



Zoning & Planning Committee Agenda

City of Newton In City Council

Monday, September 27, 2021

7:00 PM

The Zoning & Planning Committee will hold this meeting as a virtual meeting on Monday, September 27, 2021 at 7:00 PM. To view this meeting using Zoom, use this link: <https://us02web.zoom.us/j/88199787771> or call 1-646-558-8656 and use the following Meeting ID: 881 9978 7771

Items Scheduled for Discussion:

Referred to Zoning & Planning and Finance Committees

#320-21

CPC Recommendation to appropriate \$500,000 in CPA funding

COMMUNITY PRESERVATION COMMITTEE recommending appropriation of five hundred thousand dollars (\$500,000) in Community Preservation Act funds, with \$478,877 to come from the FY22 Community Housing Reserve Fund (Account #58C10498-57900C) and \$21,123 to come the Prior Year Undesignated Fund (Account #5800-3599), to the control of the Planning & Development Department to provide funding to replace roofs, repair and restore damaged siding, and replaced the HVAC systems as part of the Nonantum Village Place Senior Housing Preservation Project.

Referred to Zoning & Planning and Finance Committees

#346-21

Appropriation of \$643,215 for the Newton Housing Authority

HER HONOR THE MAYOR requesting the appropriation of six hundred forty-three thousand two hundred and fifteen dollars (\$643,215) of Inclusionary Zoning Fund monies to the Newton Housing Authority (NHA), in accordance with Section 5.11.5 (E) of the City's Zoning Ordinance, to be used for ongoing affordable housing development activities.

The location of this meeting is accessible and reasonable accommodations will be provided to persons with disabilities who require assistance. If you need a reasonable accommodation, please contact the city of Newton's ADA Coordinator, Jini Fairley, at least two business days in advance of the meeting: jfairley@newtonma.gov or (617) 796-1253. The city's TTY/TDD direct line is: 617-796-1089. For the Telecommunications Relay Service (TRS), please dial 711.

- #240-21** **Requesting Ordinance Amendments to Chapter 30**
DIRECTOR OF PLANNING AND DEVELOPMENT requesting ordinance amendments to the Newton Zoning Ordinance, Chapter 30 (1) in order to clarify definitions, edit missing or incorrectly transcribed provisions and revise inconsistencies in the ordinance.
Zoning & Planning Held 6-0 on 07/08/21
On 08/16/21 Zoning & Planning Split Item #240-21 into (1) to clarify definitions, edit missing or incorrectly transcribed provisions and revise inconsistencies in the ordinance; and (2) to amend the definition in Section 1.5.1.B Two Family Detached; Public Hearing Closed 6-0 (Councilor Leary not voting) on 08/16/21
Zoning & Planning Approved (1) 6-0 (Councilor Leary not voting) on 08/16/21
Zoning & Planning Held (2) 6-0 (Councilor Leary not voting) on 08/16/21
- #438-20** **Request for creation of Trust in Newton to support affordable housing development**
COUNCILORS ALBRIGHT, CROSSLEY, HUMPHREY, DANBERG, MALAKIE, KELLEY, BOWMAN, KALIS, GREENBERG, DOWNS, WRIGHT, RYAN, NOEL, LEARY, LIPOF AND NORTON requesting the Planning Department analyze mechanisms already in use in other cities and towns, identify funding sources, and create a Housing Trust in Newton to facilitate and foster the development of affordable housing in Newton.
Zoning & Planning Held 11/09/20, 03/22/21, 07/26/21
- #528-20** **Requesting review and possible amendment to Local Preference in Chapter 30**
COUNCILORS ALBRIGHT, NORTON, CROSSLEY, BOWMAN, NOEL, HUMPHREY, WRIGHT, LAREDO, KALIS, RYAN, LIPOF AND DANBERG requesting a review and possible amendment to the Local Preference Ordinance in Chapter 30 sections 5.11.8. This section requires an Affirmative Fair Housing Marketing and Resident Selection Plan (AFHMP) for all Inclusionary Units which provides for a local preference for up to 70% of the Inclusionary Units. Various groups including The Fair Housing Committee and the Newton Housing Partnership have questioned whether the percent of local preference to current Newton residents should be lowered with the goal of increasing racial diversity in Newton.
Zoning & Planning Held 04/12/21, 07/26/21
- Chair's Note: The Chair expects to entertain a motion to vote no action necessary on the following one (1) item:*
- Referred to Zoning & Planning and Finance Committees**
- #252-21** **Appropriation of \$643,215 for the Newton Housing Authority**
DIRECTOR OF PLANNING & DEVELOPMENT requesting the appropriation of six hundred forty-three thousand two hundred and fifteen dollars (\$643,215) of Inclusionary Zoning funds to the Newton Housing Authority (NHA) to support the creation of 55 new units of affordable senior housing at the NHA's new Haywood House development.
Zoning & Planning Approved 7-0 (Councilor Baker not voting) on 07/26/21
Finance Held on 08/02/2021

