestions for the Town to promote incremental, distributed density, and to leverage the successes of recent projects (from Habitat for Humanity, the

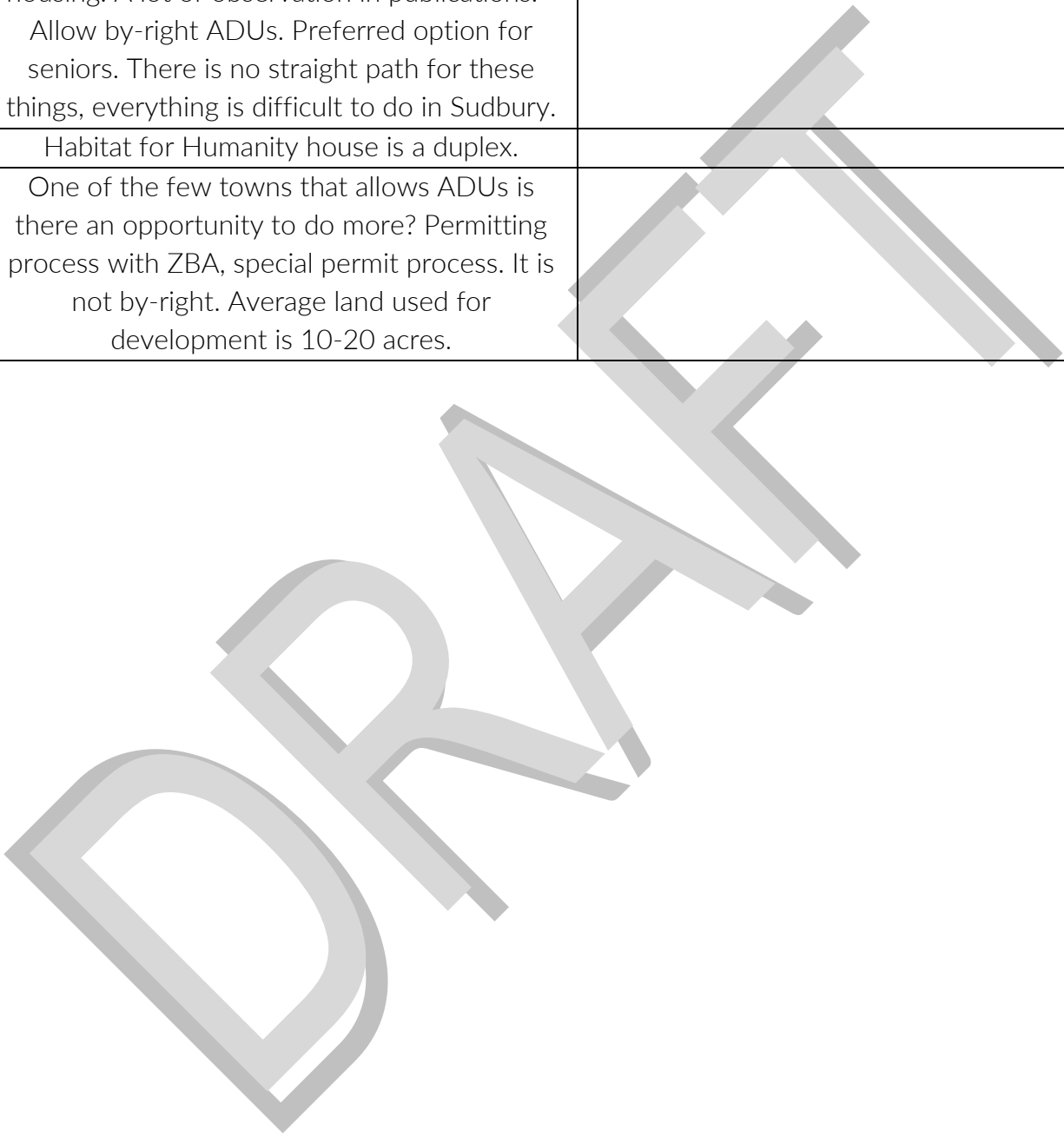
Sudbury Housing Authority, and private developers) to build community support. Robert Lieberman, Marilyn Tromer, Cheryl Wallace, and Janet Cowan were in attendance.

The following table is a transcription of the feedback recorded on the board during the second focus group.

Opportunities or Strengths to Leverage	Challenges or Issues to Recognize/Overcome
Work with existing land layout, optimize the land to expand mixed-use. Specifically multi-unit housing and other uses. Gentle density is an option.	Transportation: long standing transportation committee trying to resolve transportation issues in town. We don't have these transportation systems in place. Limited on space where we can build new housing. How to make them affordable, multi-family, etc.
Success on mixed-use sites. Cold Brook and Avalon (Age-restricted Condos)/Meadow Walk. Raytheon established its own sewer system, so Meadow Walk came with an existing system. Which is unique.	Lack of public transportation. Especially limited cab rides. No dependable scheduled transit
Has a lot of money within government programs, and money received from the state	Bias in town to conserve land rather than make it available for housing development. No shortage of people with large plots of land and want to use it for land conservation instead of development.
Strong school system	local jobs, attracting people to live in Sudbury. Need a job within reasonable proximity.
long standing transportation committee trying to resolve transportation issues in town. Has the eyes and ears of the selectboard.	We have to follow the lead of the owner of the land. We are into preserving the Sudbury history and value of Sudbury. Assabet River Bluff in Concord is a successful project Concord Land Trust and Town of Concord.
Meadow Walk is the whole development, Avalon is not connected to Meadow Walk. There was a mosquito issue and when folks asked to address it Avalon said they don't own that land/property.	Sudbury is an expensive place to live: groceries, transportation, housing, etc.
Maynard has a substantial mixed use example at Market Basket. The septic system is a big	

<p>issue we have. We are bound by the fact that we are 100% septic which curtails a lot of high density housing development desires. It's a struggle to find suitable areas to put in a sewer system because of the large amount of wetlands. The Rt. 20 corridor is limited because of the septic.</p>	
<p>More dense housing created and there is a proof of concept now. We see examples of how we can make it work without changing the character of town.</p>	
<p>Invest or work with the town for package septic solutions. Shrink lots so that homes can be handled on a 1/2 acre.</p>	
<p>Article: Share of couples buying homes has dropped substantially, more single women buying homes vs single men and families. Shows what the current housing demand is. Which is changing. This also adds to the conversation around the needs for schools and the burden on the school system, which is a common argument.</p>	
<p>Can we optimize housing authority sites? Maybe smaller properties have higher potential. Underutilization for plots of 1 acre with less buildings.</p>	
<p>Raytheon is still active. Gate that can be opened and closed.</p>	
<p>Duplexes that SHA owns have been successful because they are gentle density, location, families that live there, they are woven into the neighborhoods. 6-8 around town. 2-3 bedroom units.</p>	
<p>Seniors are starting to represent a large make-up of the town and are cheaper to "maintain." Keep down tax liability other ways to maintain affordability so seniors don't have to move. Provide zoning changes so that their house can</p>	

<p>be multi-family, or support them in finding smaller homes.</p>	
<p>Opportunity to enhance zoning to increase housing. Local zoning prevents low-income housing. A lot of observation in publications. - Allow by-right ADUs. Preferred option for seniors. There is no straight path for these things, everything is difficult to do in Sudbury.</p>	
<p>Habitat for Humanity house is a duplex.</p>	
<p>One of the few towns that allows ADUs is there an opportunity to do more? Permitting process with ZBA, special permit process. It is not by-right. Average land used for development is 10-20 acres.</p>	



APPENDIX A: ASSUMPTIONS, LIMITATIONS, AND METHODOLOGY

ASSUMPTIONS

- This summary document will regularly report summary findings as a percentage. This percentage is understood to mean out of the total number of question responses, which varies for each question. Please see the raw data in the Appendix for the exact number of responses to a question.
- All %ages are rounded to the closest half-percent using the following breakdown:
 - X.0-X.3: Round down to the closest whole percent
 - X.4-X.6: Round to closest half-percent
 - X.7-X.9: Round up to the closest whole percent

LIMITATIONS

- This survey relies on self-reported data and may not accurately capture the perspectives of all individuals in the target population.
- The sample size and demographic composition of respondents were not fully representative of the Sudbury population, leading to potential generalization issues.
- As with any survey, there may be limitations associated with the wording and structure of the survey questions, which could impact the depth and accuracy of the responses obtained.

METHODOLOGY

- Sufficient representation is determined by +/- 5 % points. For example, if renters make up 37 percent of Sudbury's housing units, 32-42 percent of survey respondents would need to be renters for sufficient renter representation. If renters made up 43% or more of respondents, they would be considered overrepresented in this survey.
- This summary utilized Survey Monkey statistical analysis tools to compare responses to different questions and determine the statistical significance of how different identities responded to questions.
- This survey was hosted on Survey Monkey; see the explanation on the following page for more information on how ranked choice questions were scored:

Analyzing Results

Your results will be presented in a table with the questions or statements listed down the first column, and the answer choices listed across the first row.

[See example results \(English only\) »](#)

Average Rating

If you enabled the **Use Weights** or **Make this a single-row rating scale** option when you created the question, you'll also see the average rating for each question or statement you asked respondents to evaluate.

If needed, you can change the weight of each answer choice in the Design section of the survey, even after the survey has collected responses.

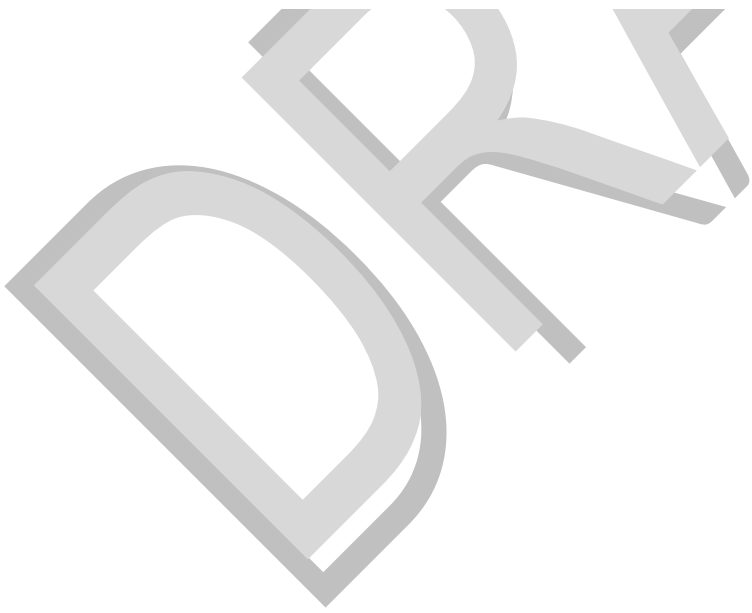
The rating average is calculated as follows, where:

w = weight of answer choice

x = response count for answer choice



$$(x_1w_1 + x_2w_2 + x_3w_3 \dots x_nw_n) / \text{Total}$$

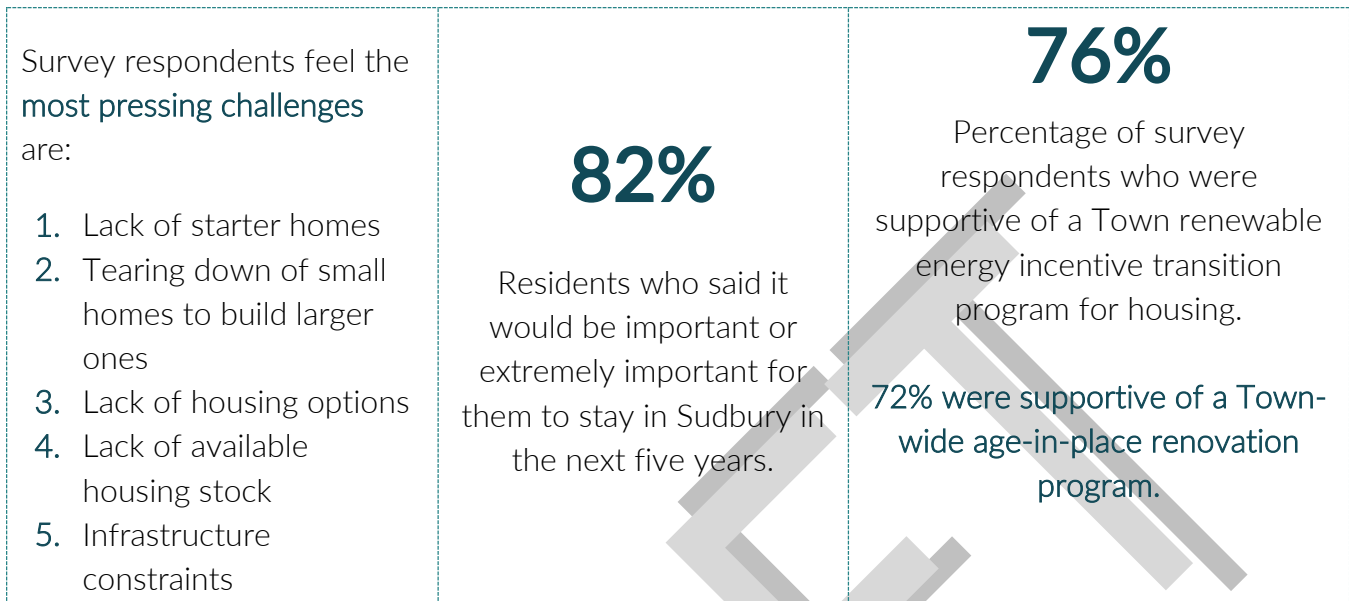
If you chose to include an N/A column on your Rating Scale question, any N/A responses will not factor into the weighted average.



