



Setti D. Warren
Mayor

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Barney S. Heath
Director

Community Preservation Committee Funding Recommendation for **AUBURN STREET** Affordable Housing & Historic Rehabilitation

date: 23 June 2017

from: Community Preservation Committee

to: The Honorable City Council

PROJECT GOALS & ELIGIBILITY

This project will create 8 units of rental housing permanently affordable to households at up to 60% of the area median income (AMI): one 3-bedroom unit in the oldest part of a rehabilitated Italianate home originally built in the 1860s; a new modular building with one 3-bedroom and one 2-bedroom unit; and a second, fully accessible modular building designed as a 5-bedroom congregate home for adults with intellectual disabilities, to be owned and operated by the Barry L. Price Rehabilitation Center.

The project is eligible for CPA funding as the creation of affordable housing. The adaptive reuse of the historic house is also eligible for CPA historic resources funding, based on the Newton Historical Commission's declaration that the house is significant in Newton's local history and on the sponsor's commitment to comply with the federal historic rehabilitation standards required by the Community Preservation Act (MGL Ch. 44B).

RECOMMENDED FUNDING

After its public hearing on 31 May 2017, on 8 June 2017 the Community Preservation Committee (CPC) voted 7-0 (chair Jonathan Yeo and member Don Fishman absent) to recommend appropriating \$977,700 for this project as shown below, from the Community Preservation Fund's reserves and fund balances for housing and historic resources and if needed from the Fund's general reserve, to the Planning & Development Department for a grant to CAN-DO, for any purpose implied in this summary budget:

USES	by type of construction & (no. of housing units)	Congregate - New (5)	Family - Historic (1)	Family - New (2)	Total (8)
acquisition		\$256,645	\$526,634	\$161,721	\$945,000
construction		\$780,318	\$605,485	\$551,327	\$1,937,129
soft costs, including but not limited to: architecture, engineering, legal, permitting, marketing/tenant selection, taxes, insurance, development consultant		\$163,029	\$68,524	\$105,041	\$336,594
developer overhead / fee (50% / 50%; combined total ≈ 10% of other costs)		\$119,999	\$120,064	\$81,809	\$321,872
capitalized operating reserves			\$4,500	\$10,500	\$15,000
TOTAL DEVELOPMENT COST		\$1,319,991	\$1,325,207	\$910,398	\$3,555,595
SOURCES					
CPA (\$300,000 historic resources, \$677,700 affordable housing)				\$977,700	
CDBG (\$1,020,000) and HOME (\$447,900)				\$1,467,900	
Facilities Consolidation Fund (state funds, for congregate home only)				\$659,995	
sale of completed congregate home to Price Center (using bank mortgage)				\$450,000	
TOTAL SOURCES				\$3,555,595	

website www.newtonma.gov/cpa

contact Alice E. Ingerson, Community Preservation Program Manager

email aingerson@newtonma.gov phone 617.796.1144

SPECIAL ISSUES CONSIDERED BY THE CPC

As for past small-scale affordable housing projects, many CPC members expressed concern about this project's high per-unit costs and about the long-term economic sustainability of the family units, to be owned by CAN-DO. However, all members also recognized that the congregate home provided important leverage for Newton public funds through access to state funds for which the rest of the project could not qualify and through the Price Center's capacity to carry a mortgage for that building, which it will own.

The Committee recognized that many reasons for the project's high costs were also reasons for the strong community support expressed at the public hearing, including from abutters. The project is in an ideal village-center location, close to shopping and transportation. The project's small scale will minimize its visual impact on the neighborhood streetscape. The project will preserve a relatively rare and early (pre-1870) historic home by moving it onto a new foundation, preserving or restoring its exterior, and rehabilitating its extensively reconfigured and deteriorated interior. Finally, the project's congregate home for residents with medically intensive disabilities will be costly to construct, but it will also allow these young adults to remain in their community, near their families.

ADDITIONAL RECOMMENDATIONS *(funding conditions)*

1. All recommended CPA funds will be appropriated within 6 months, and the project will be completed within 24 months, after the date of this recommendation. If either deadline cannot be met, CAN-DO may request a written extension from the CPC, which the Committee may grant at its discretion.
2. All housing units created through this project will be listed on the state Subsidized Housing Inventory.
3. CAN-DO, as the final owner of the family housing, and the Barry L. Price Center, as the final owner of the congregate home, will grant to the City of Newton a permanent preservation restriction on the historic home and permanent affordability restrictions on all housing units. Affordability restrictions for the family housing will allow for "high HOME" rents, based on incomes up to 60% of the area median.
4. The phased release of CPA funds for the project will be governed by a detailed grant agreement that includes but is not limited to the conditions required of past CPA-funded housing projects: initial release upon final commitment of all funding required to complete the project, plus receipt of a Comprehensive Permit; initial release for construction upon procurement of a construction contract through the City of Newton Purchasing Dept., plus receipt of a building permit; phased release of developer overhead, based on construction progress; release of the funding for the developer fee upon completion of construction; and release of final 10% of the CPA grant upon receipt and presentation of a final report to the CPC.
5. Any CPA funds appropriated but not used for the purposes stated herein will be returned to the Newton Community Preservation Fund.

KEY OUTCOMES

The Community Preservation Committee will evaluate this project based on how well it meets conditions 1 through 3 above.

ATTACHMENTS (delivered to the clerks of the Land Use Committee and Finance Committee)

- ◆ Copy of the CPC's project webpage showing all information available there, including community comments received in writing: www.newtonma.gov/gov/planning/cpa/projects/auburn.asp
In addition, once minutes of the CPC's 31 May 2017 public hearing and 8 June 2017 are approved, they will be posted on the CPC's [Committees & Meetings](http://www.newtonma.gov/gov/planning/cpa/committees/committees.htm) page: www.newtonma.gov/gov/planning/cpa/committees/default.asp#Meetings.
- ◆ Slide presentation to the CPC on 31 May 2017
- ◆ Key portions of the proposal to the CPC, including: project budgets, Newton Historical Commission review, site & floor plans, elevations and construction cost estimates
- ◆ Underwriting analysis by independent consultant, required for Newton HOME funding
- ◆ Background on the affiliation between CAN-DO and Metro West Collaborative Development

Newton CPA Proposals & Projects

Auburn Street

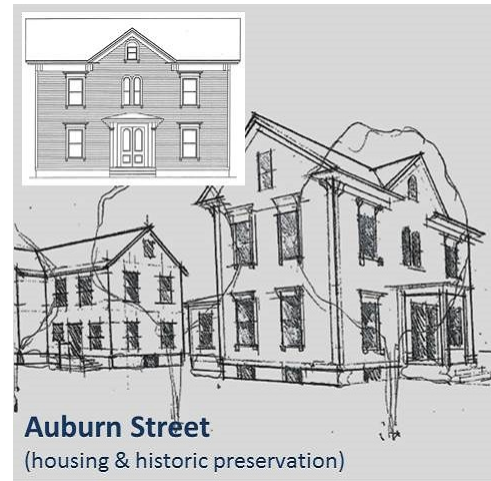
Affordable Housing & Historic Preservation

location:

236 Auburn Street, Auburndale, MA 02466

goals:

Rehabilitate an 1860s Italianate home and add modular new construction to create 8 units of permanently affordable rental housing: 3 units for families at up to 60% of the area median income (one 2-bedroom unit and two 3-bedroom units) and 5 units in a congregate home for adults with developmental disabilities, at up to 30% of the area median income.



Auburn Street
(housing & historic preservation)

funding:

\$300,000	CPA funding, historic resources (recommended)
\$677,700	CPA funding, affordable housing (recommended)
\$1,020,000	CDBG funding (federal funds allocated to Newton)
\$447,900	HOME funding (federal funds allocated to Newton)
\$659,995	Facilities Consolidation Fund (FCF), for clients of the Massachusetts Dept. of Developmental Services
\$450,000	sale of completed congregate facility to the Barry L. Price Rehabilitation Center
\$3,555,595	TOTAL PROJECT COST

contacts:

- Jennifer Van Campen, Executive Director & Josephine McNeil, Executive Director Emeritus
Citizens for Affordable Housing in Newton Development Organization (CAN-DO)
79-B Chapel Street, Nonantum, MA 02458
emails: (Van Campen) jvc@metrowestcd.org, (McNeil) jam_cando@msn.com
phones: (Van Campen) 617.923.3505, (McNeil) 617.964.3527
website: www.newtoncando.org/
- Jennifer Van Campen, Executive Director & Linda Moody, Real Estate Project Manager
Metro West Collaborative Development
79-B Chapel Street, Nonantum, MA 02458
email: linda@metrowestcd.org
phone: 617.923.3505
website: <http://metrowestcd.org/>
- Justin Salloway, President
Barry L. Price Rehabilitation Center
27 Christina Street, Newton Highlands, MA 02461
email: jsalloway@thepricecenter.org
phone: 617.244.0065, x1001
website: www.thepricecenter.org/home.html

Funding Process

2016

25 August 2016 - [property inspection report](#)

2017

February-June 2017 - **historic preservation reviews:**

- 17 February-April - [Newton Historical Commission actions](#), including declaration of local historic significance (required for CPA eligibility) and approval of site & preservation plan
- 23 March-June 2017 - [submission to Massachusetts Historical Commission](#) (MHC), as part of environmental review required for requested CDBG/HOME funding

17 March 2017 - **pre-proposal** to the CPC, including:

- [project summary, budgets, site & floor plans, state funding pre-application](#)
- [site photos & maps](#)
- [analysis of historic significance & historically significant features](#), required for CPA historic resources funding (partially duplicates MHC submission below)

28 April-1 June 2017 - **full proposal** to the CPC, including:

- [updated CPA funding request & funding sources](#) (rec'd 18 May - 1 June 2017)
- [project summary & budgets](#), plus: funding sources, evidence of site control, tenant policies & procedures: tenant selection, accommodation for tenants with disabilities, supportive services
- [site photos & maps](#) (repeated from pre-proposal above)
- [project sponsors](#): organizational finances, portfolios of past projects, project team qualifications; see also submission below for 5 June 2017 Planning & Development Board discussion
- [project design](#): historic significance & preservation, zoning, site & floor plans, construction scope & cost estimate
- Note: This file includes a brief summary of the phase 1 environmental report on this site. For the full report, [click here](#).
- [support petition with community signatures](#) (rec'd 31 May 2017)

April-June 2017 - **submissions to Planning & Development Board:**

- 3 April 2017 - background on [affiliation between CAN-DO and Metro West Collaborative Development](#)
- 31 May 2017 - information for 5 June 2017 discussion of [CAN-DO/Metro West organizational finances](#): draft 2016 audited statements; schedule of real estate owned/operated by both organizations; organizational chart; organizational budget projections for 2017-2021

9 May 2017 - [independent underwriting analysis & risk assessment](#) (required for requested use of Newton's federal housing funds)

31 May 2017 - [project presentation](#) to CPC public hearing

5 June 2017 - [community letters received to date about this proposal](#)

2 June 2017 - [project analysis by City of Newton housing & community development staff](#)

23 June 2017 - [CPC funding recommendation](#)

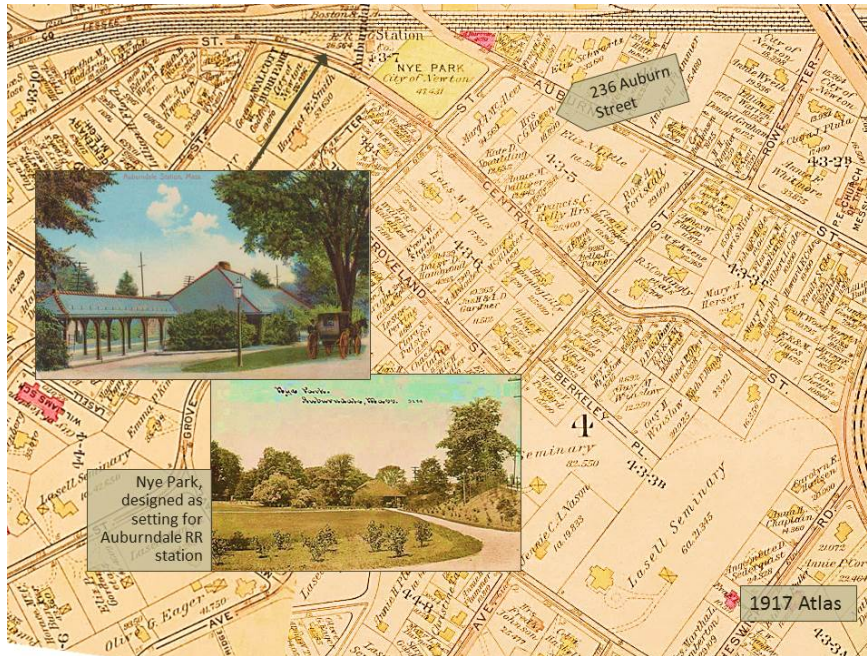
Project Background & News

2017

30 March 2017 - [aerial photograph & property record from Newton Assessors' Database](#)

17 April 2017 - full [phase 1 environmental report](#) (559 pp.)

1874-1917 - [historic maps & postcards](#) of the neighborhood



236 AUBURN STREET



presentation to Newton
Community Preservation
Committee public hearing,
31 May 2017

CITIZENS FOR AFFORDABLE HOUSING IN NEWTON DEVELOPMENT ORGANIZATION, INC

WHO WE ARE

CAN-DO

- A private non-profit community development corporation.
- Started to create and preserve affordable family housing in Newton.

The Barry Price Center

- An organization for individuals with intellectual and developmental disabilities.
- Residential, day habilitation and employment programs that foster clients' self-confidence and maximize their physical, emotional and intellectual capabilities.



WHAT'S PROPOSED

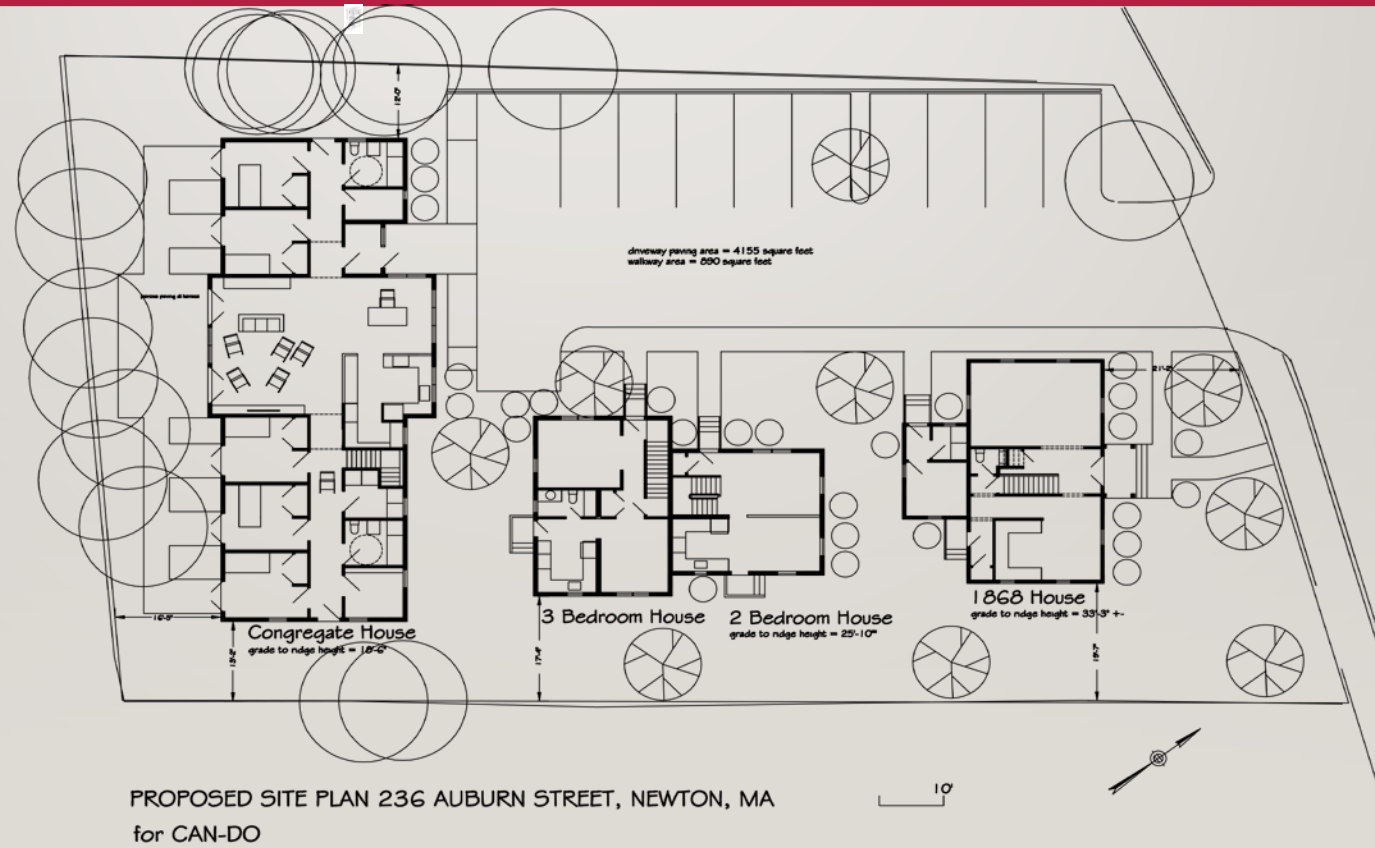
- One house for five developmentally disabled adults
- Three units of affordable family housing:

One existing historic house restored and made into a 3 bedroom affordable rental unit

Two new attached units including a 3 bedroom and a 2 bedroom affordable unit



THE SITE PLAN



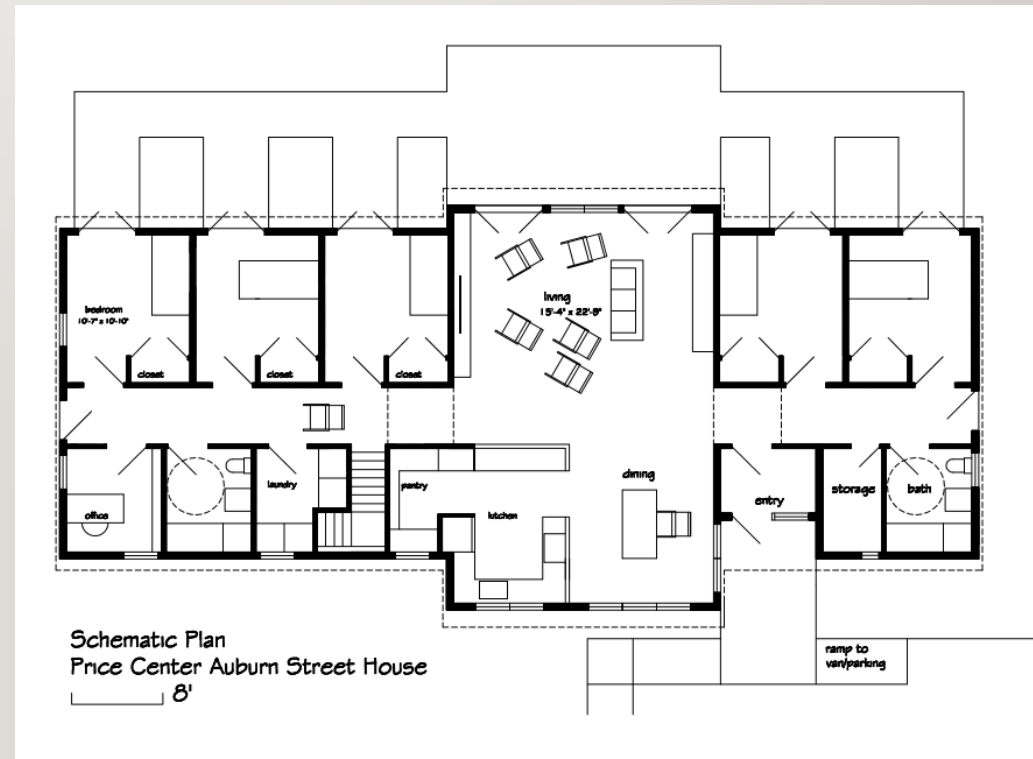
THE HISTORIC HOUSE

- Restoration of the existing house to become a three bedroom affordable family unit



THE CONGREGATE HOUSE

- Construction of a five bedroom congregate home for the developmentally disabled



THE TWO FAMILY HOUSE

- Construction of one new house with two affordable family rental units: a three bedroom and a two bedroom



ELIGIBILITY FOR RESIDENCY

- Five developmentally disabled adults
- Three low income families

Household size	1 person	2 person	3 person	4 person	5 person	6 person
Income Limit 50% area median	\$36,200	\$41,400	\$46,550	\$51,700	\$55,850	\$60,000
Income limit 30% area median	\$21,700	\$24,800	\$27,900	\$31,000	\$33,500	\$36,000

2017 data

AUBURN STREET UNITS	Total	≤ 30% AMI	≤ 50% AMI
congregate units	5	5	
2 BR	1		1
3 BR	2		2

TOTAL PROJECT COSTS

	<u>Total</u>	<u>Congregate</u>	<u>Historic</u>	<u>Family</u>
Acquisition	\$945,000	\$256,645	\$526,634	\$161,721
Construction	\$1,937,129	\$780,318	\$605,485	\$551,327
Soft Costs	\$336,594	\$163,029	\$68,524	\$105,041
<u>Developer fees</u>	<u>\$336,872</u>	<u>\$119,999</u>	<u>\$124,564</u>	<u>\$92,309</u>
Total Development Cost	\$3,555,595	\$1,319,991	\$1,325,207	\$910,398
TDC per unit:	\$444,449			

POTENTIAL SOURCES OF FUNDS*

City of Newton

- CPA: \$977,700
- CDBG: \$1,020,000
- HOME: \$447,900

Commonwealth of Massachusetts

- Facilities Consolidation Funds \$659,995

Private sources

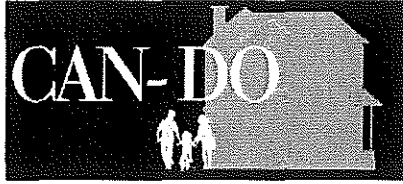
- Sale to Price Center: \$450,000
- **TOTAL BUDGET:** **\$3,555,595**

*Currently proposed/housing division recommendation (modified from original CPC submission)

236 AUBURN STREET



END



April 28, 2017

Ms. Alice Ingerson
Community Preservation Manager
City of Newton Planning Department
1000 Commonwealth Avenue
Newton, MA 02459

Dear Ms. Ingerson,

On behalf of the Board of Directors of CAN-DO and Metro West Collaborative Development I am pleased to submit this Full Proposal for the review of the Community Preservation Committee for our project at 236 Auburn Street. We appreciate the Committee's willingness to consider the request off cycle. We look forward to further exploring the project with you and the Committee over the coming weeks.

Sincerely,

A handwritten signature in black ink, appearing to read "Jennifer Van Campen", is written over the printed name and title.

Jennifer Van Campen
Executive Director

CAN-DO and Metro West Collaborative Development

City of Newton



Setti D. Warren
Mayor

Newton, Massachusetts Community Preservation Program #221-17 FUNDING REQUEST

☐

PRE-PROPOSAL

☒

PROPOSAL

Last updated February 2017.

Please submit this completed file directly – do not convert to PDF or other formats.

For full instructions, see www.newtonma.gov/cpa or contact us:

Community Preservation Program Manager,

City of Newton Planning & Development Department, 1000 Commonwealth Ave., Newton, MA 02459

aingerson@newtonma.gov 617.796.1144

(For staff use)
date rec'd:

28 April 2017

You may adjust the space for each question, but the combined answers to all questions on this page must fit on this page.

Project TITLE	Auburn Street Affordable Housing & Historic Preservation			
Project LOCATION	Full street address (with zip code), or other precise location. 236 Auburn Street, Auburndale MA 02466			
Project CONTACTS	Name & title or organization	Email	Phone	Mailing address
Project Manager	Linda Moody, RE Project Manager, Metro West CD	linda@metrowestd.org	617-923-3505	79B Chapel St., Newton, MA 02458
Other Contacts	Jennifer Van Campen, Exec. Dir., CAN-DO	jvc@metrowestcd.org	617-923-3505	79B Chapel St., Newton, MA 02458
Other Contacts	Justin Sallaway, President, Price Rehab. Ctr.	jsallaway@thepricecenter.org	617-244-0065	27 Christina St., Ste. 201, Newton, MA 02461
Sponsoring Orgs. (check all that apply)	Non-profit	Certified CHDO	Public Agency	Project LLC
Anticipated Project FUNDING	A. Newton CPA funds: \$472,800 Historic	B. Newton CDBG/HOME funds: \$300,000 HOME	C. Other funds: \$450,000 sale to Price	D. Total project cost (A+B + C): \$3,555,595
Project SUMMARY	Explain how the project will use the requested Newton public funds. For housing, please cover location, rehab vs. new construction, rental vs. ownership, target population, and unit composition, You may provide more detail in attachments, but your PROJECT SUMMARY MUST FIT IN THE SPACE BELOW. The project consists of 8 units of affordable housing: 5 units within a new 2493 sq. ft. congregate house for individuals with medically intensive disabilities, 1 three bedroom 1280 sq. ft. and 1 two bedroom 1020 sq. ft. in attached modular homes and the restoration of the existing 1512 sq. ft. nineteenth century house on the site into a 3 bedroom single family home. All units will be rental housing. There will be full handicapped accessibility in the congregate home. There will be a tot lot on site and 10 parking spaces, including room for a handicapped van. A proposed small addition to the historic house will contain an office and a ½ bath to provide meeting space for tenants and their service providers. The historic house will be preserved consistent with the current architectural preservation standards and will be further fortified by moving it to a new foundation on the site. The project is located within ¼ mile of Auburndale village center and within walking distance of the commuter rail, the express bus, and the MBTA station at Riverside. Within the village center are a supermarket, two banks, the post office, a gas station, and several restaurants. Several possible employment opportunities are available nearby including the Marriott Hotel, Lasalle College and Village and the Newton Wellesley Hospital. There is also a park within ¼ mile.			