Respectfully submitted,

Deborah J. Crossley, Chair

CITY COUNCIL

RECEIVED

CITY OF NEWTON

2021 AUG -2 PM 2: 29 DOCKET REQUEST FORM

DEADLINE NOTICE: Council Rules require items to be docketed with the Clerk of the Council NO LATER THAN 7:45 P.M. ON THE MONDAY PRIOR TO A FULL COUNCIL MEETING.

CITY CLERK
NEWTON, MA. 02459

To: Clerk of the City Council

Date: July 30, 2021

From (Docketer): Lara Kritzer, Community Preservation Program Manager

Address: Planning Department, Newton City Hall, 1000 Commonwealth Avenue Newton MA 02459

Phone: 617-796-1144

E-mail: lkritzer@newtonma.gov

Additional sponsors: Community Preservation Committee

1. Please docket the following item (it will be edited for length if necessary):

Recommendation from the Community Preservation Committee for the allocation of \$500,000 in Community Preservation Act funds, with \$478,877 to come from the FY22 Community Housing Reserve Fund (Account#58C10498-57900C) and \$21,123 to come from the Prior Year Undesignated Fund (Account #5800-3599), to the control of the Planning & Development Department to provide funding to replace roofs, repair and restore damaged siding, and replace the HVAC systems as part of the Nonantum Village Place Senior Housing Preservation Project.

2. The purpose and intended outcome of this item is:

- Fact-finding & discussion
- Appropriation, transfer,
- Expenditure, or bond authorization
- Special permit, site plan approval,
- Zone change (public hearing required)
- Ordinance change
- Resolution
- License or renewal
- Appointment confirmation
- Other: _____

3. I recommend that this item be assigned to the following committees:

- Programs & Services
- Zoning & Planning
- Public Facilities
- Finance
- Public Safety
- Land Use
- Real Property
- Special Committee
- No Opinion

4. This item should be taken up in committee:

Immediately (Emergency only, please). Please state nature of emergency:

- As soon as possible, preferably within a month
- In due course, at discretion of Committee Chair
- When certain materials are made available, as noted in 7 & 8 on reverse
- Following public hearing

5. I estimate that consideration of this item will require approximately:

- One half hour or less
- More than one hour
- More than one meeting
- Up to one hour
- An entire meeting
- Extended deliberation by subcommittee

6. The following people should be notified and asked to attend deliberations on this item. (Please check those with whom you have already discussed the issue, especially relevant Department Heads):

City personnel

Citizens (include telephone numbers/email please)

Lara Kritzer

Marcia Hannon, CASCAP mhannon@cascap.org

7. The following background materials and/or drafts should be obtained or prepared by the Clerk's office prior to scheduling this item for discussion:

8. I have or intend to provide additional materials and/or undertake the following research independently prior to scheduling the item for discussion. *

CPC Funding Recommendation, the City's Proposal for the Nonantum Village Place Senior Housing Preservation Project, and the Project Presentation made at the CPC's public hearing on July 13, 2021.

(*Note to docketer: Please provide any additional materials beyond the foregoing to the Clerk's office by 2 p.m. on Friday before the upcoming Committee meeting when the item is scheduled to be discussed so that Councilors have a chance to review all relevant materials before a scheduled discussion.)

Please check the following:

- 9. I would like to discuss this item with the Chairman before any decision is made on how and when to proceed.
- 10. I would like the Clerk's office to contact me to confirm that this item has been docketed. My daytime phone number is:
- 11. I would like the Clerk's office to notify me when the Chairman has scheduled the item for discussion.

