



November 28, 2016

Mr. Jonathan F.X. O'Brien, Chairman
Zoning Board of Appeals
Flynn Building
278 Old Sudbury Road
Sudbury, MA 01776

RE: Additional Materials – Coolidge at Sudbury Phase 2 - Operations

Dear Mr. O'Brien:

On behalf of Covenant Commonwealth Corporation¹, "CCC", we respectfully submit additional information for "The Coolidge at Sudbury Phase 2" application. We are providing 16 copies as requested by Lillian Vert, Planning and Zoning Coordinator.

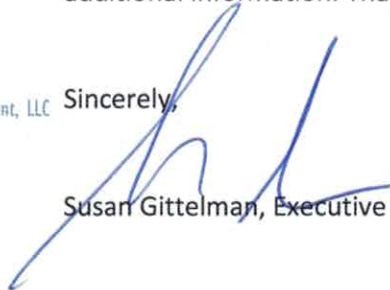
Enclosed with this letter are materials related to the Operations of The Coolidge of Sudbury. As noted in the enclosed materials, our team implemented the following key responses to address concerns raised by Town Departments:

1. Implemented 24-hour live answering service in August 2016
2. Educated tenants on appropriate use of 911 calls and Town emergency services
3. Established liaison contacts and regular communication with emergency services personnel
4. Re-staffed on-site Property Manager and Senior Portfolio Manager positions to provide a better fit with the tenants and community

These changes have resulted in a dramatic reduction of the number of 911 emergency calls from The Coolidge since the summer of 2016.

We welcome the opportunity to meet with you to review this information at future Zoning Board of Appeals meeting. Please feel free to contact Holly Grace of my staff, at (617) 731-5293 or by email at holly@bbhousing.org if you require additional information. Thank you for your consideration.

Sincerely,



Susan Gittelman, Executive Director

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¹ Covenant Commonwealth Corporation is a non-profit development entity of B'nai B'rith Housing.

The Coolidge at Sudbury

Who We Are

B'nai B'rith Housing (Sponsor):

B'nai B'rith Housing is a non-profit real estate organization whose mission is to ease the Greater Boston housing crisis by building a steady stream of high quality, award-winning affordable housing. BBH has won national recognition for its service-enriched model of senior housing which emphasizes healthy aging. Its track record includes affordable housing in Sudbury, Newton, and Boston.

BBH is the sponsor of both The Coolidge at Sudbury as well as The Coolidge at Sudbury Phase 2. Through its non-profit development entity Covenant Commonwealth Corporation, BBH controls the limited partnership owner (the legal structure necessary to utilize Low Income Housing Tax Credits) of both the Coolidge at Sudbury Phase 1 and Phase 2.

Barkan Management Company (Management Agent):

Barkan Management Company ("Barkan") provides management and oversight at the Coolidge at Sudbury. Headquartered in Boston, The Barkan Companies are a diversified group of real estate businesses with a solid record of success in property management, construction and development. Since Barkan's founding in 1964, it has established itself as an industry leader in the residential real estate sector with a present portfolio of 146 residential communities totaling approximately 22,900 units under management.

Barkan's management philosophy is to provide timely and professional services consistent with a preapproved operation plan incorporating both the short and long-range goals of the owners. As managing agent, we are employed to handle the daily operational responsibilities, supervision of site staff, budget preparation and control, and all other functions in accordance with applicable policies and regulations.

Barkan maintains a strong commitment to working with low income residential communities and community controlled housing. It has worked with local community development corporations and non-profit boards to assist in the development, management and improvement of affordable properties. Barkan currently manages 28 affordable properties, the majority of which are senior housing.

The Coolidge at Sudbury Operations Overview

Following is a summary of the current staffing and operations at The Coolidge at Sudbury (“The Coolidge”) that will address concerns raised regarding The Coolidge, as well as the proposed Phase 2. We appreciate the candor of the Zoning Board of Appeals and Town Departments in asking about operations at the property. We are committed to managing to the highest quality, and we are doing everything we can to remedy any issues and to alleviate concerns.

