



# Town of Sudbury

## Housing Trust

HousingTrust@sudbury.ma.us

Flynn Building  
278 Old Sudbury Road  
Sudbury, MA 01776  
978-639-3387  
Fax: 978-639-3314  
www.sudbury.ma.us/housingtrust

### **AGENDA**

**Thursday, September 8, 2022**

**8:00 AM**

**Virtual Meeting**

Pursuant to Chapter 107 of the Acts of 2022, this meeting will be conducted via remote means. Members of the public who wish to access the meeting may do so in the following manner:

Please click the link below to join the virtual Housing Trust Meeting:

<https://us02web.zoom.us/j/85164326118>

For audio only, call the number below and enter the Meeting ID on your phone keypad:

Call In Number: 978-639-3366 or 470-250-9358

Meeting ID: 851 6432 6118

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

#### Welcome and Announcements

#### Board Operations

1. Minutes: Approve Meeting Minutes of June 23, 2022, July 25, 2022, August 9, 2022, August 11, 2022, and September 1, 2022, if presented
2. Financial Update
  - Ratify FY23 July Transactions, if presented
  - Review FY22 Community Preservation Act CP-3 Form
  - Review FY23 Community Preservation Act Funding Request

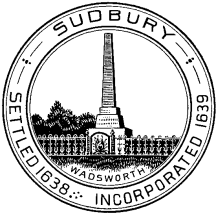
#### Housing Trust Initiatives

1. Diversity, Equity, and Inclusion Commission Discussion
  - Community Outreach
2. Program Update
  - Small Grant Program – Discussion on Program Parameters
  - Mortgage Assistance Program – Update
  - Tenant Rental Assistance Program – Review of Program Materials
3. 4 Longfellow Road – Update

#### Public Comment

#### Other or New Business

*These agenda items are those reasonably anticipated by the Chair which may be discussed at the meeting. Not all items listed may in fact be discussed and other items not listed may also be brought up for discussion to the extent permitted by law.*



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### **DRAFT MINUTES**

**JUNE 23, 2022 AT 8:00 AM**

### **VIRTUAL MEETING**

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

**Housing Trust Members Absent:** Cynthia Howe and John Riordan

**Others Present:** Director of Planning and Community Development Adam Duchesneau

Mr. Gentile called the meeting to order at 8:01 AM.

#### **1. 67-73 Nobscot Road – Site Feasibility Analysis Update including Discussion regarding Agreement with Sudbury Housing Authority**

Mr. Gentile provided an overview of the Memorandum of Agreement between the Housing Trust and the Sudbury Housing Authority which would allow the Sudbury Housing Authority to engage with the Cambridge Housing Authority to provide site feasibility analysis consulting services for the 67-73 Nobscot Road property. He noted the Memorandum of Agreement called for the Housing Trust and Sudbury Housing Authority to split the cost of these consulting services.

Mr. Duchesneau indicated the matters before the Housing Trust were to vote on whether to enter into an Agreement with the Sudbury Housing Authority to engage with the Cambridge Housing Authority, to authorize an additional \$5,000 to be allocated to the 67-73 Nobscot Road site feasibility analysis work to match the level of funding the Sudbury Housing Authority had allocated for the initiative, and to authorize Chair Carmine Gentile to sign the Agreement on behalf of the entire Housing Trust.

Ms. Cronin made a motion for the Housing Trust to enter into an Agreement with the Sudbury Housing Authority to engage with the Cambridge Housing Authority, to authorize an additional \$5,000 to be allocated to the 67-73 Nobscot Road site feasibility analysis work, and to authorize Chair Carmine Gentile to sign the Agreement with the Sudbury Housing Authority to engage with the Cambridge Housing Authority on behalf of the entire Housing Trust. Ms. Dretler seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Mr. Pops – Aye, and Ms. Scotti – Aye.

### **Public Comment**

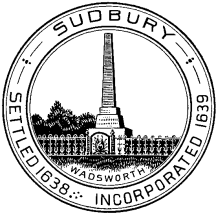
There were no public comments.

### **Other or New Business**

Mr. Duchesneau noted the next Housing Trust meeting would be held on July 14, 2022 at 8:00 AM.

At 8:08 AM, Ms. Dretler made a motion to adjourn the meeting. Mr. Pops seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Mr. Pops – Aye, and Ms. Scotti – Aye.

DRAFT



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### DRAFT MINUTES

JULY 25, 2022 AT 8:00 AM

### VIRTUAL MEETING

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

**Housing Trust Members Absent:** Karl Pops and John Riordan

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

Mr. Gentile called the meeting to order at 8:03 AM.

#### 1. Minutes: Approve Meeting Minutes of May 12, 2022 and June 9, 2022, if presented

Mr. Hummel made a motion to approve the minutes of May 12, 2022 as amended. Ms. Cronin seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Ms. Howe – Aye, and Ms. Scotti – Aye.

Ms. Cronin made a motion to approve the minutes of June 9, 2022. Mr. Hummel seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Ms. Howe – Aye, and Ms. Scotti – Aye.

#### 2. Financial Update

- Vote to Ratify FY22 May Transactions

Ms. Rust provided a brief overview of what the transactions entailed.

Ms. Cronin inquired about the logistics of the expenditure of Community Preservation Act funds, how these expenditures were tracked, and how they were entered into the Housing Trust's account.

Ms. Cronin made a motion to ratify the FY22 May Transactions. Ms. Howe seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Ms. Howe – Aye, and Ms. Scotti – Aye.

- Vote to Approve FY23 Budget

Ms. Rust provided a brief overview of what the budget entailed and provided details regarding the Community Preservation Act funds.

There was then discussion regarding how the Community Preservation Act funds which had been allocated to the Housing Trust would be designated or not to specific projects. Ms. Cronin sought confirmation as to how much funding the Housing Trust could allocate toward a potential purchase of the 67-73 Nobscot Road property. Ms. Howe suggested a very simple budget sheet be provided which broke out the Community Preservation Act funding which had been allocated and expended.

Ms. Dretler made a motion to ratify the FY23 Budget. Ms. Howe seconded the motion.

Discussion ensued regarding the specifics of funding allocations in the FY23 Budget.

Ms. Howe made a motion to amend the original motion to postpone a vote on the FY23 Budget until the next Housing Trust meeting in August of 2022. Ms. Cronin seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Ms. Howe – Aye, and Ms. Scotti – Aye.

### **3. Update on Community Preservation Coordinator Position**

Mr. Duchesneau indicated his office was in the final reference checking stage for one candidate and, if those references came back positive, they hoped to have the new person on board before the Housing Trust's next meeting in August of 2022.

### **4. 67-73 Nobscot Road – Site Feasibility Analysis Update**

Mr. Duchesneau stated on July 19, 2022 a 67-73 Nobscot Road Subcommittee kickoff meeting was held with the Cambridge Housing Authority. The plan was to conduct a site visit to the property the week of August 1, 2022 or August 8, 2022 in order to allow the Cambridge Housing Authority to see the property in person. Mr. Duchesneau noted the Subcommittee was hopeful the Cambridge Housing Authority could help the Housing Trust and the Sudbury Housing Authority understand what the limitations of the endangered species habitat were on the property and, if necessary, how to navigate the Natural Heritage and Endangered Species Program permitting process.

### **5. Mortgage Assistance Program (State Funded)**

Ms. Rust discussed the specifics of the funds which had been expended for this program. Mr. Gentile raised concerns people were not aware of the program. Ms. Howe wondered if the Assessor's Office would allow the Housing Trust to put a link in their Tax Portal to make people aware of the Housing Trust's Mortgage Assistance Program. There was then discussion regarding ways to push out notifications of this program through the various community outreach resources.

## **6. Local American Rescue Plan Act (ARPA) Awards**

- COVID Small Grant Program (\$75,000)
- Mortgage Assistance Program (\$75,000)
- Tenant Rental Assistance Program (\$125,000)

Mr. Duchesneau noted these funds had not been placed into the Housing Trust's account just yet due to the heavy workload on the Finance Department because of the closing of FY22 and start of FY23.

Ms. Dretler noted the Select Board's ARPA funding votes were taken based upon the memorandum submitted to the Select Board from the Housing Trust.

Ms. Cronin wanted to ensure the ARPA funding allocations would be expended for the appropriate programs in the designated amount of time.

Ms. Howe and Ms. Rust agreed to look into some of the details and requirements of these funding allocations for a future meeting.