Thank you.

Lara Kritzer
Signature of person docketing the item

[Please retain a copy for your own records]



Ruthanne Fuller
Mayor

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

320-21
Telephone
(617) 796-1120
Telefax
(617) 796-1142
TDD/TTY
(617) 796-1089
www.newtonma.gov

Barney S. Heath
Director

**Community Preservation Committee
Funding Recommendation for
Nonantum Village Place Senior Housing Preservation Project**

Date: July 30, 2021
From: Community Preservation Committee
To: The Honorable City Council

PROJECT GOALS & ELIGIBILITY This proposal requests \$500,000 in CPA funds, under the category of community housing, for the preservation of Nonantum Village Place, an entirely affordable senior housing facility built in 2004 in part with City CPA and CDBG funding. The facility was one of the first affordable housing projects completed with Newton CPA funding and is affordable to very low income households, with incomes at or below 50% AMI, and extremely low-income households with incomes below 30% AMI. The proposal requests funding to replace the roof, replace and repair damaged siding as needed, and replace the HVAC systems (35 individual unit systems and three building wide systems) with new electric heat pump systems that are more energy efficient and allow the building to be less reliant on fossil fuels.

This project is eligible for CPA funding under community housing as it is an entirely affordable senior housing development which was created in part with CPA funding. The requested CPA funding may be used to preserve as well as restore and rehabilitate the existing units and overall building.

RECOMMENDED FUNDING At its monthly meeting on Tuesday, July 13, the Community Preservation Committee unanimously recommended, with a vote of 8 to 0, that \$500,000 in Community Preservation Act funding be appropriated, with \$478,877 to come from the FY22 Community Housing Reserve Fund and the remaining \$21,123 to come from Prior Year Undesignated Funds, to the control of the Planning & Development Department for a grant to CASCAP, Inc. for the preservation of the existing affordable senior housing facility at Nonantum Village Place.

| Proposed CPA Funding Accounts for the Nonantum Village Place Senior Housing Preservation Project | | | |
|---|-------------------------|---|--|
| Account Name | Account Number | Amount Currently Available (minus pending recommendations) | Proposed Amount for Nonantum Village Place Preservation Project |
| FY22 Community Housing Reserve Fund | #58C10498-57900C | \$478,877 | \$478,877 |
| Prior Year Undesignated Funds | #5800-3599 | \$4,498,980.75 | \$21,123 |
| Total Project Funds | | | \$500,000 |

www.newtonma.gov/cpa

Lara Kritzer, Community Preservation Program Manager
lkritzer@newtonma.gov 617.796.1144

SPECIAL ISSUES CONSIDERED BY THE CPC

Community Need: Nonantum Village Place has provided affordable housing to Newton seniors since 2004, providing deeply affordable senior housing to households at or below 50% AMI, with the majority of those living at Nonantum Village having incomes closer to 30% AMI. The CPC recognized the strong need in Newton for the very low and extremely low income senior housing units which Nonantum Village Place provides and praised CASCAP for its work to serve this population. It was also noted that the federal programs used to create the building don't permit rents that are high enough to fund a capital reserve adequate to make these improvements. CPA funding will play a vital role in maintaining the integrity of the building envelope and improving living conditions within the facility by replacing the roof, siding, and HVAC systems. The CPC considers the preservation of Newton's existing affordable housing stock to be a valuable use of CPA funding, particularly when it protects housing resources that serve a vulnerable population such as Newton's very and extremely low income senior households.

Increased Environmental Efficiency of New Systems: The CPC encouraged CASCAP during their pre-proposal review to take advantage of this opportunity to improve the energy efficiency of the building and was impressed by the applicant's willingness to revise their proposal. The new electric heat pump HVAC systems are a significant step towards moving the building closer to full electrification and zero net carbon status. CASCAP has also been working with a consultant, New Ecology, to develop plans to improve the energy efficiency of the building and consider how additional environmental improvements can be made in the future.

Durability of New Materials: During its review of the project, CPC members noted that the quotes called for quality, durable materials which are anticipated to have a lasting and positive impact on the preservation of the structure. Both the existing roof and siding were noted to need replacement far earlier than is typical for those materials, and it was important to the CPC that quality materials with longstanding warranties be used and installed correctly to both preserve the affordable housing use and protect the City's CPA funding investment in the property.