APPENDIX B: SURVEY SUMMARY

Prepared by JM Goldson LLC April 2024

 <p>Survey respondents tended to identify as women, White, and aged 45 or older</p>	 <p>Survey respondents were most likely to hold a bachelor's degree or higher and be employed full-time</p>	<p>When asked, 64 percent of homeowners and 60 percent of renters indicated they would not be able to move to Sudbury today, citing the current median housing costs (\$1,150,000 median single-family sales price, (\$1,232/month for renters).</p>
<p>The three most supported housing types were:</p> <ol style="list-style-type: none"> 1. Cottage-style housing (small homes in a cluster with green space) 2. Deed-restricted affordable housing 3. Smaller housing types (one or two bedrooms) 	<p>Survey respondents mentioned Route 20 (11 times) and Route 117 (7 times) as potential locations for more housing in Sudbury.</p>	<ul style="list-style-type: none"> • 68 percent agreed that the Town should offer flexible zoning and permitting incentives to help businesses to create housing for their employees. • 65 percent agreed that the Town should create more affordable housing. • 56 percent agreed that the Town should amend its zoning to promote more housing.



OVERVIEW

The Sudbury Housing Production Plan project team launched a survey which collected responses from between October 2023 to January 2024. The purpose was to solicit community members’ perspectives, better understand their experiences navigating housing in Sudbury, and hear their direct observations of the housing needs and opportunities within the Town. This survey was not intended to be a statistically significant poll but rather to reach more community members than may traditionally be heard at a public forum. The survey was active for three months and received 106 responses.

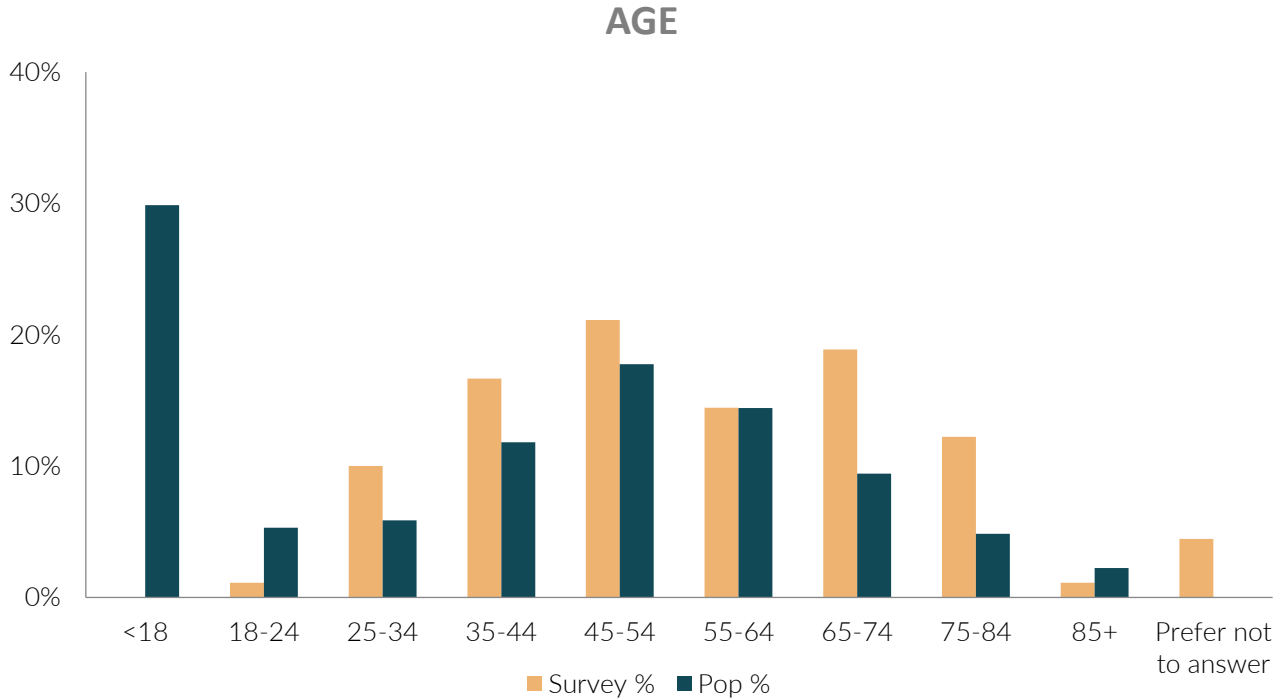
Who Took This Survey?

The following information summarizes the overall trends of the Sudbury survey respondents and compares them to the overall population of Sudbury and Middlesex County.⁶² Survey participants were asked to share different pieces of their identity through a series of questions, each including a ‘Prefer not to answer’ option. Representation is determined by those who chose to self-disclose. Over and underrepresentation were calculated based on five percentage points. Please see the appendix for a full demographic breakdown.

Overall, participation in the survey was relatively low, with renter participation (comprising 10 respondents total) being too insignificant to draw conclusions.

⁶² Survey responses are compared to the most recent U.S. Census (2020) and American Community Survey 5-Year Estimates (2018-2022) unless otherwise stated.

What Is Your Age?



The voices of Sudbury's younger residents may not be reflected in this survey. People 18 and under represent roughly thirty percent of Sudbury's population, while the vast majority (84 percent) of survey respondents were above the age of 35. As the accompanying chart demonstrates, there was a discrepancy between the Town's actual population and those who responded to the instrument.

What Is Your Gender Identity?



Most survey respondents identified as female (55 percent), with 35 percent identifying as male, and two percent as non-binary. The Census Bureau counts 49 percent of Sudbury's population as male, and a little over 50 percent as female.

How Would You Describe Your Racial Identity?



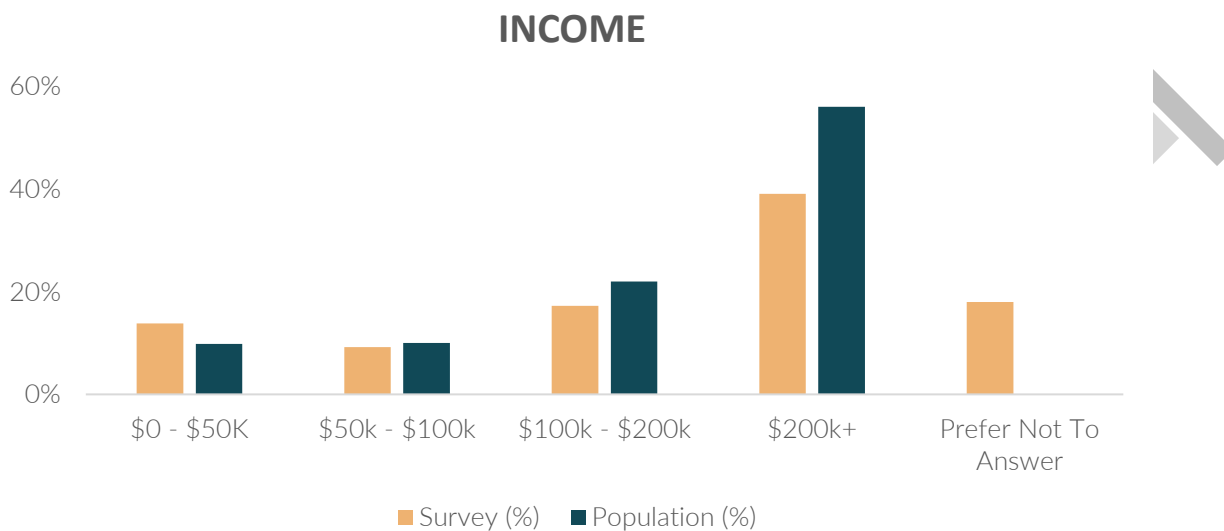
According to Census data, about eight percent of Sudbury's population identifies as Asian, though self-identified Asian survey respondents only comprised three percent. Respondents of Latin or Spanish descent represented only one percent of participants, while representing three percent of residents in the Town overall.

What Is The Highest Level Of Schooling You Have Completed, And What Best Describes Your Employment Status?



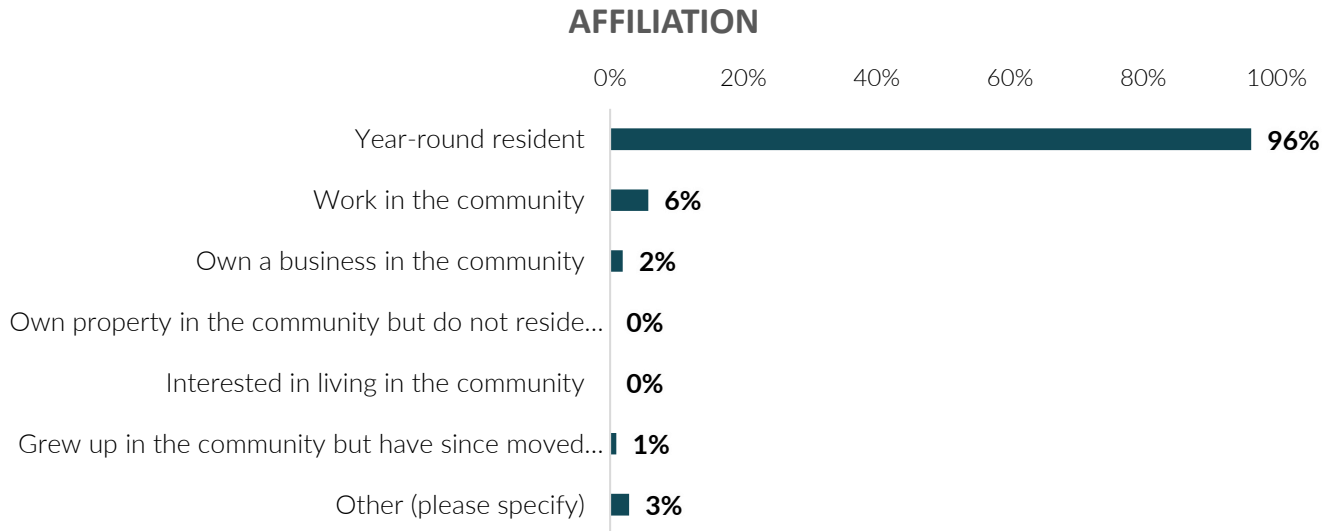
While many Sudbury residents with Bachelor's and Graduate degrees responded to the survey, residents with only High School diplomas were not as thoroughly engaged. A majority of survey respondents were employed part-time or full-time, while a third responded that they had retired from the workforce.