Mr. Gentile suggested opening back up the rental assistance program. Other Housing Trust members agreed, but Ms. Howe requested that she and Ms. Rust meet regarding the details and requirements of these funding allocations before moving forward with this idea.

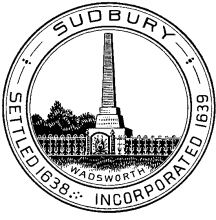
### **Public Comment**

There were no public comments.

### **Other or New Business**

Mr. Duchesneau noted the next Housing Trust meeting would be held on August 11, 2022 at 8:00 AM.

At 9:06 AM, Ms. Dretler made a motion to adjourn the meeting. Ms. Cronin seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Ms. Howe – Aye, and Ms. Scotti – Aye.



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### DRAFT MINUTES

AUGUST 9, 2022 AT 8:30 AM

### VIRTUAL MEETING

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

**Housing Trust Members Absent:** None

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

Mr. Gentile called the meeting to order at 8:32 AM.

#### 1. Resale Updates

##### a. 4 Longfellow Road – Notice Provided, Town Action, and Discussion

Mr. Gentile indicated the property owner had provided notice to the Town they were interested in selling the dwelling unit and the Town had a right of first refusal on the property.

Ms. Rust noted this dwelling was the first unit in the Home Preservation Program which converted market rate units to affordable dwelling units in 2008. She indicated the property had a deed restriction on it to maintain its affordability. Ms. Rust also stated the dwelling unit had received funding from the Housing Trust's Small Grant Program to repair various components of the dwelling.

At this time Ms. Cronin arrived at the meeting.

Ms. Rust described the issues which needed to be addressed before the dwelling unit could be resold to a new owner. She pointed out a new low-income buyer of the unit would not be able to address all of these items. Ms. Rust noted there were only 37 deed restricted affordable home ownership units in Sudbury with no new ownership affordable dwelling units on the horizon. In her opinion, the dwelling unit could not be marketed in its current state.

Mr. Gentile noted the Housing Trust or Sudbury Housing Authority would need to invest funds to bring the unit into a state where it could be resold, no matter which entity decided to take control of the dwelling unit.

Ms. Rust noted the Town, in working with the Department of Housing and Community Development, would ask the property owner to withdraw/delay their notice of intent to sell in order to assist the homeowner in addressing the deficiencies with the dwelling unit so it could be sold.

Ms. Howe wondered if this unit was suitable to be redeveloped as a two-family dwelling unit, potentially by the Sudbury Housing Authority. However, unless there was an alternative use, she advocated for the Housing Trust redeveloping/repairing the unit to retain it as an affordable homeownership property.

Ms. Dretler inquired as to what the rough estimated cost would be to rehabilitate the unit. Ms. Rust indicated it would cost between \$50,000 and \$100,000 possibly.

Ms. Dretler asked if any repairs or upgrades had been undertaken in the 14 years of ownership by the current owner. Ms. Rust stated, yes, work and repairs had been undertaken during the time the current owner had retained the property.

Ms. Howe indicated repairs for less than \$100,000 would be well worth doing to bring the dwelling unit up to marketability status.

Ms. Howe inquired if the Housing Trust needed to purchase the dwelling unit in order to preserve it as an affordable dwelling unit. She also inquired if the Housing Trust could prohibit the owner from selling the unit while the repairs to the home were being addressed. Ms. Rust indicated the dwelling unit would remain an affordable unit no matter who purchased the dwelling unit because it was deed restricted. She also noted it was possible to delay the marketing and sale of the dwelling unit in order to address the necessary repairs.

Amy Lepak from the Sudbury Housing Authority stated they were interested in the property, but would not want to take ownership of the property with the dwelling unit in its current condition.

There was then discussion regarding the potential to redevelop the property as a two-family dwelling. Ms. Lepak indicated the more financially responsible path would be to have the repairs completed before the Sudbury Housing Authority took possession of the dwelling unit.

Ms. Rust stated the Town had to indicate whether or not it would like to exercise its right of first refusal for the property.

Ms. Howe made a motion to recommend the Select Board exercise the Town's right of first refusal on the property at 4 Longfellow Road. Ms. Cronin seconded the motion. Discussion ensued.

Mr. Duchesneau noted there appeared to be three paths forward for this situation, which were as follows: 1) the Town could decide to exercise its right of first refusal to purchase the dwelling unit; 2) the Town could decide not to exercise its right of first refusal to purchase the dwelling unit; or 3) the Town could work with the homeowner to withdraw/delay their notice of intent to sell the dwelling unit and repair the dwelling to make it marketable.



Ms. Cronin inquired about the authority of the Town and/or the Department of Housing and Community Development to compel the property owner to withdraw their intent to sell and work to address the repairs to the dwelling unit. Ms. Rust indicated this was possible and was within the authority of Department of Housing and Community Development.

At this time Mr. Rust left the meeting.

Ms. Howe made a motion to withdraw the 4 Longfellow Road resale item (Item # 4) from the August 9, 2022 Select Board agenda, and to also instruct Town staff to work with the Department of Housing and Community Development and the property owner to put on hold the resale process for 4 Longfellow Road in order to work with the owner to develop a plan to address a number of deficiencies with the dwelling unit as part of any resale process. Mr. Gentile seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Ms. Howe – Aye, Mr. Pops – Aye, Mr. Riordan – No, and Ms. Scotti – Aye.

Select Board member Charlie Russo asked for background to be provided to the Select Board as to why this item was being withdrawn from the Select Board's August 9, 2022 agenda.

Ms. Howe inquired as to why Mr. Riordan voted against the motion. Mr. Riordan indicated he felt he did not have enough information about the situation to vote in favor of the motion.

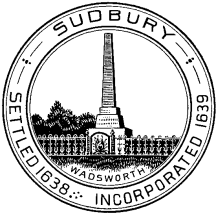
### **Public Comment**

There were no public comments.

### **Other or New Business**

There were no topics discussed under this item.

At 9:23 AM, Mr. Riordan made a motion to adjourn the meeting. Ms. Dretler seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Ms. Howe – Aye, Mr. Pops – Aye, Mr. Riordan – Aye, and Ms. Scotti – Aye.



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### **DRAFT** MINUTES

**AUGUST 11, 2022 AT 8:00 AM**

### **VIRTUAL MEETING**

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

**Housing Trust Members Absent:** None

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

Mr. Gentile called the meeting to order at 8:03 AM.

#### **1. Minutes: Approve Meeting Minutes of June 23, 2022, if presented**

Mr. Duchesneau indicated the draft minutes from June 23, 2022 had not yet been prepared, but they would be ready for review at the next Housing Trust meeting.

#### **2. Financial Update**

- Vote to Ratify FY22 June Transactions

Mr. Gentile provided a brief overview of what the transactions entailed.

At this time Ms. Cronin and Ms. Dretler arrived at the meeting.

Ms. Howe made a motion to ratify the FY22 June Transactions. Mr. Gentile seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Ms. Howe – Aye, Mr. Pops – Aye, Mr. Riordan – Absent, and Ms. Scotti – Aye.

- Review FY22 Community Preservation Act Funding, CP-3 Form
- Discuss FY23 Community Preservation Act Funding
- Revise Approved FY23 Budget, if desired

Ms. Rust discussed how Community Preservation Act funds were intended to be allocated and inquired as to how the Housing Trust would like to track these funds. She noted it may be in the

interest of the Housing Trust to seek a Community Preservation Act allocation from the May 2023 Annual Town Meeting for FY24.

At this time Mr. Riordan joined the meeting.

Mr. Gentile noted it seemed a report of how the Community Preservation Act funds were being used needed to be compiled.

Ms. Cronin stated it would be a good idea to go back to the Community Preservation Committee to inquire whether it was permissible to use the allocated Community Preservation Act funds for a variety of affordable housing activities.

Ms. Rust noted there were active requests for funding from the Housing Trust and it would be helpful for the Housing Trust to determine how they would like to allocate their funding.

There was then discussion regarding whether and how to submit a Community Preservation Act funding application request to the Community Preservation Committee. Ms. Rust recommended seeking at least the minimum 10% housing allocation for FY24. The Housing Trust members discussed possibly making a 15% FY24 Community Preservation Act funding allocation request.

Ms. Howe made a motion for the Housing Trust to file a Community Preservation Act funding application for up to 25% of the Community Preservation Act surcharge in FY24 for the acquisition, creation, preservation, and support of community housing. Ms. Dretler seconded the motion.