Prior CPA Funded Housing Development: Nonantum Village Place is one of the City's first CPA funded affordable housing projects. It was noted that the use of CPA funding to create the units in 2004 allows for CPA funds to now be used to complete rehabilitation and restoration work on the building. The CPC also acknowledged the high cost of creating new affordable senior housing at this income level and the importance of preserving it for future use.

ADDITIONAL RECOMMENDATIONS (*funding conditions*)

1. CPA Funding will be used to replace the existing roofs, repair and replace damaged siding, and install new electric heat pump HVAC systems throughout the building.
2. The project shall be fully reviewed by the applicant's project manager and/or a qualified inspector designated by the CPC to ensure that the work is of lasting quality and meets all warranty requirements of the products used.
3. All recommended CPA funds should be appropriated by the City Council within 6 months and project construction should begin within 1 year of the date of any CPC recommendation. If either deadline cannot be met, CASCAP may submit a written request for an extension from the CPC, which the CPC may grant at its discretion.
4. The release of CPA funds should be governed by a grant agreement that includes but is not limited to the usual conditions for the phased release of CPA funds for housing projects, including a final report to the CPC at the close of the project.
5. Any CPA funds appropriated but not used for the purposes stated herein should be returned to the Newton Community Preservation Fund.

KEY OUTCOMES

The Community Preservation Committee will evaluate this project based on its success in using CPA funds to preserve and rehabilitate the existing 35-unit affordable senior housing complex by installing new electric heat pump systems in each unit and the common areas, replacing and repairing damaged siding on the exterior, and replacing the roofs on the building.

ATTACHMENTS

- Proposal and selected attachments submitted to the CPC for their July 13, 2021 review
- CASCAP's presentation to the July 13 joint public hearing of the CPC and Planning and Development Board

Additional information not attached to this recommendation, including petitions and letters of support, are available on the CPC's website at:

<https://www.newtonma.gov/government/planning/community-preservation-program/proposals-projects/nonantum>



231 Somerville Avenue
Somerville, Massachusetts 02143

Phone: 617.492.5559 Fax: 617.492.6928
TTY: 617.764.3025 www.cascap.org

By Email

June 8, 2021

Lara Kritzer
Community Preservation Program Manager
City of Newton Planning & Development Department
1000 Commonwealth Avenue
Newton, MA 02459

RE: CPA funding request for
Nonantum Village Place
241 Watertown St.
Newton, MA 02458

Dear Ms. Kritzer,

I am pleased to submit this full proposal on behalf of Nonantum Village Place, thirty-five units of affordable housing for elders located in the Nonantum neighborhood.

We have incorporated several changes in response to questions raised by the Community Preservation Committee, in particular the suggestions about further evaluating the green building elements, the long-term capital building needs, and our current scope of construction. Towards this end, we have engaged New Ecology Inc. to assess the buildings energy conservation measures with an additional eye to carbon gas emission reductions. We have also been working with ABCD and New Ecology Inc. to review the proposed HVAC equipment.

This full proposal reflects the changes in equipment and scope that will provide more efficiency and carbon footprint reduction. We are now replacing the existing air conditioning system for the apartments with heat pumps that will provide both heating and cooling. We have also significantly improved the efficiency of the equipment specified to be installed. This will greatly reduce our carbon

footprint. To maximize the energy efficiency in the near term, we will include controls that switch to the existing condensing boilers during the coldest time periods. These changes have increased construction costs. While we are asking CPA for an increased amount of funding, we are also contributing more from other funding sources.

With the anticipated roof replacement and additional insulation, we will be solar ready and able to install solar photovoltaic at a later date. We are working with NEI and LISC on a design charrette and more long-term planning for the building. We are also working with LISC and Resonant Energy on installing photovoltaic arrays on Cascap's properties, including Nonantum Village Place.

We are excited to be working to improve the building for the current and future residents. As you know, NVP is income and age restricted, to those who are 62 years or older and have earning less than 50% of the Area Median Income. Most residents earn less than 30% of Area Median Income. NVP provides stable housing and on-site supportive services, as well as plenty of common spaces to foster community and well-being.