What Was Your Household's Annual Income Last Year?



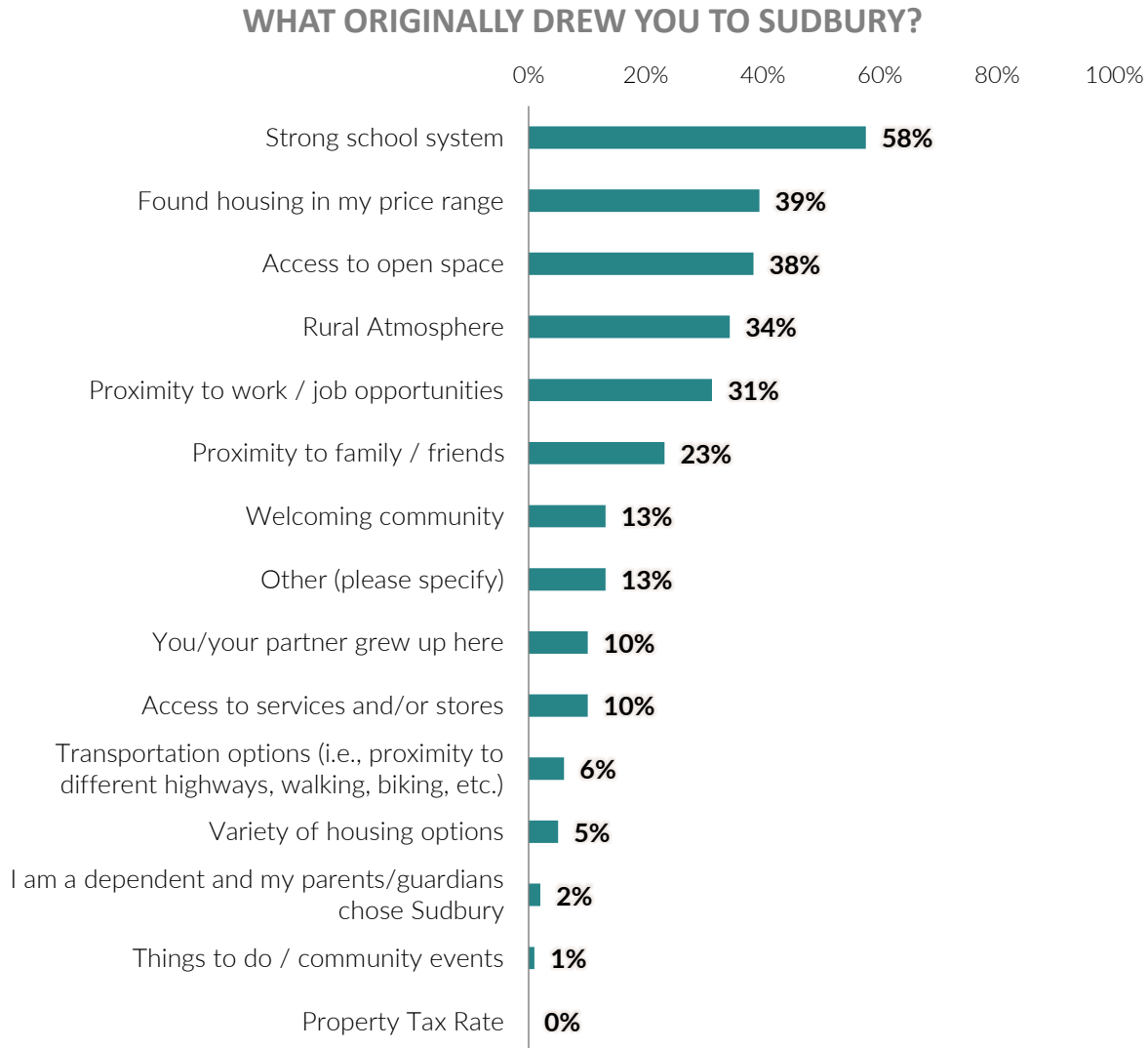
Survey responses hewed similarly to census-defined income brackets, though households earning between \$50,000 and \$200,000 were underrepresented. These households, earning well below the Town's median income (\$234,427 in 2022) likely experience housing pressures and instability.

What Is Your Connection To Sudbury?



Most survey respondents (100 out of 106) were year-round residents in Sudbury, though a small percentage (5.7 percent), reported working in the Town, but not residing there. These year-round residents tended to have lived in the community for decades, with fifty percent of survey participants having lived in Sudbury for at least twenty years.

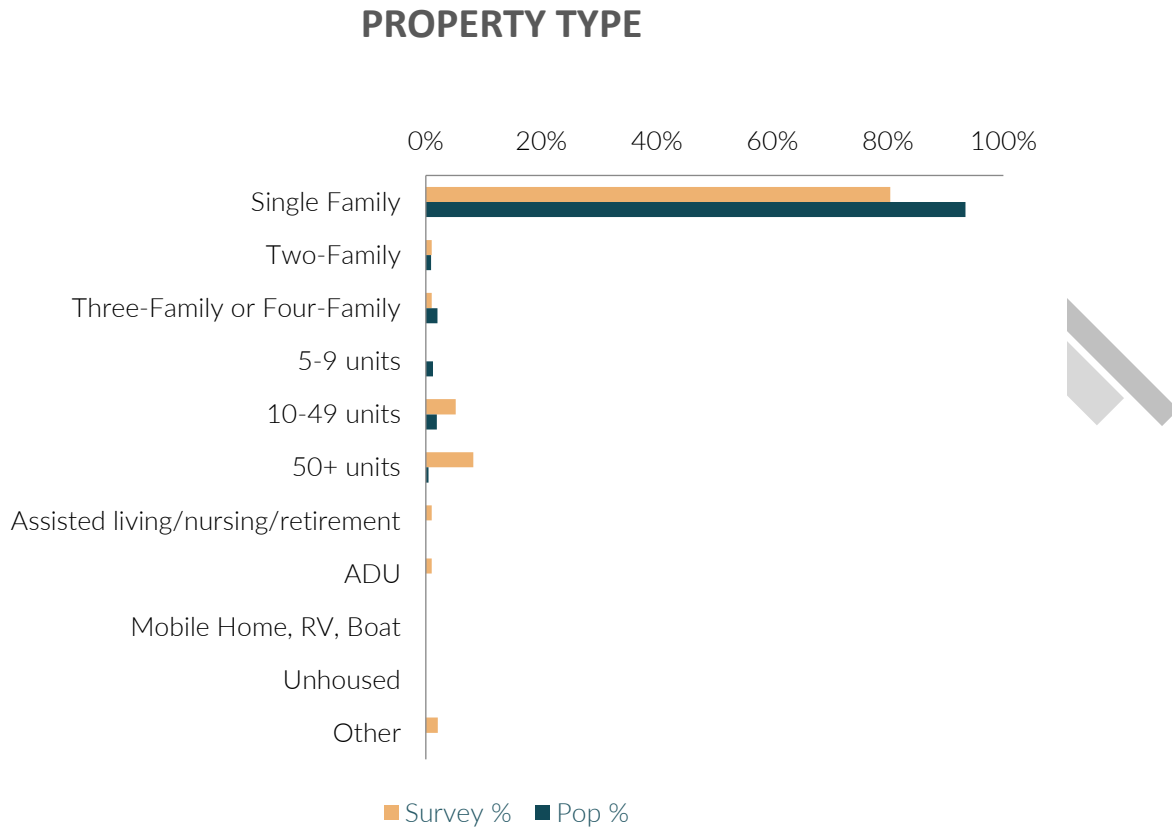
What Originally Drew You To Sudbury?



Most respondents (58 percent) cited Sudbury's strong school system as the primary reason that drew them to the Town. Housing in their price range, as well as access to open space, and the rural atmosphere. Those that wrote in their own answers mentioned the safety, recreational spaces, historic character, and rail trails of the Town as other factors that drew them to Sudbury.

HOUSING CONTEXT

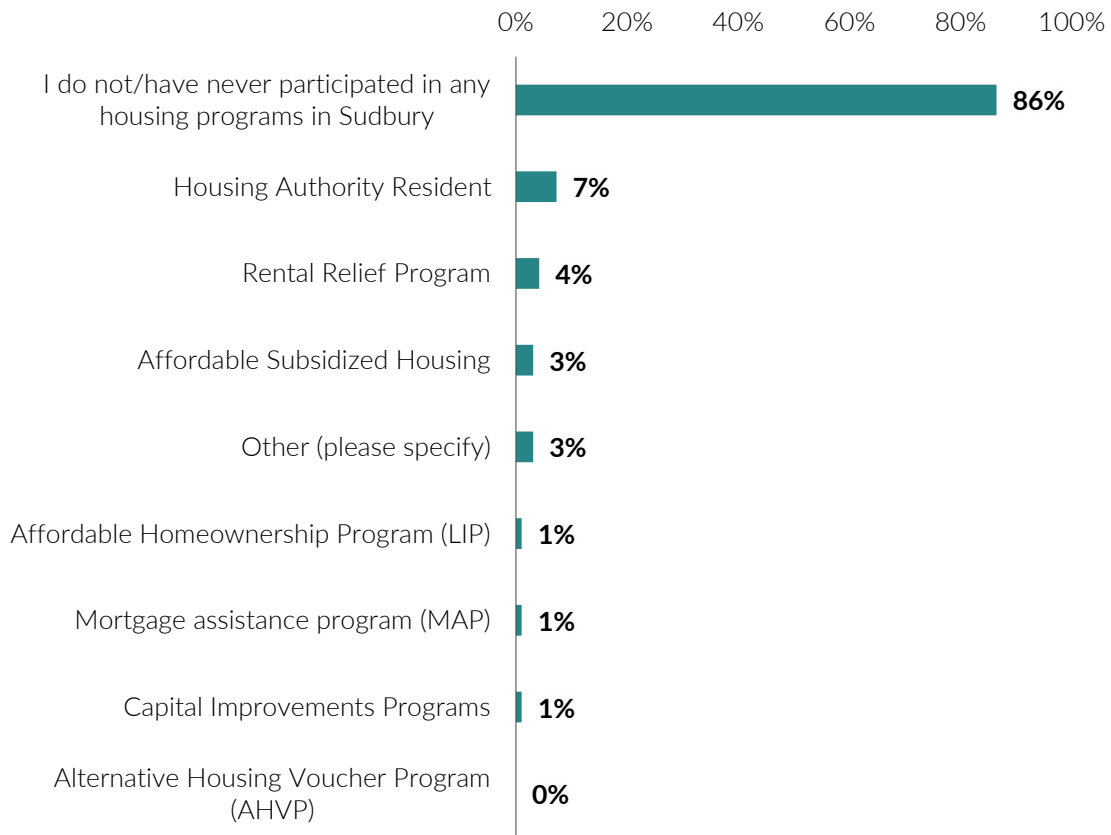
What Type Of Property Do You Live In?



Most (80 percent) of Sudbury's homes are found in single-family structures, though seven percent of the Town's housing units are in multifamily structures. Renters were well-represented in the responses, particularly those in the 50+ and 10-49 unit categories.