Discussion then ensued regarding the amount of 25% for the funding request. Certain Housing Trust members felt perhaps a 30% funding request would be more appropriate.

Mr. Riordan made a motion to amend the pending motion to remove the “up to” language from Ms. Howe’s original motion. Mr. Gentile seconded the motion. The Housing Trust members agreed to this as a friendly amendment to the original motion.

Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Ms. Howe – Aye, Mr. Pops – Aye, Mr. Riordan – Aye, and Ms. Scotti – Aye.

Amy Lepak from the Sudbury Housing Authority stated they would not be submitting a Community Preservation Act funding request application for FY24 to the May 2023 Annual Town Meeting.

### **3. Update on Community Preservation Coordinator Position**

Mr. Duchesneau introduced Mr. Poteat to the Housing Trust as the new Community Preservation Coordinator. Mr. Duchesneau stated Mr. Poteat’s primary responsibilities would be staffing the Housing Trust and Community Preservation Committee.

#### **4. Home Preservation Update – 4 Longfellow Road, 490 Dutton Road**

Ms. Rust indicated she was meeting with Habitat for Humanity later in the day to discuss the 490 Dutton Road property. She noted Habitat for Humanity was seeking the Housing Trust to fund repairs for the dwelling unit up front with Housing Trust money.

Ms. Rust then stated the Department of Housing and Community Development and the owner had agreed to put the resale of 4 Longfellow Road on hold for one month to address the repairs which are required for the dwelling unit. She suggested the Housing Trust select a few of the repair items to provide funding for and have the homeowner address the rest of the repairs for the dwelling unit. Ms. Rust indicated she was meeting with the homeowner of 4 Longfellow Road on August 12, 2022 to discuss how to handle the needed repairs.

Mr. Gentile agreed the Housing Trust should pay for the repairs to the electrical line which runs from the public right of way of Longfellow Road to the dwelling unit.

Mr. Gentile made a motion for the Housing Trust to invest funds to repair the electrical line running from the public right of way of Longfellow Road to the dwelling unit to meet code and for Town staff to work with the homeowner at 4 Longfellow Road to address the other deficiencies with the property. Mr. Riordan seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Ms. Howe – Aye, Mr. Pops – Aye, Mr. Riordan – Aye, and Ms. Scotti – Aye.

#### **5. 67-73 Nobscot Road – Site Feasibility Analysis Update**

Mr. Duchesneau indicated members from the Housing Trust and Sudbury Housing Authority, as well as staff from the Cambridge Housing Authority, would be attending a site visit to the property on August 10, 2022.

#### **6. Mortgage Assistance Program (State Funded)**

Ms. Rust provided a brief update on the status of the program and noted her office was working to further promote the program within the community.

#### **7. Local American Rescue Plan Act (ARPA) Awards**

- COVID Small Grant Program (\$75,000)
- Mortgage Assistance Program (\$75,000)
- Tenant Rental Assistance Program (\$125,000)

Ms. Rust noted the ARPA funding amounts which had been allocated by the Select Board for the various local housing assistance programs.

Mr. Gentile noted there was also a state funding earmark of \$75,000 which had been secured by the Town for usage towards the Mortgage Assistance Program, which would bring the total amount of funding for the Mortgage Assistance Program to \$150,000.

Ms. Howe discussed some gaps in the Sudbury Rental Relief Program where certain households who really needed assistance were not qualifying to obtain these grants.

At this time Mr. Gentile and Mr. Pops left the meeting.

Ms. Howe made a motion to make the following modifications to the Sudbury Rental Relief Program (SRRP) application process:

- Applicants are eligible if they spend less than 27% on rent (versus 30% before) or are below the 30% Area Median Income (AMI) limit (new).
- Only tenants who have not received assistance in the past from the Housing Trust are eligible (new).
- The minimum monthly amount is revised to be \$300 (1-bedroom), \$450 (2-bedroom), \$600 (3-bedroom), and \$750 (4-bedroom).
- A Tenant Income Certification (TIC) form can be submitted in lieu of third party financial information.
- The program will only accept applications from people who have not received assistance in the past to see what applications come in and then the program will be reevaluated to possibly expand the categories of households which can apply.

Ms. Dretler seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Ms. Howe – Aye, Mr. Pops – Absent, Mr. Riordan – Aye, and Ms. Scotti – Aye.

### **Public Comment**

There were no public comments.

### **Chapter 61B Right of First Refusal – 137 Brimstone Lane (Assessor’s Map L04-0006)**

Mr. Duchesneau provided a brief summary of the situation and indicated the Town had a right of first refusal on the Chapter 61B land which was located at the property. He clarified, based upon the information which was currently in the Town’s possession, it appeared the portion of the property which was in Chapter 61B only included the land around the buildings on the property, but not the land where the buildings were located.

At this time Mr. Gentile returned to the meeting.

Mr. Gentile made a motion to inform the Select Board the Housing Trust had no interest in the Chapter 61B land at 137 Brimstone Lane based upon the information which they had before them at this time, but to also note the Housing Trust was willing to reconsider their position should additional information come to light in the future. Ms. Howe seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel – Aye, Ms. Cronin – Aye, Ms.

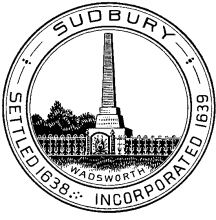
Dretler – Aye, Ms. Howe – Aye, Mr. Pops – Absent, Mr. Riordan – Aye, and Ms. Scotti – Aye.

**Other or New Business**

Mr. Duchesneau noted the next Housing Trust meeting would be held on September 8, 2022 at 8:00 AM.

At 9:13 AM, Ms. Dretler made a motion to adjourn the meeting. Mr. Riordan seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, Ms. Howe – Aye, Mr. Pops – Absent, Mr. Riordan – Aye, and Ms. Scotti – Aye.

DRAFT



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### **DRAFT MINUTES**

**SEPTEMBER 1, 2022 AT 8:00 AM**

### **VIRTUAL MEETING**

**Housing Trust Members Present:** Chair Carmine Gentile, Vice Chair Robert Hummel, Kelley Cronin, Janie Dretler, and John Riordan

**Housing Trust Members Absent:** Cynthia Howe, Karl Pops, and Susan Scotti

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

Mr. Gentile called the meeting to order at 8:05 AM.

#### **1. 4 Longfellow Road – Notice Provided, Town Action, and Discussion**

- a. Electrical Transmission Line and Other Repair Items**
- b. Right of First Refusal Recommendation**

Mr. Gentile noted this property at 4 Longfellow Road had been discussed at earlier Housing Trust meetings.

Ms. Rust discussed how the primary purpose of the meeting was to vote to allocate \$30,000 of the FY23 budgeted amount to this project. She noted there was about \$45,000 worth of capital improvements which needed to occur at the property to bring it up to standard for resale. Ms. Rust also indicated there was a total of around \$75,000 worth of expected repairs. She stated the repairs which needed to be made were electrical work, exterior repairs, driveway replacement, a rebuild of the main bathroom, carpet replacement, and painting. Ms. Rust noted the homeowner had agreed to not proceed with the resale of the dwelling unit at this time in order to address the necessary repairs. She indicated the requested funding amount was in the Housing Trust's budget, and there were a number of dwellings in the Home Preservation Program which were older and in need of repairs. This project would be another example of the Housing Trust allocating funding to these units in the Home Preservation Program to assist in maintaining a dwelling unit in the program. Ms. Rust reiterated the request was to continue the unit forward as an affordable homeownership dwelling unit and to allocate funding to address the necessary repairs.

Mr. Gentile inquired as to what the balance due was on the mortgage for the dwelling unit and Ms. Rust indicated she did not have that figure at the moment. Mr. Gentile felt the equity in the

home should be used toward the repairs but also noted the Housing Trust had allocated Small Grant Program money to dwelling units in the past to maintain them.

Ms. Cronin inquired if first time homebuyers were required to invest in dwelling units when they purchased the units. Ms. Rust noted this was not a requirement. Ms. Cronin also inquired if the Sudbury Housing Authority was interested in the dwelling unit. Ms. Rust stated the Sudbury Housing Authority Chair had indicated they would not be interested in the unit if Housing Trust was still interested in it. The Sudbury Housing Authority also noted they would not want the dwelling unit if repairs still needed to be made to the dwelling unit.