Built in 2004-2005 with the HUD 202 program capital advance funds and significant funding from the City of Newton, NVP has previously been able to address both capital needs and operating needs with ongoing operating subsidies from the HUD 202 program. However, at this junction, we find that we have significant capital needs that cannot be met by our resources, and we have an opportunity to improve the building's energy performance. We are grateful to the City of Newton for your review and consideration of our proposal.

All the Best,

Marcia Hannon

Marcia Hannon
Project Management Consultant

Cc: Jane Carbone, President Cascap Board and Nonantum Village Place Board

City of Newton



Ruthanne Fuller
Mayor

**Newton, Massachusetts Community Preservation Program, CDBG,
and HOME Investment Partnerships Program
FUNDING REQUEST**

320-21

(For staff use)
date rec'd:

PRE-PROPOSAL

PROPOSAL

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
lkritzer@newtonma.gov 617.796.1144

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 | Nonantum Village Place Senior Housing Preservation | | | | |
| Project LOCATION | Full street address (with zip code), or other precise location. 241 Watertown Street, Newton, MA 02458 | | | | |
| Project CONTACT(S) | Name & title or organization | | Email | Phone | Mailing address |
| Project Manager | Marcia Hannon Cascap Inc | | mhannon@cascap.org | 617-492-5559 | 231 Somerville Ave. Somerville, MA 02143 |
| Project FUNDING | A. CPA funds requested: \$500,000 | B. CDBG funds requested: \$100,000 | C. HOME funds requested: \$0 | D. Other funds to be used: \$292,338 | E. Total project cost: \$ 892,338 |
| Project SUMMARY | <p>Explain how the project will use the requested CPA, CDBG, and City of Newton HOME funds. You may provide more detail in attachments, but your PROJECT SUMMARY MUST FIT IN THE SPACE BELOW. Use a cover letter for general information about the sponsoring organization's accomplishments.</p> <p>Nonantum Village Place (NVP) is permanent, affordable housing for seniors (62 years or older). The thirty- five (35) units are deed restricted as affordable in perpetuity. While NVP is income restricted to those with an income below 50% of Area Median Income (AMI), most residents have incomes below 30% of AMI. NVP was built in 2004 by Cascap Inc. We are a local non -profit focused on service enriched housing to disabled and elderly residents. While the Dept of Housing and Urban Development (HUD) provided the majority of development funds through the HUD 202 Program for Supportive Housing for the Elderly, Newton provided significant funding through the CPA, CDBG, and NHA IZ funds.</p> <p>NVP is an architecturally detailed wood-frame building, with one-bedroom units and an on-site Resident Manager. Some building amenities include: seven fully accessible units; a twelve-car parking lot; a community kitchen, dining room, and large sitting room; laundry room; and staff offices. NVP provides residents with stable housing and a part time service coordinator for on-site supportive services, as well as plenty of common spaces to foster community and well-being.</p> <p>We are proposing to address the building's significant capital needs, improving the building's energy efficiency and significantly reducing our carbon footprint. The building's roof (there are 3 levels of roofing), and air conditioning system will be replaced and upgraded. Prior roof leaks have been repaired, but all three levels are deteriorated and need replacement. To replace the roofs, the 35 condensers on the roof must be removed. The air conditioning units will be replaced with heat pumps that provide both heating and cooling. The existing roof insulation will be increased to R-50. The 3 Roof Top Units (RTU) that provide air conditioning to the common areas will be replaced with higher efficiency units. As well, the building siding and trim has portions (approx. 30%) that need to be replaced and painted. The current NVP residents will benefit greatly from proposed improvements, and our ability to invest in roof, HVAC system and siding in the near-term will preserve the building for many future residents.</p> | | | | |