You may adjust the space for each question, but the combined answers to all questions on this page must fit on this page.

Project TITLE	Auburn Street Affordable Housing & Historic Preservation				
USE of CPA and CDBG/HOME FUNDS		HISTORIC RESOURCES		COMMUNITY HOUSING	
CHECK ALL THAT APPLY	create	not allowed		X	
	preserve	X			
	new construction			X	
	rehabilitate/restore	X		X	
HOUSING TARGET POPULATION <i>Check all that apply.</i>					
X Individual/Family	X Homeless/At Risk of Homelessness	X Special needs/disabilities (identify population & provider of support services, if any):			
HOUSING TYPE <i>Check all that apply.</i>					
X Rental	X Individual/single family	X Group residence/congregate			
HOUSING UNIT COMPOSITION <i>List the development's number of units in each category.</i>					
	Total	≤ 30% AMI	≤ 50% AMI	≤ 80% AMI	80- <100% AMI
congregate unit	5	5			
2 BR	1		1		
3 BR	2		2		
COMMUNITY NEEDS & OUTREACH	For community needs , provide a brief quote with plan title, year and page number from each of at least 2 plans linked to Guidelines & Forms on www.newtonma.gov/cpa showing how this project meets already recognized needs. For community outreach , summarize both efforts to date & future plans.				
This project will address 1) affordable housing needs, 2) historic preservation of a significant house, and 3) provision of housing to a developmentally challenged population in great need of accessible housing. Comprehensive Plan: The Housing Section emphasizes the steady decrease in both affordable rental and ownership units in the City and the need to protect diversity. Under Housing Goals titled "Utilizing Existing Housing" on pp 5-8 states "the importance of bringing affordability to existing housing as one of the means to attain our housing goals". Consolidated Plan 7/2015 to 6/2020: pp 100-101, comments on overcrowding of units occupied by low income families and their cost burden. This project will serve larger families and charge rents that are more than \$200 less than fair market rents for the area. Community Needs: Ramping Up: Planning for a More Accessible Newton: recommends "taking significant steps to implementing fair housing and choice for people with disabilities." Newton Leads 2040: Suggests that, "If action is not initiated, there are clear consequences for the City in terms of housing diversity and economic development outcomes. The Newton Leads 2040 Housing Strategy supports the traditional diversity of housing while at the same time providing smart, contextual, sustainable housing options that add value to the fabric of the community." Community Outreach: 3 councilors (Gentile, Harney, Sangiolo) are aware of this project. Several abutters have reviewed plans and there will be a neighborhood meeting in May to address neighbor concerns.					
COMMUNITY CONTACTS	List at least 3 Newton residents or organizations willing and able to comment on the project and its manager's qualifications. No more than 1 should be a supervisor, employee or current work colleague of the project manager or sponsor. Consult staff on the community contacts required for your specific proposal.				
Name & title or organization		Email	Phone	Mailing address	
Marcia Johnson, Newton resident			617-581-9314	39 Bemis St., Newtonville 02466	
Mary Ryan, Newton resident			617-947-1869	36 Freeman St., Auburndale 02466	
Karla Armenoff, Newton resident			617-332-1435	57 Evergreen Ave., Auburndale 02466	

You may adjust the space for each question, but the combined answers to all questions on this page must fit on this page.

Full proposals must include separate, detailed budgets in addition to this page.

Project TITLE	Auburn Street Affordable Housing & Historic Preservation	
SUMMARY CAPITAL/DEVELOPMENT BUDGET		
Uses of Funds: see attached full budget for complete breakdown		
Congregate Housing - Acquisition		\$256,645
Congregate Housing – Design (Architectural and Engineering)		\$86,179
Congregate Housing – Construction		\$977,167
Family Housing – Acquisition		\$ 161,721
Family Housing – Design (Architectural and Engineering)		\$54,304
Family Housing - Construction		\$694,373
Historic Preservation (adaptive reuse for family housing) - Acquisition		\$526,634
Design (architectural and engineering)		\$35,699
Historic Preservation (adaptive reuse for family housing) - Construction		\$762,874
E. TOTAL USES (should equal D. on page 1 and F. below)		\$3,555,595
Sources of Funds	Status (requested, expected, confirmed)	
Newton CPA funding: Housing and Historic		\$ 945,600
Newton CDBG/HOME funds	See updated allocation of funding by source, attached.	\$1,500,000
FCF		\$659,995
Sale to Price Center		\$450,000
F. TOTAL SOURCES (should equal D. on page 1 and E. above)		\$3,555,595
SUMMARY ANNUAL OPERATIONS & MAINTENANCE BUDGET (cannot use CPA funds)		
Uses of Funds		
Congregate Housing		\$1,363,000
Family Housing (excludes interest and capital costs)		\$30,408
G. TOTAL ANNUAL COST (should equal H. below)		\$1,393,408
Sources of Funds		
Congregate Housing (DDS & Rent)		\$1,309,880
Family Housing (Rent)		\$35,739
I. TOTAL ANNUAL FUNDING (should equal G. above)		\$1,345,619
Project TIMELINE	Phase or Task	Season & Year
	Newton Historical Commission Hearing, FCF Pre-App In	Feb 2017
	Community outreach, CPC pre-app, FCF full proposal, CDBG, HOME apps in	March 2017
	Community outreach, CPC meeting, CPC full app, CDBG, HOME conditional commitments	April 2017
	CPC hearing, PEL Submission	May 2017
	CPC recommendation to Council	June 2017
	DHCD site visit	July 2017
	All funding commitments, Comp. permit granted, 20 day appeal	August 2017
	ZBA Comp. permit request	September 2017
	Construction drawings, construction closings and public procurement process	Oct - Dec 2017
	General Contractor procurement	January 2018
	Building Permit, construction begins	March 2018
	Construction substantial completion	January 2019

Project TITLE		Auburn Street Affordable Housing & Historic Preservation	
☒ = submitted w pre-proposal		↓ Check off submitted attachments here. updates as of 6 & 21 April 2017	
REQUIRED.	☒	PHOTOS	of existing site or resource conditions (2-3 photos may be enough)
	☒	MAP	of site in relation to nearest major roads (omit if project has no site)
REQUIRED for full proposal.	PROJECT FINANCES printed and as computer spreadsheets, with both uses & sources of funds		
	☒	development pro forma/capital budget: include total cost, hard vs. soft costs and contingencies, and project management time from contractors or staff	
	☒	operating/maintenance budget, projected separately for each of the next 10 years – including Price Ctr congregate housing	
	☒	description of planned ownership structure (condominium)	
	☐	rental subsidy, if any: sources, commitment letters or application/decision schedules	
	☐	market analysis: including prevailing/trending rents or prices & target population	
	☐	affirmative marketing & resident selection plan	
	☐	non-CPA funding: commitment letters, letters of inquiry to other funders, fundraising plans, etc., including both cash and est. dollar value of in-kind contributions	
	☐	purchasing of goods & services: briefly summarize sponsor's understanding of applicable state statutes and City policies	
REQUIRED for full proposal.	☐	HISTORIC SIGNIFICANCE	attachments analyzing historic significance and significant features, and showing how project meets national preservation standards
REQUIRED for full proposal.	PROJECT SPONSOR FINANCES & CAPACITY		
	☐	most recent annual operating budget & audited financial statement	
	☐	transition plan, mission & current housing portfolio, including how this project fits both	
	☐	previous similar projects completed, with photographs	
	☐	fair housing: training completed, past complaints & their resolution	
	☐	Boards of Directors & project managers/team: list skills, experience, tenure & affiliations (incl. City boards or commissions)	
	SITE CONTROL, VALUE & DEED RESTRICTIONS		
	☒	deed	
	☒	appraisal by independent, certified real estate appraiser	
	☒	owner's agreement to permanent deed restrictions for affordability & historic preservation	
	ZONING & PERMITTING		
	☒	short email confirming review by the Development Review Team (DRT)	
	☒	brief property history: at least the last 30 years of ownership & use	
	☒	environmental mitigation plans: incl. lead paint, asbestos, underground tanks & results of phase 1 environmental assessment (may be submitted separately when available)	
	☒	zoning relief and permits required: incl. parking waivers, demolition or building permits, comprehensive permit or special permit	
	☒	other approvals required: local & state historical commissions, disability & architectural access boards, etc.	
	DESIGN, CONSTRUCTION & ACCESSIBILITY		
	☒	home inspection report by a licensed professional, for rehabilitation	
	☒	site plan, floor plans & elevations	
☒	architectural access worksheet: highlight accessibility in excess of legal requirements		
☒	reasonable accommodation/reasonable modification policy		
☒	scope of construction work: highlight "green" or sustainable features & materials		
OPTIONAL		LETTERS of SUPPORT	from Newton residents, organizations, or businesses

Project TITLE

Auburn Street Affordable Housing & Historic Preservation**ARCHITECTURAL ACCESS WORKSHEET**

Use this table to show how the proposed project will meet or exceed the most stringent applicable requirements.

REQUIRED**PROPOSED****1. Site access – accessible route**

Site access to the congregate house is required, site access to community spaces is required

The congregate house will have an accessible route including walkways, curbs, cutouts, ramps and one accessible parking space (which will be the van space). All community spaces and offices of the congregate house will be fully accessible.

2. Accessible parking (identify proposed total # of spaces)

Required for congregate house.

1 van accessible space.

3. Building entrances & accessible routes within buildings

Congregate house is required to have an accessible entrance per AAB, Group 2B requirements.

The congregate house will have all entrances accessible.

4. Common areas & facilities (offices, laundry rooms, community rooms, etc.)

Access is required to community areas.

All community spaces and offices of the congregate house will be fully accessible.

5. Group 1 Units (MAAB) (include units covered by the FHA)

The historic house and the Townhouses are not required to be Group 1.

No special amenities proposed in this group.

6. Group 2 Units (MAAB)

The congregate house is a lodging facility with 5 units and must meet Group 2B requirements.

Congregate house will meet Group 2 requirements of AAB.

To: Members of the Community Preservation Committee

From: Jennifer Van Campen, Executive Director, CAN-DO

Date: May 18, 2017

Updated CPA Funding Request & Sources for 236 Auburn Street

The CPC proposal submitted by CAN-DO on April 28, 2017 requested \$945,600 in CPA funds for historic preservation and affordable housing at 236 Auburn Street in Auburndale. The below explains a small modification of that request.

The Department of Planning and Development's Housing Division staff has reviewed the development budget and funding sources for 236 Auburn Street and has recommended changes based upon the City's CDBG and HOME allocations and the regulations governing those programs. In the original proposal, CAN-DO requested \$472,800 in CPA historic preservation funds and \$472,800 in CPA affordable housing funds for a total CPA request of \$945,600. Given that the CDBG funding will be used to fund demolition, site improvements, and the rehabilitation of the historic structure, staff recommended reducing the CPA funding for historic preservation and reallocating these funds towards CPA-funded affordable housing.

The proposed reallocation will increase the total CPA request by \$32,100 or 3.4%. The CPA funding request as originally proposed by CAN-DO and the current CPA funding request as recommended by Housing Division staff are detailed in the table below.

Original Proposal		Currently Proposed (Housing Division Recommendation)	
CPA Historic	\$472,800	CPA Historic	\$300,000
CPA Housing	\$472,800	CPA Housing	\$677,700
Total Request	\$945,600	Total CPA Request	\$977,700

All currently proposed funding sources for the project, including CDBG and HOME funds and state and private funding, are included in the table below.

Original Proposal		Currently Proposed (Housing Division Recommendation)	
CPA Historic	\$472,800	CPA Historic	\$300,000
CPA Housing	\$472,800	CPA Housing	\$677,700
CDBG	\$1,000,000	CDBG	\$1,020,000
HOME	\$500,000	HOME	\$447,900
Facilities Consolidation Funds	\$659,995	Facilities Consolidation Funds	\$659,995
Sale to Barry Price Center	\$450,000	Sale to Barry Price Center	\$450,000
Total Request	\$3,555,595	Total Request	\$3,555,595

The proposed reallocation of funding will allow the CPA housing funds to be used towards the two new rental units in the duplex building as well funding to support the construction of the five-bedroom congregate residence that will be owned by the Barry Price Center.

We appreciate your consideration.

Development budget attached, updated to reflect this change.

Auburn Street								
USES		Total	Congregate	Historic	Family	Total		
ACQUISITION								
Acquisition: Land		900,000	234,633	97,196	147,851	479,680		
Acquisition: Building				420,320		420,320		
Acquisition: Carrying Costs		45,000	22,012	9,118	13,870	45,000		
Acquisition Subtotal		945,000	256,645	526,634	161,721	945,000		
CONSTRUCTION								
Direct Construction		1,539,275	620,158	462,818	456,299	1,539,275		
Demolition & Site work		243,601	98,144	73,244	72,213	243,601		
Construction Contingency (5-15%)		154,253	62,016	69,423	22,815	154,253		
Construction Subtotal		1,937,129	780,318	605,485	551,327	1,937,129		
SOFT COSTS								
Architecture & Engineering		176,182	86,179	35,699	54,304	176,182		
Survey & Permits		20,000	9,783	4,053	6,165	20,000		
Clerk of the Works		-	-	-	-	-		
Environmental Engineering		25,000	12,229	5,066	7,706	25,000		
Bond Premium			-	-	-	-		
Legal - Developer Only		25,000	12,229	5,066	7,706	25,000		
Title / Recording		10,000	4,891	2,026	3,082	10,000		
Accounting & Cost Certification			-	-	-	-		
Marketing & Rent-up		3,000	-	900	2,100	3,000		
Real Estate Taxes		9,812	4,800	1,988	3,024	9,812		
Insurance		10,000	4,891	2,026	3,082	10,000		
Relocation			-	-	-	-		
Appraisal		-	-	-	-	-		
Security		-	-	-	-	-		
Construction Loan Interest		-	-	-	-	-		
Inspecting Engineer		9,000	4,402	1,824	2,774	9,000		
Fees: Construction Loan			-	-	-	-		
Fees: Permanent Loan			-	-	-	-		
Development Consultant		10,000	4,891	2,026	3,082	10,000		
Other: Lender Legal		5,000	2,446	1,013	1,541	5,000		
Other: LIP app fee		3,000	1,467	608	925	3,000		
Soft Cost Contingency 10%		30,599	14,821	6,229	9,549	30,599		
Soft Costs Subtotal		336,594	163,029	68,524	105,041	336,594		
Subtotal Acq. + Const. + Soft		3,218,723	1,199,992	1,200,643	818,089	3,218,723		
DEVELOPER FEE % OH, RESERVES								
Developer Overhead 5%		160,936	60,000	60,032	40,904	160,936		
Developer Fee 5%		160,936	60,000	60,032	40,904	160,936		
Capitalized Operating Reserves		15,000		4,500	10,500	15,000		
Subtotal Dev Fee & OH, Reserves		336,872	119,999	124,564	92,309	336,872		
TOTAL DEVELOPMENT COST		3,555,595	1,319,991	1,325,207	910,398	3,555,595		
	per unit		263,998	1,325,207	455,199			
			5	1	2			
	per unit across all					444,449		
	per bedroom across all					273,507		

[illegible]

CAN-DO Operating ProForma
236 Auburn St.

3

INCOME					Year										
	Unit	bedrooms	Rent No. units	Trending		1	2	3	4	5	6	7	8	9	10
duplex	Low HOME	2	953	1	2%	11,436	11,665	11,898	12,136	12,379	12,626	12,879	13,136	13,399	13,667
single	Low HOME	3	1,084	1		13,008	13,268	13,534	13,804	14,080	14,362	14,649	14,942	15,241	15,546
duplex	Low HOME	3	1,098	1		13,176	13,440	13,708	13,982	14,262	14,547	14,838	15,135	15,438	15,747
Gross Potential Annual Income						37,620	38,372	39,140	39,923	40,721	41,536	42,366	43,214	44,078	44,959
Vacancy 5%						(1,881)	(1,919)	(1,957)	(1,996)	(2,036)	(2,077)	(2,118)	(2,161)	(2,204)	(2,248)
Effective Annual Income						35,739	36,454	37,183	37,927	38,685	39,459	40,248	41,053	41,874	42,711
EXPENSES					per unit										
	Insurance		1,000	3%		3,000	3,090	3,183	3,278	3,377	3,478	3,582	3,690	3,800	3,914
	Management Fees		500	3%		1,500	1,545	1,591	1,639	1,688	1,739	1,791	1,845	1,900	1,957
	Administrative Expenses		1,000	3%		3,000	3,090	3,183	3,278	3,377	3,478	3,582	3,690	3,800	3,914
	Supportive Services		500	3%		1,500	1,545	1,591	1,639	1,688	1,739	1,791	1,845	1,900	1,957
	Landscaping/Snow		0	3%		0	0	0	0	0	0	0	0	0	0
	Facility Maintenance		2,000	3%		6,000	6,180	6,365	6,556	6,753	6,956	7,164	7,379	7,601	7,829
	Utilities		1,400	3%		4,200	4,326	4,456	4,589	4,727	4,869	5,015	5,165	5,320	5,480
	Property Taxes		1,500	3%		4,500	4,635	4,774	4,917	5,065	5,217	5,373	5,534	5,700	5,871
	Replacement Reserve		300	3%		900	900	900	900	900	900	900	900	900	900
	Condo Fee		1,936	3%		5,808	5,982	6,162	6,347	6,537	6,733	6,935	7,143	7,357	7,578
			10,136												
Total Annual Expenses						30,408	31,293	32,205	33,144	34,112	35,108	36,134	37,191	38,280	39,401
Net Operating Income						5,331	5,161	4,978	4,782	4,574	4,351	4,114	3,862	3,594	3,310
Debt Service															
	0	5.50%	30			0	0	0	0	0	0	0	0	0	0
Debt Service Coverage															
Cash Flow						5,331	5,161	4,978	4,782	4,574	4,351	4,114	3,862	3,594	3,310

Price Center Operating ProForma

units 5

INCOME

	Unit	BR	Rent	Trend	Year									
					1	2	3	4	5	6	7	8	9	10
DDS Rent	1		11,000	2%	1,371,000	1,398,420	1,426,388	1,454,916	1,484,014	1,513,695	1,543,969	1,574,848	1,606,345	1,638,472
Gross Potential Annual Income														
Vacancy	3%				(41,130)	(41,953)	(42,792)	(43,647)	(44,520)	(45,411)	(46,319)	(47,245)	(48,190)	(49,154)
Effective Annual Income					1,329,870	1,356,467	1,383,597	1,411,269	1,439,494	1,468,284	1,497,650	1,527,603	1,558,155	1,589,318

EXPENSES

		per unit												
Personnel		178,884	3%		894,418	921,251	948,888	977,355	1,006,675	1,036,876	1,067,982	1,100,021	1,133,022	1,167,013
Support		4,000	3%		20,000	20,600	21,218	21,855	22,510	23,185	23,881	24,597	25,335	26,095
Occupancy		7,000	3%		35,000	36,050	37,132	38,245	39,393	40,575	41,792	43,046	44,337	45,667
Transportation		3,020	3%		15,100	15,553	16,020	16,500	16,995	17,505	18,030	18,571	19,128	19,702
Consumables		7,400	3%		37,000	38,110	39,253	40,431	41,644	42,893	44,180	45,505	46,870	48,277
Equipment		2,700	3%		13,500	13,905	14,322	14,752	15,194	15,650	16,120	16,603	17,101	17,614
Condo Fee		2,000	3%		10,000	10,300	10,609	10,927	11,255	11,593	11,941	12,299	12,668	13,048
Management & Gen.		6,100	3%		30,500	31,415	32,357	33,328	34,328	35,358	36,419	37,511	38,636	39,796
Admin.		26,200	3%		131,000	134,930	138,978	143,147	147,442	151,865	156,421	161,113	165,947	170,925
		237,304												
Total Annual Expenses					1,186,518	1,222,114	1,258,777	1,296,540	1,335,436	1,375,500	1,416,765	1,459,267	1,503,046	1,548,137
Net Operating Income					143,352	134,354	124,820	114,728	104,058	92,784	80,885	68,335	55,109	41,181
Debt Service														
	450,000	####	30		28,988	29,858	30,754	31,676	32,627	33,605	34,614	35,652	36,722	37,823
Debt Service Coverage					4.95	4.50	4.06	3.62	3.19	2.76	2.34	1.92	1.50	1.09
Cash Flow					114,364	104,496	94,066	83,052	71,431	59,179	46,271	32,683	18,388	3,358

Updated Timeline

236 Auburn St. Timeline:

April 2017	- CPA, HOME and CDBG applications submitted
May 2017	- CPA hearing - Planning and Development Board review - Neighborhood meeting
June 2017	- City Council review of CPA recommendation begins - Planning and Development Board decision - FCF full application submitted - Project Eligibility request submitted
July 2017	- DHCD site visit - City Council review of CPA continues
August 2017	- Site eligibility letter awarded - All City of Newton funds committed
September 2017	- Comp permit application to ZBA - FCF funds committed
November	- Construction closing (HOME, CDBG)
October – December 2017	- Construction-set drawings completed
January 2018	- Procurement of General Contractor - Construction closing (FCF, CPA, other lenders)
March 2018	- Construction start
January 2019	- Construction substantial completion
February 2019	- Lease up and sustained occupancy
March 2019	- HOME/CDBG final close out administration - CPA Final Report

Description of Planned Ownership
Structure, Market Analysis, Non-CPA
Funding, Purchase of Goods and
Services, Transition Plan, Fair Housing
Training, Owners' Agreement to
Permanent Deed Restrictions

236 Auburn Street Ownership Structure

236 Auburn Street will be owned by a condominium trust, which will have two member/owners: CAN-DO and the Price Center. Each will own 50% of the ownership of the condominium trust. CAN-DO's 50% will include the historic house and two attached town homes and the land they sit on. The Price Center's 50% will include the congregate house and the land it sits on. Each will be responsible for the maintenance and associated operating expenses of their own property. Both will equally own common space that will minimally include the driveway and may include some or all of the parking. The two parties will contribute to the operating expenses of the common areas through a monthly condominium fee.

Market Analysis

The Price Center, with the Department of Developmental Services, has already identified five individuals for residency at this location. 3 are Newton families.

With market-rate rents of \$3,500 on average in Newton, the three affordable family units will be in high demand. CAN-DO is currently advertising the availability of two units at Cambria Rd. and over 110 have already applied to be included in the lottery and the deadline is May 3rd. This is similar to the response to the affordable units at Myrtle Village where 279 people applied for 7 units.

Existing Current Rents in the Newton Area:

Avalon, Chestnut Hill, Newton	1 Bedroom	\$2,610
	2 Bedroom	\$3,420
	3 Bedroom	\$3,625
Chestnut River Landing, Needham	1 Bedroom	\$3,045
	2 Bedroom	\$3,785
	3 Bedroom	\$5,270
1940 Washington St., Newton	1 Bedroom	\$2,731
	2 Bedroom	\$3,029
	3 Bedroom	\$4,035
199 LaGrange St., Newton	1 Bedroom	\$3,350
	2 Bedroom	\$4,150

Non-CPA Funding

The project has submitted a pre-application to the Community Economic Development Assistance Corporation for a deferred interest loan from a publicly funded resource called the Facilities Consolidation Fund, which is available to developers of housing for individuals with disabilities. These

funds would help support the construction of the Price Center portion of the project. \$659,995 have been requested.

Additionally, the project is in the process of seeking support from the City of Newton's CDBG and HOME funding programs. \$1,500,000 have been requested.

The Price Center will purchase their portion of the project from CAN-DO at construction completion. The proceeds from the sale will help offset some of the development costs. The sale price will be \$450,000. A draft Option to Purchase has been circulated to the Boards of Directors of both organizations and a final signed agreement is anticipated in late May.

Purchasing of Goods and Services

In the process of constructing 236 Auburn Street, CAN-DO will comply with all City of Newton procurement requirements as well as the those required under the federal CDBG and HOME Programs that will insure a) competitive pricing is obtained and b) no vendors nor their principals are currently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from participation.

Transition Plan

In January 2017 the Board of Directors of both CAN-DO and Metro West Collaborative Development, Inc. amended their by-laws to allow for the creation of one merged Board that is responsible for both organizations, which will each continue to exist and fulfill their missions as defined in their articles of organization and by-laws.

The purpose of CAN-DO remains, "To expand the supply of decent and affordable housing for low income persons and families in Newton." CAN-DO owns and operates 39 units of affordable housing in Newton. CAN-DO Executive Director Emeritus, Josephine McNeil, will retire in July 2017 and CAN-DO will no longer have any paid staff. Staffing will be provided by Metro West CD. The organization will continue to seek affordable housing development opportunities in Newton while also effectively stewarding the assets already under ownership.

The purpose of Metro West CD remains, "to organize residents, mobilize resources, and identify ideas that improve the quality of life for resident of Metro West communities." Metro West CD owns and operates 44 units of affordable housing in Watertown. It also currently has site control of parcels in Norwell and Medway that are projected to provide 66 units of affordable housing in 2018-2019. Metro West CD has 4.5 full time equivalents including an Executive Director, Senior Real Estate Project Manager, Affordable Housing Programs Manager, Special Projects Coordinator and an AmeriCorps Member. In addition to housing development Metro West CD provides consulting services to other non-profits, private developers and municipalities in their efforts to build and preserve affordable housing. Current clients include:

- The Towns of Hudson, Bolton, Boxborough, Stow, Littleton
- Developers of projects in Dedham, Westwood and Scituate
- Lexington Housing Assistance Board, Belmont Housing Trust and Newton Community Development Foundation

Metro West CD is also a MassHousing approved 40B compliance monitor and is involved in projects in: Stoughton, Concord, Southborough, Danvers, North Andover, Needham and Watertown. Metro West

CD responds to over 3,000 callers per year and also provides one-on-one housing search assistance to individuals seeking affordable housing.

