



Town of Sudbury

Master Plan Steering Committee

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DRAFT MINUTES

JANUARY 31, 2020 AT 8:45 AM

POLICE STATION MEETING ROOM, 75 HUDSON ROAD, SUDBURY, MA

Members Present: Chair John Sugrue, At-Large; Vice-Chair Susan Asbedian-Ciaffi, At-Large; Dan Carty, Board of Selectmen; Janie Dretler, Board of Selectmen; Nathalie Forssell, At-Large; Patricia Guthy, Commission on Disability; Jan Hardenbergh, At-Large; Dave Henkels, Conservation Commission; Ellen Joachim, Lincoln Sudbury Regional High School Committee; Lisa Kouchakdjian, Sudbury Public School Committee; Amy Lepak, Sudbury Housing Authority; Robert May, Council on Aging; John Riordan, Zoning Board of Appeals; Lee Swanson, Historic Districts Commission; and Dick Williamson, Park and Recreation Commission

Members Absent: Fred Taylor, Historic Districts Commission

Others Present: Fabiola Alikpokou, Staff Planner, Horsley Witten Group; Kay Bell, Commission on Disability; Jan Costa, Historical Commission; Jeff Dougan, Assistant Director for Community Services, Massachusetts Office on Disability; Adam Duchesneau, Director of Planning and Community Development; John Hincks, Planning Board; Nate Kelly, Principal, Horsley Witten Group; Krista Moravec, Senior Planner, Horsley Witten Group; and Beth Suedmeyer, Environmental Planner

Welcome

Mr. Sugrue opened the meeting at 8:50 AM.

Regular Meeting Business

Approval of Meeting Minutes

Mr. Sugrue motioned to approve the minutes of September 20, 2019 as amended. Ms. Asbedian-Ciaffi seconded the motion. The vote was unanimous, 14-0, with Ms. Joachim absent from the vote.

Mr. Sugrue motioned to approve the minutes of November 12, 2019. Ms. Asbedian-Ciaffi seconded the motion. The vote was unanimous, 14-0, with Ms. Joachim absent from the vote.

2019 Annual Report

Mr. Duchesneau provided a brief summary of the draft 2019 Annual Report for the Master Plan Steering Committee.

Mr. Williamson motioned to adopt the 2019 Annual Report. Mr. Riordan seconded the motion. The vote was unanimous, 14-0, with Ms. Joachim absent from the vote.

Administrative Report

Ms. Suedmeyer noted a draft of the updated Hazard Mitigation Plan would be available next week for public review for one month and would then be revised with any comments provided. She stated Federal Emergency Management Agency (FEMA) funding would be available with the adoption and approval of the Hazard Mitigation Plan. Ms. Suedmeyer indicated the Hazard Mitigation Plan would be posted to the Town website and she welcomed any comments from the Master Plan Steering Committee.

Review of Packet Materials

Ms. Moravec reminded the Master Plan Steering Committee the purpose for the upcoming four meetings was to discuss topics where specific further deliberation was needed. She noted the discussion that day would involve Town Services.

Presentation and Q&A with Jeff Dougan, Assistant Director for Community Services, Massachusetts Office on Disability

Mr. Dougan presented an overview of aspects of the Americans with Disabilities Act (ADA) and compliance. He noted the ADA jurisdictional titles:

- Title I: Employment
- Title II: State and Local Governments
- Title III: Public Accommodations
- Title IV: Telecommunications
- Title V: Miscellaneous

At this time Ms. Joachim arrived at the meeting.

Mr. Dougan mentioned discriminatory practices requiring drivers' licenses as the only acceptable form of identification; with special focus on the blind and other forms of disability. Mr. Dougan identified people with "hidden" – non-obvious – disabilities. He also discussed the ADA three prong definition of a disability:

- A Physical or Mental Impairment that Substantially Limits One or More Major Life Activities
- A Record of Such an Impairment
- Being Regarded as Having Such an Impairment

Mr. Dougan stressed the importance of ADA standards being incorporated into any new municipal construction/renovation project. He suggested Sudbury renew the ADA statement for the Town which was created in 2000, while noting funding sources available to cover such updating. Mr. Dougan also outlined the municipal responsibilities when 50 or more employees work for the municipality, including the inclusion of an ADA Coordinator, grievance procedures, retaining a self-evaluation every three years, and the implementation of a transition plan which would identify necessary structural modifications and related scheduling of such modifications.

At this time Ms. Dretler left the meeting.

Mr. Hincks commented about visual and hearing disabilities, and how Town Meeting or the Town website might address such issues. Ms. Kouchakdjian stated the Sudbury Public Schools (SPS) maintained a handicapped accessible website and indicated SPS would share this type of website with other Town departments. Mr. Dougan mentioned a specific IT contract was available for this as well.