Amy Lepak from the Sudbury Housing Authority stated the Sudbury Housing Authority was not sure if they would be interested in redeveloping the property for more than one unit, but would like to take the property only if the repairs had first been made.

Ms. Dretler advocated for investing further funds in the dwelling unit so the situation did not become worse in the future.

Mr. Riordan asked how the Housing Trust investing in the unit would affect the maximum resale price. Ms. Rust noted up to \$45,000 could be invested in the dwelling unit and that amount would go back to the homeowner upon resale. However, she also stated \$75,000 worth of repairs were needed to bring the dwelling unit to a standard where it could be resold

Ms. Cronin made a motion for the Housing Trust to invest up to \$30,000 to preserve the unit as an affordable homeownership dwelling unit at 4 Longfellow Road. Ms. Dretler seconded the motion.

There was then discussion regarding possibly pricing out potential buyers if the repairs were made to the dwelling unit and the maximum resale price was increased. Mr. Riordan wondered if the repairs could be prioritized so the Housing Trust might not need to expend up to \$30,000. Ms. Rust stated it was too early to tell and this was a matter which would need to be negotiated with the homeowner.

Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, and Mr. Riordan – Aye.

It was noted the right of first refusal matter for the 4 Longfellow Road dwelling unit was premature to be discussed and voted upon at this time since the resale of the unit was currently on hold.

### **Public Comment**

Pat Brown of 34 Whispering Pine Road inquired as to whom Mr. Poteat was and he indicated he was the new Community Preservation Coordinator who would be staffing the Housing Trust and Community Preservation Committee.



**Other or New Business**

Mr. Gentile noted the next Housing Trust meeting would be held on September 8, 2022 at 8:00 AM.

At 8:37 AM, Mr. Riordan made a motion to adjourn the meeting. Ms. Cronin seconded the motion. Roll Call Vote: Mr. Gentile – Aye, Mr. Hummel – Aye, Ms. Cronin – Aye, Ms. Dretler – Aye, and Mr. Riordan – Aye.

DRAFT

**Sudbury Housing Trust  
FY23 Transactions**

<b>Date</b>	<b>Post MO</b>	<b>Amount</b>	<b>Balance</b>	<b>Account</b>	<b>Description</b>
7/1/22	Jul-22	\$305,025.34	\$305,025.34		Carryover \$305,025.35
7/21/22	Jul-22	(\$20,438.88)	\$284,586.46	Expense	SRRP - Aug rent
7/21/22	Jul-22	(\$2,074.67)	\$282,511.79	Expense	MAP - Aug mortgage
7/19/22	Jul-22	\$1,000.00	\$283,511.79	Fee	Wellington Woods
7/31/22	Jul-22	\$120.21	\$283,632.00	Interest	Interest July
7/31/22	Jul-22	(\$126.40)	\$283,505.60	Interest	Interest July
7/25/22	Jul-22	\$75,000.00	\$358,505.60	Other Revenue	State ARPA
7/21/22	Jul-22	(\$40,946.00)	\$317,559.60	Expense	RHSO Fee
7/28/22	Jul-22	(\$200.00)	\$317,359.60	Expense	Lottery Expense
7/28/22	Jul-22	(\$200.00)	\$317,159.60	Expense	Lottery Expense
7/28/22	Jul-22	(\$1,276.90)	\$315,882.70	Expense	Lottery Expense
7/28/22	Jul-22	(\$68.00)	\$315,814.70	Expense	Lottery Expense
7/28/22	Jul-22	(\$280.00)	\$315,534.70	Expense	Lottery Expense
8/1/22	Aug-22	\$0.00	\$315,534.70		Balance to \$315,534.70

**Sudbury Housing Trust  
Financial Projection - Detail**

Description	Line#	FY21	FY22	FY23			Total
		Actual	Actual	Actual	Remaining	Projected	
<b>Housing Unit Creation</b>							
Cumulative #units created	1	14					
Cumulative per unit subsidy of created units	2	\$181,812					
Annual #Trust Created Units	3	0					
Annual \$Trust Created Units	4	\$0					
Total subsidy of created units	###	\$2,545,366					
#Trust Assisted Units	6	126					
\$Trust Assisted Units	7	\$650,000					
Cumulative per unit subsidy of assisted units	8	\$5,159					
<b>Detailed Statement of Revenues and Expenditures</b>							
Carry Forward	10	\$155,241	\$129,310.94	\$305,025.35	\$0	\$305,025	
Fees - 712543/430000	20	\$89,115	\$58,972	\$1,000	\$98,200	\$99,200	\$99,200
Resales	21	\$10,675	\$750	\$0	\$5,000	\$5,000	\$25,949
<b>External Contracts (sum of below)</b>	<b>22</b>	<b>\$78,440</b>	<b>\$58,222</b>	<b>\$1,000</b>	<b>\$93,200</b>	<b>\$94,200</b>	<b>\$900,832</b>
<i>Bedford Woods/Concord Millrun</i>	23	<i>\$4,000</i>	<i>\$9,400</i>	<i>\$0</i>	<i>\$17,800</i>	<i>\$17,800</i>	<i>\$31,200</i>
<i>Harvard - Pine Hill Village</i>	24	<i>\$5,000</i>	<i>\$2,500</i>	<i>\$0</i>	<i>\$12,500</i>	<i>\$12,500</i>	<i>\$24,200</i>
<i>Natick Graystone Lane</i>	25	<i>\$1,000</i>	<i>\$1,000</i>	<i>\$0</i>	<i>\$5,500</i>	<i>\$5,500</i>	<i>\$6,500</i>
<i>Medford Wellington Woods</i>	26	<i>\$9,000</i>	<i>\$5,000</i>	<i>\$1,000</i>	<i>\$18,000</i>	<i>\$19,000</i>	<i>\$35,000</i>
<i>Holliston - Village Green</i>	27	<i>\$1,000</i>	<i>\$1,000</i>	<i>\$0</i>	<i>\$11,000</i>	<i>\$11,000</i>	<i>\$13,000</i>
<i>Rental Recertification: Messenger, Corey St</i>	28	<i>\$3,650</i>	<i>\$3,350</i>	<i>\$0</i>	<i>\$3,400</i>	<i>\$3,400</i>	<i>\$36,150</i>
<i>Monitoring - MassHousing, Cold Brook</i>	29	<i>\$20,790</i>	<i>\$24,212</i>	<i>\$0</i>	<i>\$25,000</i>	<i>\$25,000</i>	<i>\$70,002</i>
<i>Completed</i>		<i>\$29,500</i>	<i>\$11,760</i>	<i>\$0</i>	<i>\$0</i>	<i>\$0</i>	<i>\$678,280</i>
CPA/Financing - 712549/497000	30	\$0.00	\$404,903	\$75,000	\$275,000	\$350,000	\$350,000
<b>SHA Nobscot (CPA)</b>	<b>31</b>	<b>\$0.00</b>	<b>\$16,403</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$20,300</b>
State ARPA - Mortgage Assistance	32			\$75,000	\$0	\$75,000	\$75,000
Sudbury ARPA - Mortgage Assistance	33			\$0	\$75,000	\$75,000	\$75,000
Sudbury ARPA - COVID Small Grant	34			\$0	\$75,000	\$75,000	\$75,000
Sudbury ARPA - Rental Assistance	35			\$0	\$125,000	\$125,000	\$125,000
CPA	36	\$0	\$388,500	\$0	\$0	\$0	\$3,148,996
Interest - 712548/482000, 712548/489000	41	\$638	\$408.50	-\$6	\$500	\$494	\$500
Expenditures - 712557/522100	50	-\$113,434	-\$286,197.12	-\$65,484	-\$622,789	-\$688,273	-\$668,634
Project Admin	51	\$0		\$0		\$0	-\$39,448
Legal/Parcel Feasibility	52	\$0		\$0		\$0	-\$3,600
Staff Assistance/Contract Assistance	53	\$0		\$0		\$0	-\$83,289
RHSO/Contract Assistance	54	-\$44,525	-\$44,889.00	-\$40,946	\$0	-\$40,946	-\$260,631
<b>Programs - sum of below</b>	<b>56</b>	<b>-\$57,704</b>	<b>-\$232,991.72</b>	<b>-\$22,514</b>	<b>-\$608,789</b>	<b>-\$631,303</b>	<b>-\$3,540,075</b>
<i>Remaining CPA</i>	560	<i>\$0</i>		<i>\$0</i>	<i>-\$148,250</i>	<i>-\$148,250</i>	<i>-\$148,250</i>
<i>Nobscot Feasibility (CPA)</i>	561	<i>-\$3,528</i>	<i>-\$29,277.80</i>	<i>\$0</i>	<i>-\$18,600</i>	<i>-\$18,600</i>	<i>-\$51,406</i>
<i>Small Grant Program</i>	562	<i>-\$4,286</i>	<i>-\$22,404.00</i>	<i>\$0</i>	<i>-\$25,000</i>	<i>-\$25,000</i>	<i>-\$237,530</i>
<i>Sudbury ARPA - COVID Small Grant</i>	563			<i>\$0</i>	<i>-\$75,000</i>	<i>-\$75,000</i>	<i>-\$75,000</i>
<i>Home Preservation Grants/HFH</i>	564	<i>-\$8,690</i>	<i>-\$17,950.00</i>	<i>\$0</i>	<i>-\$40,000</i>	<i>-\$40,000</i>	<i>-\$103,753</i>
<i>Rental Assistance - ERAP (Trust funded)</i>	565	<i>-\$41,200</i>	<i>\$0.00</i>		<i>\$0</i>	<i>\$0</i>	<i>-\$41,200</i>
<b><i>Rental Assistance - SRRP (CPA funded)</i></b>	<b>566</b>		<b><i>-\$161,766.26</i></b>	<b><i>-\$20,439</i></b>	<b><i>-\$26,939</i></b>	<b><i>-\$47,378</i></b>	<b><i>-\$209,144</i></b>
<i>Sudbury ARPA - Rental Assistance</i>	567			<i>\$0</i>	<i>-\$125,000</i>	<i>-\$125,000</i>	<i>-\$125,000</i>
<i>State ARPA - Mortgage Assistance</i>	568		<i>-\$1,593.66</i>	<i>-\$2,075</i>	<i>-\$75,000</i>	<i>-\$77,075</i>	<i>-\$78,668</i>
<i>Sudbury ARPA - Mortgage Assistance</i>	569			<i>\$0</i>	<i>-\$75,000</i>	<i>-\$75,000</i>	<i>-\$75,000</i>
<i>H4H, Dutton Road</i>	570	<i>\$0</i>					<i>-\$48,249</i>
<i>Grants: Coolidge/SHA</i>	571	<i>\$0</i>					<i>-\$450,000</i>
<i>Home Preservation Program</i>	572						<i>-\$1,028,094</i>
<i>Maynard Rd</i>	573	<i>\$0</i>					<i>-\$868,780</i>
<b>Lottery Expense (sum of below)</b>	<b>58</b>	<b>-\$11,205</b>	<b>-\$8,316.40</b>	<b>-\$2,025</b>	<b>-\$14,000</b>	<b>-\$16,025</b>	<b>-\$231,356</b>
<i>Advertising/Insurance</i>	581	<i>-\$11,205</i>	<i>-\$8,316.40</i>	<i>-\$2,025</i>	<i>-\$14,000</i>	<i>-\$16,025</i>	<i>-\$170,427</i>
Trust portion of Salaries - 712551/511100	60	-\$2,249	-\$2,372.28	\$0	-\$52,500	-\$52,500	-\$219,130
Ending Balance	70	\$129,310.94	\$305,025.35	\$315,534.71	-\$301,589	\$13,946	