This merged Board structure, but independent organizations, provides for some economies of scale that will reduce costs, including a reduction in administrative overhead, as well as increased financial strength through a more diversified funding and program base as well as greater staff capacity as more projects in more communities allow the organizations to recruit and keep talented staff and a highly skilled Board of Directors.

Fair Housing training, past complaints & resolution

Metro West CD staff participate regularly in trainings on Fair Housing provided by the Department of Housing and Community Development, the West Metro HOME Consortium and the Mass Housing Partnership. Neither Metro West CD or CAN-DO have had a fair housing complaint filed against them.

Owners' agreement to permanent deed restrictions

Both CAN-DO and the Price Center are fully committed to affordable housing and willing to enter into permanent deed restrictions with the City of Newton.

Facilities Consolidation Fund (FCF)

Preliminary Application Form

1. Date: 1/25/2017

Agency: DMH / DDS (circle)

2. Name of Sponsoring Organization: CAN-DO, 79B Chapel St., Newton, MA 02458 and The Barry L Price Center, 27 Christina Street, Newton Highlands, MA 02161.

3. Contact Person/ Phone: Jennifer Van Campen or Linda Moody, 617-923-3505 and Justin Sallaway 617-244-0065

4. Property Location (street, city/town): 236 Auburn St., Newton, MA.

5. Description of Property and Development Plan (i.e. # Units, # Residents – type of work to be done)

FCF funds are being sought to create a new construction 5-bedroom congregate residence for DDS clients who have intensive medical needs. The residence will be part of a larger affordable housing development that will include the renovation of an existing historic house and up to four units collectively serving up to five low income units.

6. Description of Site/ Location (i.e. environmental, zoning, proximity to goods, services)

MR-1 zoning, 2.3 miles to commuter rail Newtonville Station. Short walk to various buses, 6-minute walk to grocery store/shopping center, ½ mile to library, 1 mile to closest bank.

7. Experience of Sponsoring Organization:

The Price Center has been providing services to individuals with developmental disabilities in Newton and surrounding communities for the past forty years. The Center currently provides services to twenty three individuals in DDS funded community residences with twenty four hour coverage. The Price Center also operates an intensive Day Habilitation Program that provides services to developmentally disabled individuals with intensive medical needs, who are the target population for this community residence. Other programs run by The Price Center include employment, community based day, and family support. CAN-DO is a non-profit developer of affordable housing, founded in 1994, which has created 46 units of housing including units for victims of domestic violence and for individuals with developmental disabilities.

8. Financing Plan:

The project will be funded by a variety of funding sources. The primary funding sources will be a City of Newton Community Development Housing Block Grant and City of Newton Community Preservation Act Funding. Additional funding is being applied for through CEDAC and FCF.

9. Development Team:

CAN-DO non-profit development company; Terrance Heinlein, architect; Barry Price Rehabilitation Center, congregate housing owner and manager; Daniel Violi, housing consultant; Mathew Yarmolinsky cost estimator.

10. Project Schedule:

CAN-DO purchased the property in December, 2016. We anticipate the project will be completed in the next eighteen months. Key next steps include finalizing the site plan, securing City of Newton funding commitments and submission of a LIP application to DHCD.

11. Population to be Served:

Developmentally disabled young adults with intensive medical needs.

12. Services Anticipated:

The providing of a twenty-four-hour community residence for five developmentally disabled turning twenty-two individuals with intensive medical needs.

13. Attach Additional Notes or Documents (if any)

(Complete and return to DMH or DDS Area Housing Coordinator with copy to CEDAC)

Rental Subsidy



The Commonwealth of Massachusetts

Executive Office of Health & Human Services
Department of Developmental Services

Metro Region

465 Waverley Oaks Road

Suite 120

Waltham, Massachusetts 02452

Tel 781 314-7500 Fax 781 314-7579

Charles D. Baker
Governor

Karyn E. Polito
Lieutenant Governor

Marylou Sudders
Secretary

Elin M. Howe
Commissioner

Gail Gillespie
Regional Director

Barney Heath
Director of Planning and Development
The City of Newton
1000 Commonwealth Ave.
Newton, MA 02459-1449

January 31, 2017

Dear Mr. Heath:

I would like to lend my support to the application of the Price Center to the City of Newton to develop an accessible group home. The proposed home is intended to serve individuals with developmental disabilities and intense medical needs. The Department of Developmental Services has identified individuals with medical needs who may be prioritized for this type of residential support.

I would be happy to talk with you further at your convenience (781.314.7501).

Sincerely,

A handwritten signature in cursive script, appearing to read "Gail Gillespie".

Gail Gillespie
Regional Director
Metro Region

Cc: Justin Salloway, President, The Price Center ✓

**Bank Mortgage Commitment
to Price Center**



307 Auburn Street • Auburndale, MA 02466 • Phone: (617) 527-6090 • Fax: (617) 965-8945 • E-mail: info@village-bank.com

Your Village. Your Bank.

April 6, 2017

Justin Sallaway
President
The Barry L. Price Rehabilitation Center, Inc.
27 Christina Street
Newton, MA 02461

Re: Loan Request

Dear Justin:

Your organization has been a long-standing and valuable customer of the Village Bank. As your primary lending institution for many years I am very interested in pursuing the financing for your next project located at 236 Auburn Street, Newton. Based on our prior experience with you on these types of projects I am confident that you will be able to obtain the necessary combination of public and private financing to successfully purchase and develop this project.

This letter is not a commitment for the Bank to lend, but is an indication of our strong interest in financing this project.

Thank you again for your business.

Sincerely,

David C. Pennybaker
Vice President

Deed and Appraisal

Return to:

JOSEPH ROSSI
ATTORNEY AT LAW
2120 COMMONWEALTH AVENUE
NEWTON, MA 02466

QUITCLAIM DEED

2016 00235156
Bk: 68683 Pg: 242 Doc: DEED
Page: 1 of 2 12/29/2016 12:27 PM

I, **Maia R. Perel, Personal Representative of the Estate of Peter I. Parel a/k/a Pyotr Perel, Middlesex Probate and Family Court Docket #M16P1756EA**, of Lawrence, Kansas, holder of a Decree of License to Sell Real Estate from the Probate Court of Middlesex County dated December 2016, by power conferred by said Decree and every other power,

For consideration paid of Nine Hundred Thousand Dollars (900,000.00),

Grant to **Citizens For Affordable Housing In Newton Development Organization, Inc., a Massachusetts corporation** with a principal office at 1075 Washington Street, Newton, MA 02465,

with *quitclaim covenants*,

The land with the buildings thereon situate on the Southerly side of Auburn Street in that part of Newton, Middlesex County, Massachusetts know as Auburndale and being number 236 Auburn Street, bounded and described as follows:

NORTHERLY: by Auburn Street, one hundred seven (107) feet;
EASTERLY: by land now or formerly of William E. Tyler, one hundred ninety (190) feet;
SOUTHERLY: by land now or formerly of George Banker, one hundred seven (107) feet, ten (10) inches and
WESTERLY: by land now or formerly of F. Shumway, one hundred seventy (170) feet.

Excepting, however, from the above described premises, so much of the same as was taken by Massachusetts Turnpike Authority as set forth in instrument recorded with Middlesex South District Registry of Deeds on March 7, 1963 in Book 10228, Page 235.

Grantor states under the pains and penalties of perjury that there are no persons entitled to rights of homestead in the premises.

For Grantor's title, see Deed dated November 4, 2014 and recorded with the Middlesex South County Registry of Deeds at Book 64494, Page 22.

MASSACHUSETTS EXCISE TAX
Southern Middlesex District ROD # 001
Date: 12/29/2016 12:27 PM
Ctrl# 258168 26000 Doc# 00235156
Fee: \$4,104.00 Cons: \$900,000.00

236 Auburn Street, Newton

APPRAISAL OF REAL PROPERTY

LOCATED AT

236 Auburn St
Auburndale, MA 02466
South Middlesex County Registry of Deeds Book 64494 Page 22

FOR

The Village Bank
309 Auburn Street
Newton, MA 02466

AS OF

09/29/2016

BY

William J. Lanciloti, Jr., SRA
Suburban Appraisal Services
727 Washington Street
Newton, MA 02460
(617) 969-3008
suburbanappraisal@verizon.net

Borrower	Josephine McNeil	File No.	236aub
Property Address	236 Auburn St		
City	Auburndale	County	Middlesex
Lender/Client	The Village Bank	State	MA
		Zip Code	02466

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Packet forwarded to City Council includes conclusions only. The full appraisal is available on the CPC website's project page.

Suburban Appraisal Services
LAND APPRAISAL REPORT

#221-17

File No. 236aub

SUBJECT	Borrower <u>Josephine McNeil</u>		Census Tract <u>3748.00</u>		Map Reference <u>15764</u>	
	Property Address <u>236 Auburn St</u>		County <u>Middlesex</u>		State <u>MA</u> Zip Code <u>02466</u>	
	City <u>Auburndale</u>					
	Legal Description <u>South Middlesex County Registry of Deeds Book 64494 Page 22</u>					
NEIGHBORHOOD	Sale Price \$ <u>900,000</u>		Date of Sale <u>09/19/2016</u>		Loan Term <u>Unk</u> yrs.	
	Actual Real Estate Taxes \$ <u>9,212</u>		(yr) Loan charges to be paid by seller \$ <u>0</u>		Other sales concessions <u>None known</u>	
	Lender/Client <u>The Village Bank</u>		Address <u>309 Auburn Street, Newton, MA 02466</u>			
	Occupant <u>Vacant</u>		Appraiser <u>William J. Lanciloti, Jr., SRA</u>		Instructions to Appraiser <u>Provide opinion of land value.</u>	
	Location	☐ Urban	☒ Suburban	☐ Rural	Good	Avg.
	Built Up	☒ Over 75%	☐ 25% to 75%	☐ Under 25%	Employment Stability	☒
	Growth Rate	☒ Fully Dev.	☐ Rapid	☐ Steady	Convenience to Employment	☒
	Property Values	☒ Increasing	☐ Stable	☐ Declining	Convenience to Shopping	☒
	Demand/Supply	☒ Shortage	☐ In Balance	☐ Oversupply	Convenience to Schools	☒
	Marketing Time	☒ Under 3 Mos.	☐ 4-6 Mos.	☐ Over 6 Mos.	Adequacy of Public Transportation	☒
Present	<u>70</u> % One-Unit	<u>10</u> % 2-4 Unit	<u>5</u> % Apts.	<u>5</u> % Condo	<u>0</u> % Commercial	Recreational Facilities
Land Use	<u>0</u> % Industrial	<u>0</u> % Vacant	<u>10</u> % College, Elementary School	<u>0</u> % Other	<u>0</u> % Other	Adequacy of Utilities
Change in Present	☒ Not Likely	☐ Likely (*)	☐ Taking Place (*)	Property Compatibility		
Land Use	(*) From <u>Owner</u>		To <u>0-5 % Vacant</u>		Protection from Detrimental Conditions	
Predominant Occupancy	☒ Owner		☐ Tenant		Police and Fire Protection	
One-Unit Price Range	\$ <u>400,000</u> to \$ <u>7,500,000</u>		Predominant Value \$ <u>900,000</u>		General Appearance of Properties	
One-Unit Age Range	<u>0</u> yrs. to <u>250</u> yrs.		Predominant Age <u>106</u> yrs.		Appeal to Market	
Comments including those factors, favorable or unfavorable, affecting marketability (e.g. public parks, schools, view, noise) <u>See Comment Addendum.</u>						

SITE	Dimensions <u>Refer to Attached Deed</u>		= <u>18,760</u> sf		☐ Corner Lot	
	Zoning Classification <u>Multi-Residence 1</u>		Present Improvements ☒ Do ☐ Do Not Conform to Zoning Regulations			
	Highest and Best Use ☒ Present Use ☐ Other (specify)					
	Public ☒ Other (Describe)		OFF SITE IMPROVEMENTS			
	Elec.	☒	Street Access	☒ Public ☐ Private	Topo	<u>Primarily Level</u>
	Gas	☒	Surface	<u>Paved Asphalt</u>	Size	<u>Above Average</u>
	Water	☒	Maintenance	☒ Public ☐ Private	Shape	<u>Rectangular</u>
	San. Sewer	☒	☒ Storm Sewer ☒ Curb/Gutter	View	<u>Residential</u>	
	☐ Underground Elect. & Tel.		☒ Sidewalk ☒ Street Lights	Drainage	<u>Appears Adequate</u>	
	Is the property located in a FEMA Special Flood Hazard Area? ☐ Yes ☒ No					
Comments (favorable or unfavorable including any apparent adverse easements, encroachments, or other adverse conditions) <u>See Comment Addendum</u>						

The undersigned has recited the following recent sales of properties most similar and proximate to subject and has considered these in the market analysis. The description includes a dollar adjustment reflecting market reaction to those items of significant variation between the subject and comparable properties. If a significant item in the comparable property is superior to or more favorable than the subject property, a minus (-) adjustment is made, thus reducing the indicated value of subject; if a significant item in the comparable is inferior to or less favorable than the subject property, a plus (+) adjustment is made thus increasing the indicated value of the subject.

ITEM	SUBJECT PROPERTY	COMPARABLE NO. 1	COMPARABLE NO. 2	COMPARABLE NO. 3
Address	<u>236 Auburn St</u> <u>Auburndale, MA 02466</u>	<u>Lot 0 Edinboro St</u> <u>Newton, MA 02460</u>	<u>31 Westchester Rd</u> <u>Newton, MA 02458</u>	<u>33 Green St</u> <u>Newton, MA 02458</u>
Proximity to Subject		<u>1.81 miles NE</u>	<u>2.48 miles E</u>	<u>2.63 miles E</u>
Sales Price	\$ <u>900,000</u>	\$ <u>1,050,000</u>	\$ <u>1,055,000</u>	\$ <u>785,000</u>
Price \$/Sq. Ft.	\$ <u>47.97</u>	\$ <u>62.36</u>	\$ <u>74.56</u>	\$ <u>78.93</u>
Data Source(s)	<u>Inspection/Assessor</u>	<u>MLSPIN #71960078</u>	<u>MLSPIN #71830729</u>	<u>MLSPIN #71773640</u>
ITEM	DESCRIPTION	DESCRIPTION	+(-)\$ Adjust.	DESCRIPTION
Date of Sale/Time Adj.	<u>09/19/2016</u>	<u>04/01/2016</u>	<u>+50,000</u>	<u>08/03/2015</u>
Location	<u>Average</u>	<u>Average</u>	<u>+80,000</u>	<u>02/26/2015</u>
Site/View	<u>18,760 sf/Resid.</u>	<u>16,837 sf/Resid./Prk</u>	<u>-200,000</u>	<u>Average</u>
Improved/Vacant	<u>Improved</u>	<u>Vacant</u>	<u>+25,000</u>	<u>9,945 sf/Resid.</u>
List Price	<u>Unknown</u>	<u>\$1,050,000</u>		<u>Improved</u>
Days on Market	<u>Unknown</u>	<u>0 Days</u>		<u>5 Days</u>
Sales or Financing	<u>Unknown</u>	<u>Closed Sale</u>		<u>Closed Sale</u>
Concessions	<u>Unknown</u>	<u>Cash;0</u>		<u>Conv. Financing;0</u>
Net Adj. (Total)		☐ + ☒ - \$ <u>-100,000</u>	☐ + ☒ - \$ <u>-95,000</u>	☒ + ☐ - \$ <u>157,000</u>
Indicated Value of Subject		\$ <u>950,000</u>	\$ <u>960,000</u>	\$ <u>942,000</u>

Comments on Market Data See attached addenda.

Comments and Conditions of Appraisal The appraisal is made "as is". It is assumed a clear and marketable title exists. It is also assumed the subject's subsoil is suitable for construction of two new townhouses.

Final Reconciliation The Sales Comparison Approach is given sole weight in the final analysis. Sale 1 is the best sale due to its similar lot size. The Cost Approach is not a useful method of valuation for land and is not developed. The Income Approach is also not developed as residentially zoned land in Newton typically is not used for rental purposes.

I (WE) ESTIMATE THE MARKET VALUE, AS DEFINED, OF THE SUBJECT PROPERTY AS OF 09/29/2016 TO BE \$ 950,000

Appraiser <u>William J. Lanciloti, Jr., SRA</u>	Supervisory Appraiser (if applicable)
Date of Signature and Report <u>10/04/2016</u>	Date of Signature
Title <u>SRA</u>	Title
State Certification # <u>636</u> ST <u>MA</u>	State Certification # ST
Or State License # ST	Or State License # ST
Expiration Date of State Certification or License <u>10/28/2017</u>	Expiration Date of State Certification or License
Date of Inspection (if applicable) <u>09/29/2016</u>	☐ Did ☐ Did Not Inspect Property Date of Inspection

Bk: 64494 Pg: 22

Middlesex South Registry of Deeds
Electronically Recorded Document

This is the first page of the document - Do not remove

Recording Information

Document Number : 172923
Document Type : DEED
Recorded Date : November 12, 2014
Recorded Time : 10:27:04 AM

Recorded Book and Page : 64494 / 22
Number of Pages(including cover sheet) : 4
Receipt Number : 1753437
Recording Fee (including excise) : \$125.00

MASSACHUSETTS EXCISE TAX
Southern Middlesex District ROD # 001
Date: 11/12/2014 10:27 AM
Ctrl# Doc# 00172923
Fee: \$.00 Cons: \$100.00

Middlesex South Registry of Deeds
Maria C. Curtatone, Register
208 Cambridge Street
Cambridge, MA 02141
617-679-6300
www.cambridgedeeds.com

Bk: 64494 Pg: 23

Return To & Mail Tax Forms To:

Peter Perel
236 Auburn Street
Newton, MA 02466

QUITCLAIM DEED

I, Peter Perel of 236 Auburn Street, Newton, MA, 02466, for consideration paid, and in full consideration of less than One Hundred and 00/100 Dollars (\$100.00) grant to Peter Perel a/k/a Pyotr Perel, individually, of 236 Auburn Street, Newton, MA, 02466, with quitclaim covenants:

Property Address: 236 Auburn Street, Newton, MA 02466

SEE COMPLETE LEGAL ATTACHED AS EXHIBIT "A"

Being all of the same premises conveyed to Peter Perel, by virtue of a Quitclaim Deed from Ruth Rosenberg and Peter Perel, by deed dated February 23, 1998, and recorded on March 3, 1998, with the Middlesex County Southern District Registry of Deeds in Book 28256, at Page 324.

The consideration being less than \$100.00 no documentary stamps are needed.

Bk: 64494 Pg: 24

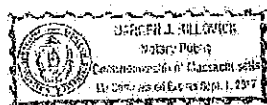
WITNESS our hands and seals this 4th day of November 2014.

X Peter Perel
Peter Perel

COMMONWEALTH OF MASSACHUSETTS

Middlesex, ss.

On this 4th day of November, 2014, before me, the undersigned notary public, personally appeared Peter Perel, who proved to me through satisfactory evidence of identification, which were driver license, to be the person whose name is signed on the preceding or attached document, and acknowledged the foregoing to be his free act and deed.



[Signature]
Notary Public
My commission expires 9/1/17

Bk: 64494 Pg: 25



EXHIBIT "A"

The land with the buildings thereon situated on the Southerly side of Auburn Street in that part of Newton, Middlesex County, Massachusetts, known as Auburndale and being numbered 236 Auburn Street, bounded and described as follows:

NORTHERLY: by Auburn Street, one hundred seven (107) feet;

EASTERLY: by land now or formerly of William E. Tyler, one hundred ninety (190) feet;

SOUTHERLY: by land now or formerly of George Banker, one hundred seven (107) feet, ten (10), inches;
and

WESTERLY: by land now or formerly of F. Shumway, one hundred seventy (170) feet.

Excepting, however, from the above-described premises, so much of the same as was taken by Massachusetts Turnpike Authority as set forth in instrument recorded with Middlesex South District Registry of Deeds on March 7, 1963 in Book 10228, Page 235.

Being the same property conveyed to Peter Perel by deed from Ruth Rosenberg and Peter Perel dated February 23, 1998 and recorded March 3, 1998 in Book 28256 at page 324 in the Middlesex South District Registry of Deeds Office.

Commonly known as: 236 Auburn Street, Auburndale, Massachusetts 02466

Tax ID: 43014 0016

Affirmative Marketing & Resident Selection Plan

Regional Ready Renter Program

2015-2018

**A Regional Effort of
Belmont, Lexington, Watertown
And other Metro West Communities**

Modified for 236 Auburn Street, Newton

For more information contact:
Jennifer Van Campen, Metro West Collaborative Development, Inc.
At 617-923-3505 x 4 or jvc@metrowestcd.org

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Attachments omitted in packet forwarded to City Council. Full attachment is available on the CPC's project webpage.

Regional Ready Renter Program Lottery and Tenant Selection Process and Affirmative Fair Housing Marketing Plan

In an effort to most efficiently get affordable rental housing units placed on the Massachusetts Subsidized Housing Inventory (SHI) and insure their compliance with Town Agreements, with the least amount of burden to the developer or owner of a property, the Towns of Watertown, Lexington and Belmont have established a Ready Renter Program that will have one Affirmative Marketing Plan and centralized wait list in which all interested parties could participate. To accomplish this effort the Towns have utilized the services of Metro West Collaborative Development, Inc., a regional community housing development organization.

Ready Renter Program

This program shall provide owners of rental housing with income-eligible tenants and supporting documents that all comply with the Massachusetts Subsidized Housing Inventory Guidelines.

Tenants who are identified through this program shall:

- 1) Have been recruited through Affirmative Marketing strategies consistent with the Massachusetts Fair Housing Goals, and
- 2) Be income-eligible households (earning less than 80% of the area median income) having met income, asset and other eligibility provisions.

Metro West CD will also assist owners and tenants in annual monitoring and compliance that may be required.

Tenant Eligibility

"Eligible" Household

An eligible household is one that:

- has submitted a complete pre-application
- meets all income and asset criteria described above
- has the appropriate household size for the available unit

A "household" shall mean two or more persons who will live regularly in the unit as their principal residence and who are related by blood, marriage, law or who have otherwise evidenced a stable inter-dependent relationship, or an individual.

Income and Asset Eligibility

The total income of the applicant and all other members of the applicant's household over the age of eighteen (18) may not exceed 80% of the area median income that includes Watertown, Newton and Belmont adjusted for family size. An applicant's total household income cannot exceed the following limits:

Household size	1 person	2 persons	3 persons	4 persons	5 persons	6 persons
Income limit units (80%)	\$51,150	\$58,450	\$65,750	\$73,050	\$78,900	\$84,750

In addition, income will be imputed from the total value of all of the assets of the applicant and all other members of the applicant's household over the age of eighteen (18), as stipulated in the DHCD guidelines. Household income will be verified based on information contained in pay stubs (or equivalent documents) and IRS documents.

Household Size Eligibility

Household size should be appropriate for the number of bedrooms in the home. It is appropriate to set a minimum. A maximum household size for the units may be established provided that:

- Maximum allowable household size may not be more restrictive than the State Sanitary Code or applicable local bylaws, and may not violate state and federal civil rights laws.

Larger Household Preference

Within an applicant pool **first preference** shall be given to households requiring the total number of bedrooms in the unit based on the following criteria:

- a) There is at least one occupant per bedroom. (Disabled households must not be excluded from a preference for a larger unit based on household size if such larger unit is needed as a reasonable accommodation.)
- b) A husband and wife, or those in a similar living arrangement, shall be required to share a bedroom. Other household members may share but shall not be required to share a bedroom.
- c) A person described in the first sentence of (b) shall not be required to share a bedroom if a consequence of sharing would be a severe adverse impact on his or her mental or physical health and the lottery agent receives reliable medical documentation as to such impact of sharing.
- d) A household may count an unborn child as a household member. The household must submit proof of pregnancy with the application.
- e) If the applicant is in the process of a divorce or separation, they may enter a rental housing lottery, if their estimated assets and income would allow them to qualify for the unit. However, the applicant must provide proof that the divorce or separation has been finalized and submit updated financial information in accordance with the timelines provided herein before they will be considered for tenancy.

After Initial Lease-Up

Some units are subject to annual review of incomes and income limits. If the household's income increases and exceeds 140% of the above limits then the household will no longer be eligible for the affordable unit.

Application, Lottery Process and Tenant Selection (Generally—Auburn Street, Newton preferences described in Attachment A)

Pre-Applications and the Applicant Pool

- All potential tenants will be given a brief pre-application form that identifies their housing needs, income and desired rent.
- All households who submit a complete pre-application and are deemed to be preliminarily eligible shall be entered into the Applicant Pool.

- Applications that are not complete or households that appear to not meet the eligibility guidelines will be notified and given seven days to rectify their application.
- Applicants have the right to request a reasonable accommodation(s), which may include a change to a rule, policy, procedure or practice to afford a person with a disability an equal opportunity to participate fully in the housing program or to use and enjoy the housing. Applicants may also be entitled to a reasonable modification(s) of the housing, when such modifications are necessary to afford a person with a disability an equal opportunity to use and enjoy the housing.
- Free language assistance is available to households with limited English proficiency.