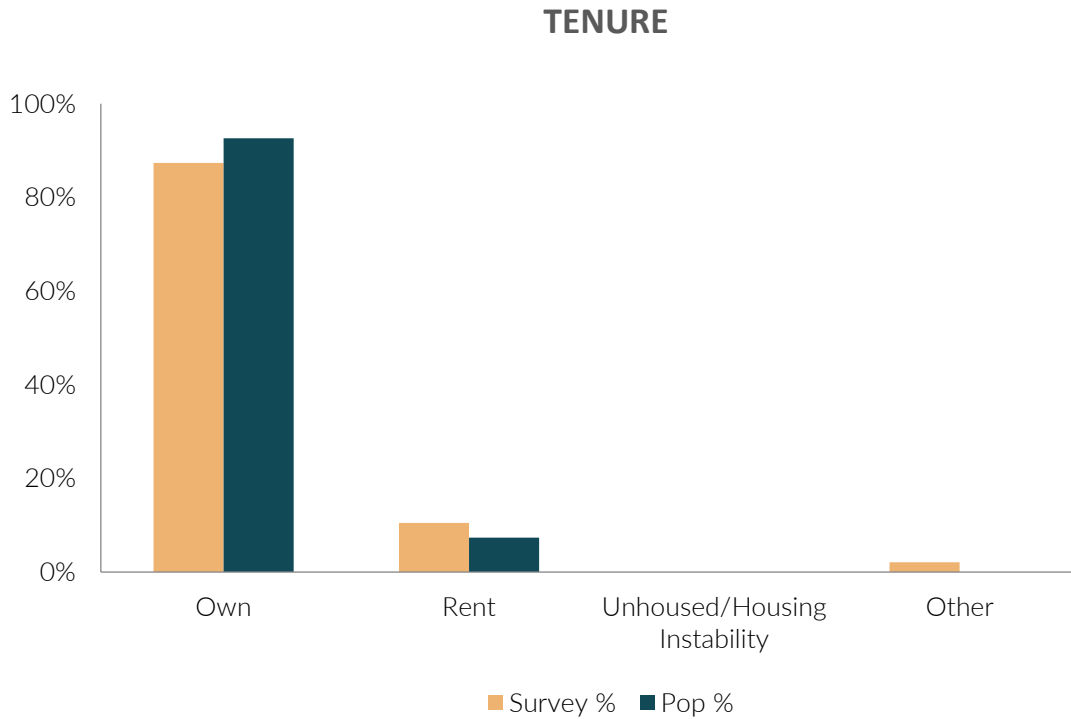
Housing Program Participation

HOUSING PROGRAM PARTICIPATION



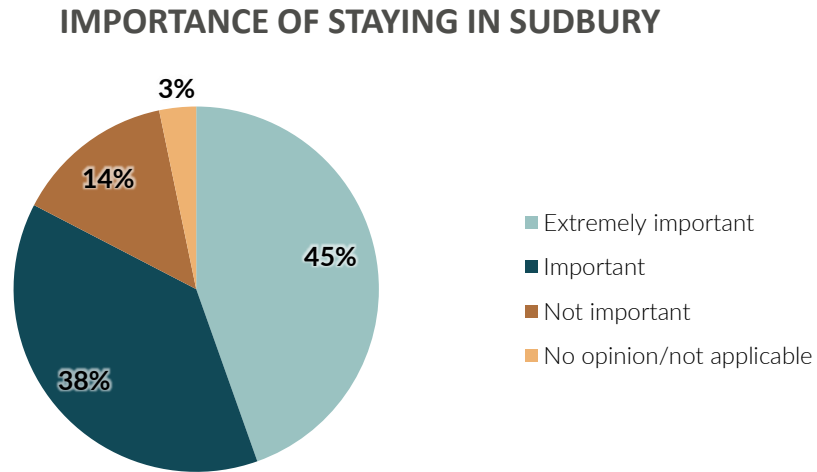
The vast majority (86 percent) of survey respondents have not participated in housing programs in Sudbury. However, seven percent shared that they were Sudbury Housing Authority residents. Four percent responded saying that they had participated in the Town's Rental Relief Program, and three percent lived in Affordable Subsidized Housing.

Tenure



Tenure refers to a resident's homeownership status--whether a household rents or owns their home. Sudbury's population is majority homeowner (92 percent), and the survey reflected that, with 87 percent of respondents reporting their status as homeowners, and about eleven percent currently renting in the community. While renters seem to be slightly overrepresented, it should be noted that, in raw numbers, they only comprised ten respondents.

Importance Of Staying In Sudbury



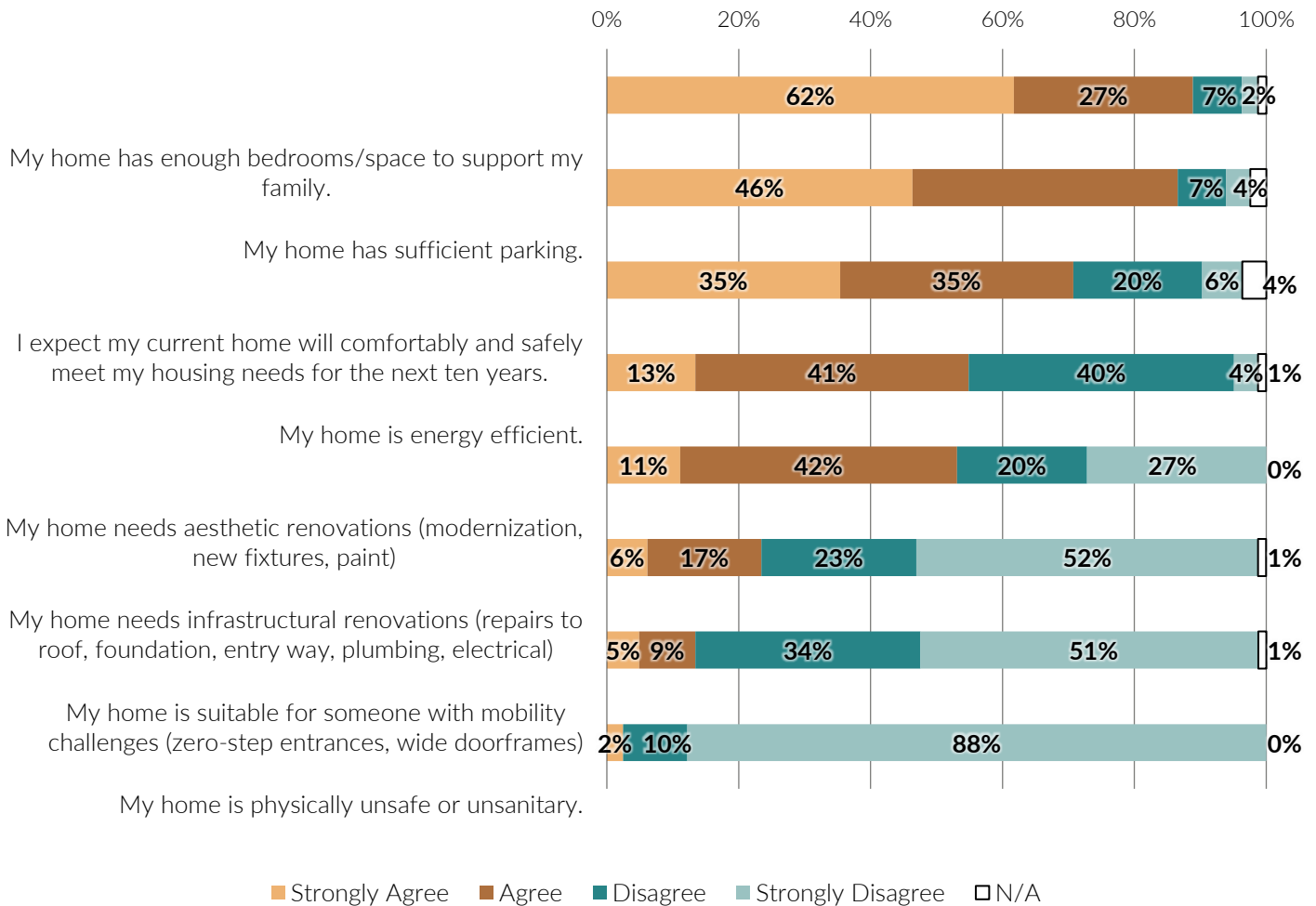
A majority (83 percent) of participants said that it was important or extremely important for them to stay in Sudbury in the next five years. A nearly similar share (76 percent) said it would also be important to stay in their current home. While 60 percent of respondents said they did not anticipate moving in the next five years, forty percent did, signifying potential housing challenges.

HOUSING CONDITIONS FOR HOMEOWNERS

Questions were given to both homeowners and renters. The next two subsections show varying responses for each.

Housing Conditions

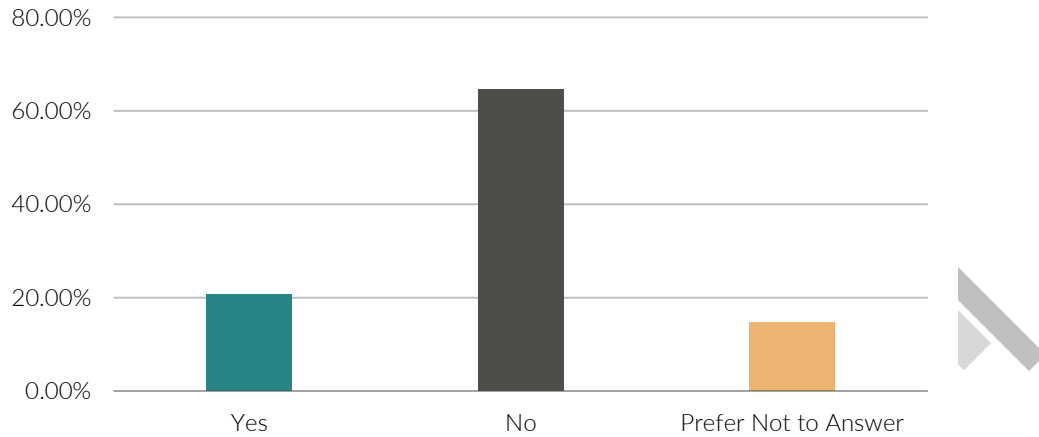
HOUSING CONDITIONS FOR HOMEOWNERS



Homeowners strongly agreed that they had sufficient bedrooms in their home for their families, and that their home was physically safe and sanitary. They disagreed, however, that their home was suitable for someone with mobility challenges, highlighting a challenge identified in later comments: the need for accessibility retrofits in many of Sudbury's homes.

Could You Buy In Sudbury Today?

IF YOU WERE TO PURCHASE YOUR HOME TODAY<, COULD YOU AFFORD THE MEDIAN SALES PRICE (\$1,150,000)>?



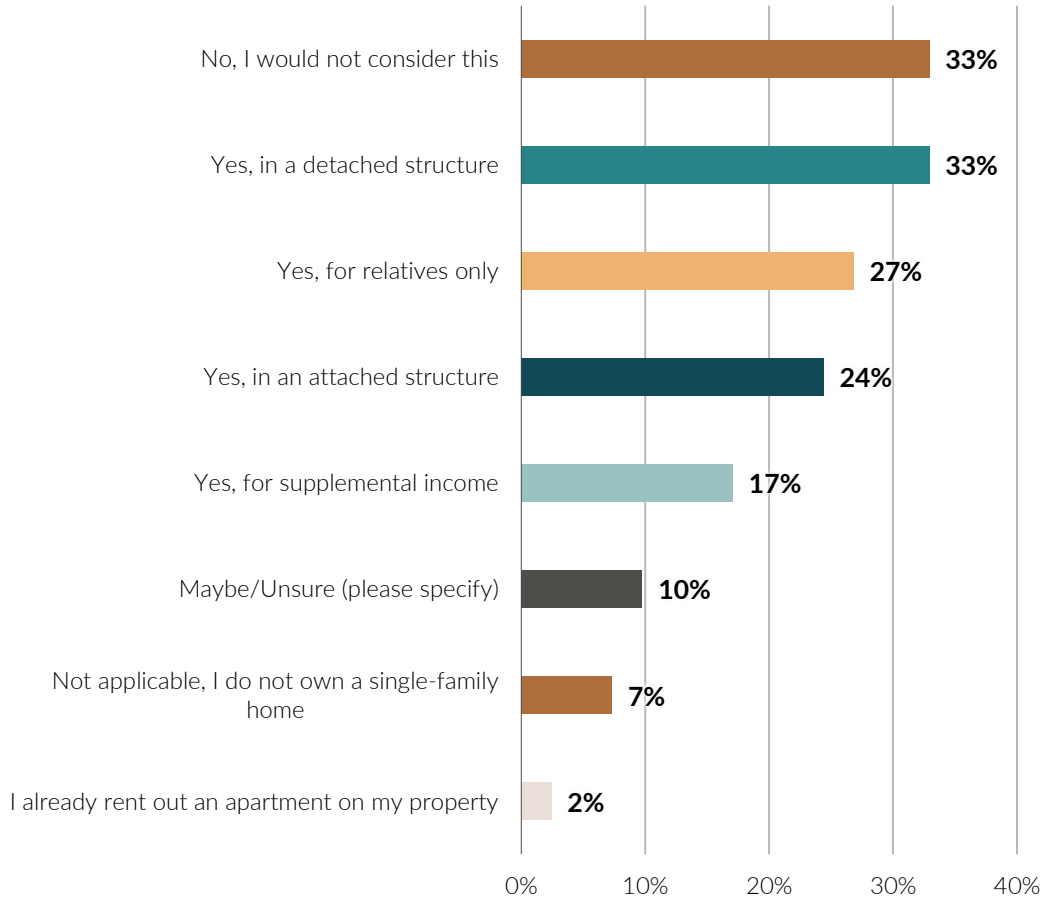
Homeowners were also asked whether they would be able to afford to move to Sudbury today, given current prices. Like the renters, most (53 out of 82 respondents) indicated that they would not be.