## MUNICIPAL AFFORDABLE HOUSING TRUST

Annual Report to the Community Preservation Committee (CPC)

**Municipal Affordable Housing Trusts (MAHT) created under MGL Chapter 44, section 55c are required to report Community Preservation Act (CPA) expenditures to the CPC on an annual basis.** This form can be used to list CPA expenditures and should be filed with the municipal official responsible for completing the CPA Projects Report (CP-3). *Since the CP-3 is due to the Department of Revenue by September 15, this form should be submitted to the CPC by September 1 or another agreed upon date.*

**TRUST NAME:** Sudbury Housing Trust **FISCAL YEAR:** FY22

**YOUR NAME:** Elizabeth Rust **EMAIL:** Liz@RHSOhousing.org

**PHONE NUMBER:** Phone number

PROJECT #1	
Project name	Emergency Rental Assistance Program (SRRP)
Project address	Various
Approval date	FY2022
Project status	In progress
Description	Provide Emergency Rental Assistance payments to eligible tenants (SRRP)

Does this phase of the project include acquiring real property (such as ownership of land or buildings) or acquiring a real property interest (a legal interest in land such as an affordable restriction)? Yes or No.

HOUSING UNITS ANTICIPATED or CREATED	
Number of new units created	0
Number of units supported	0
LAND	
Number of acres acquired for housing	Number of acres.
AFFORDABLE PROJECT RESTRICTIONS FOR THIS PROJECT	
Entity holding restriction	Name of entity holding restriction.
Date recorded	Date restriction was recorded.
Book and page of restriction	Enter book/page here.
Registry of Deeds	Middlesex County
<i>If no restriction, please explain why.</i>	If no restriction, please explain why.

**CPA PROJECT FUNDS FROM MAHT = \$161,766**

Other Municipal Funds = Enter dollar amount. Private Donations = Enter dollar amount.

State Funds = Enter dollar amount. Federal Funds = Enter dollar amount.

Other Funds = Enter dollar amount. Please describe other funding: Enter other funding sources.

**TOTAL PROJECT COST = \$190,000 Total, \$161,766 spent in FY22)**

Created by MHP with support from The Kuehn Charitable Foundation.



<b>PROJECT #</b> Enter project number.	
<b>Project name</b>	Nobscot Road – Feasibility
<b>Project address</b>	67-73 Nobscot Road
<b>Approval date</b>	June 10, 2021
<b>Project status</b>	In progress
<b>Description</b>	Conduct feasibility for housing development at 67-73 Nobscot Road

Does this phase of the project include acquiring real property (such as ownership of land or buildings) or acquiring a real property interest (a legal interest in land such as an affordable restriction)? No

<b>HOUSING UNITS ANTICIPATED or CREATED</b>	
Number of new units created	Number of units.
Number of units supported	Number of units.
<b>LAND</b>	
Number of acres acquired for housing	6
<b>AFFORDABLE PROJECT RESTRICTIONS FOR THIS PROJECT</b>	
Entity holding restriction	Name of entity holding restriction.
Date recorded	Date restriction was recorded.
Book and page of restriction	Enter book/page here.
Registry of Deeds	Middlesex County
<i>If no restriction, please explain why.</i>	If no restriction, please explain why.

**CPA PROJECT FUNDS FROM MAHT = \$30,000**

Other Municipal Funds = Enter dollar amount.

Private Donations = Enter dollar amount.

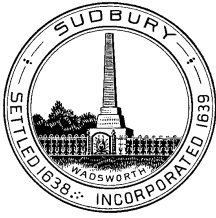
State Funds = Enter dollar amount.

Federal Funds: Enter dollar amount.

Other Funds = Enter dollar amount. Please describe other funding: Enter other funding sources.

**TOTAL PROJECT COST = \$30,000**





# Town of Sudbury

## Community Preservation Committee

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

cpc@sudbury.ma.us

www.sudbury.ma.us/cpc

### PROJECT SUBMISSION FORM

Applicant:

Submission Date:

Group or Committee Affiliation (if any):

Applicant Address:

Purpose (please select all that apply):

Open Space & Recreation

Community Housing

Historic Resource

Applicant Email & Phone Number:

Project Manager Email & Phone Number:

Project Name:

Project Description:

Costs:

Fiscal Year	Total Project Cost	CPC Funds Requested	Other Funding Sources (Amount and Source)
2024			
2025			
2026			
2027			
2028			
<b>Total</b>			

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

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

For Community Preservation Committee Use:

Form Received On: \_\_\_\_\_

Project Presented to CPC On: \_\_\_\_\_

Reviewed By: \_\_\_\_\_

Determination: \_\_\_\_\_

# **FY2024 Community Preservation Committee Application Form Sudbury Housing Trust – Housing Allocation Attachment A**

The Sudbury Housing Trust requests 25% of the CPA allocation, a 15% increase over the 10% housing requirement, to continue to fund the programs the Trust supports for the creation of new affordable units of housing, continued support for residents impacted by COVID and struggling to pay their rent, and for the variety of other programs and initiatives the Trust undertakes.