Mr. Dougan discussed buildings with historical significance and possible methods for ADA compliance. Ms. Kouchakdjian inquired about the differences between Title II and Title III, and indicated there was confusion about Title III in Sudbury with regard to private businesses. Mr. Dougan confirmed Title III applied to private businesses/non-profit organizations and mentioned the two mandates – programmatic access (for public buildings) and readily achievable barrier removal (for private buildings). He stressed the size of the private organization had varying mandates and ADA obligations.

Municipal Comparisons

Ms. Moravec reviewed various aspects of the Municipal Comparisons document.

Mr. Riordan noted Sudbury was at the low end (except for education) when compared to the per capita/year spending of neighboring communities and Ms. Moravec agreed.

Small Groups

Ms. Moravec presented discussion questions to be addressed by the Master Plan Steering Committee in consideration of growing needs of older residents, investment in new technology, tools for communication, capital investments in upkeep and maintenance of Town facilities and infrastructure, accessibility, the role of volunteers in Town services, providing utilities, and investment in new facilities:

- Do we highlight this issue in the Master Plan?
- What is the direction and level of commitment?

Ms. Moravec noted the discussion of wastewater management and Route 20 would occur at the February 28, 2020 meeting. She also suggested the Bruce Freeman Rail Trail be discussed at that time as well.

The Master Plan Steering Committee then broke into small discussion groups to address the above questions.

At this time Ms. Dretler returned to the meeting

Report Out and Discussion

Mr. Kelly reviewed the small group discussion results within his group, noting significant modification was seen in the areas of Town volunteer services and provision for Town utilities.

At this time Mr. Carty left the meeting.

Ms. Moravec stated her group made similar comments and also included discussion regarding Town board, committee, and commission vacancies. She concluded her group indicated the undertaking of Town utility inclusion was too extensive a task, with exception of possible internet service.

Ms. Alikpokou stated her group indicated the volunteer role should be connected to the communications piece and forming relevant communities. She mentioned a proposed IT Committee, which could advance communication aspects and a Health Committee which might assist with the Senior Center.

Mr. Hincks noted his proposal regarding the implementation of a utility strategy for Sudbury with the inclusion of sustainable energy possibilities. Mr. Moravec stated her group had a similar discussion.

Ms. Suedmeyer commented about the high level of technological expertise many volunteers possessed, which could significantly contribute to a proposed IT Committee.

Ms. Dretler described the connection between increased technology in Town, and the maintenance and attraction of various jobs. Mr. Hincks affirmed such implementation would help with the reduction of traffic.

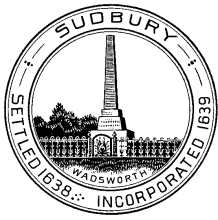
Next Steps

Ms. Moravec confirmed small break out groups would be used at future Master Plan Steering Committee meetings.

Adjourn

Mr. Duchesneau stated the next Master Plan Steering Committee meeting would be held on February 7, 2020.

Mr. May motioned to adjourn the meeting at 11:15 AM. Mr. Hardenbergh seconded the motion. The vote was unanimous, 14-0, with Mr. Carty absent from the vote.



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DRAFT MINUTES

FEBRUARY 7, 2020 AT 8:45 AM

POLICE STATION MEETING ROOM, 75 HUDSON ROAD, SUDBURY, MA

Members Present: Chair John Sugrue, At-Large; Vice-Chair Susan Asbedian-Ciaffi, At-Large; Dan Carty, Board of Selectmen; Nathalie Forssell, At-Large; Patricia Guthy, Commission on Disability; Jan Hardenbergh, At-Large; Dave Henkels, Conservation Commission; Ellen Joachim, Lincoln Sudbury Regional High School Committee; Lisa Kouchakdjian, Sudbury Public School Committee; Amy Lepak, Sudbury Housing Authority; Robert May, Council on Aging; John Riordan, Zoning Board of Appeals; Lee Swanson, Historic Districts Commission; and Dick Williamson, Park and Recreation Commission

Members Absent: Janie Dretler, Board of Selectmen and Fred Taylor, Historic Districts Commission

Others Present: Fabiola Alikpokou, Staff Planner, Horsley Witten Group; Adam Duchesneau, Director of Planning and Community Development; Rory Fitzgerald, Fitzgerald & Halliday, Inc.; John Hincks, Planning Board; Nate Kelly, Principal, Horsley Witten Group; Krista Moravec, Senior Planner, Horsley Witten Group; Parker Sorenson, Fitzgerald & Halliday, Inc.; and Beth Suedmeyer, Environmental Planner

Welcome

Mr. Sugrue opened the meeting at 8:50 AM.

Regular Meeting Business

Approval of Meeting Minutes

Mr. Duchesneau indicated there were no meeting minutes for approval.