Difficulty With Housing Payments For Homeowners

\$ Nearly 60% of homeowners replied that they had not struggled to make mortgage payments in the past year. The next highest category (nearly 20%) had already paid off their mortgage. The remaining 20% had experienced difficulty with mortgage payments and other housing costs in the past year.

Would You Consider Creating An Accessory Unit?

WOULD YOU CONSIDER CREATING AND RENTING OUT AN ACCESSORY HOME ON YOUR PROPERTY?

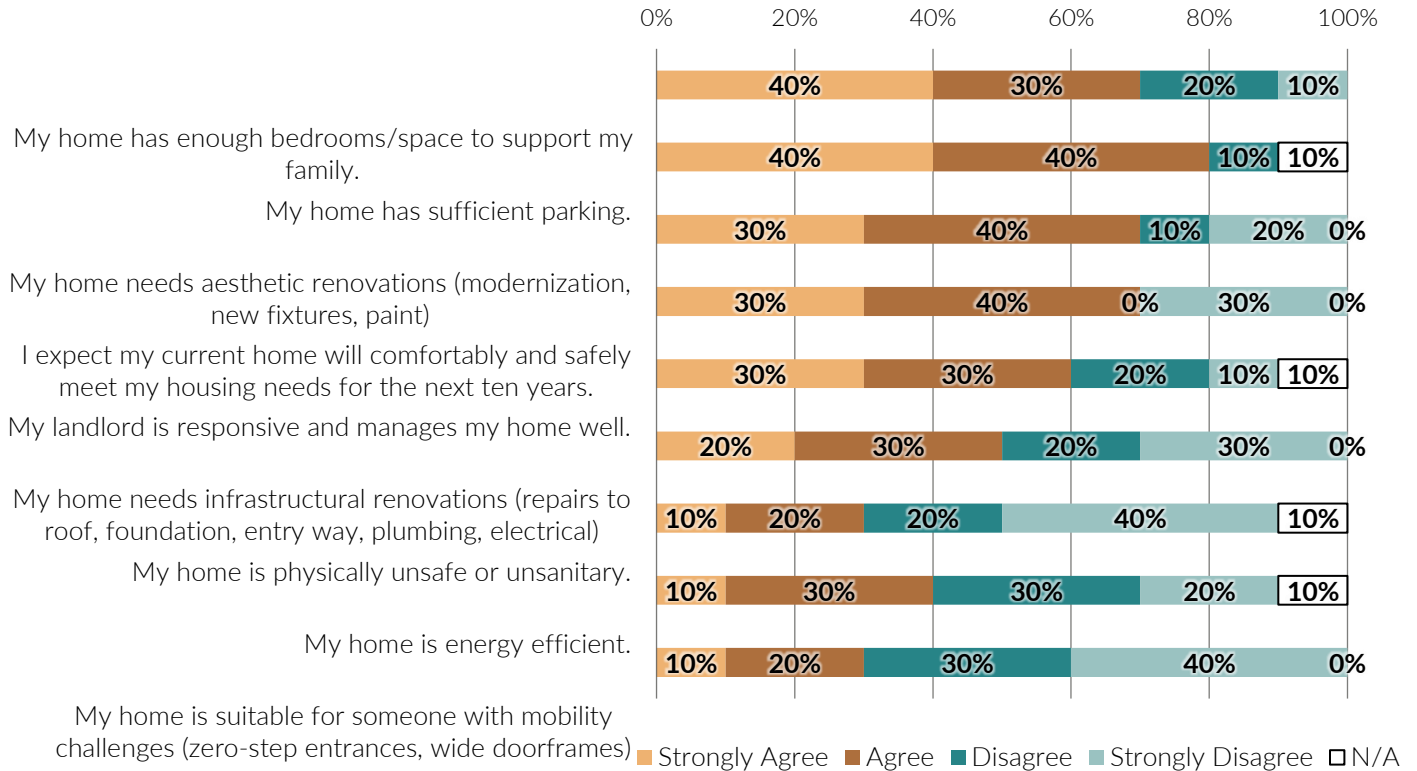


Respondents were asked whether they would consider building and renting an accessory apartment on their home (if they owned their home). Most replied that they would consider an accessory unit in various permutations: for supplemental income, for a relative, and in a detached or attached structure. Those that were unsure (eight comments total) replied that:

- They already had an accessory unit on their property (Two respondents).
- They were in favor, but it was likely cost-prohibitive (One respondent).
- They were in favor, but needed approval from their wife (One respondent).
- They were in favor, but it would need to be only one floor (One respondent).
- Their lot was too small to accommodate it (One respondent).
- They would move into an ADU on another person's property (One respondent).
- They were not in favor. (One respondent).

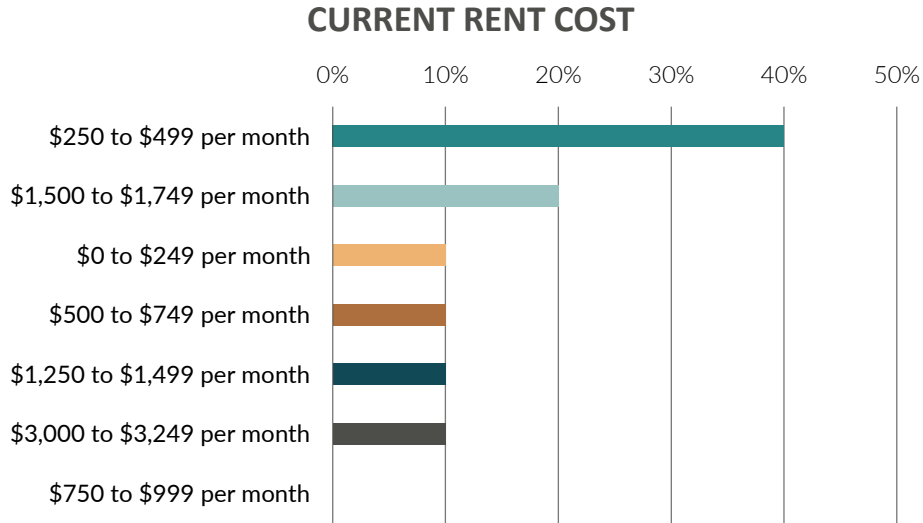
HOUSING CONDITIONS FOR RENTERS

HOUSING CONDITIONS FOR RENTERS



While most renters agreed that their landlord was responsive and managed their home well, and that they had sufficient parking, they also called out needs for aesthetic renovations, a lack of energy efficiency, and accessibility for people with mobility challenges. A second question for renters, highlighting housing costs, asked them if they would be able to move to the community today with current rental prices.

Current Housing Costs For Renters



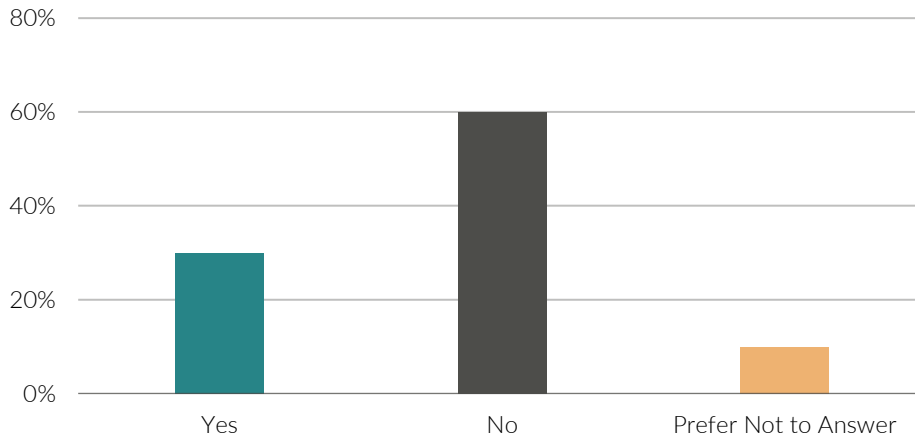
Most renters who responded to the survey paid less than the Census' median gross rent estimate of \$1,232. However, due to the small number of renters who responded (ten in total), this observation should be taken with caution.

Difficulty With Housing Payments For Renters

\$ Six out of ten renter respondents said that they have not struggled in the past year to afford rental payments and other housing costs. However, four out of ten had struggled at least one month to make payments.

Could You Sign A Lease In Sudbury Today?

IF YOU WERE TO SIGN A LEASE TODAY< COULD YOU AFFORD THE MEDIAN RENT (\$1,232)?

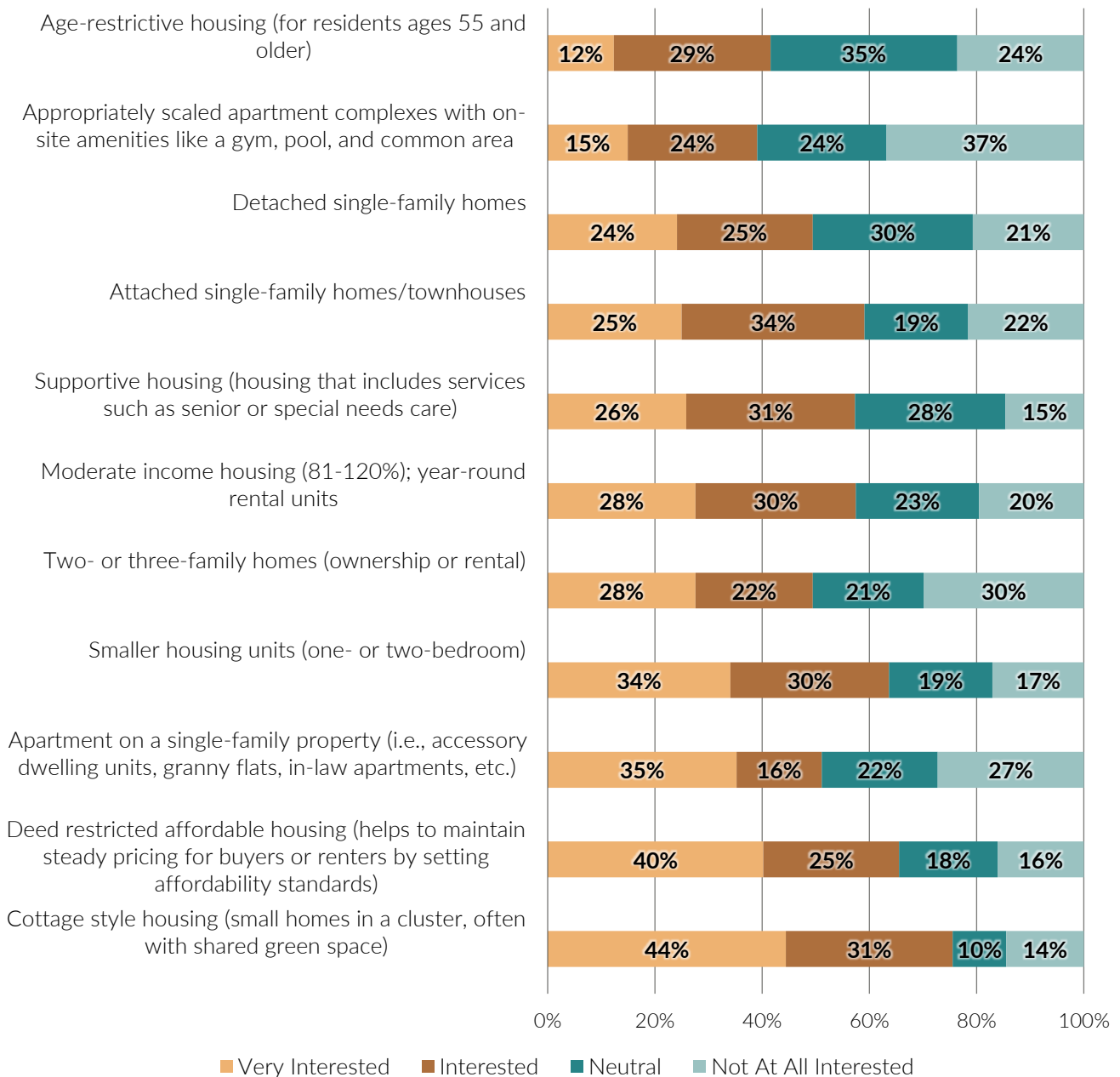


Most renters (60 percent) replied that they could not afford to sign a lease today at Sudbury’s median rent.