Available Unit Announcement

- Upon announcement of an available apartment, the potential tenants in the Applicant Pool shall be sent informational materials about the available unit and invited to participate in a lottery.
- Potential tenants will have 14 days to decide whether or not to participate in the lottery.
- Households who choose not to participate in the lottery shall be placed back into the Applicant Pool for future rental opportunities.

The Lottery and Tenant Selection

- All applicants in the Lottery Pool are assigned a Lottery Number.
- The Lottery will be held in a public accessible place at a convenient time for a majority of applicants.
- All applicants will then be drawn and assigned an Available Unit Wait List number in the order they were drawn.
- The list will then be reviewed for re-ordering based on preferences.
- The top three households will then be invited to a) see unit and b) get their application verified for final eligibility determination.
- After the Lottery the three households will have ten (10) days to provide additional information required by Metro West CD to verify their eligibility.
- If the highest ranked household, wants the unit and their application is verified and deemed eligible then they will be forwarded to owner for final selection.
- Final selection may include Criminal Background Checks and/or Credit Checks as may be the standard practice of the owner/developer of the unit.
- An owner may deny tenancy to a finalist based on credit or other background checks so long as the same screening procedures and considerations apply evenly to all of the applicants within a rental property, regardless of the unit they have applied for.
- If the household declines the available unit they will be returned to the Applicant Pool and Metro West CD will offer the unit to the next highest ranked household.
- Failure to provide the requested information will result in the household becoming ineligible for the unit and they will be returned to the Applicant Pool.
- Eligible households that are not selected by the owner will be returned to the Applicant Pool.
- If the owner does not select a tenant from the first five households from the Wait List then Metro West CD will proceed down the Wait List until the unit(s) is filled.

Removal from the Applicant Pool or Lottery Pool

- Households who do not respond to phone or mail inquiries or who do not respond to a request for additional information within the time frame provided shall be removed from the Lottery Pool, but may remain in the Applicant Pool.
- Every 24 months a new marketing plan will be conducted and a new Applicant Pool will be created. Those in the Applicant Pool at the time of the purge will be invited to re-apply.

Right to Appeal

An applicant has the right to appeal the decisions of Metro West CD and/or of the owner/developer within 7 (seven) business days from the date of the written notification. An applicant may in person, or in writing, or via a designee appear before the Appeals Committee chaired by a member of the Board of Directors of Metro West CD, who is not involved in the day-to-day operation of the housing development. At least one member of the Appeals Committee will be a neutral party. At the hearing, the applicant or his/her designee may present supporting information relevant to the reason for rejection. A final decision will be rendered by the Appeals Committee, in writing, within five business days from the date of the hearing.

An applicant concerned with discrimination against them may also contact the Mass Commission Against Discrimination at 617-727-3990 or the US Department of Housing and Urban Development at 617-994-8300.

Affirmative Marketing Methods

Metro West CD seeks to provide clear, accessible information regarding the lease of affordable units in Watertown, Newton and Belmont. Affirmative marketing efforts are intended to encourage maximum participation from low – moderate income households and members of the region's traditionally underserved racial and ethnic communities. Metro West CD does not discriminate on the basis of race, color, religion, national origin, disability, familial status, sex, age, marital status, children, sexual orientation, genetic information, gender identify, ancestry, veteran/military status or membership

Ready Renter Program Marketing Period

- Once per 24-month period, Metro West CD will develop an Affirmative Marketing Plan that is based on the most recently available demographic information for the towns. The plan will identify the populations for special outreach efforts and the methods to be undertaken.
- Once per 24-month period, Metro West CD, will advertise in multiple sources and in multiple methods to attract applicants least likely to apply for housing in the participating towns. A list of advertisement methods is attached. This list shall be amended to consider additional or different language groups once per 24 month period.
- Advertising will be general in nature and describe each of the types of housing anticipated to be available in the given year.
- The marketing period will be for 60 days. Pre-applications that are complete and considered eligible received before and after that date will be added to the Applicant Pool.

Marketing Activities

The plan covers a 60-day period. The plan consists of five main components:

- 1) Website Postings: The lottery and relevant information will be listed on the websites listed in the "Affirmative Marketing: Websites" chart.
- 2) Direct Mailings: The agencies listed in the "Affirmative Marketing: Organizations" chart on subsequent pages will receive notification of the unit availability and relevant information.
- 3) Information Session: Metro West CD will also conduct two information sessions for households interested in potential units. One on a weekday evening and one on a weekend.
- 4) E-mail blasts: Metro West CD maintains a data base of program participants, which is a racially, ethnically, and geographically diverse pool of potential applicants.
- 5) Print Advertisements: The publications listed in the "Affirmative Marketing: Advertisements" chart on subsequent pages will advertise the Ready Renter Program guidelines.

Applications and information packets will be available at the Newton, Watertown, Lexington and Belmont Town Halls, the public libraries, and will be available via mail by contacting the office of Metro West CD. The staff of Metro West CD are available to assist individuals in the completion of their application and are able to accommodate households with disabilities that may impede their ability to complete the application. Metro West CD staff can also arrange for assistance for households that have limited English proficiency. Applicants have the right to request a reasonable accommodation, which may include a change to a policy, procedure or practice to afford a person with a disability an equal opportunity to participate fully in the housing program or to use and enjoy the housing. Applicants may also be entitled to a reasonable modification(s) of the housing, when such modifications are necessary to afford a person with a disability an equal opportunity to use and enjoy the housing.

Upon Vacancies or Creation of New Units

Upon vacancies of specific units the following additional marketing will take place:

- website postings with Metro List and Mass Access
- mailings to local community organizations

If an insufficient number of applicants are in the pool then the following marketing will take place:

- e-mails to the entire data base of potentially interested parties
- additional paid advertising, pending availability of funding
- additional website postings

Affirmative Marketing Timeline

Metro West CD already has a list of 200+ individuals and families who are searching for affordable rental housing. These potential applicants were recruited through this Ready Renter Program. In addition to a mailing to this list, Metro West CD

Advertising for Ready Renter Program begins Advertising shall run twice in a 60 day period	Fall 2017
Information sessions	November 2017
Pre-Applications may be received. All COMPLETE pre-applications who are preliminarily eligible will be entered into an Applicant Pool.	Pre-applications may be mailed, faxed, e-mailed or hand delivered. However, the applicant is responsible for insuring its receipt by Metro West CD.
Applicants who submit incomplete pre-applications will be promptly notified in writing of the deficiencies of their application. They may remedy the deficiencies, but will not be placed in the Applicant Pool until the application is complete.	
Applicants deemed ineligible will be notified in writing and given 7 days to appeal the decision. They will remain in the Applicant Pool until the appeal process is complete.	
When a rental unit becomes available all households, of the appropriate household size, in the Applicant Pool will be notified of the specific opportunity and will be invited to participate in a Lottery. If an insufficient number express interest in the available unit(s) then other households in need of the number of units minus one will be invited to participate. Applicants will have 14 days to respond to the Lottery invitation and provide any additional information requested by Metro West CD.	On-going
The Lottery will be held at least 30 days after the unit has been identified and a rent established.	
The Applicant Pool will be purged every 24 months. Households in the Pool at the time of the purge will be invited to submit a new pre-application.	December 2019

Contractor Qualifications

Metro West CD has successfully implemented affirmative marketing plans and lotteries for the following developments:

- Archstone Properties (2004) – 13 rental units / first come first served (no lottery)
- Riverbank Lofts (2006-2007) – 7 ownership units
- Repton Place (2007-2008) – 28 ownership units
- Admiral Cove/Castle Courtyard (2009-2010) – 6 ownership units
- 1060 Belmont (2010) – 18 rental units

Charlesbank Apts. (2012) – 4 rental

Riverbank Apts. (2013) – 17 rental

For each development Metro West CD responded to requests for assistance from individuals with limited English proficiency by having translators available, working with sister organizations to provide translation of information sessions, and providing certain written materials in key languages (Spanish and Chinese).

There have been no findings or determinations against Metro West CD or its staff for violation of any state or federal fair housing laws and the above developments required no intervention on the part of a Subsidizing Agency to address fair housing complaints or concerns.

Affirmative Marketing: Websites

Website	Organization
mbhp.org	Metropolitan Boston Housing Partnership
MassAccessHousingRegistry.org	Citizens Housing and Planning Association (CHAPA)
MetroWestCD.org	Metro West Collab. Dev.

Affirmative Marketing: Organizations

Organizations
Metropolitan Housing Clearing Center/MetroList

Affirmative Marketing: Local Organizations

Organizations
Boston area organizations: List attached
Belmont organizations: List attached
Newton organizations: List attached
Watertown organizations: List attached

Affirmative Marketing: Publications and Media

Media	Area Served	Demographic
Watertown Tab and CNC West Zone	Watertown / Waltham Framingham: Russian language supplement	Mixed
El Mundo	Greater Boston	Hispanic / Latino
Bay State Banner	Greater Boston	African American
Sampan	Greater Boston	Chinese & Other Asian
Boston Haitian Reporter	Greater Boston	Haitian
Bate Papo Magazine	Greater Boston	Brazilian/Portuguese
Local Cable Access	Watertown Newton Belmont	Mixed

This ad was run in 2015.

**Want to Live in Belmont, Newton,
Watertown and other Metro West towns?**

Several Metro West communities are jointly establishing a list of "Ready Renters" who would be interested and income-eligible to rent affordable apartments in these towns.

Income Limits:

1 person \$45,100
2 person \$51,550
3 person \$58,000
4 person \$64,400



Maximum Rents*:

1 bedroom \$1,175
2 bedroom \$1,288
3 bedroom \$1,600

*including utilities or utility allowance.
Actual rents will vary.



Applicants will be notified of available units as they come up for lease. Studio, 1, 2 and 3-bedroom units are expected.

General Info. Sessions: _____ at
7:00 pm and Saturday _____ Call
for details.

For a pre-application and additional information contact Robyn at Metro West CD 617-923-3505 x 5 or visit this website: www.metrowestcd.org

Reasonable Accommodation Policy

Non-discrimination/reasonable accommodation statement: CAN-DO and Metro West Collaborative Development

CAN-DO and Metro West CD does not discriminate in the selection of applicants on the basis of race, color, national origin, religion, disability, age, ancestry, children, familial status, genetic information, marital status, public assistance reciprocity, religion, sex, sexual orientation, gender identity, veteran/military status, or any other basis prohibited by law.

The staff of Metro West CD are available to assist individuals in the completion of their application and can accommodate households with disabilities that may impede their ability to complete the application. Metro West CD staff can also arrange for assistance for households that have limited English proficiency. Applicants have the right to request a reasonable accommodation, which may include a change to a policy, procedure, or practice to afford a person with a disability an equal opportunity to participate fully in the housing program or to use and enjoy the housing. Applicants may also be entitled to a reasonable modification(s) of the housing, when such modifications are necessary to afford a person with a disability an equal opportunity to use and enjoy the housing.

Lottery process: Opportunity to rent these units (specify, not the group home) shall be awarded by lottery. After the lottery numbers for this unit have been drawn, the list will be re-ordered to give first preference to applicants who request and have need for an accessible unit, per Affirmative Fair Housing Marketing guidelines, and as approved by DHCD's approval of an Affirmative Fair Housing Marketing Plan.

After the lottery, the Property Manager or Monitoring Agent shall maintain a list of any households that have contacted them to express their interest in renting the Accessible unit(s). Upon vacancy, the Accessible unit shall be marketed according to the approved Affirmative Fair Housing Marketing Plan, and anyone on the Accessible Unit Contact List shall be notified of the opportunity to participate in the Accessible Unit Lottery.

Supportive Services for the Price Center House, Description and Funding Source

236 Auburn Street Home

The proposed 236 Auburn Street home is being designed to house five residents with significant physical and developmental disabilities. The Price Center's mission statement is: "To empower individuals with intellectual and developmental disabilities to thrive in their living, social, and work communities." The following are key elements that will be taken into account as the program is developed and operated:

- Creating a home in which family and friends are always welcome
- Respecting the dignity of each resident
- Hiring caring staff who demonstrate compassion and respect for the residents
- Promoting personal growth of each resident
- Encouraging full participation in community life
- Exceeding standards for quality and safety
- Adhering to the highest ethical standards

The five individuals who are planning to move to this home are at risk problematic health outcomes, being isolated from their community, and being marginalized by staff and community neighbors. However, through the efforts of the resident's family, friends and Price Center staff we will provide a supportive approach to tap the potential for each resident to participate in a rich community life with a variety of experiences and the cultivation of new friendships. We also hope that as we participate in individualized community activities with each of these residents, we also create communities that are more caring and more inclusive.

Given the medical needs of the residents at the Auburn Street home, there will be on-site nursing to oversee the medical needs of each resident and provide training to the staff on the various medical/nursing needs of each resident. The house will provide staffing coverage for the times the individuals are in the program. It is anticipated the residents will go to The Price Center Day Program during the week days. All staff will be certified to administer medication (certification through the Medication Administration Program-MAP), will be First Aid and CPR trained. Additionally they will be finger printed and CORI checked to ensure they do not have any outstanding criminal offenses.

The home is being designed to accommodate people in wheelchairs. Each bedroom will have double doors leading to the outside that allow for beds to be moved out of the home and onto a patio for emergency evacuation. There will be a generator as a back-up when electricity is out to ensure we have the ability to power respirators and any other medical device in the event of a power outage. The program will be supervised by Ms. Jen Thompson, Director of Residential Services at The Price Center.

The program's operations will primarily be funded by a contract with the Massachusetts Department of Developmental Services (DSS). Other sources of funding include charges for care charges to individual which would be based of 30% of each resident's benefits, and Medicaid billing to cover transportation and day program costs.

Historical:

~~Analysis of Historical Significance~~

~~Description of Historically Significant Features~~

Summary and Justification of Proposed Treatment

Newton Historical Commission:

Confirmation of Historical Significance

Detailed analysis of historic significance available on the CPC's
project webpage but omitted from packet forwarded to City Council.



Setti D. Warren
Mayor

City of Newton, Massachusetts
Department of Planning and Development
1000 Commonwealth Avenue Newton, Massachusetts 02459

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(617) 796-1120
Telefax
(617) 796-1142
TDD/TTY
(617) 796-1089
www.newtonma.gov
Barney S. Heath
Director

RECORD OF ACTION:

DATE: February 28, 2017

SUBJECT: 236 Auburn Street

At a scheduled meeting and public hearing on February 23, 2017, the Newton Historical Commission, by a vote of 4-0:

RESOLVED to find 236 Auburn Street, without its rear additions, preferably preserved for architectural integrity and historic context.

Voting in the Affirmative: Voting in the Negative: Abstained:

Mark Armstrong, Member
Jean Fulkerson, Member
Peter Dimond, Member
Laura Fitzmaurice, Member

At a scheduled meeting and public hearing on February 23, 2017, the Newton Historical Commission, by a vote of 4-0:

RESOLVED to find 236 Auburn Street historically significant for its architectural and historical contributions to the history of Newton.

Voting in the Affirmative: Voting in the Negative: Abstained:

Mark Armstrong, Member
Jean Fulkerson, Member
Peter Dimond, Member
Laura Fitzmaurice, Member

At a scheduled meeting and public hearing on February 23, 2017, the Newton Historical Commission, by a vote of 4-0:

RESOLVED to approve moving the structure at 236 Auburn Street, without its rear additions, closer to Auburn Street on the same lot, with the exact location of the relocated house to be determined at a later date.

Voting in the Affirmative: Voting in the Negative: Abstained:

Mark Armstrong, Member
Jean Fulkerson, Member
Peter Dimond, Member
Laura Fitzmaurice, Member

Newton Historical Commission
1000 Commonwealth Avenue, Newton, Massachusetts 02459
Email: kholmes@newtonma.gov
www.ci.newton.ma.us



Setti D. Warren
Mayor

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Barney S. Heath
Director

RECORD OF ACTION:

DATE: April 3, 2017
SUBJECT: 236 Auburn Street

At a scheduled meeting and public hearing on March 23, 2017, the Newton Historical Commission, by a vote of 4-0:

RESOLVED to approve the proposed new siting of the historic house on the lot at 236 Auburn Street as well as the proposed site plan for three additional detached one-story housing units, parking, and landscaping as part of the project. The NHC also supports the plan to restore all architectural detail on the house where possible and replicate that which cannot be restored.

Voting in the Affirmative: Voting in the Negative: Abstained:

Nancy Grissom, Member
Mark Armstrong, Member
Laura Fitzmaurice, Member
Len Sherman, Alternate

Title Reference: Owner of Property:

CAN-DO

Deed recorded at:

Middlesex (South) Registry of Deeds

Book _____, Page _____

Date _____


Katy Hax Holmes, Staff

National Preservation Standard by Department of Interior Statement:

The Secretary of the Interior's standards for rehabilitation have been reviewed and will be met for the exterior of the 1868 House.

This was confirmed by the project architect Terrence G. Heinlein, AIA

Photos

#221-17





236 Auburn Street
November 2016



#221-17



236 Auburn Street
November 2016



#221-17



236 Auburn Street
November 2016



#224-17

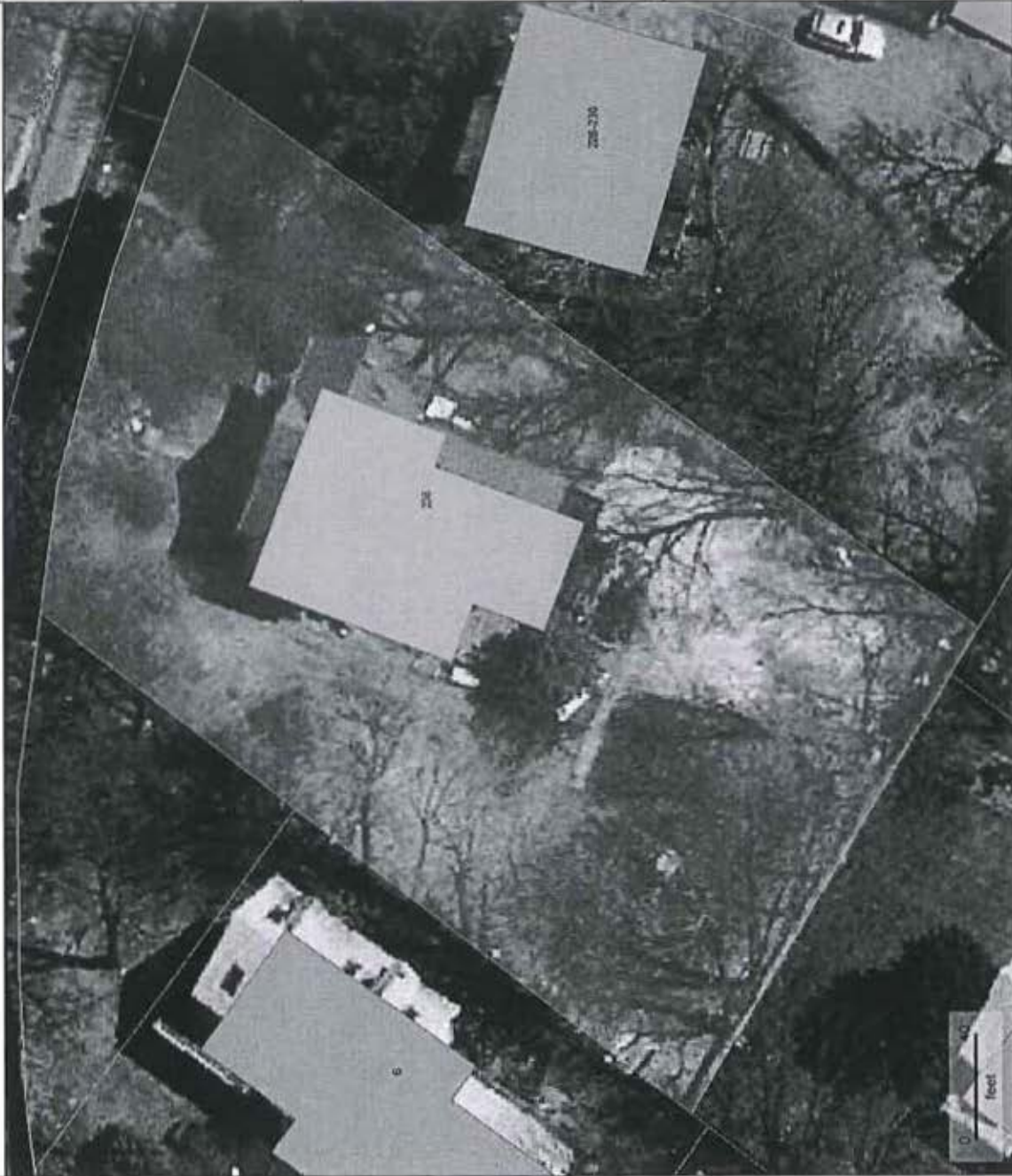
Maps

1/9/2017

City of Newton

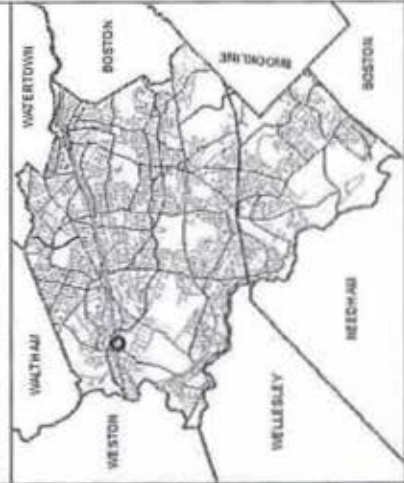
Property ID:
Address:
Owner:

43014 0016
235 AUBURN ST
PEREL PETER



MAP FOR REFERENCE ONLY
NOT A LEGAL DOCUMENT

Because of different update schedules, current property assessments may not reflect recent changes to property boundaries. Check with the Assessors' Office to confirm boundaries uses at the time of assessment.



43014 0016

236 AUBURN ST

43014 0016

Property SBL 43014 0016
 Property Address 236 AUBURN ST
 Land Use * 105
 Land Use Descr * THREE FAMILY

Tax Bill Number 2719789
 Zoning ** MR1
 Map ID 039SW
 Neighborhood 5C

Sale Date 11/12/2014
 Sale Price \$100
 Legal Reference 064494/0022
 Current Owner
 PEREL PETER

Prior Sale Date 2/1/1998
 Prior Sale Price \$75,000
 Prior Legal Reference 028256/0324
 Prior Owner
 PEREL PETER

236 AUBURN ST
 AUBURNDALE, MA 02466

Residential Information

Style Colonial
 Story Height 2.5
 Year Built 1861
 Exterior Walls Clapboard
 Masonry/Trim None
 Foundation Brick/Fldstone
 Roof Type Gable
 Roof Material Asphalt Shingl
 Attached Garage
 Carport Area
 Deck Area 354 sq ft
 Porch Area 185 sq ft
 Enclosed Porch
 Basement Garage

Rooms 12
 Bedrooms 5
 Baths 4
 Half Baths
 Heat Type Forced Air-Duc
 Fuel Type Gas
 Air Conditioning None
 Fireplaces 1
 Kitchen Quality Average
 Bath Quality Average
 Interior Condition Good
 House Size 3,429 sq ft

Finished Attic Area
 Unfinished Attic Area
 Basement Area 1,202 sq ft
 Finished Basement Area
 Recent Field Visit 10/14/2009
 Prior Field Visit 9/13/2004

Assessment History

FY 2016	\$809,500
FY 2015	\$756,500
FY 2014	\$717,500
FY 2013	\$717,500
FY 2012	\$717,500
FY 2011	\$717,800
FY 2010	\$732,200
FY 2009	\$770,700
FY 2008	\$770,700
FY 2007	\$756,900
FY 2006	\$734,900
FY 2005	\$713,500
FY 2004	\$618,800
FY 2003	\$542,800
FY 2002	\$542,800
FY 2001	\$408,800
FY 2000	\$373,300
FY 1999	\$339,700

Land Information

Lot Size 18,760 sq ft
 Frontage 111 ft
 Zoning MR1

Detached Structures (Data to right of category)