Review of Packet Materials

Ms. Moravec stated the focus of the meeting would be regarding transportation/circulation but discussion regarding wastewater management would be covered at the next Master Plan Steering Committee (MPSC) meeting on February 28, 2020.

Mr. Swanson explained he had been the Town Historian for several years and noted there was little transportation in town for many years. He spoke about transportation from a historical perspective and explained a train line had gone through Union Avenue. He indicated remorse about losing the train line.

Ms. Fitzgerald commented about improved transportation in Sudbury. She noted the MetroWest Regional Transit Authority (MWRTA) was used but it was not meeting commuter needs. She also spoke of other associated formative issues with the Sudbury roadways, etc. These other issues included:

- Completion of the Bruce Freeman Rail Trail, which will be an asset to transportation and recreation in town.
- Traffic congestion caused by student pick-up and drop off at schools; noting that sidewalks and pathways might help decrease the congestion.
- Corner extensions and bulb-outs (extensions of sidewalks into the street).
- Median Barriers
- Median Islands
- Mini Roundabouts
- On-Street Parking
- Raised Intersections

At this time Mr. May arrived at the meeting.

Mr. Duchesneau noted the Town had received a Community Compact Grant for \$80,000 last year to initiate a regional microtransit pilot program. He indicated this pilot program would be for on-demand ride-share services for seniors, people with disabilities, veterans, and financially vulnerable individuals. He stated negotiations were underway with Uber and taxi companies to provide these services. Mr. Duchesneau noted rider fares would be \$1.00 for rides within Sudbury, \$2.00 for rides to an adjacent community, and \$10.00 for other trips within a 25-mile radius of Sudbury. Every ride would be subsidized by the grant money to keep these rider fares low. He indicated \$45,000 of the grant would be allocated to a Program Manager and \$15,000 would be used for public outreach. Separate transportation mitigation money from Sudbury would be used by the Town to subsidize their rides.

Ms. Suedmeyer spoke regarding the Bruce Freeman Rail Trail and the current status of the project which would stretch from the Concord town line to the Chiswick Park entrance roadway off Union Avenue. She provided information regarding current progress, the proposed timeline for completion, and related details.

Ms. Suedmeyer also provided information regarding the Town's proposed acquisition of a portion of the CSX Rail Line near Framingham, which was currently a Warrant Article for the May 2020 Annual Town Meeting.

Mr. Duchesneau explained the Town's involvement with the Complete Streets Program run by the Massachusetts Department of Transportation (MassDOT), which provided construction funding to communities to complete roadway projects. He detailed the requirements and the different tiers/stages of the program.

Small Groups

Ms. Moravec stated the discussion focus would include modes of transportation and connectivity, with continued consideration of highlighting the issue in the Master Plan and what the level of commitment might be.

Ms. Moravec presented discussion questions to be addressed by the MPSC members including consideration of the growing needs of older residents, investment in new technology, and tools for communication. She also asked the groups to discuss capital investments regarding the upkeep and maintenance of Town facilities and infrastructure, accessibility, the roles of volunteers in Town services, and providing utilities and investment in new facilities.

Ms. Kochakdjian mentioned the increase of people doing their work at Peet's Coffee, Starbucks, and Whole Foods, and inquired about various towns implementing related work hubs. Ms. Moravec confirmed that communities were investing in such work hubs, and questioned if such hubs were near transportation or commuter lines. Ms. Moravec suggested MPSC members include notes about such centers in relation to transportation.

Mr. May commented about Boston Post Road/Route 20, Maynard Road/Route 27, and North Road/Route 117 being at full capacity. Ms. Moravec agreed that all those roadways should be included in the discussion. Mr. Hardenbergh reiterated that Boston Post Road/Route 20 would be the topic of discussion at another meeting. Ms. Moravec confirmed a focus on Boston Post Road/Route 20 would be addressed at the February 28, 2020 MPSC meeting.

Report Out and Discussion

Mr. Kelly reviewed the small group discussion results and noted the groups agreed about varying levels of detail. Mr. Kelly discussed group agreement regarding the traffic problem being a paramount issue which Sudbury could not control without significant help. He detailed the importance of policies which might be worth pursuing to improve safety, quality of life, and provide added amenities.

At this time Mr. Carty left the meeting.

Mr. Kelly spoke of group consensus regarding the necessity of professional staff to address the issue/s. He detailed the global/national culture indicators regarding improved pedestrian travel, which are influenced by local leadership as well as regional and state leadership.

At this time Ms. Lepak left the meeting.

Ms. Moravec stressed the necessity of a holistic, comprehensive approach, and the consideration of land use allocation and possible employment centers.