HOUSING PREFERENCES

What Types Of Housing Options Would You Like To See More Of?

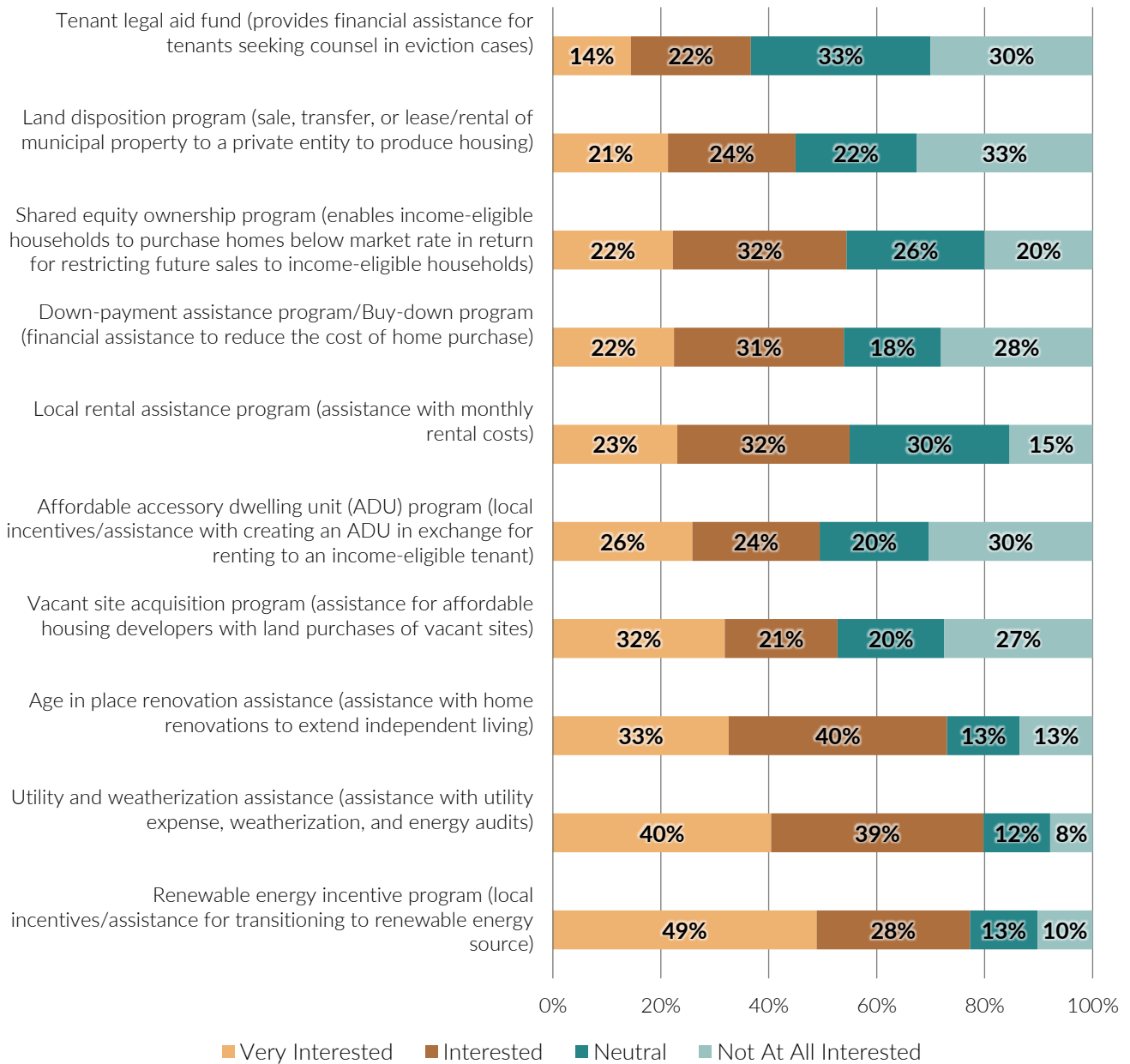
HOUSING TYPE PREFERENCES



This question asked respondents to rank their preferences regarding various housing types for the community. Strong interest was shown for cottage style housing, deed-restricted affordable housing, accessory units, and housing units with smaller sizes.

What Types Of Housing Programs Would You Like To See More Of?

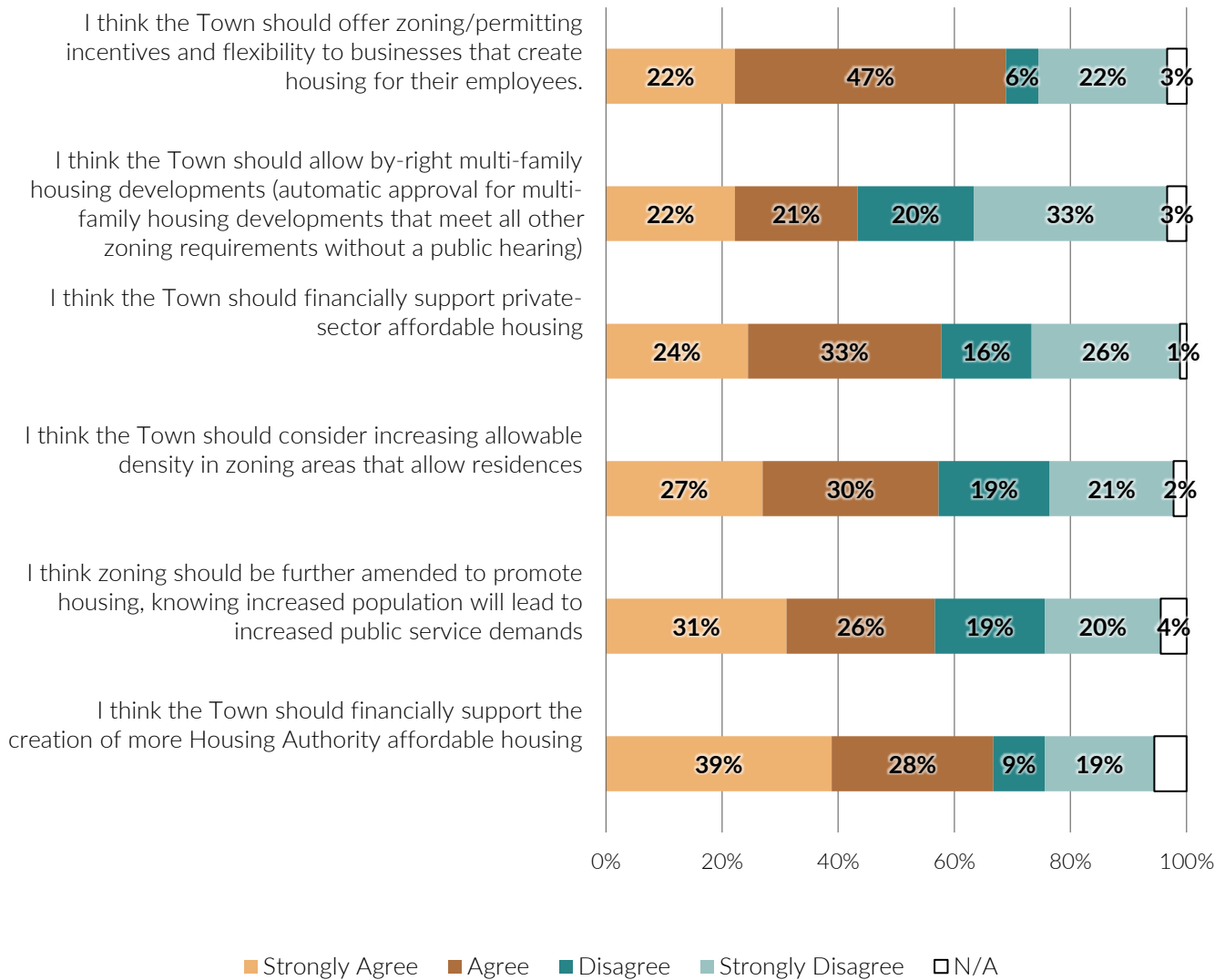
HOUSING PROGRAM PREFERENCES



Survey participants were also asked for their preferences for types of state, federal, and Town-administered housing programs. The strongest support shown was for utility and weatherization assistance (80% in favor), with the second-most popular program being a potential renewable energy incentive for transitioning to renewable energy sources (76%). Respondents were also generally supportive of programs such as age-in-place renovation assistance (72% in favor), a program that would purchase vacant sites and develop affordable homes there (51% in favor), a down-payment assistance program (53% in favor), and local incentives for creating ADUs with income restrictions (48% in favor).

Town Initiative Preferences

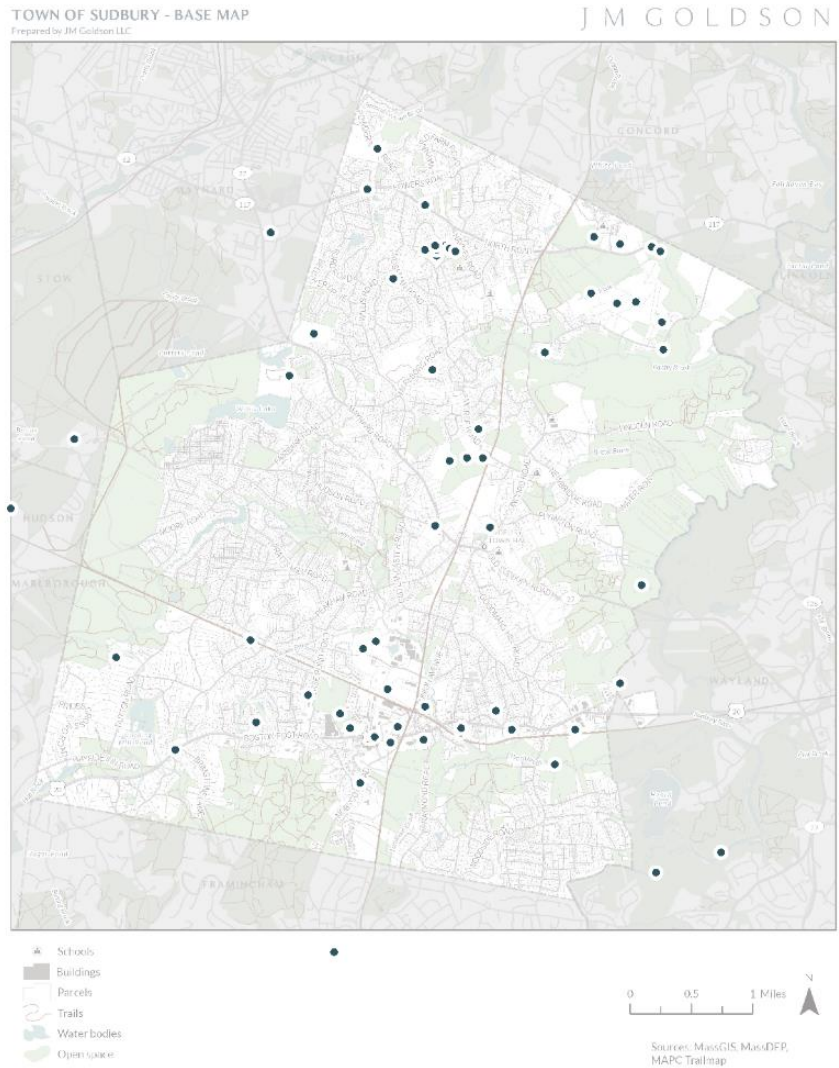
TOWN INITIATIVE PREFERENCES



The community was also asked to give their preferences regarding various initiatives that the Town could pursue to address housing issues. A majority supported the Town offering zoning

and permitting flexibility for businesses to house their employees, as well as increasing allowable density in residential zoning areas, amending zoning to permit housing, and financially supporting the creation of more affordable units through the Sudbury Housing Authority.