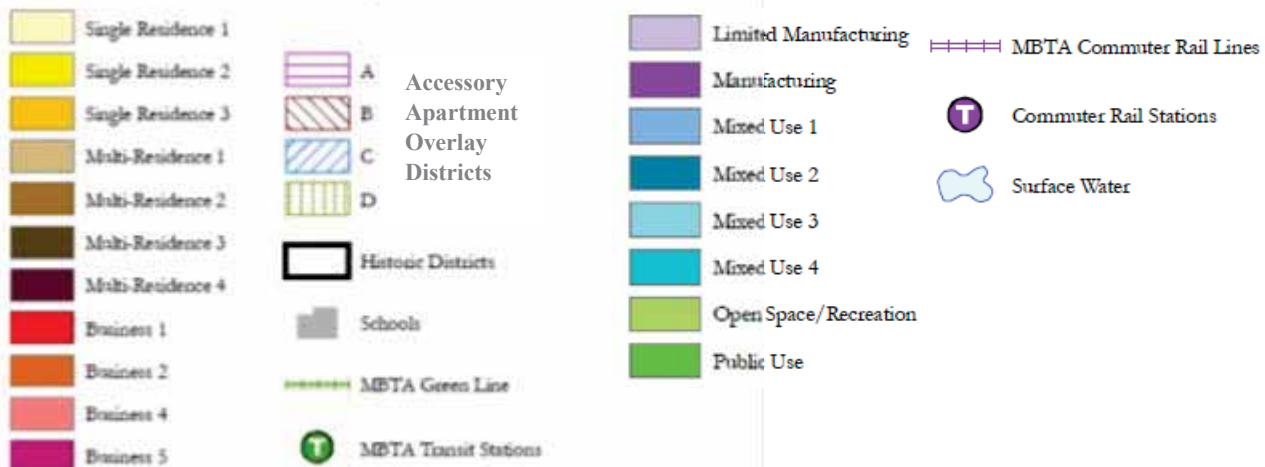
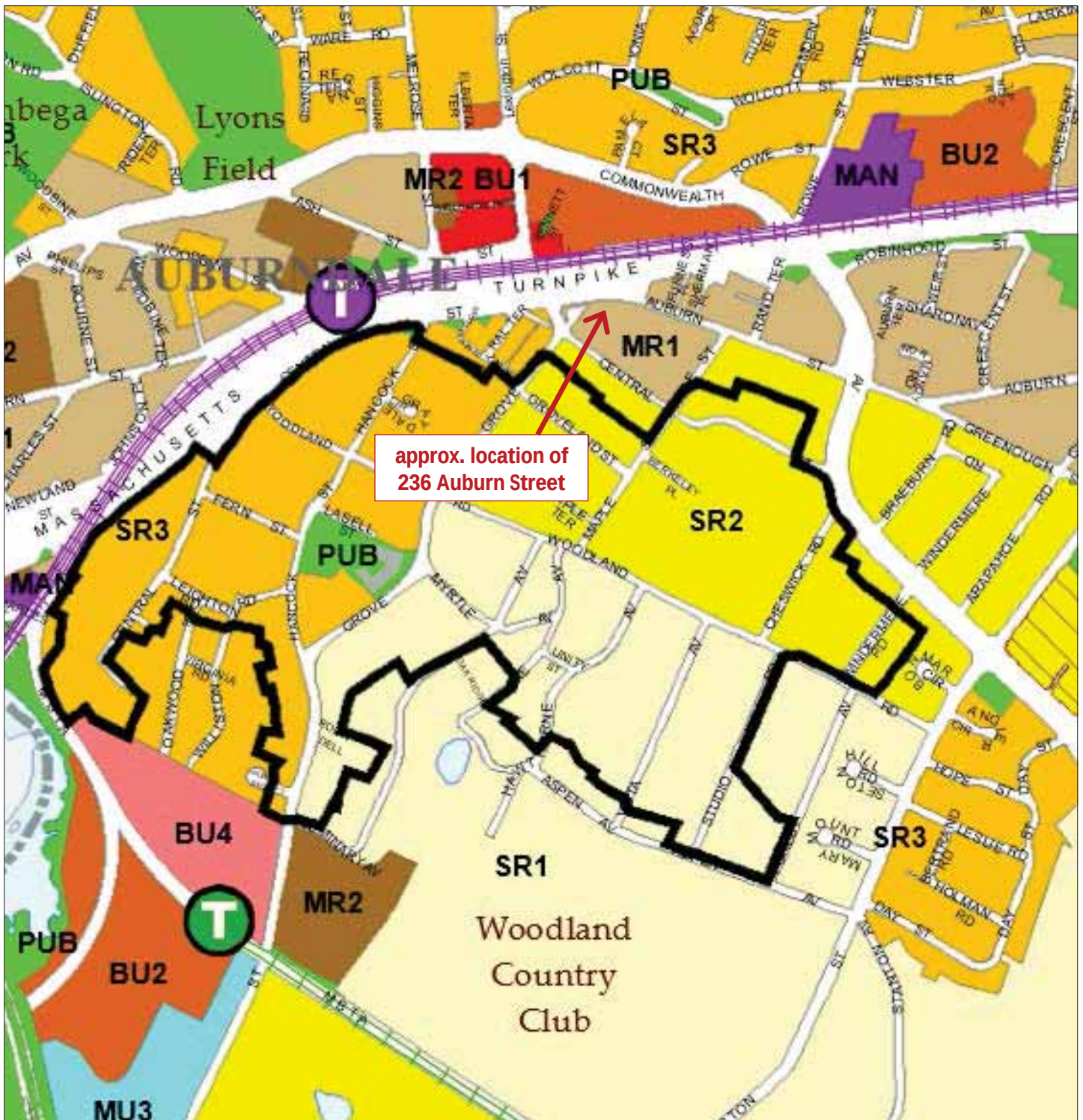
Detached Garage Area
 Living Space in Garage
 Shed Area
 Tennis Courts
 Swimming Pool
 Cabana Area

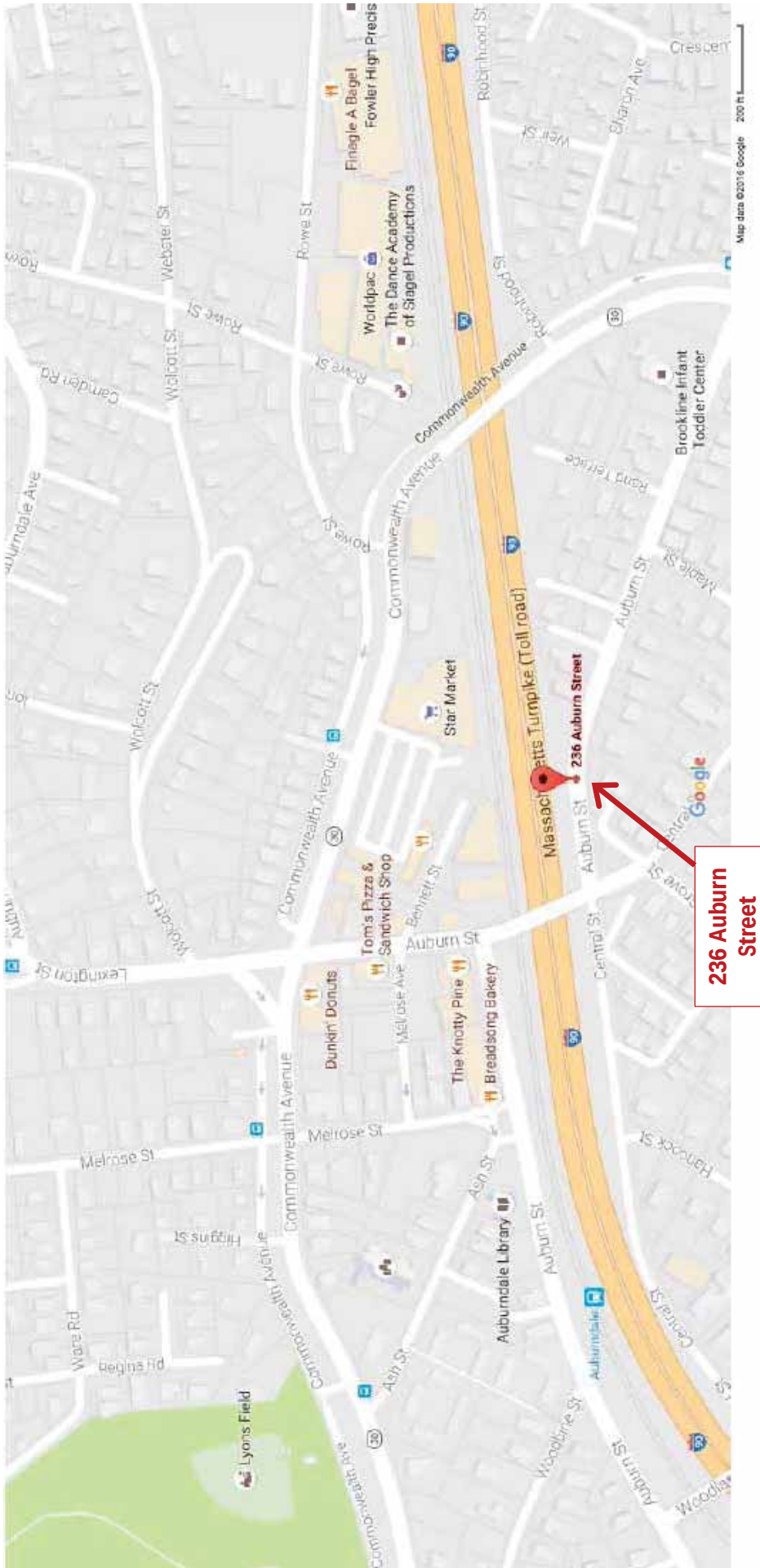


* The land use and description listed here are for Assessing Department purposes based on historical records in the Assessing Department.

For an official ruling on the legal use of the property pursuant to the state building code and/or Newton Zoning Ordinances, contact the Inspectional Services Department.

** For reference purposes only. Please check with Engineering Department for official zoning designation.





236 Auburn
Street

Site Plan with Setbacks, Elevations, Floor Plans

Note:

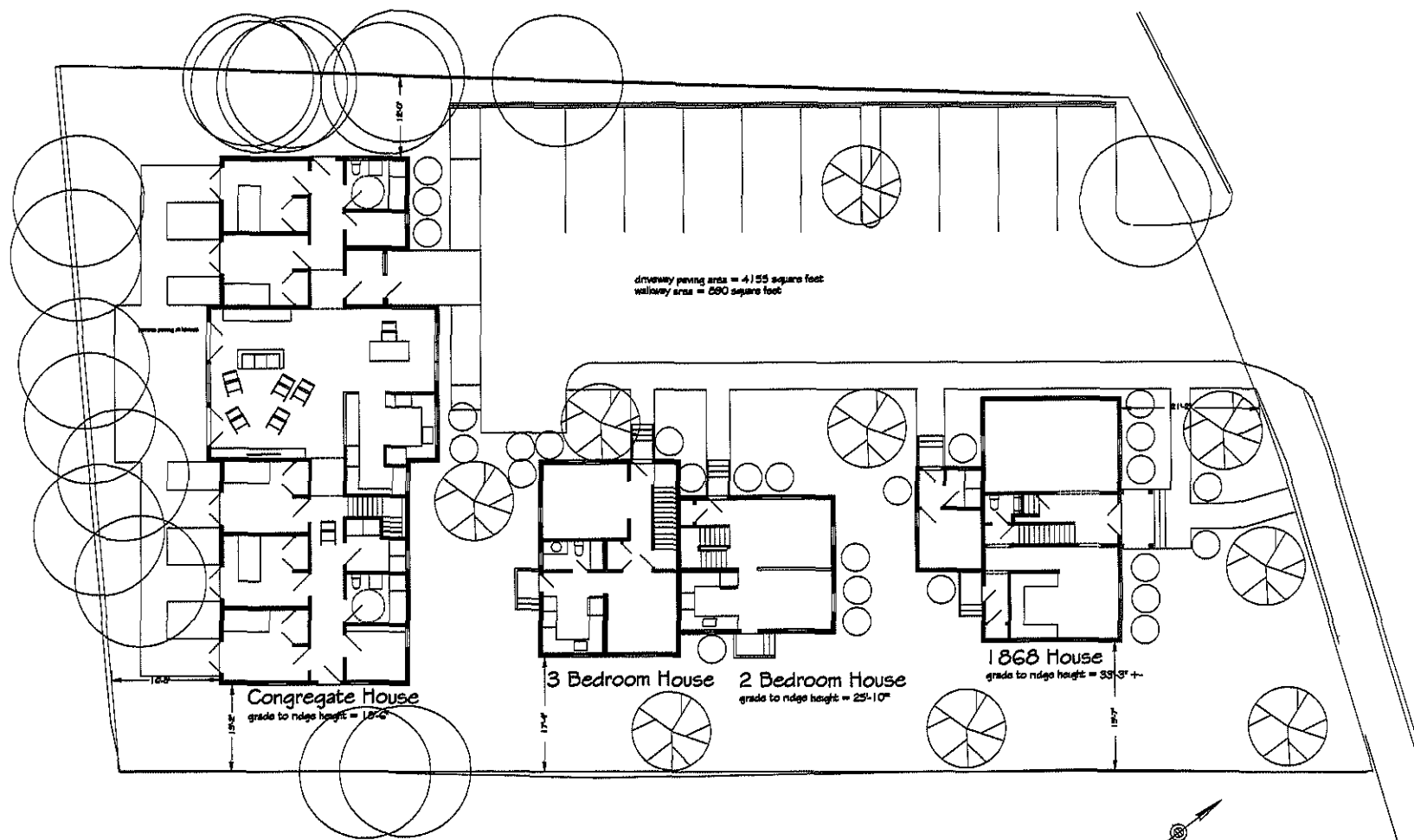
Building footprints cover 23% of site,
impervious surface covers 45%



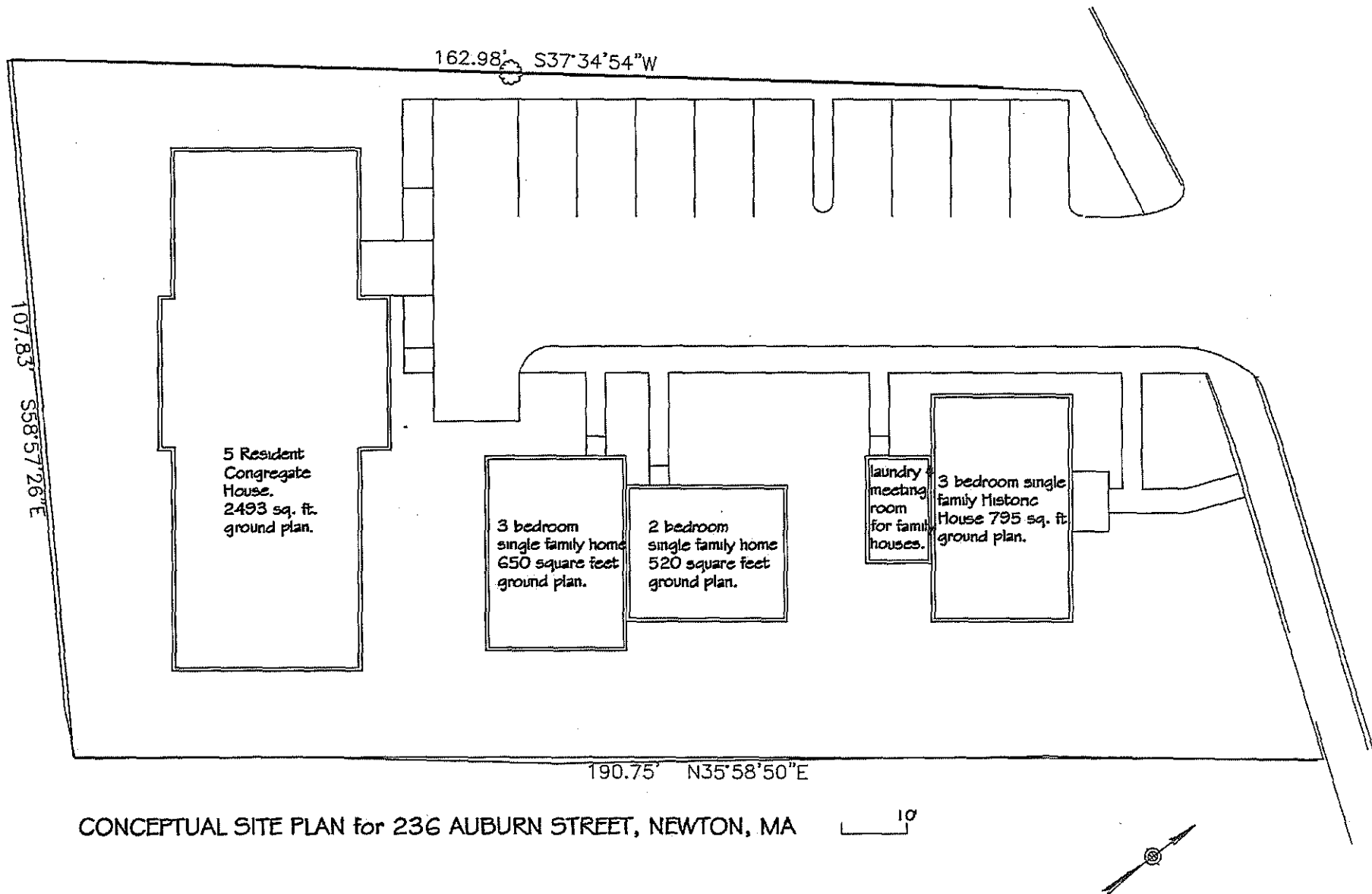
PERSPECTIVE SKETCH LOOKING SOUTHEAST

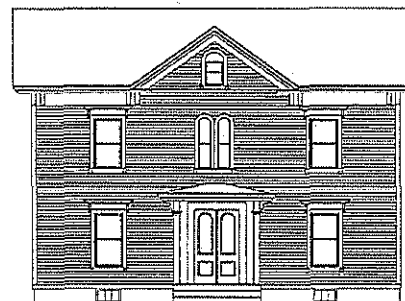
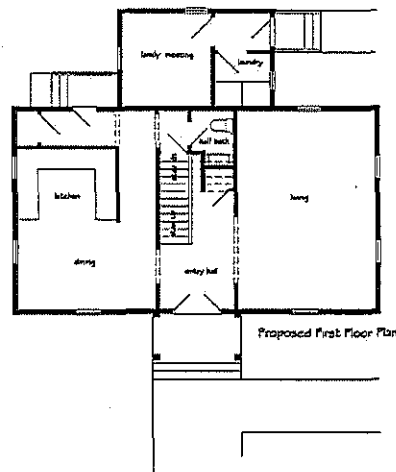
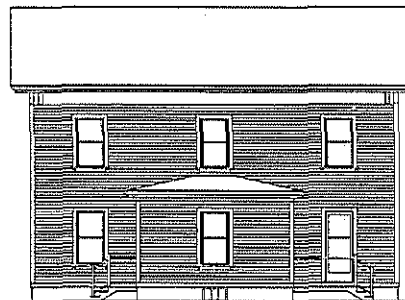
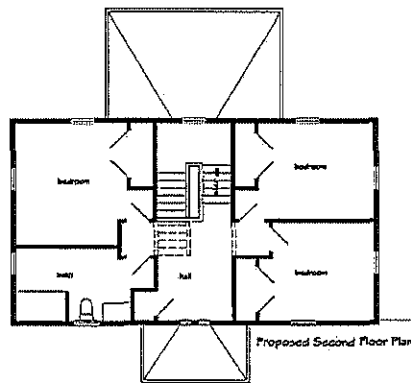


PERSPECTIVE SKETCH LOOKING NORTHWEST

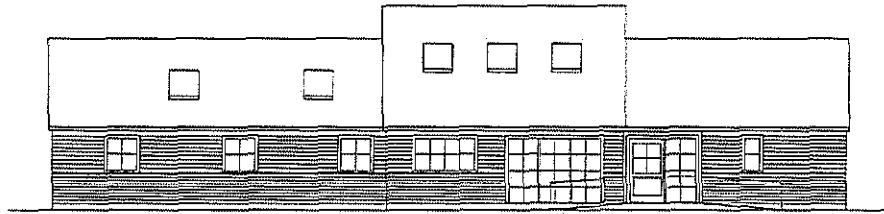


PROPOSED SITE PLAN 236 AUBURN STREET, NEWTON, MA
for CAN-DO





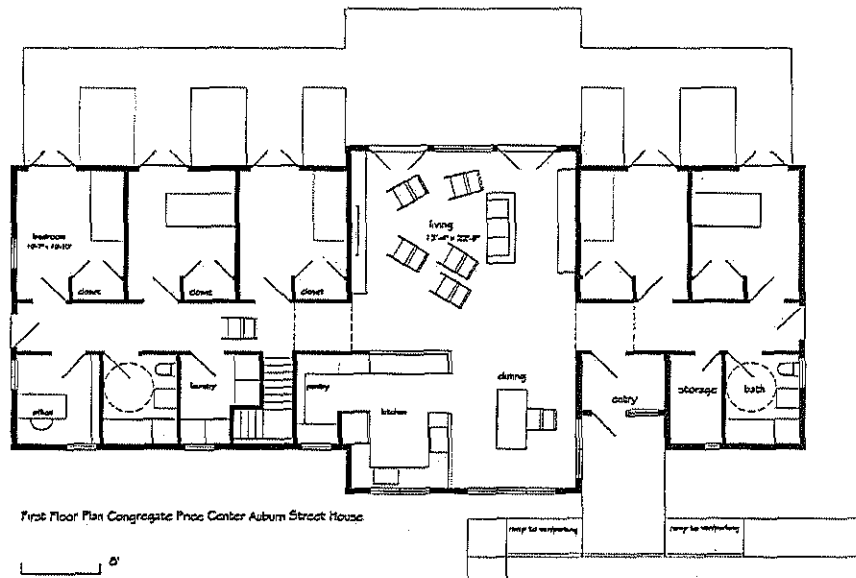
PROPOSED PLANS & ELEVATIONS for HISTORIC HOUSE 236 AUBURN STREET, NEWTON, MA
for CAN-DO



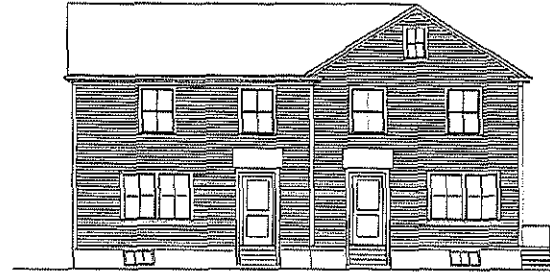
Proposed North Elevation Congregate House



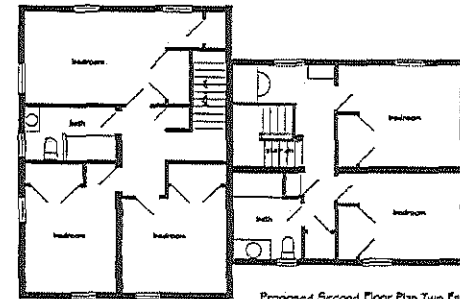
Proposed West Elevation Congregate House



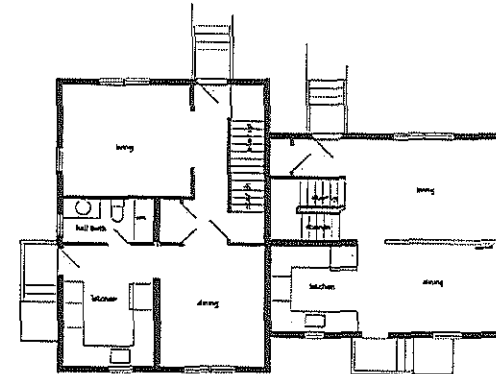
First Floor Plan Congregate Phase Center Auburn Street House



Proposed West Entry Elevation Two Family House



Proposed Second Floor Plan Two Family House



Proposed First Floor Plan Two Family House

PROPOSED PLANS & ELEVATIONS FOR CONGREGATE & TWO FAMILY HOUSES 236 AUBURN ST.
for CAN-DO

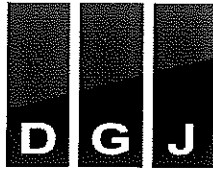
Green and Sustainable Construction Features

Green and Sustainable Features of 236 Auburn Street:

The existing house will be restored using wood clapboard siding and will have a new concrete foundation with energy standard foundation insulation and floor insulation. This makes it much less energy consuming than the existing granite foundation, with its leaks and lack of any insulation. The inside of the historic house will be gutted and all the exterior walls and attic will be insulated to meet the MA Energy Code, making it a much higher standard than the existing.

The new housing will be built to meet MA Energy Code and Stretch Code standards, and will be assembled off site in a factory, minimizing the site labor. This modular principle is the wave of the future to produce tight, factory precision in new construction.

The congregate house will also be modular, and will be built to the MA Energy Code and Stretch Code standards. The house will be completely accessible for its developmentally disabled clientele and will be built of safe and durable materials to provide a high-quality standard for that population.