| | | | |
|---|---|--|----------------------------|
| Project TITLE | Nonantum Village Senior Housing Preservation | | |
| USE of CPA and HOME Funds | COMMUNITY HOUSING | Preservation | |
| COMMUNITY NEEDS | From each of at least 2 plans linked to the Guidelines & Forms page of www.newtonma.gov/cpa , provide a brief quote with plan title, year, and page number, showing how this project meets previously recognized community needs. You may also list other community benefits not mentioned in any plan. | | |
| <p>The Nonantum Village Senior Housing Preservation project meets the following recognized community needs:</p> <ol style="list-style-type: none"> 1. Preserve much-needed affordable housing for a growing elderly population – As identified in the “Newton Leads 2040” planning process, “While some retirees will be able to afford to age in place, many are forced to leave Newton if they choose to downsize since there are few options available” (Housing Needs Analysis and Strategic Recommendations, June 2016, pg. 38). These critical capital investments in Nonantum Village Place will preserve the longevity of the property and increase the well-being of its residents today. Likewise, the FY16-20 Consolidated Plan [for Housing and Community Development] finds that rehabbing existing affordable housing, particularly housing for elderly populations near amenities is a high priority (pg. 113). 2. Reduce greenhouse gas emissions – As identified in the Newton Comprehensive Plan (2007), Newton has an <i>Energy Action Plan</i> that aims to reduce greenhouse gas emissions (pg. 8-6). By replacing existing air conditioning units with modern, energy efficient heat pumps that provide both heating and cooling and adding additional rooftop insulation, the building will reduce its carbon footprint. | | | |
| 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. For housing projects, at least 2 contacts should reside in or near the project’s neighborhood. | | |
| | Name & title or organization | Email | Phone |
| | Marilyn Brashears | | 241 Watertown St., Unit 27 |
| | Mary Ann Lambert | | 241 Watertown St., Unit 23 |
| | Maria Scibelli Greenberg Newton Ward 1 City Councilor | msgreenberg@newtonma.gov | |
| | Alison M. Leary Newton City Council Councilor Ward 1 | aleary@newtonma.gov | |

| Project TITLE | | Nonantum Village Senior Housing Preservation | |
|--|--|--|-------------------|
| SUMMARY CAPITAL/DEVELOPMENT BUDGET | | | |
| Uses of Funds | | | (rounded amounts) |
| Construction | | | 725,000 |
| Construction contingency | | | 108,750 |
| Soft costs | | | 58,588 |
| | | | |
| D. TOTAL USES (should equal C. on page 1 and E. below) | | | \$892,338 |
| Sources of Funds | | Status (requested, expected, confirmed) | (rounded amounts) |
| Newton CPA Funds | | Requested | \$ 500,000 |
| Newton CDBG Funds | | Requested | \$ 100,000 |
| Utility/LEAN Funds | | Requested | \$102,338 |
| Foundation Charlesbank | | Confirmed | \$50,000 |
| Nonantum Village Place reserves | | Confirmed | \$140,000 |
| E. TOTAL SOURCES (should equal C. on page 1 and D. above) | | | \$ 892,338 |
| SUMMARY ANNUAL OPERATIONS & MAINTENANCE BUDGET (cannot use CPA funds) | | | |
| Uses of Funds | | | (rounded amounts) |
| NVP annual budget: Administrative and renting expenses | | | \$81,043 |
| Maintenance | | | \$87,148 |
| Resident Services | | | \$25,327 |
| Utilities, taxes, and insurance | | | \$126,047 |
| Replacement reserve -requested (current amount is \$70,000 annually) | | | \$115,875 |
| F. TOTAL ANNUAL COST (should equal G. below) | | | \$435,440 |
| Sources of Funds | | | (rounded amounts) |
| Residential Effective Annual Gross Income HUD Rental Subsidy and tenant payments | | | \$436,825 |
| Laundry | | | \$1,000 |
| | | | \$ |
| G. TOTAL ANNUAL FUNDING (should equal F. above) | | | \$437,825 |
| Cashflow | | | \$2,385 |
| | | | |

| Project TIMELINE | Phase or Task | Season & Year |
|------------------|---|--------------------|
| | Funding application and building permit application | Spring-Summer 2021 |
| | Construction start- Building Siding and Trim | Summer- Fall 2021 |
| | Roof replacement (all three roofs) | Spring 2022 |
| | A/C systems for 35 units (heat pump replacement) and common area Roof Top Units | Spring 2022 |
| | | |