Mr. Hincks expressed his reluctance regarding additional studies and advocated for a complete traffic assessment (actual vehicle count) to provide options for improving the situation. He stressed that a 5% improvement could be easily implemented. Mr. Hardenbergh agreed that all roadways, especially feeder streets, must be examined. Related discussion took place.

Ms. Kouchakdjian emphasized the need for professional Town guidance to find the additional funding needed to address these issues.

Next Steps

Ms. Moravec reiterated the focus of the next MPSC meeting would be regarding Boston Post Road/Route 20. Mr. Hardenbergh inquired about the Draft Baseline Report and Ms. Moravec stated it would be presented to the MPSC by the end of the month.

Mr. May emphasized Maynard Road/Route 27 and North Road/Route 117 could not be ignored by the MPSC. Ms. Moravec assured Mr. May the Master Plan would cover and discuss those roadways. Mr. Hincks hoped the Boston Post Road/Route 20 discussion at the next MPSC meeting would not rehash the traffic aspects that had been discussed at this meeting. Ms. Moravec agreed and indicated the Boston Post

Road/Route 20 economic development piece, and infrastructure/traffic implications would be the focus points at the next MPSC meeting.

Mr. Henkels noted North Road/Route 117 was not a state road and asked if the existing Master Plan addressed any achievements regarding this roadway. Mr. Kelly indicated a review of this matter had been performed at the beginning of the MPSC process. Ms. Moravec offered to revisit this matter again.

Adjourn

Mr. Hardenbergh motioned to adjourn the meeting at approximately 10:55 AM. Mr. Riordan seconded the motion. The vote was unanimous, 12-0, with Mr. Carty and Ms. Lepak absent from the vote.

Sudbury Master Plan Steering Committee

Housing Diversity Workshop

March 13, 2020

The purpose of the Housing Diversity Workshop is to determine policy direction and level of commitment the Town will make related to current and future housing needs. Specifically:

- How much more residential growth is the Town willing to accommodate?
- Where will this growth happen and what will it look like?
- What level of commitment the Town will make to support other needed services that support housing?

Items in this packet:

- Draft Formative Issues from November workshops related to housing needs
- Key housing data points from the draft Baseline Report
- Summary of Sudbury's Subsidized Housing Inventory (SHI) units
- Memo dated February 12, 2020 from Jody Kablack of the Regional Housing Services Office to Adam Duchesneau, RE: Sudbury Local Preference in Affordable Units

Draft Formative Issues Related to Housing Needs

The following are taken from the Draft Formative Issues reviewed during the November joint workshops with the MPSC and Planning Board.

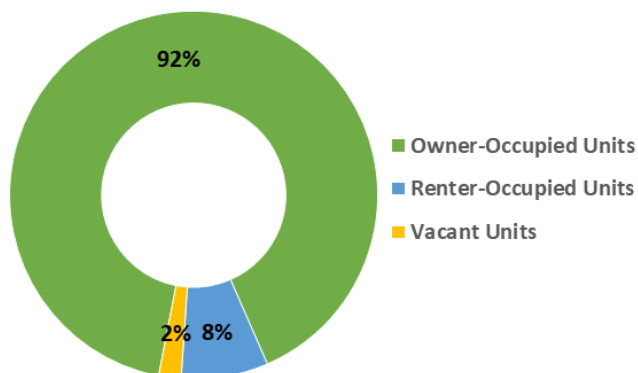
1. Overall, housing costs are increasing in Sudbury and the region, which puts a disproportionate burden on low income residents and households with fixed incomes. While the average household income is increasing, so is the cost of living and the buying power of residents has remained flat over the past 20 years. These conditions create a need for more affordable and diverse housing options.
 - a. Allow for more diverse housing types in zoning.
 - b. Zone for smaller lots.
 - c. Revisit accessory dwelling unit bylaw.
 - d. Evaluate whether inclusionary zoning would be an effective tool.
2. Sudbury has achieved 10% Subsidized Housing Inventory (SHI) goal. However, this achievement has not satisfied the local need. Units are still expensive and, because many units are rentals, market rate units were eligible for the SHI.
 - a. Target future SHI affordable housing units for low and very low-income households (less than 80% AMI)

3. Sudbury Housing Authority's current housing stock is aging and will require investments in maintenance in the future. Much of the housing is located on smaller sites scattered throughout town. Funding sources for the SHA to build new units is also limited.
 - a. Identify a sustained source of funding to ensure maintenance and improvements to all SHA units.
 - b. Identify opportunities to transfer excess town land to the SHA for the development of affordable housing.
4. Transportation needs to be linked with housing development to ensure residents can access work, school, and needed services, particularly seniors, people with disabilities, and low income residents.
 - a. Work with developers to link projects with the existing transportation network or build in services for SHI units.
5. There are few rental housing options in Sudbury.
 - a. Invest in areas like Route 20 (infrastructure) to allow for small-scale multi-family and mixed use housing options.