Where In Town Would Be A Great Place For Housing Development?



The survey also included an interactive map where participants could identify potential opportunity sites in the Town. Clustering indicates that multiple participants agreed on the suitability of that particular area.

The top locations mentioned in the survey for housing development were:

- Route 20 (mentioned 11 times)
- Route 117 (mentioned seven times).
- Camp Sewataro (mentioned seven times).

- Nobscot Reservation (mentioned five times).
- Broad Acres Farm (mentioned four times).

DRAFT

Housing Opportunities

Respondents were also given the opportunity to call out housing opportunities for Sudbury. The following is a summary of key themes:

- Create more housing targeted towards seniors and people with disabilities (mentioned four times).
- More accessory units (mentioned three times).
- More housing on Route 20 (mentioned twice).
- Promote cluster development (mentioned twice).

Final Thoughts

At the close of the survey, participants were able to include additional comments on housing in Sudbury. An abridged summary of those comments is included below:

- Addressing affordability for senior residents should be a priority.
- Options for redevelopment should be limited to long-term residents to prevent speculators.
- Tax rates for seniors should be kept in mind.
- Focus more on energy efficiency support for homes in the Town, cultivating local businesses, and creating additional flexibility for landowners and homeowners.
- Access to reliable public transportation.
- Additional financial assistance in maintaining income-restricted and privately-owned housing occupied by lower-income residents.
- The Camp Sewataro project should be scrutinized.
- The community is aging because young people have been priced out of the community.
- Long-time residents face great housing costs pressures, too. ADA accessibility and energy efficiency and sustainability should also be prioritized.

APPENDIX C: COMMUNITY FORUM BOARDS

SUDBURY HOUSING PRODUCTION PLAN

**CAN YOU ENVISION THE HOUSING LANDSCAPE OF SUDBURY?
WE ARE CREATING A PLAN TO DO JUST THAT!**

WHAT IS A HOUSING PRODUCTION PLAN?

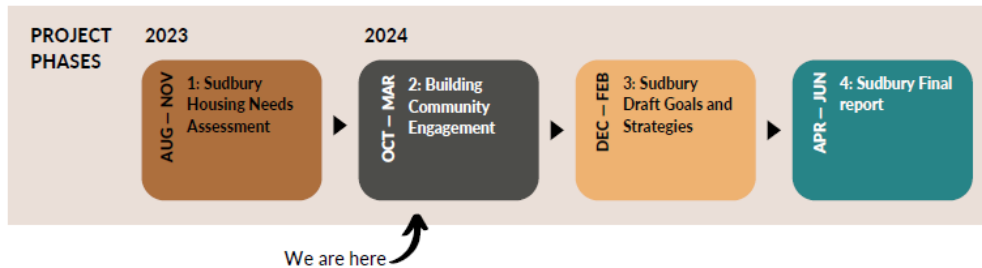
A Housing Production Plan (HPP) is a policy document that helps local decision-makers respond to housing need and create a guide for affordable housing. Creating a Housing Production Plan is a way for a municipality to influence the location, type, and pace of affordable housing development.

Per Massachusetts 760 CMR 56.03(4), all HPP's must have the following elements covering a period of 5 years:

1. Comprehensive housing needs assessment;
2. Affordable housing goals;
3. Implementation strategies.



This HPP describes how the Town of Sudbury plans to create and preserve affordable and mixed-income housing as well as stabilize housing for existing residents and create more housing options in the community.



WHO IS WORKING ON SUDBURY’S HPP?

The Sudbury Housing Production Plan project team is comprised of the Sudbury Housing Production Plan Committee, Planning and Community Development Department Staff, and consultants from the Regional Housing Services Office and JM Goldson.

The Planning and Community Development department is the body overseeing the Housing Production Plan process. Housing Production Plan meetings are held monthly by the Committee.

WHY IS SUDBURY WRITING AN HPP?

An HPP is approved by the Massachusetts Department of Housing and Community Development (DHCD) for a five-year period. Sudbury’s last HPP was in 2016. HPPs help to:

- Address unmet housing needs of low- and moderate-income residents in the community
- Influence the type, amount, and location of mixed-income and Affordable Housing
- Help maintain the State mandate requiring that 10% of total year-round housing units be Affordable by setting a numeric goal for annual housing production.

SUDBURY HOUSING PRODUCTION PLAN

J M GOLDSON
REGIONAL HOUSING
SERVICES OFFICE

Thank you for joining us today! Please use the stickers to answer the following questions and give us a sense of who you are.

1: WHAT IS YOUR CONNECTION TO SUDBURY?

I LIVE IN SUDBURY	I DON'T LIVE IN SUDBURY, BUT I WORK HERE	I DON'T LIVE IN SUDBURY, BUT I OWN PROPERTY HERE	I HAVE A DIFFERENT CONNECTION TO SUDBURY THAN THOSE LISTED HERE
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2: HOW OLD ARE YOU?

UNDER 18	18-34	35-64	65 OR OLDER
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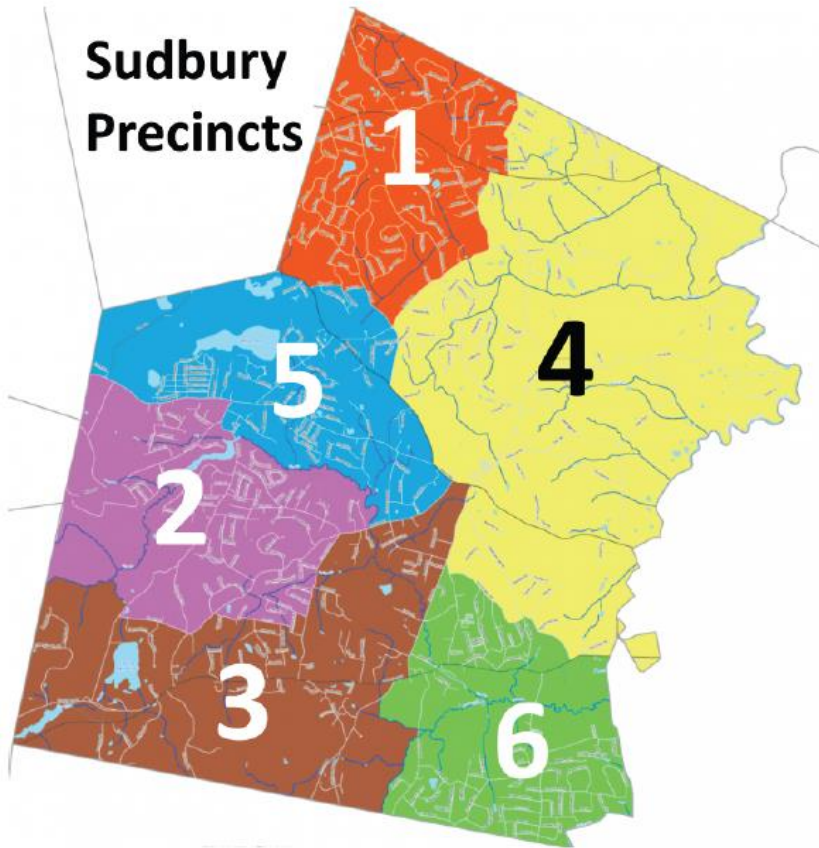
3: WHAT IS YOUR HOUSING STATUS?

I/MY HOUSEHOLDS OWNS OUR PLACE OF RESIDENCE	I/MY HOUSEHOLD RENTS OUR PLACE OF RESIDENCE	I/MY HOUSEHOLD IS CURRENTLY EXPERIENCING HOUSING INSTABILITY	OTHER
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4: HOW LONG HAVE YOU BEEN AFFILIATED WITH SUDBURY?

LESS THAN FIVE YEARS	5-10 YEARS	11-19 YEARS	20+ YEARS
----------------------	------------	-------------	-----------

Please use the stickers to help us understand which regions are represented today!



PRECINCT 1	PRECINCT 2	PRECINCT 3
PRECINCT 4	PRECINCT 5	PRECINCT 6
I DO NOT LIVE IN SUDBURY		

SUDBURY HOUSING PRODUCTION PLAN

J M GOLDSON
REGIONAL HOUSING
SERVICES OFFICE



STATUS OF GOALS AND STRATEGIES

Sudbury's last Housing Production Plan was written in 2016, read on to see where the Town stands with its previous goals and strategies!

Implementation Strategies		
ID	Action	Status
Goal 1	Create more SHI-eligible housing	Complete
Goal 2	Promote a diversity of housing	Complete
Goal 3	Support an aging population	Complete
Goal 4	Housing in the business districts	Complete
Goal 5	Monitor and Preserve existing homes	Complete
Goal 6	Leverage local funds and resources	Complete
Goal 7	Maintain, advance capacity	In Progress
Goal 8	Create workforce housing	Incomplete
Zoning Bylaw Amendments		
ID	Action	Status
Strategy 1	Inclusionary Zoning	Complete
Strategy 2	Expand Village Business District	Unsure
Private Property		
ID	Action	Status
Strategy 3	Advance town goals through private 40B developments	Complete
Strategy 4	Review other private properties for housing	Incomplete
Identification of Municipal Parcels		
ID	Action	Status
Strategy 5	Investigate Town-owned properties for housing	Incomplete
Development of Housing Programs		
ID	Action	Status
Strategy 6	Advance the Home Preservation Program	Incomplete
Strategy 7	Continue the Small Grants Program	Complete
Advancement of Local Capacity & Participation in Regional Collaborations		
ID	Action	Status
Strategy 8	Dedicate Housing Staff	Complete
Strategy 9	Continue membership to the regional housing services office	Complete



SUDBURY PEOPLE THEN & NOW

Sudbury's last Housing Production Plan was written in 2016, read on to see how the community has changed since then!

2010

2020

POPULATION

17,308

+11%

POPULATION

19,248

RACIAL MAKEUP

9% BIPOC

+96%

RACIAL MAKEUP

16% BIPOC

ADULTS AGED 65+

12%

+43%

ADULT AGED 65+

15%

POPULATION DENSITY (PER SQUARE MILE)

713.1 (PER MI²)

+11%

POPULATION DENSITY (PER SQUARE MILE)

793.0 (PER MI²)

MEDIAN HOUSEHOLD INCOME

\$153,295

(2010 dollars as adjusted for inflation)

+27%

MEDIAN HOUSEHOLD INCOME

\$195,073

(2020 dollars as adjusted for inflation)

EDUCATIONAL ATTAINMENT

74.2% BACHELORS+

+21%

EDUCATIONAL ATTAINMENT

79.7% BACHELORS+

*All statistics presented on this board were taken from the 2010 U.S. Census and 2020 U.S. Census, when available. Where 2020 U.S. Census data was not available, the 2017-2021 U.S. Census Bureau's American Community Survey 5-Year Estimates were used instead.