The Trust last requested CPA funds in 2020 for FY21, and has not created any new units since then, as the Trust relies on CPA funds for unit creation. Additionally, the Trust is looking to provide long term support to some new programs it has started in the last few years and for others which may be needed in the future.

The Trust hopes to continue its robust and extremely popular Sudbury Rent Relief Program to serve the lower and lowest income level households making the restricted units in town affordable to these households. The Trust has implemented and administered an extremely successful program, and looks to continue this into the future. This program would continue to have the effect of deepening the affordability of numerous units in Sudbury and would serve very low-income households.

This CPA funding request would also assist in the creation of new units of affordable housing in the Trust's Home Preservation Program which converts existing smaller market homes to affordable homes and provides affordable homeownership opportunities to income eligible households. The Trust is the main, if not the only, entity with plans to create affordable homeownership units in Sudbury. Through its program, the Trust has seen tenants of the Sudbury Housing Authority become owners for their families, and owners of deed restricted properties in Sudbury purchase market rate homes in town. These demonstrate first-hand the benefits of a homeownership program. Sudbury has had 37 ownership units in its affordable housing portfolio since 2016, with no strong possibilities of additional homeownership units in the pipeline.

However, with that said, the Trust, working in conjunction with the Sudbury Housing Authority, is currently investigating purchasing a piece of land at 67-73 Nobscot Road to create several new construction affordable dwelling units on the property. These funds would be used for the continued feasibility analysis of this land, and possibly towards the purchase and eventual redevelopment of the property, as well as for other potential sites in the future.

The Trust would also like to further support its Mortgage Assistance Program to help residents maintain housing. The Mortgage Assistance Program provides aid in the form of a grant and promotes a socioeconomic environment that encourages a diversity of income and ensures long-term affordability to the Sudbury community.

The 25% CPA allocation, or estimated at \$730,000 using FY24 projections, will allow the Trust to move forward on each of these fronts in FY24.

**FY2024 Community Preservation Committee Application Form  
Sudbury Housing Trust – Housing Allocation  
Attachment B**

The Sudbury Housing Trust’s Home Preservation Program correlates precisely to CPA eligible activities in the category of community housing. It conforms to the Town’s Housing Production Plan, contributes long-term affordability towards the 10% Chapter 40B threshold, converts market rate units to affordable units, and promotes a socioeconomic environment that encourages a diversity of income.

The Sudbury Housing Trust’s Rent Relief Program meets the Community Housing criteria by conforming to the Town’s Housing Production Plan, intermingling affordable and market rate housing at levels that exceed state requirements for percentage of affordable units, and promotes a socioeconomic environment that encourages a diversity of income.

The purpose of the Sudbury Housing Trust is to provide for the creation and preservation of affordable housing in the Town of Sudbury for the benefit of low- and moderate-income households. The Trust implements the recommendations set forth in the Sudbury Community Housing 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.





# Town of Sudbury

## Housing Trust

HousingTrust@sudbury.ma.us

Flynn Building  
278 Old Sudbury Road  
Sudbury, MA 01776  
978-639-3387  
Fax: 978-443-0756  
[www.sudbury.ma.us/housingtrust](http://www.sudbury.ma.us/housingtrust)

October 25, 2021

To: Sudbury Select Board, Town Manager Henry Hayes  
From: John Riordan, Vice-Chair, Sudbury Housing Trust  
CC: Cynthia Howe, Chair, Sudbury Housing Trust  
RE: Sudbury Housing Trust ARPA Funds request

The Sudbury Housing Trust (the “Trust”) appreciates the Select Board’s interest in asking for ideas on the town’s use of state allocated American Rescue Plan Act (“ARPA”) funds.

With respect to housing, an affirmatively stated priority need under ARPA, we understand that program requirements limit use of ARPA funds to specified Qualifying Census Tracts for uses such as preservation or creation of affordable housing units. Assuming that Sudbury does not include designated Qualified Census Tracts, the Trust has not included housing creation in this request. If this assumption is not correct, please let us know.

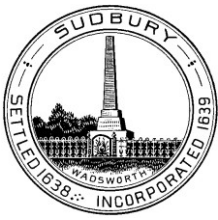
The Trust does request funds to help residents cost burdened and/or at risk for homelessness due to a decrease in income due to COVID. The Trust proposes funding the following programs with state allocated ARPA funds:

1. Tenant rental assistance program for residents impacted by COVID (\$125k):
2. **COVID Small Grant Program for deferred maintenance due to COVID loss of income, available to homeowners and small landlords (\$75k):**
3. Mortgage Assistance program (\$75k), providing two months of mortgage principal assistance; and

In each of these program ideas, the applicant will be evaluated for eligibility under specified income limits where the applicant is cost burdened (spending more than 30% on housing), their income has decreased due to COVID, and certain other program requirements.

The Trust is well positioned to implement these program ideas, as they are similar to existing programs successfully developed and managed by the Trust during the ongoing COVID crisis. In addition the Trust has access to the Regional Housing Services Office which provides similar program design and administration for other neighboring communities. Total funding of this request for meeting these critical local housing needs would be approximately 5% of the state allocated ARPA funds to Sudbury.

The Trust thanks the Select Board and the Town Manager for considering this request.



# Town of Sudbury

*Sudbury Housing Trust*

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

<http://www.sudbury.ma.us>  
[SudburyHousingTrust@sudbury.ma.us](mailto:SudburyHousingTrust@sudbury.ma.us)

## SMALL GRANT PROGRAM APPLICATION

Dear Sudbury Resident,

Thank you for your interest in the Sudbury Small Grants Program. The purpose of this program is to provide financial assistance to preserve existing housing units occupied by income eligible households. It is sponsored by the Sudbury Housing Trust for the benefit of Sudbury residents.

The attached confidential application and grant process is designed to be simple and quick. There is minimal documentation required. A completed application, an estimate for work requested, and copies of recent tax returns are all that is needed.

Grant cycles are held twice a year: with **application deadlines of March 30 and September 30**, and grants awarded two months later by May 31 and November 30.

These grants are given on an unsecured basis; there is no repayment required of the funds awarded to you after the first year.

You must meet the following requirements to be eligible:

1. Property is in Sudbury and is the primary residence of the applicant, and applicant intends to remain a resident of Sudbury for the next 12 months,
2. Maximum income of 100% of the Area Median Income,
3. Property assessment is below the Town median,
4. Agreement to notify the Sudbury Housing Trust prior to listing your home for sale.

The grant limit for this program is **\$5,000**. Applications are evaluated and prioritized based on health and safety considerations, financial need of the applicant, with higher priority for emergencies and first-time applicants.

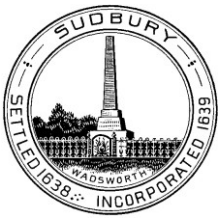
The Sudbury Housing Trust, in line with its mission, continually searches for properties which can be added to the pool of properties in Sudbury affordable to teachers, police, firefighters and other members of the community. In accepting grants from this program, you are required sign a Grant Agreement, and to notify the Sudbury Housing Trust at least 60 days prior to listing your home for sale.

If you have questions regarding this program or if you require assistance in filling out the application, please contact us at the information below. Applicants are encouraged to discuss their needs with program staff prior to submitting a full application.

**Submit application and attachments to:**

**Ryan Poteat, Community Preservation Coordinator**  
**Department of Planning & Community Development**  
978-639-3388  
278 Old Sudbury Road  
Sudbury, MA 01776

**Office Hours: Monday, Wednesday, Thursday 8:30 A.M.-4:00 P.M.**  
**Tuesday 8:30 A.M. – 7:00 P.M.**  
**Friday 8:30 A.M. – 12:30 P.M.**



# Town of Sudbury

Sudbury Housing Trust

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[SudburyHousingTrust@sudbury.ma.us](mailto:SudburyHousingTrust@sudbury.ma.us)

## SMALL GRANT PROGRAM APPLICATION

### Eligible Projects

The Small Grant Program provides financial assistance to correct conditions dangerous to health and safety; and to correct substandard conditions. Some examples of eligible projects are listed below.

Minor plumbing, carpentry, window repairs, gutters or downspouts, door repairs or replacements, step or porch repairs, lock repair or replacement, cement work or masonry repair, tiling, plaster patching and wallpapering, sheet-rock repair, smoke/CO2 detectors, weather stripping, electrical including connectivity, heating, floors, installation, masonry, siding, roofing, bathroom grab bars, raised toilets or toilet seats, hand-held shower heads, railings or other adaptive projects.