The Coolidge at Sudbury is an independent living rental apartment community. Phase 1 includes 64 one-bedroom and two-bedroom apartments in a building for residents who are age 55 and older. Residents have incomes up to 60% of Area Median Income, at this time equivalent to \$41,400 for a one person household and \$47,280 for a two person household. Approximately one third of the current residents are still actively employed. The proposed Phase 2 includes 56 one-bedroom rental apartments of independent living with the same age and income criteria. All of the apartments meet the criteria of “affordable” under M.G.L. Chapter 40B.

Site Staff:

The property management office for The Coolidge Phase 1 is located on site and there are three full-time employees based there. There is a Property Manager responsible for the day to day administration of the property and a Maintenance Supervisor who cares for the building and grounds and makes any needed repairs. A new Property Manager started in October after the former manager left after two years in the position.

There is also a Resident Services Coordinator/Activities Director who schedules programs and activities for the residents, provides a friendly ear for residents, makes home visits to residents in need, and is available to assist with coordinating services. Barkan employs a LICSW professional at another nearby property who is contracted with on an as needed basis and acts as a resource for the current Resident Services Coordinator. In response to community suggestions, we are investigating contracting with an individual or agency to provide additional services if there is a need. Recently, Cynthia Howe assumed the responsibility of Senior Portfolio Manager and serves as the account supervisor of the site and staff. She brings almost twenty years of experience in property management, has managed both market and affordable properties, and is a long-term Sudbury resident.

Phase 2 will have three additional staff which will likely include a full time Property Manager and a Maintenance Technician and will also have offices and community space located in that building. There will be a second Resident Services Coordinator with any professional designations required to best serve the needs of our residents and with the intent to reduce any impact of an

aging population on Town services. With the additional staff we expect to be able to stagger employee schedules in the two buildings, increasing the hours the offices are open and improving convenience and responsiveness for our residents and the Town.

Emergency Responsiveness:

The Coolidge's Maintenance Supervisor is on call 24 hours a day for all emergency calls. Additionally, the Coolidge retains a 24/7 live answering service that is available any time the office is closed or the staff is unavailable. All messages (emergency and non-emergency) are taken by the answering service and forwarded accordingly. The answering service has a call list of staff phone numbers to address any and all calls.

The answering service was upgraded and changed as of August 2016 in response to recommendations by the Sudbury Fire Department. Our prior procedure utilized only a voicemail system during the day and the live answering service after hours. The prior procedure did not allow any effective way to page the staff during office hours if the phones were busy in the event of any urgent issue. We have addressed that concern by utilizing live answering service coverage at any time that the phones are not answered promptly.

Resident Programming, Communication, and Discouraging Nuisance Emergency Calls:

We provide a number of programs and activities for our residents. (See attached list) The new Property Manager has started holding regular monthly resident coffee hours that include a comment and suggestion process to encourage participation by residents who have the option to remain anonymous.

Additionally, we are committed to working with our residents to better understand the benefits and challenges of apartment living and the appropriate use of "911" and other services. Earlier this year, the Sudbury Police Department attended a resident meeting and provided information on emergency calls and using "911". They also conducted a separate session on CPR and basic first aid and we look forward to representatives of the Department attending future meetings. Sudbury Police Chief Nix has appointed an officer liaison to improve communications regarding any site or resident issue. The Senior Portfolio Manager has met with Chief Nix and the liaison and they now conduct monthly or bi-monthly meetings between staff and the liaison.

The Sudbury Fire Department has graciously agreed to attend a future meeting to discuss emergency calls and other fire safety topics with residences at the Coolidge. The Fire Department has also recommended that a liaison be appointed, and Barkan has agreed that regular meetings and communication would be beneficial for all involved.