SUDBURY HOUSING PRODUCTION PLAN

J M GOLDSON
REGIONAL HOUSING
SERVICES OFFICE



SUDBURY HOUSING THEN & NOW

Sudbury's last Housing Production Plan was written in 2016, read on to see how housing has changed since then!

2010

2020

HOUSEHOLDS

5,555

+13%

HOUSEHOLDS

6,301

HOUSING UNITS

5,764

+11%

HOUSING UNITS

6,399

AVERAGE HOUSEHOLD SIZE

3.01 PEOPLE

-3%

AVERAGE HOUSEHOLD SIZE

3.00 PEOPLE

TENURE

5.8% RENTERS

+75%

TENURE

9.0% RENTERS

MEDIAN HOUSE VALUE

\$640,400

(2010 dollars as adjusted for inflation)

+18%

MEDIAN HOUSE VALUE

\$754,200

(2020 dollars as adjusted for inflation)

PERCENTAGE OF HOUSEHOLDS LIVING IN MULTI-FAMILY HOUSING

6%

+40%

PERCENTAGE OF HOUSEHOLDS LIVING IN MULTI-FAMILY HOUSING

7%

*All statistics presented on this board were taken from the 2010 U.S. Census and 2020 U.S. Census, when available. Where 2020 U.S. Census data was not available, the 2017-2021 U.S. Census Bureau's American Community Survey 5-Year Estimates were used instead.

SUDBURY HOUSING PRODUCTION PLAN

J M GOLDSON
REGIONAL HOUSING
SERVICES OFFICE

WHAT DO YOU HOPE THIS HPP WILL INCLUDE?

Please use the post-it notes and pens to write your responses.



WHAT DO YOU THINK ARE THE BIGGEST HOUSING OPPORTUNITIES IN SUDBURY? WHAT CREATIVE IDEAS DO YOU HAVE FOR HOUSING IN TOWN?

Please use the post-it notes and pens to write your responses.



WHAT DO YOU THINK ARE THE MOST PRESSING HOUSING CHALLENGES IN SUDBURY, EVEN IF YOU HAVE NOT PERSONALLY EXPERIENCED THEM?

Please use the post-it notes and pens to write your responses.



SUDBURY'S MULTI-FAMILY AND GENTLE DENSITY



COOLIDGE PHASE II
56 RENTALS
100% AFFORDABLE SENIOR HOUSING



AVALON
250 RENTALS
25% AFFORDABLE FAMILY HOUSING



COLD BROOK CROSSING
101 RENTALS
25% AFFORDABLE FAMILY HOUSING



VILLAGES AT OLD COUNTY ROAD
25% AFFORDABLE OWNERSHIP



SUDBURY HOUSING AUTHORITY
FAMILY RENTAL

PHASE II ENGAGEMENT ROADMAP



COMMUNITY FORUM #1

The results of today's forum will help us generate our future housing goals and strategies for the Housing Production Plan.

Thank you for being here today and be on the lookout for our other engagement opportunities.

COMMUNITY SURVEY


Sudbury is currently collecting community feedback through its online Community Survey to gain a better understanding of what the Sudbury community thinks about different Housing Production Plan topics.

Scan this QR code or visit www.surveymonkey.com/r/SudburyHPP



Stay engaged with Sudbury's Planning and Community Development work by following Sudbury on Facebook, and Twitter/X!

 Facebook: [TownofSudbury](https://www.facebook.com/TownofSudbury)

 Twitter/X: [@Sudbury_Town](https://twitter.com/Sudbury_Town)

DRAFT GOALS AND STRATEGIES



Using the results of early Phase II engagement tools, JM Goldson will continue to meet with the HPP Committee members and Planning and Community Development staff to write the first draft of Sudbury's HPP Goals and Strategies.

COMMUNITY REVIEW PERIOD & FORUM #2

JM Goldson will take the results of the engagement tools and create the Goals and Strategies first draft. Community members will be invited to submit written feedback on these statements and attend a second virtual forum, similar to today's activities, to help revise them. JM Goldson will make revisions accordingly and present final drafts at a public presentation to the Planning Board and Select Board.



SUDBURY GOALS AND STRATEGIES

WHAT QUESTIONS DO YOU STILL HAVE ABOUT THE HPP PROCESS?

Please use the post-it notes and pens to write your responses.



EOHLC AFFIRMATIVE FAIR HOUSING GUIDELINES

The Commonwealth of Massachusetts has a compelling interest in creating fair and open access to affordable housing and promoting compliance with state and federal civil rights obligations. Therefore, all housing with state subsidy or housing for inclusion on the SHI shall have an Affirmative Fair Housing Marketing Plan. To that end, EOHLC has prepared and published comprehensive guidelines that all agencies follow in resident selection for affordable housing units.

In particular, the local preference allowable categories are specified:

- **Current Residents.** A household in which one or more members is living in the Town or town at the time of application. Documentation of residency should be provided, such as rent receipts, utility bills, street listing, or voter registration listing.
- **Municipal Employees.** Employees of the municipality, such as teachers, janitors, firefighters, police officers, librarians, or town hall employees.
- **Employees of Local Businesses.** Employees of businesses located in the municipality.
- **Households with Children.** Households with children attending the locality's schools.

The latest revisions to the guidelines were in May 2013. The full guidelines can be found here: <https://www.mass.gov/doc/ma-fair-housing-marketing-and-resident-selection-plan-guidelines-1/download>.

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INTERAGENCY BEDROOM MIX POLICY

DRAFT

INTERAGENCY AGREEMENT

Regarding Housing Opportunities for Families with Children

This Interagency Agreement (this "Agreement") is entered into as of the 17th day of January, 2014 by and between the Commonwealth of Massachusetts, acting by and through its Department of Housing and Community Development ("DHCD"), the Massachusetts Housing Partnership Fund Board ("MHP"), the Massachusetts Housing Finance Agency (in its own right and in its capacity as Project Administrator designated by DHCD under the Guidelines for Housing Programs in Which Funding is Provided By Other Than a State Agency, "MassHousing"), the Massachusetts Development Finance Agency ("MassDevelopment") and the Community Economic Development Assistance Corporation ("CEDAC"). DHCD, MHP, MassHousing, MassDevelopment and CEDAC are each referred to herein as a "State Housing Agency" and collectively as the "State Housing Agencies".

Background

A. DHCD's 2013 Analysis of Impediments to Fair Housing Choice ("AI") includes action steps to improve housing opportunities for families, including families with children, the latter being a protected class pursuant to fair housing laws, including the federal Fair Housing Act, as amended (42 U.S.C. §§ 3601 *et seq.*) and Massachusetts General Laws Chapter 151B. In order to respond to development patterns in the Commonwealth that disparately impact and limit housing options for families with children, such steps include requiring a diversity of bedroom sizes in Affordable Production Developments that are not age-restricted and that are funded, assisted or approved by the State Housing Agencies to ensure that families with children are adequately served.

B. The State Housing Agencies have agreed to conduct their activities in accordance with the action steps set forth in the AI.

C. This Agreement sets forth certain agreements and commitments among the State Housing Agencies with respect to this effort.

Definitions

1) "Affordable" - For the purposes of this Agreement, the term "Affordable" shall mean that the development will have units that meet the eligibility requirements for inclusion on the Subsidized Housing Inventory ("SHI").

2) "Production Development" - For purposes of this Agreement "Production Development" is defined as new construction or adaptive reuse of a non-residential building and shall include rehabilitation projects if the property has been vacant for two (2) or more years or if the property has been condemned or made uninhabitable by fire or other casualty.



Agreements

NOW, THEREFORE, DHCD, MHP, MassHousing, MassDevelopment and CEDAC agree as follows:

Bedroom Mix Policy

1) Consistent with the AI, it is the intention of the State Housing Agencies that at least ten percent (10%) of the units in Affordable Production Developments funded, assisted or approved by a State Housing Agency shall have three (3) or more bedrooms except as provided herein. To the extent practicable, the three bedroom or larger units shall be distributed proportionately among affordable and market rate units.

2) The Bedroom Mix Policy shall be applied by the State Housing Agency that imposes the affordability restriction that complies with the requirements of the SHI.

3) The Bedroom Mix Policy shall not apply to Affordable Production Developments for age-restricted housing, assisted living, supportive housing for individuals, single room occupancy or other developments in which the policy is not appropriate for the intended residents. In addition, the Bedroom Mix Policy shall not apply to a Production Development where such units:

- (i) are in a location where there is insufficient market demand for such units , as determined in the reasonable discretion of the applicable State Housing Agency; or
- (ii) will render a development infeasible, as determined in the reasonable discretion of the applicable State Housing Agency.

4) Additionally, a State Housing Agency shall have the discretion to waive this policy (a) for small projects that have less than ten (10) units and (b) in limited instances when, in the applicable State Housing Agency's judgment, specific factors applicable to a project and considered in view of the regional need for family housing, make a waiver reasonable.

5) The Bedroom Mix Policy shall be applicable to all Production Developments provided a Subsidy as defined under 760 CMR 56.02 or otherwise subsidized, financed and/or overseen by a State Housing Agency under the M.G.L. Chapter 40B comprehensive permit rules for which a Chapter 40B Project Eligibility letter is issued on or after March 1, 2014. The policy shall be applicable to all other Affordable Production Developments funded, assisted, or approved by a State Housing Agency on or after May 1, 2014.



COMPREHENSIVE PERMIT DENIAL AND APPEAL PROCEDURES

(a) If a Board considers that, in connection with an Application, a denial of the permit or the imposition of conditions or requirements would be consistent with local needs on the grounds that the Statutory Minima defined at 760 CMR 56.03(3)(b or c) have been satisfied or that one or more of the grounds set forth in 760 CMR 56.03(1) have been met, it must do so according to the following procedures. Within 15 days of the opening of the local hearing for the Comprehensive Permit, the Board shall provide written notice to the Applicant, with a copy to the Department, that it considers that a denial of the permit or the imposition of conditions or requirements would be consistent with local needs, the grounds that it believes have been met, and the factual basis for that position, including any necessary supportive documentation. If the Applicant wishes to challenge the Board's assertion, it must do so by providing written notice to the Department, with a copy to the Board, within 15 days of its receipt of the Board's notice, including any documentation to support its position. The Department shall thereupon review the materials provided by both parties and issue a decision within 30 days of its receipt of all materials. The Board shall have the burden of proving satisfaction of the grounds for asserting that a denial or approval with conditions would be consistent with local needs, provided, however, that any failure of the Department to issue a timely decision shall be deemed a determination in favor of the municipality. This procedure shall toll the requirement to terminate the hearing within 180 days.

(b) For purposes of this subsection 760 CMR 56.03(8), the total number of SHI Eligible Housing units in a municipality as of the date of a Project's application shall be deemed to include those in any prior Project for which a Comprehensive Permit had been issued by the Board or by the Committee, and which was at the time of the application for the second Project subject to legal appeal by a party other than the Board, subject however to the time limit for counting such units set forth at 760 CMR 56.03(2)(c).

(c) If either the Board or the Applicant wishes to appeal a decision issued by the Department pursuant to 760 CMR 56.03(8)(a), including one resulting from failure of the Department to issue a timely decision, that party shall file an interlocutory appeal with the Committee on an expedited basis, pursuant to 760 CMR 56.05(9)(c) and 56.06(7)(e)(11), within 20 days of its receipt of the decision, with a copy to the other party and to the Department. The Board's hearing of the Project shall thereupon be stayed until the conclusion of the appeal, at which time the Board's hearing shall proceed in accordance with 760 CMR 56.05. Any appeal to the courts of the Committee's ruling shall not be taken until after the Board has completed its hearing and the Committee has rendered a decision on any subsequent appeal.

Source: EOHLC Comprehensive Permit Regulations, 760 CMR 56.03(8)