**236 Auburn Street
Newton MA**

Feasibility Study Cost Estimate

**Prepared for:-
Terry Heinlein**

**Prepared by:-
D G Jones International, Inc.
3 Baldwin Green Common, Suite 202,
Woburn, MA 01801-1868
email : boston@dgjonesboston.com
Tel: 781-932-3131**

April 21, 2017

256 Auburn Street, Newton, MA
Feasibility Study Cost Estimate - Summary

April 21, 2017

SUMMARY

	CONSOLIDATED			Existing House			Congregate House			Two Family House			Sitework/Site Utilities
GROSS FLOOR AREA (in square feet)	10,991			2,569			4,996			3,426			
Element Name													
A Substructure	356,682	32.45	22.53%	86,675	33.74	21.52%	171,425	34.31	31.76%	98,582	28.77	24.82%	0
Foundations	159,190	14.48	10.05%	43,074	16.77	10.69%	74,438	14.90	13.79%	41,678	12.17	10.49%	
Basement Construction	197,492	17.97	12.47%	43,601	16.97	10.82%	96,987	19.41	17.97%	56,904	16.61	14.33%	
B Shell	150,488	13.69	9.50%	94,982	36.97	23.58%	22,641	4.53	4.19%	32,866	9.59	8.28%	0
Superstructure	6,218	0.57	0.39%	6,218	2.42	1.54%	0	0.00	0.00%	0	0.00	0.00%	
Exterior Enclosure	126,243	11.49	7.97%	70,737	27.53	17.56%	22,641	4.53	4.19%	32,866	9.59	8.28%	
Roofing	18,027	1.64	1.14%	18,027	7.02	4.47%	0	0.00	0.00%	0	0.00	0.00%	
C Interiors	141,093	12.84	8.91%	90,291	35.15	22.41%	25,322	5.07	4.69%	25,481	7.44	6.42%	0
Interior Construction	59,828	5.44	3.78%	37,078	14.43	9.20%	15,613	3.13	2.89%	7,138	2.08	1.80%	
Stairs	35,121	3.20	2.22%	16,169	6.29	4.01%	3,464	0.69	0.64%	15,488	4.52	3.90%	
Interior Finishes	46,144	4.20	2.91%	37,044	14.42	9.20%	6,245	1.25	1.10%	2,855	0.83	0.72%	
D Services	145,972	13.28	9.12%	77,333	30.10	19.20%	45,901	9.19	8.50%	22,738	6.64	5.73%	0
Conveying Systems	0	0.00	0.00%	0	0.00	0.00%	0	0.00	0.00%	0	0.00	0.00%	
Plumbing	19,720	1.79	1.25%	19,720	7.68	4.90%	0	0.00	0.00%	0	0.00	0.00%	
Heating, Ventilating and Air Conditioning (HVAC)	70,115	6.38	4.43%	35,378	13.77	8.78%	23,419	4.69	4.34%	11,318	3.30	2.85%	
Fire Protection Systems	0	0.00	0.00%	0	0.00	0.00%	0	0.00	0.00%	0	0.00	0.00%	
Electrical Systems	56,136	5.11	3.55%	22,234	8.65	5.52%	22,482	4.50	4.16%	11,420	3.33	2.88%	
E Equipment and Furnishings	17,205	1.57	1.09%	17,205	6.70	4.27%	0	0.00	0.00%	0	0.00	0.00%	0
Equipment	5,505	0.50	0.35%	5,505	2.14	1.37%	0	0.00	0.00%	0	0.00	0.00%	
Furnishings	11,700	1.06	0.74%	11,700	4.55	2.90%	0	0.00	0.00%	0	0.00	0.00%	
F Special Construction and Demolition	528,355	48.07	33.37%	36,355	14.15	9.02%	274,500	54.94	50.85%	217,500	63.49	54.76%	0
Special Construction	508,842	46.30	32.14%	16,842	6.56	4.18%	274,500	54.94	50.85%	217,500	63.49	54.76%	
Selective Demolition	19,513	1.78	1.23%	19,513	7.60	4.84%	0	0.00	0.00%	0	0.00	0.00%	
G Building Sitework	243,601	22.16	15.38%	0	0.00	0.00%	0	0.00	0.00%	0	0.00	0.00%	243,601
Site Preparation	88,571	8.06	5.59%	0	0.00	0.00%	0	0.00	0.00%	0	0.00	0.00%	88,571
Site Improvements	71,215	6.48	4.50%	0	0.00	0.00%	0	0.00	0.00%	0	0.00	0.00%	71,215
Site Civil/Mechanical Utilities	51,865	4.72	3.28%	0	0.00	0.00%	0	0.00	0.00%	0	0.00	0.00%	51,865
Site Electrical Utilities	31,949	2.91	2.02%	0	0.00	0.00%	0	0.00	0.00%	0	0.00	0.00%	31,949
Other Site Construction	0	0.00	0.00%	0	0.00	0.00%	0	0.00	0.00%	0	0.00	0.00%	0
Sub-Total Construction	1,583,396	144.06	100.00%	402,840	156.81	100.00%	539,789	108.04	100.00%	397,166	115.93	100.00%	243,601
General Conditions/Requirements	11.00%	174,174	15.85										
Payment & Performance Bond	1.00%	17,576	1.60										
General & Excess Liability Insurance	1.25%	22,189	2.02										
Builders Risk Insurance		By Owner											
Building Permit Fee	0.75%	13,480	1.23										
Escalation to mid-point of construction 3Q2018	6.3125%	114,308	10.40										
Estimating Contingency		Excluded by Architect											
GC's Fee	3.00%	57,754	5.25										
Sales Tax		Excluded											
Construction Contingency		By Owner											

Notes

1. Brief project description:-
 - Relocation of existing house and 2# new modular housing units with associated site work.
2. The estimate is based on the following:-
 - Open shop wage rates.
 - Competitive bid.
 - GC type project.
 - Receipt of 5# bona fide bids.
 - Single contract, no phasing.
 - Estimate based on assumed construction start date of 1Q2018.
 - Construction period 10-12 months.
3. The gross floor area is based on the following:-
 - Measurement is taken to the outside face of the exterior wall, measured through all stair wells, elevator shafts and ducts.
4. Story heights:-
 - Varies
5. General Conditions/Requirements for this project are priced as a percentage on the Summary page..
6. Special Conditions for this project are not applicable.
7. Escalation to the mid-point of construction (3Q2018) allowed at: -
 - 5%/annum.
8. Estimating contingency is an allowance for future design modifications/additions, which alter the cost of the building as the design progresses, this percentage reduces as the design develops. It is based on a percentage of the sum of Sub-Total Construction, General Conditions/Requirements and Escalation. For this level of estimate the following has been included:-
 - Excluded by Architect
9. Construction contingency is an allowance for scope/design modifications made by the owner during construction and also for any unforeseen circumstances. It is based on a percentage of the sum of Sub-Total Construction, General Conditions/Requirements, Escalation and Estimating Contingency. The following has been included:-
 - By Owner

Notes (Cont'd)

10. This estimate has been prepared from the following design information:-
 - Architectural floor plans and elevations received 04/10/2017.
 - Narrative received 04/10/2017.
 - Telecons, meeting and E-mails with/from Terry Heinlein.
11. The estimate includes the following:-
 - Building Permit Fee.
 - Conduit & draw wire only to low voltage systems.
 - See Estimate.
12. The estimate excludes the following:-
 - Utility company backcharges.
 - Sales tax.
 - Design consultant's fees.
 - Rock removal during excavation work.
 - Water removal during excavation work.
 - Loose furniture, fittings and equipment.
 - Telephones.
 - Complete audiovisual.
 - Cameras, monitors, videos etc.
13. Allowances:-
 - Hazmat abatement - no budget number provided by specialist sub consultant.
 - See Estimate.
14. Assumptions:-
 - See Estimate.
15. Estimates by other firms:-
 - None

Notes (Cont'd)

16. Common abbreviations included in this estimate:-

- cd = construction documents.
- cf = cubic foot.
- cy = cubic yard.
- dd = design development.
- ea = each.
- EO = extra over.
- flr = floor.
- lb = pound.
- lf = linear foot.
- ls = lump sum.
- ly = linear yard.
- mg = make good.
- opg = opening.
- rsr = riser.
- sd = schematic design.
- sf = square foot.
- sy = square yard.
- tn = ton.
- vb = vapor barrier.

17. Builders work in connection (BWIC) with conveying, mechanical and electrical systems includes the following:-

- Drilling and coring.
- Chasing.
- Cutting and patching.

236 Auburn Street, Newton, MA
Feasibility Study Cost Estimate - Estimate Existing House

April 21, 2017

Description	Qty	Unit	Rate	Amount	Total
<u>Foundations</u>					
Complete foundation system including excavation, concrete, formwork, reinforcement, damproofing, insulation, vapor barrier, etc - footprint area	965	sf	44.64	43,074	43,074
<u>Foundations</u>	<u>Total</u>			43,074	43,074
<u>Basement Construction</u>					
Complete foundation system including excavation, concrete, formwork, reinforcement, damproofing, insulation, vapor barrier, etc - footprint area	802	sf	54.37	43,601	43,601
<u>Basement Construction</u>	<u>Total</u>			43,601	43,601
<u>Superstructure</u>					
Structural					
Allowance - Repair existing frame structure	1	ls	2,750.00	2,750	2,750
Structural Decks					
Structural Decks				Not Required	
Miscellaneous Structural Items					
Moisture mitigation system to floor slabs				Not Required	
Structural Fireproofing					
Structural Fireproofing					
Fire protection (allow, gfa)	2,569	sf	0.50	1,285	
Intumescent paint to exposed steel, allow					
Adapt and amend Fire Protection/Firestopping at Existing Building	2,569	sf	0.85	2,184	3,468
<u>Superstructure</u>	<u>Total</u>			6,218	6,218
<u>Exterior Enclosure</u>					
Exterior Wall System					
Exterior Wall Finish System - Existing House					
Cedar clapboard siding w/stain	2,086	sf	8.75	18,253	
Cedar clapboard siding w/stain including back up	110	sf	17.85	1,964	
New exterior wall concrete band (Below existing bldg)	123	sf	Included w/Foundation		
Restore trims, etc at gables/eaves/corners	308	lf	15.00	4,620	
Exterior Wall Finish System - Addition					
Cedar clapboard siding w/back up	279	sf	17.85	4,980	
New exterior wall concrete band (Below addition)	48	sf	Included w/Foundation		
Allowance - Wall trims	1	ls	249.01	249	30,065
Exterior Glazing Systems					
Restore Existing Windows - Existing House					
Existing window - 1' 5" x 5' 5" (Curved on top)	2	ea	423.30	847	
Existing window - 2' 1" x 3' 5" (Curved on top)	1	ea	391.25	391	
Existing window - 2' 6" x 1' 6" (Basement)	4	ea	206.25	825	
Existing window - 2' 5" x 3' 11"	2	ea	521.75	1,044	
Existing window - 2' 10" x 5' 3"	4	ea	820.05	3,280	
Existing window - 2' 10" x 5' 5"	4	ea	846.60	3,386	
Existing window - 3' 0" x 5' 3"	6	ea	866.25	5,198	
Existing window - 3' 0" x 5' 5"	2	ea	894.30	1,789	

236 Auburn Street, Newton, MA
Feasibility Study Cost Estimate - Estimate Existing House

April 21, 2017

Description	Qty	Unit	Rate	Amount	Total
Triple Glazed Windows - Addition					
New window - 2' 6" x 3' 10" (Addition)	1	ea	864.00	864	
New window - 3' 0" x 5' 6" (Addition)	2	ea	1,485.00	2,970	
Window lintel at extg window	80	lf	16.00	1,280	
Trim to exterior window	406	lf	9.00	3,654	25,527
Exterior Doors					
Restore Existing Doors - Existing House					
Existing SL door - 2' 8" x 7' 0"	1	ea	875.00	875	
Existing DL door - 4' 8" x 7' 7"	1	ea	1,250.00	1,250	
New Doors - Addition					
New SL door & transom above - 3' 6" x 8' 0" (Addition)	1	ea	1,985.00	1,985	4,110
General Items					
Staging/Scaffolding	1,770	sf	3.00	5,310	
Flashing	406	lf	9.00	3,654	
Sealant	406	lf	2.25	914	
Wood Blocking	406	lf	2.85	1,157	
Expansion, control & isolation joints				Not Required	11,035
Exterior Enclosure	Total			70,737	70,737

Roofing

Roofing Systems					
Allowance - Repair/replace extg roof	963	sf	5.00	4,815	
Closed cell foam insulation to extg roof	963	sf	3.85	3,708	
New roof (Addition) including framing, etc	203	sf	16.65	3,380	
New roof (Porch) including framing, etc	67	sf	16.65	1,116	
Trim to eaves	60	lf	25.00	1,500	
Column at porch	4	ea	450.00	1,800	16,318
General Items					
Roof accessories, allow					
Roof Hatch System				Not Required	
Metal access ladder	1	ea	600.00	600	
Fall protection equipment				Not Required	
Miscellaneous flashings	56	lf	9.00	504	
Sealant	56	lf	2.25	126	
Blocking	168	lf	2.85	479	1,709
Roofing	Total			18,027	18,027

Interior Construction

Partitions					
Interior Partitions	1,800	sf	8.50	15,300	
Sealant to partitions	800	lf	1.25	1,000	
Blocking	400	lf	2.65	1,060	17,360
Interior Doors					
Interior Frame & Doors					
SL wood door, frame, hardware & paint	11	ea	1,094.00	12,034	
DL wood closet doors, frame, hardware & paint	3	ea	1,329.00	3,987	
Allow for					
Access doors	1	ls	1,000.00	1,000	
Wood blocking	247	lf	2.65	655	
Sealant	494	lf	1.25	618	18,293

236 Auburn Street, Newton, MA
Feasibility Study Cost Estimate - Estimate Existing House

April 21, 2017

Description	Qty	Unit	Rate	Amount	Total
Fittings					
Bathroom Accessories					
Single toilet	1	ea	350.00	350	
Single toilet/bathtub	1	ea	550.00	550	
Lockers				Not Required	
Fire Extinguisher Cabinets:-					
Fire extinguisher & cabinet, recessed type	1	ea	350.00	350	
Allow for mounting brackets, etc	1	ea	125.00	125	1,375
Sealant and Blocking					
Sealant at sanitary appliances & counters	22	lf	2.25	50	50
<u>Interior Construction</u>	<u>Total</u>			37,078	37,078
<u>Stairs</u>					
Exterior Stairs Construction					
Wood Stairs and Landing					
Exterior stair - 3' 6" wide x 3# riser	1	ea	1,815.00	1,815	
Exterior stair - 4' 4" wide x 3# riser	1	ea	1,889.70	1,890	
Front Stair - 9' 2" wide x 3# riser	1	ea	2,325.30	2,325	
Landing to stair	31	sf	15.00	465	
Railing					
Guardrail to landing	11	lf	85.00	935	
Guardrail to stairs	6	lf	90.00	540	
Handrail to stairs	2	lf	30.00	60	8,030
Interior Stairs					
Stair & railing from 1st Floor to 2nd Floor	1	fir	4,675.00	4,675	
Stair & railing from Basement to 1st Floor	1	fir	3,464.00	3,464	8,139
<u>Stairs</u>	<u>Total</u>			16,169	16,169
<u>Interior Finishes</u>					
Floor Finish System					
Allow to 1st/2nd Floors	1,767	sf	7.75	13,694	
Allow to Basement	802	sf	1.00	802	14,496
Base Finish System					
Wall base	688	lf	4.50	3,096	3,096
Walls Finish System					
Allow to 1st/2nd Floors	6,192	sf	2.00	12,384	12,384
Ceilings Finish System					
Allow to 1st/2nd Floors	1,767	sf	4.00	7,068	7,068
<u>Interior Finishes</u>	<u>Total</u>			37,044	37,044

236 Auburn Street, Newton, MA
Feasibility Study Cost Estimate - Estimate Existing House

April 21, 2017

Description	Qty	Unit	Rate	Amount	Total
<u>Conveying Systems</u>					
No Work in this Element					
<u>Conveying Systems</u>	<u>Total</u>			0	0
<u>Plumbing</u>					
Sanitary Fixtures, Etc.					
Plumbing Fixtures					
Water closet (Renovation)	2	ea	1,650.00	3,300	
Lavatory (Renovation)	2	ea	1,600.00	3,200	
Bathtub/Shower (Renovation)	1	ea	2,250.00	2,250	
Water closet (Addition)	1	ea	1,650.00	1,650	
Lavatory (Addition)	1	ea	1,600.00	1,600	
Hook-up for laundry (Addition)	1	ea	950.00	950	
Hook-up for dishwasher (Addition)	1	ea	325.00	325	
Plumbing Equipment					
Allowance - Water heater	1	ea	1,000.00	1,000	
Allowance - Pressure reducing valve	1	ea	100.00	100	14,375
Plumbing Fixture Piping					
Plumbing Fixture Piping				Included w/Fixtures	
Underground Piping					
Allowance - Underground Piping	1,767	sf	1.50	2,651	2,651
Natural Gas System					
Allowance - Natural Gas System	1,767	sf	0.75	1,325	1,325
Storm Water System					
Rainwater systems				Not Required	
General Items					
Access panels	1	ls	350.00	350	
Seismic bracing to pipework	1	ls	140.26	140	
Permit fees	1	ls	18.84	19	
Allow for Commissioning by Sub-Contractor	1	ls	94.30	94	
Owner Training, allow				Not Required	
Test & balance	1	ls	379.08	379	982
Sub Bid					
	Total			19,333	19,333
Builders work in connection with Plumbing @ 2%	1	ls	386.66	387	
General Contractor's overhead and profit				GC's Fee Carried in Summary	387
<u>Plumbing</u>	<u>Total</u>			19,720	19,720

Heating, Ventilating and Air Conditioning (HVAC)**Equipment**

Heating system - Baseboard hydronic, gas fueled	1,767	sf	7.50	13,253	
Exhaust at Bathroom including ductwork, etc	2	ea	640.00	1,280	
Air conditioning unit & condensor and boiler	1	ls	12,250.00	12,250	26,783

Pipework

Piping System	1,767	sf	3.00	5,301	5,301
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236 Auburn Street, Newton, MA
Feasibility Study Cost Estimate - Estimate Existing House

April 21, 2017

Description	Qty	Unit	Rate	Amount	Total
HVAC Controls					
Automatic Temperature Controls system	1	ls	1,500.00	1,500	1,500
General					
Vibration isolation	1	ls	251.88	252	
Commissioning by Sub-Contractor	1	ls	169.18	169	
Owner Training, allow				Not Required	
Test & balance	1	ls	680.09	680	1,101
Sub Bid	Total			34,685	34,685
Builders work in connection with HVAC @ 2%	1	ls	693.69	694	
General Contractor's overhead and profit				GC's Fee Carried in Summary	694
<u>Heating, Ventilating and Air Conditioning (HVAC)</u>	<u>Total</u>			35,378	35,378

Fire Protection Systems

No Work in this Element

<u>Fire Protection Systems</u>	<u>Total</u>			0	0
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Electrical Systems**Electrical Equipment**

Allowance - Panelboards, etc.

1,767	sf	0.70	1,237	1,237
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Feeders

Allowance - Feeders

1,767	sf	0.35	618	618
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Small Power

Allowance - Small power

1,767	sf	2.50	4,418	4,418
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Electrical Power to: -

HVAC Equipment

1	ls	1,500.00	1,500	
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Plumbing Equipment

1	ea	325.00	325	1,825
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Lighting

Allowance - Lighting System

1,767	sf	4.50	7,952	
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Allowance - Lighting Controls

1,767	sf	1.00	1,767	9,719
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Fire Alarm

Allowance - Fire Alarm System

1,767	sf	1.00	1,767	1,767
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Low Voltage Systems (conduit & draw wire only)

Allowance

1,767	sf	0.35	618	618
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General

Grounding, allow

1,767	sf	0.50	884	
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Lightning protection

1,767	sf		Not Required	
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Seismic restraint, allow

1	ls	158.14	158	
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Permit fees

1	ls	21.24	21	
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Allow for Commissioning by Sub-Contractor

1	ls	106.32	106	
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Owner Training, allow

Not Required

Test

1	ls	427.42	427	1,597
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Sub Bid

Total			21,798	21,798
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236 Auburn Street, Newton, MA
Feasibility Study Cost Estimate - Estimate Existing House

April 21, 2017

Description	Qty	Unit	Rate	Amount	Total
Builders work in connection with electrical @ 2%	1	ls	435.97	436	
General Contractor's overhead and profit			GC's Fee Carried in Summary		436
Electrical Systems	Total			22,234	22,234

Equipment**Commercial Grade Kitchen Equipment**

Commercial kitchen equipment Not Required

Residential Appliances

Allowance - Kitchen Appliances

Range cooker/oven	1	ea	875.00	875	
Dishwasher	1	ea	685.00	685	
Full size refrigerator	1	ea	1,450.00	1,450	
Microwave	1	ea	375.00	375	

Allowance - Laundry Appliances

Washer	1	ea	975.00	975	
Dryer	1	ea	1,145.00	1,145	5,505

Projection Screens

Projection screens, allow Not Required

Equipment	Total			5,505	5,505
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Furnishings**Window Treatment**

Window Treatment

Exterior - Roller window shades					Not Required
Interior - Roller window shades					Not Required

Custom Casework

Kitchen

Plam base cabinet	20	lf	275.00	5,500	
Plam wall cabinet	20	lf	175.00	3,500	
Solid surface countertop to base cabinet	20	lf	115.00	2,300	
Backsplash	25	lf	16.00	400	11,700

Furnishings	Total			11,700	11,700
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Special Construction

Move existing house to new foundations	1	ls	16,842.00	16,842	16,842
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Special Construction	Total			16,842	16,842
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Selective Demolition**Demolition**

Remove and Dispose - Exterior

R&D : Exterior wall finishes	2,086	sf	0.45	939	
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Remove and Dispose - Interior

Gut out demolition (1st/2nd Floors & Attic)	1,767	sf	4.50	7,952	
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236 Auburn Street, Newton, MA
 Feasibility Study Cost Estimate - Estimate Existing House

April 21, 2017

Description	Qty	Unit	Rate	Amount	Total
Allow for: -					
Hazardous material abatement & removal, allow	1	ls	10,000.00	10,000	
Make safe MEP prior to commencement of work				Included w/Site	
Miscellaneous demolition/alteration					
Temporary screen and barriers					
Remove rubbish off site	1	ls	622.31	622	19,513
<u>Selective Demolition</u>	<u>Total</u>			19,513	19,513

236 Auburn Street, Newton, MA
Feasibility Study Cost Estimate - Estimate Congregate House

April 21, 2017

Description	Qty	Unit	Rate	Amount	Total
<u>Foundations</u>					
Complete foundation system including excavation, concrete, formwork, reinforcement, damproofing, insulation, vapor barrier, etc - footprint area	2,498	sf	29.80	74,438	74,438
<u>Foundations</u>	<u>Total</u>			74,438	74,438
<u>Basement Construction</u>					
Complete foundation system including excavation, concrete, formwork, reinforcement, damproofing, insulation, vapor barrier, etc - footprint area	2,498	sf	38.83	96,987	96,987
<u>Basement Construction</u>	<u>Total</u>			96,987	96,987
<u>Superstructure</u>					
No Work in this Element					
<u>Superstructure</u>	<u>Total</u>			0	0
<u>Exterior Enclosure</u>					
Exterior Wall System					
Exterior Wall Finish System					
Cedar clapboard siding w/stain	1,831	sf	8.75	16,021	
New exterior wall concrete band	160	sf	Included w/Foundation		
Allowance - Wall trims	1	ls	1,602.13	1,602	17,623
Exterior Glazing Systems					
Double Hung Windows			Included w/Modular Bldg		
Exterior Doors					
Exterior Doors			Included w/Modular Bldg		
General Items					
Staging/Scaffolding	1,200	sf	3.00	3,600	
Flashing	126	lf	9.00	1,134	
Sealant	126	lf	2.25	284	
Wood Blocking			Not Required		
Expansion, control & isolation joints			Not Required		5,018
<u>Exterior Enclosure</u>	<u>Total</u>			22,641	22,641
<u>Roofing</u>					
Roofing Systems					
Sloped Roofing System			Included w/Modular Bldg		
<u>Roofing</u>	<u>Total</u>			0	0
<u>Interior Construction</u>					

236 Auburn Street, Newton, MA
Feasibility Study Cost Estimate - Estimate Congregate House

April 21, 2017

Description	Qty	Unit	Rate	Amount	Total
Interior Construction			Included w/Modular Bldg		
Insulate ceiling of Basement	2,498	sf	2.25	5,621	
Allow for work to Basement	2,498	sf	4.00	9,992	15,613
<u>Interior Construction</u>	<u>Total</u>			15,613	15,613
 <u>Stairs</u>					
Stair & railing from Basement to 1st Floor	1	flr	3,464.00	3,464	3,464
<u>Stairs</u>	<u>Total</u>			3,464	3,464
 <u>Interior Finishes</u>					
Interior Finishes			Included w/Modular Bldg		
Allow for work to Basement	2,498	sf	2.50	6,245	6,245
<u>Interior Finishes</u>	<u>Total</u>			6,245	6,245
 <u>Conveying Systems</u>					
No Work in this Element					
<u>Conveying Systems</u>	<u>Total</u>			0	0
 <u>Plumbing</u>					
Plumbing			Included w/Modular Bldg		
<u>Plumbing</u>	<u>Total</u>			0	0
 <u>Heating, Ventilating and Air Conditioning (HVAC)</u>					
Heating, Ventilating and Air Conditioning (HVAC)			Included w/Modular Bldg		
Air conditioning unit & condensor and boiler	1	ls	15,925.00	15,925	
Allow for work to Basement	2,498	sf	3.00	7,494	23,419
<u>Heating, Ventilating and Air Conditioning (HVAC)</u>	<u>Total</u>			23,419	23,419
 <u>Fire Protection Systems</u>					
No Work in this Element					
<u>Fire Protection Systems</u>	<u>Total</u>			0	0
 <u>Electrical Systems</u>					

236 Auburn Street, Newton, MA
Feasibility Study Cost Estimate - Estimate Congregate House

April 21, 2017

Description	Qty	Unit	Rate	Amount	Total
Electrical Systems			Included w/Modular Bldg		
Allow for work to Basement	2,498	sf	9.00	22,482	22,482
<u>Electrical Systems</u>	<u>Total</u>			22,482	22,482
<u>Equipment</u>					
Equipment			Included w/Modular Bldg		
<u>Equipment</u>	<u>Total</u>			0	0
<u>Furnishings</u>					
Furnishings			Included w/Modular Bldg		
<u>Furnishings</u>	<u>Total</u>			0	0
<u>Special Construction</u>					
Modular Buildings					
Single story, modular construction	1	ls	258,000.00	258,000	
Connect modular units, allow	1	ls	16,500.00	16,500	274,500
<u>Special Construction</u>	<u>Total</u>			274,500	274,500
<u>Selective Demolition</u>					
No Work in this Element					
<u>Selective Demolition</u>	<u>Total</u>			0	0

236 Auburn Street, Newton, MA
Feasibility Study Cost Estimate - Estimate Two Family House

April 21, 2017

Description	Qty	Unit	Rate	Amount	Total
<u>Foundations</u>					
Complete foundation system including excavation, concrete, formwork, reinforcement, dampproofing, insulation, vapor barrier, etc - footprint area	1,142	sf	36.50	41,678	41,678
<u>Foundations</u>	<u>Total</u>			41,678	41,678
<u>Basement Construction</u>					
Complete foundation system including excavation, concrete, formwork, reinforcement, dampproofing, insulation, vapor barrier, etc - footprint area	1,142	sf	49.83	56,904	56,904
<u>Basement Construction</u>	<u>Total</u>			56,904	56,904
<u>Superstructure</u>					
No Work in this Element					
<u>Superstructure</u>	<u>Total</u>			0	0
<u>Exterior Enclosure</u>					
Exterior Wall System					
Exterior Wall Finish System					
Cedar clapboard siding w/stain	2,545	sf	8.75	22,269	
New exterior wall concrete band	302	sf	Included w/Foundation		
Allowance - Wall trims	1	ls	2,226.88	2,227	24,496
Exterior Glazing Systems					
Double Hung Windows			Included w/Modular Bldg		
Exterior Doors					
Exterior Doors			Included w/Modular Bldg		
General Items					
Staging/Scaffolding	2,265	sf	3.00	6,795	
Flashing	140	lf	9.00	1,260	
Sealant	140	lf	2.25	315	
Wood Blocking			Not Required		
Expansion, control & isolation joints			Not Required		8,370
<u>Exterior Enclosure</u>	<u>Total</u>			32,866	32,866
<u>Roofing</u>					
Roofing Systems					
Sloped Roofing System			Included w/Modular Bldg		
<u>Roofing</u>	<u>Total</u>			0	0
<u>Interior Construction</u>					

236 Auburn Street, Newton, MA
Feasibility Study Cost Estimate - Estimate Two Family House

April 21, 2017

Description	Qty	Unit	Rate	Amount	Total
Interior Construction			Included w/Modular Bldg		
Insulate ceiling of Basement	1,142	sf	2.25	2,570	
Allow for work to Basement	1,142	sf	4.00	4,568	7,138
<u>Interior Construction</u>	<u>Total</u>			7,138	7,138

Stairs

Exterior Stairs Construction

Wood Stairs and Landing

Exterior stair - 3' 4" wide x 3# riser

2 ea 1,799.70 3,599

Exterior stair - 3' 6" wide x 4# riser

2 ea 1,920.00 3,840

Landing to stair

55 sf 15.00 825

Railing

Guardrail to landing

28 lf 85.00 2,380

Guardrail to stairs

14 lf 90.00 1,260

Handrail to stairs

4 lf 30.00 120 12,024

Interior Stairs Construction

Stair & railing from Basement to 1st Floor

1 flr 3,464.00 3,464 3,464

Stairs

Total 15,488 15,488

Interior Finishes

Interior Finishes

Allow for work to Basement

Included w/Modular Bldg
1,142 sf 2.50 2,855 2,855

Interior Finishes

Total 2,855 2,855

Conveying Systems

No Work in this Element

Conveying Systems

Total 0 0

Plumbing

Sanitary Fixtures, Etc.