### Financial Assistance

The grants are offered as unsecured and unconditional funds, with no repayment clauses. The maximum grant available is \$5,000 per grant period and a cap of no more than \$10,000 over 7 years for a household at a given property address. A one year wait period, from the date the last payment was issued, is required before an applicant can re-apply to the Small Grant Program. This wait period can be waived in an emergency situation upon approval by the Program Administrator in a situation that poses a danger to the health/safety of the occupant.

### Applicant Qualification

- Income – 100% of Area Median Income.** The combined income of all parties living in the home must be less than 100% of the Boston Area Median Income. Income limits as of April 2022 are:  
Household of 1: \$98,200, Household of 2: \$112,200, Household of 3: \$126,200, Household of 4: \$140,200  
Income includes all sources of regular income such as; earnings, Social Security, Pension, and interest income and is calculated from the most recent IRS 1040 form, adding all non-taxable amounts to the Adjusted Gross Income. Additionally 2% of the equity in the home (computed as the current tax assessment minus the outstanding amounts of any liens on the property, including mortgages and home equity line of credit) is counted towards income.
- Home Value – Up to \$739,600.** The current assessment of the home is not to be greater than the single family median home assessment in Sudbury, which for FY 2021 is \$739,600.
- Home-owner – Sudbury resident.** The Applicant must be the owner of the property, use the property as their primary residence for the entire year (12 month period) following the completion of the repair, and the property must be in Sudbury. The resident also agrees to notify the Sudbury Housing Trust prior to selling the house at any time in the future. Applicant agrees to pay back the funds if they sell their home within 12 months.

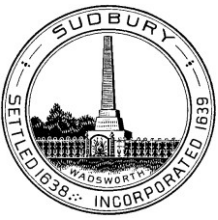
### Grant Applications

Grant cycles are held twice a year: with application deadlines of March 30 and September 30, and grants awarded two months later by May 31 and November 30.

The applicant completes the application with appropriate income and three estimates, including photos. Town employees, including special municipal employees, are not eligible contractors in accordance with MGL Chapter 268A, section 20.

If awarded, the repair must be completed within 12 months from the award date. The Trust will pay the amount approved to the repair provider upon receipt of the invoice with the W9 form of the provider, photo of the finished repair, and approval from the applicant. The Trust will not reimburse homeowners unless specifically approved.

The application with income information will be kept confidential.



# Town of Sudbury

Sudbury Housing Trust

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

<http://www.sudbury.ma.us>  
[SudburyHousingTrust@sudbury.ma.us](mailto:SudburyHousingTrust@sudbury.ma.us)

## SMALL GRANT PROGRAM APPLICATION

### 1. Household Information

Applicant Name \_\_\_\_\_ Phone Number \_\_\_\_\_ E-mail \_\_\_\_\_

Address \_\_\_\_\_ City/State/Zip \_\_\_\_\_

Co-Applicant Name \_\_\_\_\_ Phone Number \_\_\_\_\_ E-mail \_\_\_\_\_

Address \_\_\_\_\_ City/State/Zip \_\_\_\_\_

Number of people currently living in household, their names and their ages: \_\_\_\_\_

Any person in the household\* (optional):

Disabled:  No  Yes    Deed Restricted Property:  No  Yes

### 2. Property Information (optional)

Is there a mortgage on the property?     No     Yes, Balance: \_\_\_\_\_  
*Please attached tax bill showing assessed value, and statement showing mortgage/lien balance*

Is the property your primary residence?     No     Yes

Do you own additional real estate?     No     Yes, Address: \_\_\_\_\_  
*Please attached tax bill showing assessed value, and statement showing mortgage/lien balance*

### 3. House Repair Needed

Indicate the amount requested, and which estimate you are requesting:    \$ \_\_\_\_\_

Please describe the work needed. Is completion of this work item related to preserving the structural integrity of the dwelling or health/safety/welfare of its occupants? Describe the urgency of need.

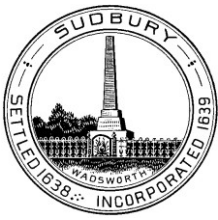
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# Town of Sudbury

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## SMALL GRANT PROGRAM APPLICATION

### CERTIFICATION

I/We, the undersigned, have made application to the Sudbury Small Grants Program for monies from the Sudbury Housing Trust to cover the cost of repairs or adaptations to my home as stated, and the Program Administrator or their designated representative may verify the information in this application by personal inspection of appropriate documents, by hearing corroborating testimony or by other available means.

I/We agree to sign a Grant Agreement if the project is approved and funds awarded.

I/We agree to comply with all applicable building codes and to obtain all required permits.

I/We understand that if the project is over the grant amount, I will pay for the amount over the grant award, and that I will be required to fund my portion of the project in advance of the grant funds.

I/We certify that all the information in this application and any additional information provided by me in support of this application is, and will be, entirely accurate to the best of my knowledge; and that no information relevant to that application has been, or will be, deliberately withheld.

I/We understand that any Sudbury Small Grants Program monies committed, or used to pay, for my requested home repairs or adaptations will be subject to recapture at any time during the contracted work, during the first year following the contracted work or at any time after the first year should any information supplied by me prove to be deliberately false or misleading, including all application material, or if I rent or sell my home in the first year after Sudbury Small Grants Program work is completed. Failure to comply with the rules and guidelines of this program may result in homeowner repayment of the grant monies.

Therefore, I agree to notify the Sudbury Housing Trust at least 60 days prior to listing my home for sale.

By signing below, Applicant(s) requests the Program Administrator to review this application for the purpose of receiving funding assistance through the Sudbury Housing Trust. Applicant(s) declares that the information and statements provided herein are true and correct to the best of their knowledge.

#### THIS APPLICATION IS NOT COMPLETE IF NOT SUBMITTED WITH:

- \_\_\_\_\_ Completed application
- \_\_\_\_\_ Copies of most recent Federal tax return, and supporting schedules
- \_\_\_\_\_ Copies of most recent property tax bills for all properties
- \_\_\_\_\_ Copies of all current mortgage balances, including home equity lines of credit
- \_\_\_\_\_ Copies of three estimates for work by professional contractor
- \_\_\_\_\_ Picture of area to be worked on
- \_\_\_\_\_ Copy of Picture Identification (Driver's License or similar)

Applicant

Date

Co-Applicant

Date

# SUDBURY

## ARPA RENT RELIEF PROGRAM (SRRP)

### APPLICATION PACKET

**INITIAL APPLICATIONS PERIOD**  
**SEPTEMBER XX<sup>TH</sup>, 2022 - OCTOBER XX<sup>RD</sup>, 2022\***

*\*Complete applications received by 5:00 p.m. Thursday October X will be considered for initial funding. If requests exceed available funds eligible applicants will be entered into a lottery to select program participants; otherwise program will remain open and award grants on a first come, first served basis to eligible applicants.*

### APPLICATION PACKET

Please read all information carefully. This packet contains:

- **Frequently Asked Questions**: See Program Guidelines for more detailed information.
- **Application Checklist**: Must be completed and submitted with application. Required documentation must be submitted to be determined eligible for the program.
- **Application**: This is a fillable document and can be completed electronically, printed out and signed or printed out and legibly filled out by hand. All applications must have required documentation and be signed to be considered complete.

### APPLICATION SUBMISSION

It is preferred that application, checklist and required documents be submitted electronically to [info@RHSOhousing.org](mailto:info@RHSOhousing.org)

For questions: email [info@RHSOhousing.org](mailto:info@RHSOhousing.org) or call 978-287-1093.

Applications also accepted by mail or drop-off at the following locations:

RHSO Housing  
37 Knox Trail  
Acton, MA 01720  
Attn: ARPA SRRP

*Place in large black mailbox at the bottom of the outside steps.*

Town Clerk's Office (at the rear of Town Hall)  
322 Concord Road  
Sudbury, MA 01776  
Attn: ERAP

*Place in the drop box in the vestibule  
Open 24 hours a day, 7 days a week*



## SRRP - FREQUENTLY ASKED QUESTIONS

### WHAT IS SRRP? *See Guidelines and Application for more detail.*

SRRP provides temporary monthly rental assistance in the form of a grant to eligible households. Initial grants will be for six-month period and one-time grant renewals may be possible depending on need and available funding. Payments amounts will be determined based on applicants rent and gross income and will be at least: (but not to exceed tenant rent)

\$300/mo. - 1br    \$450/mo. - 2br    \$600/mo.- 3br    \$750/mo.- 4br

Payments are made directly to the landlord. SRRP is funded is through the Sudbury Housing Trust. Utility and rental arrears payments are also allowable, see guidelines and application.