Key Housing Data

Availability of Rental Units

Most housing in Sudbury was occupied (98%) in 2017 and primarily by owners.



Source: Table DP04, 2017 American Community 5-Year Estimates (2013-2017)

Figure 1. Housing Occupancy

Buying a Home

The median sales price for a single-family home in Sudbury in 2018 was \$749,900, an increase of 11% since 2014.

Table 1. Median Sales Price of a Single Family Home, 2014-2018

| | 2014 | 2015 | 2016 | 2017 | 2018 | % Change 2014-2018 |
|---------|-----------|-----------|-----------|-----------|-----------|-----------------------|
| Sudbury | \$675,000 | \$680,000 | \$695,000 | \$718,500 | \$749,900 | 11% |

Source: The Warren Group

Household Income

The median household income for Sudbury was \$170,945 and the median family household income was \$183,234.

By occupancy, nearly three-quarters of renters and 11% of owner-occupied households were considered low, very low, or extremely low income.

Table 2. Income Distribution Based on Household Occupancy, 2015

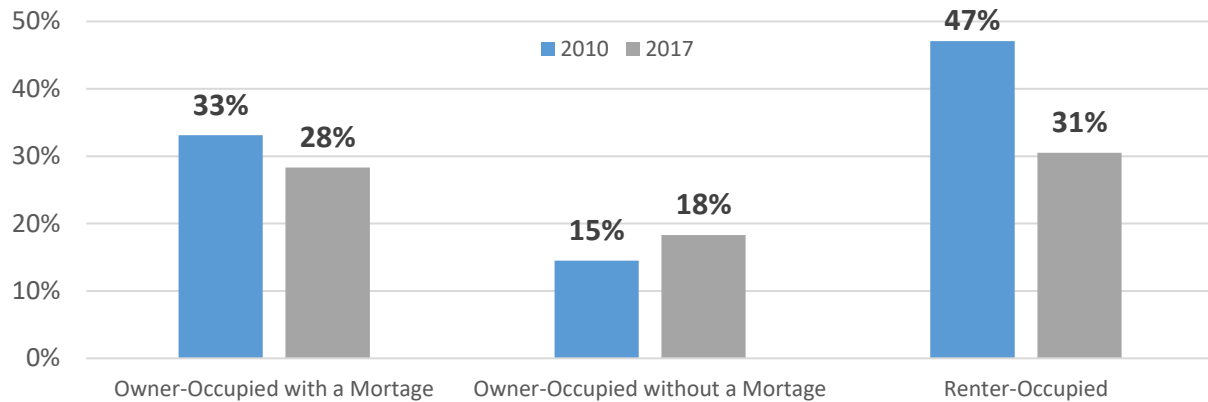
| Income Distribution Overview | Owner-Occupied Households | Renter-Occupied Households | Total Households |
|--|------------------------------|-------------------------------|---------------------|
| Household Income <= 30% HAMFI (extremely low income) | 285 (5%) | 115 (32%) | 400 (7%) |
| Household Income >30% to <=50% HAMFI (very low income) | 95 (2%) | 135 (38%) | 230 (4%) |
| Household Income >50% to <=80% HAMFI (low income) | 225 (4%) | 25 (7%) | 250 (4%) |
| Household Income >80% to <=100% HAMFI (moderate income) | 290 (5%) | 10 (3%) | 300 (5%) |
| Household Income >100% HAMFI | 4,815 (84%) | 70 (20%) | 4,885 (81%) |
| Total | 5,710 | 355 | 6,065 |

HAMFI – HUD Area Median Family Income. This is the median family income calculated by HUD for each jurisdiction, in order to determine Fair Market Rents (FMRs) and income limits for HUD programs. HAMFI will not necessarily be the same as other calculations of median incomes (such as a simple Census number), due to a series of adjustments that are made (For full documentation of these adjustments, consult the [HUD Income Limit Briefing Materials](#)). If you see the terms "area median income" (AMI) or "median family income" (MFI) used in the CHAS, assume it refers to HAMFI. Sudbury is part of the Boston-Cambridge-Quincy MA-NH HUD Metro FMR, where the HAMFI was \$98,500 in 2015.

Source: HUD CHAS data based on 2015 American Community Survey 5-Year Estimates (2011-2015)

Housing Affordability and Cost-Burdened Households

As a rule of thumb, when aggregated, housing costs (rent, mortgage, insurance, utilities, fees, real estate taxes, etc.) should be no more than 30% of a household's income. When housing costs are greater than 30%, a household is considered to be "cost-burdened." **Error! Reference source not found.** figure below shows the change from 2010 to 2017 in renter-occupied households and owner-occupied households, with and without a mortgage with housing cost burdens in Sudbury.