Included w/Modular Bldg

Plumbing

Total 0 0

Heating, Ventilating and Air Conditioning (HVAC)

Heating, Ventilating and Air Conditioning (HVAC)

Boiler

Included w/Modular Bldg
2 ea 3,375.00 6,750

Allow for work to Basement

1,142 sf 4.00 4,568 11,318

Heating, Ventilating and Air Conditioning (HVAC)

Total 11,318 11,318

236 Auburn Street, Newton, MA
Feasibility Study Cost Estimate - Estimate Two Family House

April 21, 2017

Description	Qty	Unit	Rate	Amount	Total
<u>Fire Protection Systems</u>					
No Work in this Element					
<u>Fire Protection Systems</u>	<u>Total</u>			0	0
<u>Electrical Systems</u>					
Electrical Systems			Included w/Modular Bldg		
Allow for work to Basement	1,142	sf	10.00	11,420	11,420
<u>Electrical Systems</u>	<u>Total</u>			11,420	11,420
<u>Equipment</u>					
Equipment			Included w/Modular Bldg		
<u>Equipment</u>	<u>Total</u>			0	0
<u>Furnishings</u>					
Furnishings			Included w/Modular Bldg		
<u>Furnishings</u>	<u>Total</u>			0	0
<u>Special Construction</u>					
Modular construction					
Two story, modular construction	1	ls	203,000.00	203,000	
Connect modular buildings	1	ls	14,500.00	14,500	217,500
<u>Special Construction</u>	<u>Total</u>			217,500	217,500
<u>Selective Demolition</u>					
No Work in this Element					
<u>Selective Demolition</u>	<u>Total</u>			0	0

236 Auburn Street, Newton, MA
Feasibility Study Cost Estimate - Estimate Sitework

April 21, 2017

Description	Qty	Unit	Rate	Amount	Total
<u>G10 Site Preparation</u>					
Demolition					
Building Demolition					
R&D : Addition building to Existing House, 2 storys	820	sf	16.00	13,120	
Demolish bay window addition to existing house	1	ls	1,650.00	1,650	
Demolish and remove existing concrete slab	1,622	sf	7.50	12,165	
Demolish and remove existing foundation walls	199	lf	28.00	5,572	
Loading & removing off site including dump fees	1	ls	4,876.05	4,876	
Terminating & capping extg utilities	1	ls	2,250.00	2,250	
Hazardous material abatement & removal, allow	1	ls	6,500.00	6,500	
General site clearing/misc. demolition to remaining areas	18,108	sf	0.30	5,432	
Allow for					
Miscellaneous demolition	1	ls	1,500.00	1,500	
Remove rubbish off site	1	ls	500.00	500	53,565
Temporary work					
Allowance - Inlet protection	5	ea	250.00	1,250	
Allowance - Silt fencing	586	lf	6.00	3,516	
Allowance - Stabilized construction entrances	1	ea	1,500.00	1,500	
Allowance - Dust Control	1	ls	394.60	395	
Allowance - Construction fence w/gates	586	lf	6.00	3,516	
Allowance - Temporary service to existing/disturbed site utilities				Not Required	10,177
Earth Stripping and Stockpiling					
Strip topsoil & store on site	335	cy	6.00	2,010	
Cut & Fill at Paving and planting/lawn areas	283	cy	8.50	2,406	
Fill areas of site with excavated material to achieve new grade levels	142	cy	6.25	888	
Remove surplus excavated material off site	476	cy	12.00	5,712	
EO for excavating rock	14	cy	45.00	630	
Import fill to achieve proposed grade levels				Not Required	
Grade over entire site to achieve final levels	19,730	sf	0.15	2,960	
Proof Roll/Compact Building Slab-On-Grade area	4,442	sf	0.25	1,111	
Buildings excavation				Included w/Buildings	
Water removal during excavation works	1	ls	314.30	314	16,029
Excavate and Part Backfill					
Trenching and backfill for utility removal				Not Required	
Trenching and backfill for utility installation					
Trench for - Water Pipe (Underground) - From Auburn Street to Buildings	240	lf	11.92	2,860	
Trench for - Gas Pipe (Underground) - From Auburn Street to Buildings	240	lf	11.92	2,860	
Trench for - Sanitary Pipe (Underground) - From Auburn Street to Buildings	240	lf	12.83	3,080	
Trench for - Surface drainage system (Under paving)					8,800
<u>G10 Site Preparation</u>				<u>Total</u>	88,571
					88,571
<u>G20 Site Improvements</u>					
Asphalt Paving					
Bituminous driveway & parking	4,405	sf	4.25	18,721	
Patch roads after utility installations	1	ls	3,200.00	3,200	
Connect new bituminous driveway to extg	32	lf	6.00	192	
Allowance - Traffic Markings	1	ls	250.00	250	22,363
Concrete Paving					
Concrete sidewalk	683	sf	8.00	5,464	
Concrete sidewalk at street side	592	sf	8.00	4,736	
Concrete patio at back of Congregate House	797	sf	9.00	7,173	
Concrete ramp	273	sf	11.00	3,003	
Stairs & landing	174	sf		Included w/Buildings	
Connect new side walk to extg at street side	14	lf	10.00	140	

236 Auburn Street, Newton, MA
Feasibility Study Cost Estimate - Estimate Sitework

April 21, 2017

Description	Qty	Unit	Rate	Amount	Total
Concrete curb	102	lf	17.00	1,734	22,250
Site Improvement					
Stockade wood fence at the perimeter of parking	279	lf	35.00	9,765	
EO - Gate	3	ea	500.00	1,500	
Exterior Signage					
Directional traffic signs, allow	1	ea	350.00	350	
HP parking signs, allow	1	ea	350.00	350	11,965
Landscaping					
Allowance - Landscaping (including following items) & Planting	8,364	sf	1.75	14,637	
3-4 inch caliper trees throughout site				Included	
Foundation planting around entry/side porches and ramps				Included	
Pruning of existing perimeter mature oak and maple trees				Included	
Seeded lawns				Included	14,637
G20 Site Improvements	Total			71,215	71,215

G30 Site Civil/Mechanical Utilities**Water Service and Fire Protection**

Water Pipe (Underground) - From Auburn Street to Existing House (1861)	40	lf	30.00	1,200	
Two Family House (2# Services)	40	lf	30.00	1,200	
Congregate House	160	lf	30.00	4,800	
Allowance - Fire Service					
Fire Service to Hydrant	120	lf	75.00	9,000	
Hydrant	1	ea	2,250.00	2,250	18,450

Gas Service

Gas Pipe (Underground) - From Auburn Street to Existing House (1861)	40	lf		Trenching Only	
Two Family House (2# Services)	40	lf		Trenching Only	
Congregate House	160	lf		Trenching Only	

Sanitary Sewer

Sanitary Pipe (Underground) - From Auburn Street to Existing House (1861)	40	lf	22.00	880	
Two Family House (2# Services)	40	lf	22.00	880	
Congregate House	160	lf	22.00	3,520	
Sewer Manhole	1	ea	4,500.00	4,500	9,780

Stormwater Management

Surface drainage system (Under paving)	6,332	sf	3.48	22,035	22,035
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General Items

Trenching and backfill to utility lines			Included w/Earthwork		
Police detail for utility connections	20	hour	80.00	1,600	1,600

G30 Site Civil/Mechanical Utilities	Total			51,865	51,865
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G40 Site Electrical Utilities**Electrical Service**

Equipment					
Utility transformer				By Utility Company	
Electrical Service (Conduit & trench only) to Existing House (1861)	40	lf	42.00	1,680	
Two Family House (2# Services)	40	lf	42.00	1,680	

236 Auburn Street, Newton, MA
Feasibility Study Cost Estimate - Estimate Sitework

April 21, 2017

Description	Qty	Unit	Rate	Amount	Total
Congregate House	160	lf	42.00	6,720	10,080
Site Lighting					
Allowance - Site pole lights	5	ea	2,933.80	14,669	14,669
Site Security				Not Required	
Site Telecommunication					
Tel/Data/Cable Service (Conduit & trench only) to Existing House (1861)	40	lf	30.00	1,200	
Two Family House (2# Services)	40	lf	30.00	1,200	
Congregate House	160	lf	30.00	4,800	7,200
<u>G40 Site Electrical Utilities</u>	<u>Total</u>			31,949	31,949
<u>G90 Other Site Construction</u>					
No Work in this Element					
<u>G90 Other Site Construction</u>	<u>Total</u>			0	0

236 Auburn Street, Newton, MA
Feasibility Study Cost Estimate - Gross Floor Areas

April 21, 2017

Gross Floor Areas

Locations	Gross Floor Areas (sf)	Perimeter
<u>Existing House</u>		
Basement	802	118
First Floor Renovation	802	118
Second Floor Renovation	802	118
First Floor Addition	163	52
Total Existing House	2,569	
<u>Congregate House</u>		
Basement	2,498	
First Floor	2,498	240
Total Congregate House	4,996	
<u>Two Family House</u>		
Basement	1,142	
First Floor	1,142	151
Second Floor	1,142	151
Total Two Family House	3,426	
Total Project Area	10,991	

COOPERSTOWN environmental

PHASE I ENVIRONMENTAL SITE ASSESSMENT

236 Auburn Street
Newton, MA 02466

Prepared for:

Citizens for Affordable Housing in Newton Development Organization, Inc.

(CAN-DO)

79-B Chapel Street
Newton, MA 02458

Prepared by:

Cooperstown Environmental LLC
Andover, Massachusetts

Conclusions only included in packet
forwarded to City Council. Full report
available on CPC project webpage.

April 2017

PRIVILEGED AND CONFIDENTIAL

Environmental Site Assessment Report
236 Auburn Street, Newton, MA

19
April 2017

8.0 CONCLUSIONS AND RECOMMENDATIONS

Cooperstown has performed this ESA in conformance with the scope and limitations of the ASTM International "Standard Practice for Phase I Environmental Site Assessment" (E-1527-13), as outlined in the proposal submitted to CAN-DO, dated April 7, 2017. The purpose of the Phase I ESA was to identify "recognized environmental conditions" (RECs) in connection with the Subject Property. The Phase I ESA included a review of regulatory and historical records, site reconnaissance, and interviews with persons having knowledge of the property.

The site reconnaissance, owner interview, and review of regulatory and historical records show a history of the Subject Property back to approximately 1861. Historical aerial photos, City Directories, and local sources contain a record of the past uses of the Subject Property and surrounding properties. The established timeline of the historical record indicates there are no significant data gaps in meeting the standard for Phase I investigations (E-1527-13).

We have performed a Phase I Environmental Site Assessment in conformance with the scope and limitations of ASTM Practice E 1527 of 236 Auburn Street in Newton, Massachusetts (the site or Subject Property). Any exceptions to, or deletions from, this practice are described in Section 9.0 of this report. This assessment has revealed no evidence of recognized environmental conditions (RECs) in connection with the Subject Property.

There was one de-minimus condition associated with household solid waste surrounding the dumpster at the property. Additionally there is a history of lead based paint detected in the interior of the property building. Considering this history, there is the possibility that lead based paint was used on the exterior of the property building which has the potential to leach into site soils. This condition is exempt from reporting to Mass DEP and therefore is not a REC. However, it does affect re-use options for site soil if off-site disposal of soils was required as part of re-development in order to comply with similar soils provisions.

Performed by: Daniel R. Gaulin, subcontractor to FinePoint Associates
May 9, 2017

- WestMetro HOME Consortium \$500,000 subsidy
- 3 HOME units – 1 low HOME 2-BR units and 2 low HOME 3-BR units

I reviewed the proforma and supporting documentation submitted as part of the full proposal from CAN-DO and Metro West Collaborative Development (CAN-DO) to the Community Preservation Committee dated April 28, 2017. This analysis follows the underwriting guidelines of the United States Department of Housing and Urban Development and the WestMetro HOME Consortium.

Project Description

CAN-DO purchased 236 Auburn Street, a historic house containing three units located on 18,760 sf lot in a Multi-family 1 zoning district. It is proposing to rehabilitate the house into a 3-BR rental unit and build two new structures: a duplex containing one 2-BR and one 3-BR unit and a 5-BR group home for individuals with medically intensive disabilities. The project is seeking Facilities Consolidation Funding from the state and HOME, CDBG and Community Preservation funding from the City of Newton.

The proposed HOME amount is within the subsidy limits.

There will be a total of 3 fixed HOME units (the 2-BR and 3-BR units) which the developer has proposed to designate as low HOME units.

The proposed group home will be developed by CAN-DO and sold to The Price Center, a large non-profit that specializes in providing housing and support services for disabled residents.

Market Risk Analyses

There is negligible market risk. The proposed rent for the 2-BR is \$953/month and the 3-BRs are \$1,084/month. These rents are a third of the market rents in Newton.

The proposed group home has a letter of support from the Massachusetts Department of Developmental Services (DDS) which is willing to provide residents to the development as well as a contract for residential services and support. DDS reports it has potential residents identified for the proposed group home.

Developer Risk Analyses

The project has a complicated development plan that involves three development entities: CAN-DO, Metro West Collaborative Development and The Price Center. The success of the project depends on the ability of each entity to execute its part of the development.

CAN-DO, founded in 1994, has focused on increasing the supply of affordable rental housing in Newton. Metro West Collaborative Development, founded in 1991 as Watertown Community Housing, initially focused on the development and preservation of ownership and rental affordable housing in Watertown, but it has recently taken on development and consulting projects in nearby towns (Belmont, Lexington and Weston) as well somewhat further away (Norwell and Medway). CAN-DO owns and operates 39 scattered-site units in Newton. Metro West owns and operates 44 units in two developments in Watertown, and it has two projects in development outside of Watertown that are projected to add 66 units to their portfolio.

Two years ago, the Board of Directors of CAN-DO began to plan for the retirement of Josephine McNeil, its founding Executive Director. The Board decided to retain CAN-DO as an organization but to merge the Board with Metro West and enter into a contract for services for Metro West to operate CAN-DO's rental portfolio and provide development services for 236 Auburn Street.

Ms. McNeil of CAN-DO has lent her expertise to the acquisition of the property and in community outreach to neighbors and City Councilors. She is currently CAN-DO's Executive Director Emeritus. She will be retiring in July and Metro West, which has been working along with CAN-DO from the beginning of the project, will have primary responsibility for the remainder of the development.

CAN-DO now shares an Executive Director with Metro West: Jennifer Van Campen. Ms. Van Campen led Metro West's developments at St. Joseph Hall and Belmont Street which had larger, more complicated, financing than Auburn Street. Metro West also employs Linda Moody, a part-time project manager who is a licensed architect and continues to operate her own architectural firm. The development team is further strengthened by the addition of Daniel J Violi, a consultant in affordable housing financing who has experience in all types of affordable housing, including group homes.

The Price Center is a Newton-based nonprofit provider of services for individuals with intellectual and developmental disabilities and their families, including group homes for the individuals with disabilities. Established in 1977, it has grown into an organization with annual revenue of over \$7,000,000 and currently operates four group homes. Its role in the process is to help obtain \$659,995 in state financing for the group home and to purchase the completed the group home from CAN-DO for \$450,000. The Price Center has a strong track record with the state and it has a strong balance sheet and strong letter of interest from Village Bank to provide mortgage financing for the purchase price. Prior to closing on the HOME/CDBG/CPA funds, Newton should require that The Price Center provide a firm commitment for financing and evidence of sufficient cash to complete the purchase of the group home.

The architect for this project is Terrence Heinlein. Mr. Heinlein specializes in residential construction and has extensive experience with historic preservation and modular construction.

The contractor will be chosen in an open bidding process, managed by the City of Newton Purchasing Dept.

This development team has completed projects of larger size and complexity. Newton should review the final plans and specifications and review the qualifications of the contractor selected in the bid process.

Project Risk Analyses

The project as proposed is not allowed under current zoning. It will need to obtain a comprehensive permit from the City of Newton. There is a chance that the project will not obtain a permit. To mitigate against this risk, the City of Newton should condition its HOME funds on the receipt of a comprehensive permit for the project as proposed.

Sources and Uses

The total development cost is projected to be \$3,555,595 (\$444,449/unit). The project sources are also projected to be \$3,555,595.

CAN-DO purchased the property for \$900,000 on December 29, 2016. The acquisition lender, Village Bank, commissioned an appraisal performed by William J. Lanciloti by Village Bank which indicates an as-is Market Value of \$950,000 as of September 29, 2016. The appraisal assumed that

the building which is currently vacant but was last used as a three-family house could be demolished and replaced with an attached two-family structure. The appraisal considered five comparable sales – four two-family houses and one two-family lot. All sales were within Newton with appropriate adjustments for location, size of the lots and inflation of .5% per month. The adjusted values ranged from \$942,000 to \$975,000, which provides strong support for the value of \$950,000.

The hard costs excluding contingency are projected at \$1,864,275 or \$169.25/sf. The contingency is 8.3% which is a blended rate of 10% for the new group home, 15% for the historic rehabilitation and 5% for the new modular duplex. The estimated hard cost in the proforma is \$105,121 (5%) lower than the cost estimate prepared by D G Jones International.

The soft costs are projected at \$326,594 or 9.2% of the total development costs. This project has higher than permitting and carrying costs since it requires a comprehensive permit and its architectural fees reflect that there are three distinct projects: a historic rehabilitation, a new group home and a modular duplex. The projected soft costs are reasonable for the size and complexity of the project.

The gross developer fee and overhead and consultant fee is projected at \$331,872 or 9.3% of all other project costs. This fee is below the maximum fee allowed under DHCD's Tax Credit Qualified Allocation Plan (\$391,308). It is a reasonable fee for the amount of work it takes to put together a transaction of this size and complexity.

There are 6 sources of funds involved in the project:

1. WestMetro HOME:	\$ 500,000
2. Newton CDBG :	\$1,000,000
3. Newton CPA - Historic:	\$ 472,800
4. Newton CPA - Housing:	\$ 472,800
5. Mass Facilities Consolidation Fund	\$ 659,995
6. The Price Center	\$ 450,000

Income and Expenses

All income and expenses are noted on the 1-Stop application Version 3.

The projections for income and expense inflation are reasonable: 2% for affordable rents and laundry income, 3% for all expenses. The vacancy rate assumption for residential units is a reasonable 5%.

The maintenance and operating budget of the three family units is projected at \$30,408 or \$10,040/unit/year. This is based on the actual costs in CAN-DO's portfolio and includes \$500/unit for supportive services and an estimate of \$1,500/unit for property taxes. The Consortium may want to confirm with the City Assessor that the value of the property as restricted by the HOME/ CDBG/ CPA funds is in line with a tax bill of \$4,500/year. At Newton's current tax rate of \$11.12 per thousand, the development team is estimating an assessed value of \$404,675 for the three family units.

Metro West intends to manage the property and the rest of the CAN-DO portfolio utilizing a maintenance service available 24 hours a day and its office staff to collect rent and pay bills. Metro West will re-evaluate this approach after a trial run of 6-12 months and determine whether to continue or seek a property management company to handle all of the management tasks. Since all of CAN-DO's current properties for which Metro West will be responsible have some amount of financing from the City of Newton, the Consortium should monitor Metro West's management performance prior to final commitment.

Cash Flow - Return on Equity

Since there is no debt service on the three family units, a debt service coverage ratio cannot be calculated. We can note that the projected initial cash flow is \$5,331 per year represents a cushion of 17.5% above all other expenses.

The proforma does not explicitly identify developer equity; however, two sources totaling \$109,436 can be imputed from the proposal. The appraised value of the property is \$50,000 higher than carried on the proforma and the developer is taking a \$59,436 lower fee than would be allowed under the Massachusetts Tax Credit Allocation Plan, a widely used underwriting benchmark in the state. The projected cash flow results in a modest 4.9% return on imputed equity.

HOME Rental Projects – Underwriting and Risk Assessment Checklist

Source: Franke Consulting Group

	Risk Category – Risk Factor	Acceptable Risk	Reducible Risk	Unacceptable
1	Market Risk			
	<u>Market Trends</u> – General market trends (vacancy levels, prices) support the development of the additional units at the proposed pricing	✓		
	<u>Neighborhood market</u> – The immediate project area market conditions are positive and support development of the units at the proposed pricing	✓		
	<u>Community conditions</u> – The physical and social conditions in the immediate environment surrounding the proposed project are suitable for the target audience	✓		
	<u>Target population pool</u> – A sufficient pool of target households exists in the primary geographic market area to support the project; or sufficient primary data (waiting lists or client lists) is presented to support timely occupancy of the development upon completion	✓		
	<u>Affordability</u> – The prices are affordable to a reasonable range of income levels (range = minimum income required to afford: maximum eligibility income)	✓		
	<u>Needs</u> – The project design (unit types, sizes, amenities, services) reflects the apparent needs & desires of the target population	✓		
	<u>Competition</u> – The project's price, location, condition and amenities are reasonably attractive in comparison to other housing choices available to low-income area HHs	✓		

HOME Rental Projects – Underwriting and Risk Assessment Checklist

Source: Franke Consulting Group

	Risk Category – Risk Factor	Acceptable Risk	Reducible Risk	Unacceptable
	Other market risk factors: <i>None</i>	<i>✓</i>		
2	Borrower Risk			
	<u>Compatibility</u> – The project is compatible with the mission and strategic focus of the applicant	<i>✓</i>		
	<u>Board capacity</u> – The board (if a nonprofit) is stable and has the skills and experience to oversee development	<i>Merger of two boards results in stronger oversight</i>		
	<u>Staff development capacity</u> – The applicant's staff & development team have the required skills to undertake & complete the project		<i>✓ Developer has reduced risk by hiring a consultant</i>	
	<u>Past performance</u> – The applicant has performed adequately on previous projects of a similar nature	<i>✓</i>		
	<u>Backlog/current project</u> – The current workload will not affect the ability of the applicant to complete this project	<i>✓</i>		
	<u>Equity/pre-dev funds availability</u> – The applicant has the cash needed for its equity contributions, pre-development advances & organizational overhead to support the project during planning and implementation (5 – 10% of TDC)	<i>✓ Developer obtained acquisition and pre-development financing from Village Bank</i>		
	<u>Liquidity/financial ability to absorb overruns/delays</u> – The applicant has sufficient financial strength to absorb reasonable project delays and cost overruns (check current ratio and liquidity of current assets)		<i>✓ Budget contains adequate hard and soft contingency</i>	
	<u>Opportunity costs</u> – The applicant will not be prevented from accomplishing its other key activities as a result of undertaking this development	<i>✓ Proposed project is at the heart of developer's mission</i>		

HOME Rental Projects – Underwriting and Risk Assessment Checklist

Source: Franke Consulting Group

	Risk Category – Risk Factor	Acceptable Risk	Reducible Risk	Unacceptable
	project			
	<u>Contingent/portfolio liabilities</u> – The financial obligations of the organization with respect to its portfolio or other programs present no significant risks to the proposed project	✓		
	<u>Ongoing management capacity</u> – The applicant (or its identified management agent) has the capacity to manage the ongoing real estate, and to provide services as proposed		✓ Review Metro West's management performance over the next 6 months.	
	Other Borrower risk factors:		It will be managing the CAU-DO portfolio.	
3	Project Risk			
	Development budget cost reasonableness:			
	<u>Acquisition cost</u> – The acquisition cost is supported by appraisal or other evidence of market value, and is reasonable given site remediation, infrastructure and prep costs	✓		
	<u>Hard costs</u> – Construction/rehab costs: ▪ The design incorporates “green principles” for energy-efficiency; ▪ The scope will ensure property standards compliance & economic useful life for at least the compliance period; ▪ Costs are reasonably related to scope; ▪ Costs are final or based on detailed specifications to be considered reliable; and ▪ There is a reasonable contingency provision for construction costs	✓		

HOME Rental Projects – Underwriting and Risk Assessment Checklist

Source: Franke Consulting Group

Risk Category – Risk Factor	Acceptable Risk	Reducible Risk	Unacceptable
<u>Soft costs</u> – All non-construction line items are reasonable and supported, and reflect all expected project-related costs	✓		
<u>Developer/consultant fees</u> – Total fees (including other fees collected by the developer or related parties) are reasonable compared to other projects	✓		
<u>Reserves</u> – The project has adequate provisions for operating & replacement reserves: ▪ Capitalization of initial operating deficit is sufficient to reflect a reasonable rent-up period ▪ Reserves are capitalized or reasonable annual contributions are in the operating budget <u>Operating budget cost reasonableness:</u> ▪ <u>Rental Revenue</u> – Rents comply with HOME limits and are reasonable compared to market rents; vacancy/collection loss allowance is adequate ▪ <u>Operating Expenses</u> – Total operating expenses (per unit per annum, or month) are reasonable for this type of project; all individual line items are reasonable ▪ <u>Management Expenses</u> – sufficient allowance for management costs for this type of project ▪ <u>Reserve Contributions</u> – Reasonable contributions to operating and replacement reserves (taking into account capitalized contributions to	<i>\$15,000 capitalized reserves for 3 units</i> <i>Low HOME are well below market</i> ✓ ✓	<i>Confirm real estate taxes</i>	

HOME Rental Projects – Underwriting and Risk Assessment Checklist

Source: Franke Consulting Group

	Risk Category – Risk Factor	Acceptable Risk	Reducible Risk	Unacceptable
	reserves – see above) ▪ <u>Net Operating Income</u> – NOI and net available for debt service are reasonably calculated to maximum borrowing potential; debt service coverage ratio is reasonable or reflects lender requirements ▪ <u>Cash Flow</u> – Cash flow projections are reasonable and not excessive for equity invested (if any) ▪ <u>Services</u> – Adequate provision for services to reflect the target population's needs; service revenue sources identified sufficient to cover service expenses (separate from real estate operations)	✓ ✓ rents projected to cover service budget of \$1,500/yr.		