### WHO IS ELIGIBLE?

- Current residents of Sudbury not currently receiving rental assistance from State/Federal program (RAFT, ERAP, ) and who have not received assistance from the Sudbury Housing Trust rental assistance programs in the past. Also, households that own other real estate do not qualify.
- Households spending >27% of their gross income on rent or whose income is below 30% AMI
- Households whose income is below the following limits:

Effective: 4/1/2022	100% AMI Income Limits					
Household size	1 person	2 person	3 person	4 person	5 person	6 person
100% Income Limit	\$89,200	\$112,200	\$126,200	\$140,200	\$151,500	\$162,700
30% Income Limit	\$29,450	\$33,650	\$37,850	\$42,050	\$45,450	\$48,800

- Households whose current monthly rent is below the following:  
1 Bedroom \$2,021, 2 Bedroom \$2,272, 3 Bedroom \$2,726, 4 Bedroom \$2,990

#### **How is the program funded? And what is the application and award process?**

The program, sponsored by the Sudbury Housing Trust, will provide temporary rental assistance in the form of a grant for the purpose of supporting eligible households in maintaining housing from local ARPA funding. The program is being administered by the RHSO. An initial application period will be open for 10 days. If requests received during the initial application period exceed available funds eligible

applicants will be entered into a lottery to select program participants. If there are funds remaining after the initial application period the program will remain open and accept applications on a first-come, first-served basis as long as funding is available. Applicants must submit sufficient documentation to demonstrate their eligibility. Once eligible a Participation Agreement will be issued. Landlords must agree to participate in the program. Repayment of assistance will not be required.

## SRRP APPLICATION CHECKLIST

The following is a list of information needed to determine eligibility for assistance. Please provide all *applicable* information with your completed application.

**All adult household members (over 18 years of age) must provide all documentation.**

**Signed lease, tenancy agreement, or tenancy-at-will form**

- ✓ Statement from landlord of back rent due, if applicable.
- ✓ Most recent rent calculation statement from property or voucher issuing agency

**Utility Bill (ONLY for households applying for utility assistance)**

**Documentation of Current Income**

- ✓ Currently Employed - Provide two months of the most recent paystubs received.
- ✓ Self-employed - Provide *year-to-date* Profit and Loss statements, showing monthly amounts (i.e. written amounts of money received each month since the beginning of the year).
- ✓ Unemployment Assistance - Provide determination letter and recent statement of benefits
- ✓ Other Government Assistance – Social Security Income (SSI or SSDI)
- ✓ Child Support or Alimony Verification
- ✓ Other Income - Document all other income including pension, investment income, etc.
- ✓ No Income / Cash Income Verification Form – Complete for no income or cash only income.

**Asset Information**

- ✓ Bank Statements - Copies of last 2 statements (all pages) from all bank accounts (Checking, savings, IRA, etc.)
- ✓ Other Assets - Copies of any investment statements for previous 3 months (Investment, Retirement, Pensions, Annuities, etc.)

**NOTE: A Tenant Income Certification form from your landlord can be submitted instead of income and asset documentation**

You may provide any additional information if you feel it is applicable to you and your household. **The Town and/or the Regional Housing Services Office may request additional information if necessary to make a determination of eligibility.**



**Regional Housing Services Office (RHSO)**  
**SUDBURY RENT RELIEF PROGRAM (SRRP) APPLICATION**

On behalf of the Town of Sudbury, the RHSO is administering an Emergency Rental Assistance Program. Please refer to program guidelines to determine if your household is eligible. Always keep your application information and address up to date with this office. Thank you and we look forward to assisting you.

**Return electronically to:** [info@RHSOhousing.org](mailto:info@RHSOhousing.org) (in a PDF legible format)  
**Mail or Drop-off hard copy to:** 37 Knox Trail, Acton MA 01720 (Black mail box at bottom of steps)

*Please use fillable form to complete electronically or print clearly and complete all information requested. Do not leave blanks or we may be unable to process your application.*

**I. APPLICANT INFORMATION**

**Applicant Name** \_\_\_\_\_

Telephone: \_\_\_\_\_ Email (PRINT CLEARLY): \_\_\_\_\_

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

Has anyone in your household (including yourself) applied for, received or currently receiving assistance from the state's assistance programs (RAFT, ERAP, ERMA)? \_\_\_ YES \_\_\_ NO

If yes, date of application: \_\_\_\_\_ Date of last assistance payment: \_\_\_\_\_

Has anyone in your household (including yourself) received assistance from the Sudbury Housing Trust in the past?  
 \_ \_\_\_ YES \_\_\_ NO

Do you currently owe back rent? \_\_\_ YES \_\_\_ NO If yes, how much? \_\_\_\_\_

Do you own back utilities? \_\_\_ YES \_\_\_ NO If yes, list amount and utility (gas, elec., etc.)?

Company: \_\_\_\_\_ Utility: \_\_\_\_\_ Amount: \_\_\_\_\_

Company: \_\_\_\_\_ Utility: \_\_\_\_\_ Amount: \_\_\_\_\_

Does anyone in your household own any real estate property?  YES  NO

**Co-Applicant Name** \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

Current monthly Income (List Total Amount from all sources) : \_\_\_\_\_

**Additional Household Members:** *Please list all other persons residing in the unit.*

Name:	Relationship to Applicant	Over 18? Y/N	Full-Time Student? Y/N

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

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

**III. HOUSEHOLD ASSETS:** Please provide all information on assets accounts held by all family members

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

**III. UNIT AND LANDLORD INFORMATION:**

Unit address: \_\_\_\_\_  
\_\_\_\_\_

Move-in Date: \_\_\_\_\_ Number of bedrooms in your unit: \_\_\_\_\_

Current monthly rent amount: \_\_\_\_\_

Current estimated monthly tenant utility payments (heat, electricity, and water sewer): \_\_\_\_\_

Do you receive any other rental assistance such as Section 8 Voucher, MRVP or live in subsidized housing where your rent is based on your income: \_\_\_\_\_ YES \_\_\_\_\_ NO *If yes, submit your last rent determination letter.*

**Landlord Contact Information:** This must be completed for your application to be considered. Landlords must agree to participate in program. Any assistance provided will be paid directly to the landlord.

Landlord Name \_\_\_\_\_

Telephone: \_\_\_\_\_ Email: \_\_\_\_\_

Landlord Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

**VII. Signatures/Certification of True and Correct Information**

**Please be sure you have answered all questions. Otherwise, we will be unable to process your application.** All completed applications will be reviewed for eligibility to receive emergency rental assistance under the program guidelines. If it is determined that your household is eligible and rental assistance is granted, payments will be made on your behalf to the landlord for a period of up to six months (or less if applied to arrears) with an option to renew one time, pending funding availability and recertification of eligibility. The landlord must agree to participate in order to receive rental assistance from the program.

By signing below you certify the following:

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

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

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

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

\_\_\_\_\_  
(Applicant Signature)

\_\_\_\_\_  
( Date )

\_\_\_\_\_  
(Co-Applicant Signature)

\_\_\_\_\_  
( Date )

**WARNING: Section 1001, of Title 18 of the U.S. code, makes it a criminal offense to make willful false statements or misrepresentation to any department or agency of the United States as to any matter within its jurisdiction**

**APPLICATION WILL NOT BE CONSIDERED COMPLETE WITHOUT THE FOLLOWING:**

*(See Application Checklist for more detail)*

**PROPERTY DOCUMENTATION:** Lease or other form of confirmation of rent payment.

**UTILITY BILLS:** Only for households applying for utility assistance.

**INCOME DOCUMENTATION:**

Current Income – Recent paystubs, unemployment statement, explanation of bank deposits, social security or other government assistance, child support, alimony, etc

**ASSET INFORMATION:** Copies of last 2 statements from all bank accounts (Checking, savings, IRA, Investment, Retirement, Pensions, Annuities, etc.)

You may provide any additional information if you feel it is applicable to you and your household. **The Town and/or the Regional Housing Services Office may request additional information if necessary to make a determination of eligibility.**