Source: Table DP04, 2010 (2006-2010) and 2017 (2013-2017) American Community Survey 5-Year Estimates
Figure 2. Percentage of Units with Housing Cost Burdens by Occupancy Type in Sudbury, 2010 and 2017

The median home sales price in 2018 was \$749,900. It is estimated the monthly mortgage payment for a home with this cost is \$4,285, and the household income needed to afford this payment is \$171,040.¹ The median household income for Sudbury was \$170,945 and the median family household income was \$183,234. This payment would equate to approximately 30% and 28% of the monthly income for these households, respectively, at or slightly under the 30% threshold.

The Massachusetts Homeless Coalition identifies the lack of affordable housing as a main driving force behind the rise of homelessness. Those most at risk in Sudbury are individuals and families which are cost-burdened, particularly those paying more than 50% of their income on housing (severely cost-burdened). These data were available through the 2015 CHAS data, and it was estimated that 615 households were severely cost-burdened in Sudbury.

Table 3. Severely Cost-Burdened Households in Sudbury, 2015

| Household Type | Estimated Households |
|---|----------------------|
| Elderly Family Households (2 persons either or both 62 years or older) | 155 |
| Elderly Non-Family Households (2 persons either or both 62 years or older) | 212 |
| Small Family Households (2 persons neither 62 years or older, or up to 4 persons) | 190 |
| Large Family Households (5 persons or more) | 23 |
| Other Household Types (non-family, non-elderly) | 35 |
| Estimated Total | 615 |

Severely cost-burdened: Household paying more than 50% of its income on aggregate housing costs
 Source: HUD CHAS data based on 2015 American Community Survey 5-Year Estimates (2011-2015)

¹ Assumes a 20% down payment and includes insurance, taxes (\$17.91/\$1,000 for FY 2019), and P&I. Source: <https://www.zillow.com/mortgage-calculator/>. \$4,285 x 12 months = \$51,420, which is 30% of \$171,400.

Subsidized Housing Inventory (SHI) for Sudbury (2020)

| Project | Developer or owner | Rent/own | Restrictions | Affordable | Market units | Total Units Toward SHI | Affordability Deed Restriction/ Expiration |
|---|---------------------------|----------|-----------------------------------|------------|--------------|------------------------|--|
| Avalon Sudbury | Private | rent | None | 63 | 187 | 250 | Perpetuity |
| Carriage Lane | Private | own | None | 4 | 12 | 4 | Perpetuity |
| Coolidge 1 | Private | rent | 55+ | 64 | 0 | 64 | Perpetuity |
| Coolidge 2 | Private | rent | 55+ | 56 | 0 | 56 | Perpetuity |
| DDS Group Homes | DDS | - | Persons with disabilities | 5 | 0 | 5 | - |
| Family Rental Units #1 (Great, Ford, Great Lake, Oakwood) | Sudbury Housing Authority | rent | None | 8 | 0 | 8 | Perpetuity |
| Family Rental Units #2 (Greenwood, Curry, Beachwood, Richard) | Sudbury Housing Authority | rent | None | 4 | 0 | 4 | Perpetuity |
| Family Rental Units #3 (Fairbanks Cir, Old Meadow, Pine) | Sudbury Housing Authority | rent | None | 12 | 0 | 12 | Perpetuity |
| Habitat for Humanity - Dutton Rd. | Sudbury Housing Trust | own | None | 2 | 0 | 2 | Perpetuity |
| Home Preservation Program (scattered sites) | Sudbury Housing Trust | own | None | 8 | 0 | 8 | Perpetuity |
| Landham Crossing | Private | own | None | 8 | 23 | 8 | Perpetuity |
| Landham Rd. | Sudbury Housing Authority | rent | None | 3 | 0 | 3 | Perpetuity |
| Longfellow Glen (elderly) | Private | rent | 62+ and persons with disabilities | 50 | 0 | 50 | 2071 |
| Longfellow Glen (family) | Private | rent | None | 70 | 0 | 70 | 2071 |
| Maynard Rd. | Sudbury Housing Trust | own | None | 3 | 0 | 3 | Perpetuity |
| Musketahquid Village | Sudbury Housing Authority | rent | 62+ and persons with disabilities | 64 | 0 | 64 | Perpetuity |

| Project | Developer or owner | Rent/own | Restrictions | Affordable | Market units | Total Units Toward SHI | Affordability Deed Restriction/ Expiration |
|--|---------------------------|----------|-----------------|------------|--------------|------------------------|--|
| Orchard Hill at Sudbury | Private | rent | Assisted living | 10 | 35 | 45 | 2049 |
| Sudbury Meadows/ Snowberry Ln. | Private | own | None | 2 | 6 | 2 | Perpetuity |
| Villages Old County Rd. | Private | own | None | 10 | 27 | 10 | Perpetuity |
| Willis Lake Dr. | Sudbury Housing Authority | rent | None | 1 | 0 | 1 | Perpetuity |
| Subtotal | | | | 447 | | 669 | |
| Quarry North (in development, est. 2030) | Private | rent | None | 25 | 75 | 100 | Perpetuity |
| Total | | | | 472 | | 769 | |