HOME Rental Projects – Underwriting and Risk Assessment Checklist

Source: Franke Consulting Group

Risk Category – Risk Factor	Acceptable Risk	Reducible Risk	Unacceptable
<u>Readiness to Proceed</u> – Project plans are sufficiently advanced to ensure timely commencement of project upon award: ▪ <u>Site Control</u> – applicant owns or controls the site ▪ <u>Status of Approvals</u> – local approvals are in place or strong support is in evidence ▪ Funds are committed ▪ Project designs are completed	✓	condition of obtaining permit condition on FCF + Village Bank commitments condition of completion	
<u>Completion Risk</u> – Completion of the project on time and within budgeted resources is likely, taking into account the following risk factors: ▪ <u>Site Acquisition</u> – The risk of not being able to complete acquisition of the site or require environmental remediation ▪ <u>Likelihood of Approvals</u> – The risk of obtaining all required approvals to develop the site ▪ <u>Adequacy of Funds</u> – The risk of losing or not being able to finalize all critical funding commitments ▪ <u>Firmness of Budget</u> – The risk that budget estimates are insufficient to cover construction scope or unfunded cost overruns ▪ <u>Realistic Schedule</u> – The risk of failing significantly behind on the proposed implementation schedule	✓ Site purchased Clean 21-E	condition of obtaining permit condition on FCF + Village Bank Condition on Final construction cost within budget	

HOME Rental Projects – Underwriting and Risk Assessment Checklist

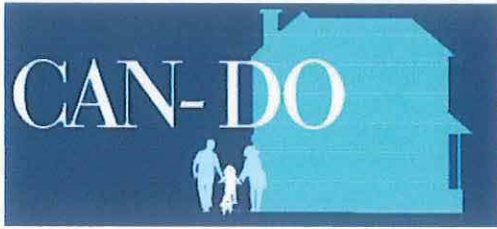
Source: Franke Consulting Group

Risk Category – Risk Factor	Acceptable Risk	Reducible Risk	Unacceptable
Viability Risk – The risk that the project, upon completion, will not be able to be maintained as affordable housing for at least the compliance period: ▪ Long-term operating projections (based on reasonable year-to-year rent and expense increases) provide adequate reserve contributions and positive cash flow; ▪ Management & maintenance plans are sufficient to protect physical property long-term	✓ ✓		

4 Overall Risk Rating & Project Changes

Recommended project changes and conditions for commitment based on risk factors identified:

- Review of final plans and spec
- Review of contractor once selected
- Obtaining comprehensive permit
- Review of Metrolinx management capacity of CARR's portfolio
- Firm commitment of FCF funds
- If real estate tax assumption is faulty, consider allowing High HOME rents on 1 or 2 units
- Final construction budget within projected amount
- Firm commitment of mortgage financing to The Price Center in connection with its purchase of the group home



To: Members of the Newton Planning and Development Board
From: Suneeth John, President CAN-DO and Metro West Collaborative Development
Date: March 29, 2017

On January 1, 2017 CAN-DO and Metro West Collaborative Development became affiliates. The two organizations continue to exist as independent entities, and each maintain their 501(c)3 status, but have interlocked boards of directors.

Because the organizations remain independent the ownership structure of CAN-DO properties remains unchanged. Similarly, donors and supporters of CAN-DO efforts may continue to contribute to CAN-DO knowing that their contributions remain in Newton promoting affordable housing in Newton.

CAN-DO will cease to have employees effective April 1, 2017. All executive, financial and programmatic staffing will be provided by Metro West CD under a management agreement.

Short term goals for the organizations:

- 1) With support from the West Metro HOME Consortium the Board of Directors is participating in a 4-month training process with third party consultants to collectively understand the roles and responsibilities of a non-profit that undertakes and manages real estate.
- 2) A full analysis of the existing CAN-DO portfolio including assessing any capital needs, tenancy issues, and current methods of operations. This analysis will include meeting with funders and non-profit partners.
- 3) Facilitating a project at 236 Auburn Street that can be fully supported, funded and permitted by the City of Newton.

The leadership of both organizations feel that this affiliation is in the best interest of both organizations for their long-term sustainability. We look forward to working with you in the coming months and years.

Management Contract
Between CAN-DO and Metro West Collaborative Development

The below services begin January 1, 2017 and may be altered or terminated upon 30-day notice by either party. The Transition Period for the purposes of this contract is January 1, 2017 through August 1, 2017.

Property Management

Metro West CD with assistance from Josephine McNeil through the Transition Period will provide staff on behalf of CAN-DO and shall be responsible for the day to day operations of CAN-DO rental properties. This shall include:

- Collection of rent effective 2/1/17
- Responding to tenant questions and complaints
- Conducting annual income certifications
- Coordinating inspections with funders as necessary
- Coordination with Fitzimmons Contracting for property maintenance activities within the budget established by the CAN-DO Board of Directors
- Communication with other partners, including The Second Step, Newton Wellesley Weston, and third party vendors as necessary
- Preparation of required reports from third parties such as CEDAC and DHCD

Project Management

Metro West CD shall provide staff on behalf of CAN-DO to do project management in collaboration with Josephine McNeil through the Transition Period for:

- The Auburn Street project
- The completion of Cambria Rd. and
- Pre-development efforts on new projects

Administration

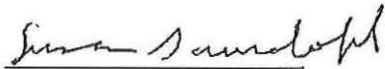
Metro West CD shall provide staff on behalf of CAN-DO as are necessary to ensure CAN-DO's compliance with federal, state and local accounting guidelines, affordable housing covenants and other regulations as may be required to maintain its 501(c)3 non-profit corporate status. Functions will include: bookkeeping, accounting, Executive and Administrative, fundraising, etc. Jennifer Van Campen, Executive Director of Metro West shall, from the date of execution through April 1, 2017 shall provide services as Executive Director – Elect of CAN-DO, and from April 1, 2017 forward shall be Executive Director of CAN-DO. Josephine McNeil shall remain as Executive Director of CAN-DO through April 1, 2017, and shall thereafter through the end of the Transition Period shall be Executive Director Emeritus.

During the period between the date of execution and through April 1, 2017, the Executive Director-Elect and the Executive Director shall both have authority, individually, to represent CAN-DO in accordance with the following:

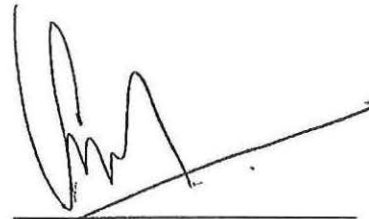
- 1) As Executive Director-Elect through April 1, 2017 Jennifer Van Campen shall be made aware of and kept apprised of administrative and executive decisions and actions that affect the budget, programs or real estate activities of CAN-DO. As Executive Director after April 1, 2017 Jennifer Van Campen shall have signing authority for all documents relating to CAN-DO as to which an Executive Director is authorized to sign. The CAN-DO Board shall confirm such authority in a duly adopted resolution.
- 2) As Executive Director through April 1, 2017, Josephine McNeil shall have authority as to which an Executive Director is authorized to sign to execute all documents on behalf of CAN-DO relating to Taft Ave., Cambria Rd., the Gala, and all normal operations functions relating to CAN-DO's operations.

All services will be provided as needed and Metro West CD will be reimbursed for time and materials and an overhead charge of 20%. Metro West CD will maintain a class in QuickBooks called "CAN-DO" so that all activity is easily reported.

Accepted by:



President
CAN-DO



President
Metro West CD



Setti D. Warren
Mayor

City of Newton, Massachusetts
Department of Planning and Development
1000 Commonwealth Avenue Newton, Massachusetts 02459

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TDD/TTY
(617) 796-1089
www.newtonma.gov

Barney S. Heath
Director

MEMORANDUM

To: Planning and Development Board
From: Nathan Robinson, Housing Planner
Date: March 31, 2017
Re: CAN-DO and Metro West Collaborative Development Affiliation

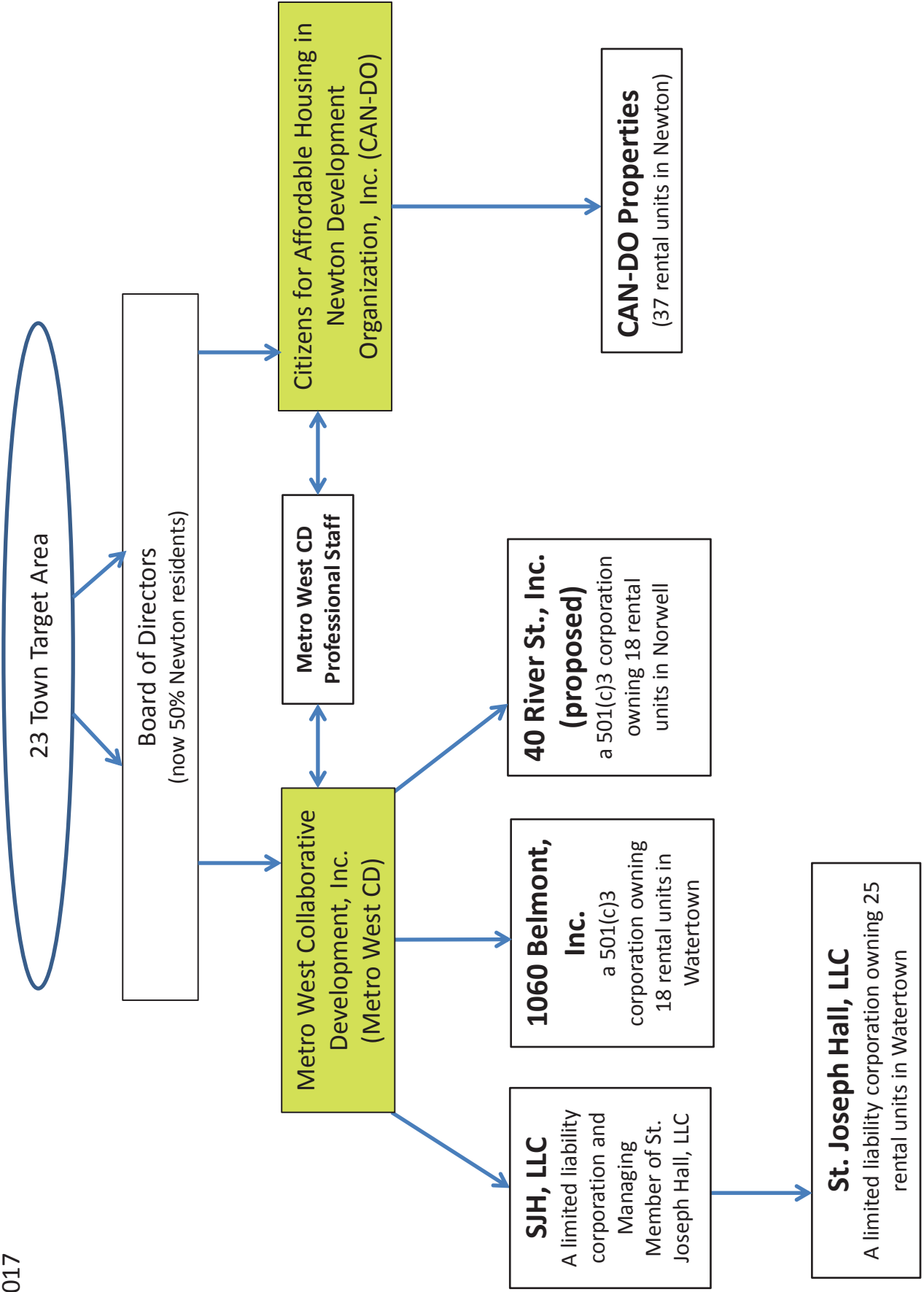
Background

Since 1994, CAN-DO (Citizens for Affordable Housing in Newton Development Organization) has operated as nonprofit, Community Housing Development Organization (CHDO), creating affordable housing opportunities for low-income families in Newton. CAN-DO is one of three CHDOs in the West Metro HOME Consortium along with Metro West Collaborative Development and South Middlesex Opportunity Council (SMOC).

In anticipation of the retirement of CAN-DO's long-time executive director, Josephine McNeil, in 2017 CAN-DO and Metro West Collaborative Development formalized an organizational affiliation that will allow CAN-DO to remain an independent nonprofit in Newton. Through the affiliation, both organizations remain separate legal entities, with their missions unchanged, but they are now directed by a single board of directors. Under the affiliation, staffing for both organizations is now provided by Metro West Collaborative Development under a management contract between the two organizations.

Suneeth John and Bart Lloyd will be discussing the affiliation with Planning Development and Board. Mr. John is now the president of the board of directors for the organizations and was the president of Metro West Collaborative Development prior to the affiliation. Mr. Lloyd is a board member for both organizations and was on the board of directors of CAN-DO prior to the affiliation.

Enclosures: Memorandum from Suneeth John, President, CAN-DO and Metro West Collaborative Development; Management Contract, CAN-DO and Metro West Collaborative Development; CAN-DO and Metro West Collaborative Development



WORKING SESSION on Proposal for 236 Auburn Street



As background, attached are the documents submitted to the Planning & Development Board for their June 5th discussion of **organizational finances and the affiliation between CAN-DO and Metro West Collaborative Development:**

- ♦ ~~draft 2016 audited statements for both organizations, not yet voted on/approved by their now joint Board of Directors~~
- ♦ schedule of real estate owned/operated
- ♦ ~~organizational chart~~, staffing and budget projections for 2017-2021

Final financial statements for 2015 and drafts for 2016 are available on the CPC's project webpage but have been omitted from packet forwarded to City Council.

Schedule of Real Estate Owned

CAN-DO rental properties

Property Address	Number of Units	Vacancy Rate*	Amortizing Debt Balance	Deferred Debt	Monthly Debt Service Payments	Annual Debt Service	Other Operating Costs ^	Other Operating Costs / unit
Property Address								
236 Auburn St.	8	in pre-dev.						
10-12 Cambria	2	in final phase construction	\$ 761,778					
54 Taft Ave	2		\$ 996,742					
14 Nonantum	3	20%	\$ 108,018	\$ 279,000	\$ 784	\$ 9,408	\$ 66,966	\$ 22,322
90 Christina	5	7%	\$ 289,289	\$ 361,320	\$ 2,099	\$ 25,188	\$ 107,049	\$ 21,410
228 Webster St	6	0%	\$ 216,294	\$ 877,768	\$ 1,526	\$ 18,312	\$ 101,048	\$ 16,841
18-20 Cambria	2	0%	\$ 383,125	\$ 439,360	\$ 1,545	\$ 18,540	\$ 50,205	\$ 25,103
163 Jackson	2	0%	\$ 247,291	\$ 537,500	\$ 1,749	\$ 20,988	\$ 45,895	\$ 22,948
20-22 Falmouth	2	0%	\$ 245,439	\$ 537,500	\$ 1,634	\$ 19,608	\$ 46,606	\$ 23,303
11-13 Cambria	2	5.5%	\$ 216,371	\$ 550,000	\$ 1,350	\$ 16,200	\$ 53,898	\$ 26,949
Comm Ave./Veterans	2	20%	\$ 177,267	\$ 725,000	\$ 1,911	\$ 22,932	\$ 49,751	\$ 24,876
61 Pearl St.	3	3%	\$ 201,567	\$ 1,145,000	\$ 902	\$ 10,824	\$ 80,241	\$ 26,747
54 Eddy St.	2	0%	\$ 114,236	\$ 933,822	\$ 612	\$ 7,344	\$ 56,754	\$ 28,377
other								
TOTAL	29		\$ 2,198,897	\$ 6,386,270	\$ 14,112	\$ 169,344	\$ 658,413	\$ 238,875
AVERAGE across CAN-DO portfolio		5.5%	219,890	638,627	1,411	16,934	65,841	23,887
	CAN-DO	Metro West						
rental completed prior to 2017	29	53						
nearing completion or in pipe.	12	66						
ownership units sold	15	4						
total (in) development	56	123						
Metro West CD rental properties								
St. Joseph Hall, Watertown	25	2%	\$ 1,079,079	\$ 3,047,403	\$ 5,486	\$ 65,836	\$ 311,051	\$ 12,442.04
1060 Belmont, Watertown	18	5.5%	\$ 989,288	\$ 3,067,683	\$ 5,905	\$ 70,860	\$ 199,667	\$ 11,092.61
TOTAL	43		\$ 2,068,367	\$ 6,115,086	\$ 11,391	\$ 136,696	\$ 510,718	\$ 23,535

Schedule of Real Estate Owned								
CAN-DO rental properties								
Property Address	Number of Units	Depreciation	Potential Rental Income (Annual)	Net Cash Flow BEFORE Dep.(Annual)	Annual Tax Bill	Per unit tax bill	Operating Reserves	Rep. Reserves
Property Address								
236 Auburn St.	8							
10-12 Cambria	2							
54 Taft Ave	2							
14 Nonantum	3	\$ 26,091	\$ 69,072	\$ 18,789	\$ -			\$ -
90 Christina	5	\$ 47,750	\$ 97,481	\$ 12,994	\$ 9,402	\$ 1,880.40		\$ 6,177
228 Webster St	6	\$ 48,048	\$ 70,200	\$ (1,112)	\$ 6,796	\$ 1,132.67		\$ 23,111
18-20 Cambria	2	\$ 15,954	\$ 50,000	\$ (2,791)	\$ 5,872	\$ 2,936.00		\$ -
163 Jackson	2	\$ 19,271	\$ 41,675	\$ (5,937)	\$ 5,486	\$ 2,743.00		\$ -
20-22 Falmouth	2	\$ 19,569	\$ 37,586	\$ (9,059)	\$ 6,004	\$ 3,002.00		\$ -
11-13 Cambria	2	\$ 19,603	\$ 38,385	\$ (12,110)	\$ 6,122	\$ 3,061.00		\$ -
Comm Ave./Veterans	2	\$ 19,468	\$ 41,256	\$ (11,959)	\$ 7,692	\$ 3,846.00		\$ -
61 Pearl St.	3	\$ 37,675	\$ 45,736	\$ (7,654)	\$ 9,334	\$ 3,111.33		\$ -
54 Eddy St.	2	\$ 27,579	\$ 37,144	\$ 625	\$ 7,766	\$ 3,883.00		\$ -
other								\$ 2,761
TOTAL	29	\$ 281,008	\$ 528,535	\$ (18,214)	\$ 64,474	\$ 25,595	\$ -	\$ 32,049
AVERAGE across CAN-DO portfolio		28,101	52,854	(1,821)	6,447	2,844	-	2,914
	CAN-DO							
rental completed prior to 2017	29							
nearing completion or in pipe.	12							
ownership units sold	15							
total (in) development	56							
Metro West CD rental properties								
St. Joseph Hall, Watertown	25	\$ 353,382	\$ 379,154	\$ 2,267	\$ 39,158	\$ 1,566	\$ 300,238	\$ 43,920
1060 Belmont, Watertown	18	\$ 249,958	\$ 251,202	\$ (19,325)	\$ 14,481	\$ 805	\$ 186,346	\$ 56,720
TOTAL	43	\$ 603,340	\$ 630,356	\$ (17,058)	\$ 53,639	\$ 2,371	\$ 486,584	\$ 100,640

Metro West Collaborative Development, Inc.

Staff

2017

Executive Director, Jennifer Van Campen, 25+ years in community development field. Primary responsibilities:

- Financial oversight (with third party bookkeeping service), fundraising, marketing
- Staff management and organizational plan implementation
- Asset management and regulatory compliance oversight
- Zoning and financing applications for 18-unit project in Norwell and 48-unit project in Medway

Senior Real Estate Project Manager, Linda Moody, 25+ years as architect and construction supervision. Primary responsibilities:

- Zoning and financing applications for 236 Auburn St., Newton
- Zoning application support to 6-unit project for the Lexington Housing Assistance Board
- Pre-development analyses for sites in Wayland, Hudson, Wellesley and Medfield

Affordable Housing Programs Manager, Amie Lindenboim, 25+ years in environmental policy and regulatory compliance. Primary responsibilities:

- Affirmative Marketing Plans and Lottery and Wait List administration for municipal and private developers in: Concord, Newton, Medford, Scituate, Dedham, Stoughton, Watertown and Weston
- Affordable Housing Compliance Consulting to consortium of towns: Bolton, Boxborough, Hudson, Littleton and Stow
- MassHousing 40B compliance monitoring of projects in: Danvers, Needham, North Andover and Reading.

Ready Renter Program Coordinator, Holly Josephs, AmeriCorps Member. Primary responsibilities:

- Review and data entry of Ready Renter applications. Communicate to applicants of any file deficiencies. Currently 500+ people in program
- One-on-one housing search support to Ready Renter applicants. Approximately 5 people served per week.
- Research and data analysis. Currently providing support to the Belmont Housing Trust in the completion of a Housing Production Plan.
- Supported housing forums and events in Dedham, Lexington and Watertown

Special Projects Coordinator, Robyn Rufo, 15+ years in affordable housing and community development. Primary Responsibilities:

- CAN-DO portfolio integration into Metro West CD asset management systems
- Interface with CAN-DO property maintenance contractors
- Interface with CAN-DO tenants and their supportive services providers

2017 Combined Organization Budget

	2017 projection			2018 projection	2019	2020	2021
EXPENSES	CAN-DO	Metro West CD	Total	Combined	Combined	Combined	Combined
Salaries							
Executive	43,000	68,000	111,000	70,000			
Real Estate	26,000	88,000	114,000	90,500			
Housing Programs	-	60,000	60,000	61,500			
Gala/Special Projects	12,000	35,000	47,000	36,000			
AmeriCorps	-	15,000	15,000	15,000			
Property Management	29,553	-	29,553	30,000			
Benefits	13,640	48,000	61,640	64,500			
Audit & Accounting	29,500	60,000	89,500	85,000			
Rent & Office	21,270	53,550	74,820	55,000			
Insurance	4,950	10,000	14,950	12,500			
Auto Lease	1,890	-	1,890	-			
Consultant	1,500	35,000	36,500	35,000			
Supplies/Equip	2,100	7,500	9,600	8,500			
Postage & Printing	3,900	8,500	12,400	10,000			
Program Expenses/other	4,600	5,000	9,600	9,000			
REO*	505,163	64,000	569,163	586,238			
	699,066	557,550	1,256,616	1,168,738	1,203,800	1,239,914	1,277,111
			change	(87,878)			
INCOME							
CHDO	20,000	20,000	40,000	40,000	40,000	40,000	40,000
Grants/Foundations	21,000	40,000	61,000	61,000	61,000	61,000	61,000
Fundraising/Gala	110,000	-	110,000	110,000	110,000	110,000	110,000
Developer Fee	90,000	50,000	140,000	150,000	906,000	785,000	785,000
CITC	-	150,000	150,000	150,000	150,000	150,000	150,000
Aff. Marketing/Compliance	-	75,000	75,000	75,000	75,000	75,000	75,000
Asset Man./REO*	505,163	126,174	631,337	637,650	637,650	644,027	650,467
	746,163	461,174	1,207,337	1,223,650	1,979,650	1,865,027	1,871,467
			-				
	47,097	(96,376)	(49,279)	54,912	775,850	625,113	594,356

*assumes CAN-DO REO breaks even