Board of Health Recommendations:

The Coolidge currently hosts monthly blood pressure clinics and seasonal flu shot clinics, which are held consistently, although not well attended. Several local organizations have presented informational sessions regarding services available for our residents. We are exploring the option of providing additional nursing clinics if these would benefit our residents either now or in the future.

Resident concerns and complaints should typically be addressed by the Property Manager. However, the Senior Portfolio Manager provides direct oversight of the staff and is available to manage any issues that can't be resolved by the site staff. The new Property Manager has created a monthly "wish card", which residents can utilize to make comments or suggestions. These are addressed, as appropriate, at the monthly resident meetings. We also work with mediation services that can be helpful in managing disputes between residents.

Summary:

B'nai B'rith Housing and Barkan Management Company appreciate your time and we share your commitment to excellence in all housing options in Sudbury. We hope the above overview of the site management and operations and the ways in which we have worked to address community comments have helped to alleviate any concerns about The Coolidge at Sudbury or the proposed Phase 2.

The Coolidge at Sudbury Operations Highlights

- The current site staff includes three full time employees and a supervisor:
 - Peggy Golden, Property Manager
 - Craig Jarjoura, Maintenance Supervisor
 - Julie Benoit, Resident Services Coordinator
 - Cynthia Howe, Senior Portfolio Manager
- Phase 2 will include three additional staff members and extended office hours. We will work to stagger staff work hours to maximize on-site coverage between the two phases.
- There is a 24 hour *live* answering service that has emergency numbers for all staff in order to respond to any situation. This answering service improvement was implemented in August 2016.
- There is 24 hour on call maintenance staff for all urgent calls. Maintenance and administrative staff from other properties are on call to cover during vacations or to assist in true emergencies.
- The Senior Portfolio Manager supervises the staff and addresses any resident issues not able to be handled by the Property Manager.
- The Coolidge offers a monthly blood pressure clinic and seasonal flu shot clinics, as well as many programs and activities for residents including several designed to improve and maintain health. (See Attached)
- The property manager and resident services coordinator have committed to holding monthly resident meetings and have implemented a process for residents to submit suggestions and complaints.
- The Coolidge is working with residents and the Sudbury Police Department to discourage nuisance emergency calls and the call volume has decreased dramatically in the past few months as a result.

The Coolidge at Sudbury Activities/Programs

On-going Wellness programs:

1. Monthly blood pressure clinic
On-site flu shot clinic (seasonally)
2. Tai Chi (4X/week)
3. Chair exercise (2X/week)
4. Core class (for strength and balance 1X/week)
5. "Ageless Grace" (a mind/body exercise class 1X/month)
6. Walking group (meets nightly)
7. Weight management group (meets weekly)
8. Chair massage (monthly)

On-going Activities:

1. Monthly coffee hours with Peggy and Julie (NEW!)
2. Games scheduled weekly (BINGO, Dominoes, LCR)
3. Puzzles (on-going)
4. Weekly movie night
5. Knitting and Arts and Crafts Club

Special Programs/Speakers Calendared Events:

This is a sample of typical scheduled activities and entertainment

1. Nutritionist presentation
2. AAA- "Older Wiser Driver" presentation
3. Metrowest Mediation Services facilitated a Community Discussion to encourage a more tolerant, peaceful co-existence
4. "Building Peaceful Community", a workshop to follow the Community Discussion to provide tools resolving conflict peacefully
5. Sudbury Police Department conducted a CPR/AED awareness training and avoiding scams presentation
6. Sudbury Police Department attended a community meeting regarding fire alarm protocol and safety
7. Longfellow Health Center presentation on services and preventative tips
8. Bouvier Pharmacy provided information on medication services (delivery, auto-dispensers, etc.)
9. BayPath Elder Services presentation on area services and resources
10. Sudbury Senior Center has made several presentations on transportation as well as activities available at the senior center.
11. SHINE counselor
12. Music performances (LSRHS jazz and violin ensembles and Sarah Hanahan Quartet)
13. VeeBops Ice Cream truck