Source: Regional Housing Services Office (<https://www.rhsohousing.org/node/86/housing-inventory>) and Sudbury Housing Authority

Units to Own: All have no age restrictions.

| Affordable | Market Units | Total Units Toward SHI |
|------------|--------------|------------------------|
| 37 | 57 | 37 |

*Includes Quarry North and does not include DDS Group Homes

Units to Rent

| Restriction | Affordable | Market Units | Total Units Toward SHI | % of Total Affordable Rental Units |
|-----------------------------------|------------|--------------|------------------------|------------------------------------|
| 55+ | 120 | 0 | 120 | 28% |
| 62+ and persons with disabilities | 114 | 0 | 114 | 27% |
| Assisted living | 10 | 35 | 45 | 2% |
| None | 186 | 262 | 448 | 43% |
| Total | 430 | 297 | 727 | |

*Includes Quarry North and does not include DDS Group Homes

Age-Restricted Developments in Sudbury

| Project | Owner | Rent/own | Restricted | Market units | Expiration of Deed Restriction | Notes |
|-----------------------------------|-------------|----------|-------------------|--------------|--------------------------------|-------------------|
| Northwoods midrise | Private | own | 55+ | 22 | N/A | |
| Northwoods TH | Private | own | 80% 55+ | 19 | N/A | |
| Mahoney Farm | Private | own | 55+ | 33 | N/A | |
| Highcrest at Meadow Walk | Private | own | 55+ | 60 | N/A | |
| Maple Meadows | Private | own | 55+ | 23 | N/A | |
| Springhouse Pond | Private | own | 55+ | 29 | N/A | |
| Grouse Hill | Private ISD | own | 55+ | 52 | Perpetuity | price restriction |
| Frost Farm (town owned leasehold) | Sudbury ISD | own | 55+ asset/ inc | 44 | Perpetuity | price restriction |

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ISD is Incentive Senior Development, a Sudbury bylaw giving increased density for perpetual resale price restriction.

A special exception to the 55 and over restrictions for all condos in Sudbury was made for the second phase of Northwoods, therefore only 80% age restricted.



Regional Housing Services Office

Serving Acton, Bedford, Concord, Lexington, Lincoln, Sudbury, Wayland, and Weston

Office Address: 37 Knox Trail, Acton, MA 01720
Phone: (978) 287-1092

Website: WWW.RHSOhousing.org
Email: INFO@RHSOhousing.org

TO: Adam Duchesneau, Director of Planning and Community Development
FROM: Jody Kablack, RHSO Specialist
DATE: February 12, 2020
RE: Sudbury Local Preference in Affordable Units

As requested by the Master Plan Steering Committee, we have researched the use of the “Local Preference” classification in Sudbury affordable housing units over the last 3 years, and are ready to share the results with you. We looked at all affordable units – rental and homeownership. Some developments, through their development permits, require a local preference, and some do not. All developments reported with the exception of Orchard Hill, which does provide 10 affordable units (all of which are prioritized for local preference).

“Local Preference”, as documented in an April 6, 2019 letter from the RHSO to the Director of Planning and Community Development (attached), includes:

- Current Sudbury residents
- Families with children enrolled in the Sudbury/LS schools
- Employees of the Town of Sudbury, including Sudbury Public School
- Employees of businesses located in the Town of Sudbury
- Employees of the Lincoln-Sudbury Regional High School
- Employees of the Sudbury Water District
- Employees of the Sudbury Housing Authority

Over the last 3 years, 124 affordable vacancies were filled in Sudbury (this includes all 63 of the Avalon affordable rental units). Of these, 36 households qualified as Local Preference (or 29%). Of that 36 households:

- 30 were current Sudbury residents
- 3 work in Sudbury
- 1 is a Sudbury school enrollee
- 2 are unclassified

One other category that is not defined as Local Preference, but which does benefit Sudbury residents, are those with a connection to Sudbury – former residents and family members of Sudbury residents. Sixteen (16) additional units are occupied by this group.

The data from each development is below:

- Coolidge I - 23 move-ins since 2017, 2 Local Preference - 1 Sudbury resident, 1 employed in Sudbury; 16 with a Sudbury connection - 2 former Sudbury residents, 14 with immediate family member living in Sudbury
- Musketahquid Village - 27 move-ins since 2017, 19 Sudbury residents



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Website: WWW.RHSOhousing.org
Email: INFO@RHSOhousing.org

-
- Sudbury Housing Authority Family units - 9 move-ins since 2017, 5 Sudbury residents
 - Avalon Sudbury - 63 move-ins, 8 local preferences. 3 were current residents, 2 were employees, 1 is enrolled in Sudbury schools and 2 are unclassified but met the criteria.
 - Village at Old County Road - 1 sale since 2017, went to local resident
 - Carriage Lane - 1 sale since 2017, went to local resident

The need to offer units as Local Preference must be documented to DHCD as needed when affordable housing lotteries are conducted. The most recent lottery in Sudbury was for the Coolidge II development. Sudbury continues to document the need for, and benefit from, providing Local Preference units, as indicated above.

If there is anything else you need regarding this issue, do not hesitate to contact the RHSO.

Attachment



Regional Housing Services Office

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

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

www.RHSOHousing.org
info@RHSOhousing.org

April 6, 2019

To: Adam Duchesneau, Jesse Kanson-Benanav

From: Liz Rust, RHSO

RE: Local Preference for Coolidge

This Local Preference justification is for the Coolidge Phase II, to request that 33 units be set aside at the initial lottery for those households that claim a local preference in Sudbury, as further describes.

The Coolidge Phase II is comprised of 56 units, of which 8 are project based section 8 units and not eligible for Local Preference. The 70% local preference (rounded down) is based on the resulting 48 units, leaving 33 units.

The need for affordable rental housing in Sudbury is particularly prominent. Sudbury's Housing Production Plan (HPP), highlights that Sudbury has the lowest percentage of rental housing compared to its neighboring communities at only 8%. The HPP goes on to point out that market rental housing in Sudbury is virtually non-existent, and Sudbury has not increased rental housing since 2000. Furthermore, there are only a limited number of affordable rental units in Sudbury with wait times for these units ranging from five to twelve years.¹

The US Census reports that there were 5,771 households in Sudbury in 2010. According to housing.ma, the Massachusetts Housing Data Portal, 4.4% (254) of Sudbury households are extremely low income – below 30% Area Median Income (AMI), 4.1% (237) are very low income – between 30% and 50% AMI, and 2.8% (162) are low income – between 50% and 80% AMI. This means that a total of 653 households in Sudbury are low income. A low income family of four in Sudbury at 80% of the Area Median Income (AMI) earns no more than \$73,050 annually. Using a 30% housing allowance, such a family can afford to pay approximately \$1,826 per month in rent if all utilities are included, or \$1,395 per month in rent if no utilities are included.

According to trulia.com, the median price for rentals in Sudbury in October, 2016 was \$3,500. According to a trulia.com search on 11/15/16, there were only seven rental listings. Two of the listings – one was just a room, and the other was an age-restricted affordable unit – rented at a cost affordable to a low-income household. There was one other apartment listed for \$2,000. The other listings were large homes with rents ranging from \$2,500 to \$12,500 per month. These numbers demonstrate that the rental inventory in Sudbury clearly offers very few options for the 653 low-income households in Sudbury.

It is not likely that all 653 low-income households in Sudbury are looking for rental housing. However, a significant percentage of these households are cost-burdened, meaning that they spend more than 30% of their incomes on housing costs. According to housing.ma, 73% of extremely low income households, 93% of very low income households, and 51% of low income households in Sudbury are cost burdened. These percentages equate to a total of 488 cost-burdened, low-income households in need of housing that is more affordable to them. The rental options currently available in Sudbury are not nearly enough to meet the need of this large number of cost-burdened, low-income households.

Given the shortage of rental housing affordable to low-income residents of Sudbury and the housing cost burden faced by many Sudbury residents, the Town of Sudbury would like to offer more affordable rental opportunities to its residents.

Any person or household who qualifies under the local preference shall have equal consideration in the Local Pool, and will also be eligible in the General Pool. The local preference is defined further as residents of the Town, to include:

- Current Sudbury residents
- Families with children enrolled in the Sudbury/LS schools

¹ Sudbury Housing Production Plan, pp. 6, 14-15, 18, <http://www.mass.gov/hed/docs/dhcd/cd/pp/sudbury.pdf>



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- Employees of the Town of Sudbury, including Sudbury Public School
- Employees of businesses located in the Town of Sudbury
- Employees of the Lincoln-Sudbury Regional High School
- Employees of the Sudbury Water District
- Employees of the Sudbury Housing Authority.

The Town is committed to providing equal access to all applicants. In the event that the pool of applicants with a local preference does not include at least 27% of households who have one or more member who is a minority as defined in the application, then other eligible minority applicants will be included in the lottery for the local preference units. The number of minority applicants needed in order to meet or exceed 27% will first be determined from the final list of eligible lottery applicants, and then eligible minority applicants will be included from the general pool through a minority pre-lottery.