| Project TITLE | | Nonantum Village Senior Housing Preservation | |
|---|---|---|--|
| ↓ Check off submitted attachments here. See also supplemental checklist for housing proposals. | | | |
| REQUIRED | X | PHOTOS | of existing site or resource conditions (2-3 photos may be enough) |
| | X | MAP | of site in relation to nearest major roads (omit if project has no site) |
| Pre-proposals: separate attachments not required, just use page 3 of form. Full proposals: separate, detailed budget attachments REQUIRED. | PROJECT FINANCES printed and as computer spreadsheets, with both uses & sources of funds | | |
| | X | Development pro forma/capital budget: include total cost, hard vs. soft costs and contingencies, and project management – amount and cost of time from contractors or staff (in-kind contributions by existing staff must also be costed) | |
| | X | Operating/maintenance budget, projected separately for each of the next 10 years (CPA funds may not be used for operations or maintenance) (NB: including year one rather than 10 years) | |
| | X | Non-CPA, CDBG, and Newton HOME funding: commitment letters, letters of inquiry to other funders, fundraising plans, etc., including both cash and est. dollar value of in-kind contributions | |
| | X | Purchasing of goods & services: briefly summarize sponsor’s understanding of applicable state statutes and City policies | |
| REQUIRED for full proposal. | SPONSOR FINANCES & QUALIFICATIONS, INSTITUTIONAL SUPPORT | | |
| | X | For sponsoring organization, most recent annual operating budget (revenue & expenses) & financial statement (assets & liabilities); each must include both public (City) and private resources (“friends” organizations, fundraising, etc.) | |
| | X | For project manager: relevant training & track record of managing similar projects | |
| REQUIRED for all full proposals involving real estate acquisition, construction, or other building/ landscape improvements. | SITE CONTROL, VALUE & DEED RESTRICTIONS | | |
| | X | Owner’s agreement to a permanent deed restriction for affordability | |
| | ZONING & PERMITTING | | |
| | | Short email confirming review by the Development Review Team (DRT) | |
| | X | Brief property history: at least the last 30 years of ownership & use (ask CPC staff for assistance with sources) | |
| | X | Environmental mitigation plans: incl. lead paint, asbestos, underground tanks | |
| | X | Zoning relief and permits required: incl. parking waivers, demolition or building permits, comprehensive permit, or special permit | |
| | X | Other approvals required: Newton Conservation Commission, Newton Historical Commission, Newton Commission on Disabilities, Massachusetts Historical Commission, Massachusetts Architectural Access Board, etc. | |
| | DESIGN & CONSTRUCTION | | |
| | X | Professional design & cost estimates: include site plan, floor plans & elevations | |
| X | Materials & finishes; highlight “green” or sustainable features & materials | | |
| OPTIONAL for all proposals. | | LETTERS of SUPPORT | from Newton residents, organizations, or businesses |

| Project TITLE | | Nonantum Village Senior Housing Preservation | | | | |
|--|---------------------------------|---|----------------------------------|----------------------------------|----------------|--------------------|
| Newton, Massachusetts Community Preservation Program, CDBG, and HOME Investment Partnerships Program | | | | | | |
| These attachments are required for full proposals only. Electronic attachments may be submitted as PDFs. With printed copies, insert this checklist immediately after the main proposal attachments checklist. | | | | | | |
| USES OF FUNDS <i>Check all that apply.</i> | | | | | | |
| Acquisition | Rehabilitation/ Preservation | New construction | Mortgage buydown/ refinance | Site preparation/ remediation | | |
| TARGET POPULATION, TYPE OF HOUSING, SPECIAL FEATURES – <i>Check & describe all that apply.</i> | | | | | | |
| Individuals | Families | Seniors X | Homeless/At Risk of Homelessness | | | |
| Rental X | Ownership | Condominium | Cooperative | Group/congregate | | |
| Combination or other (identify): | | | | | | |
| Special needs/disabilities (identify population & provider of support services, if any): Residents are elders, aged 62 years or older. Many have disabilities or are frail. Support services are provided by Wingate Companies | | | | | | |
| Special features (historic preservation, sustainability, etc.): (expand description) Sustainability: reflective roofing, R-50 roof insulation, high efficiency heat pumps to provide both air conditioning and heating to apartments to be installed as part of the project. Higher efficiency common area cooling equipment to be installed. Project will also allow for solar thermal or photovoltaic installation at a later date. | | | | | | |
| UNIT COMPOSITION <i>List number of units in each category.</i> | | | | | | |
| UNIT TYPE | ≤ 30% AMI | ≤ 50% AMI | ≤ 80% AMI | 80-100% AMI | Market-rate | TOTAL |
| SRO | | | | | | |
| Studio | | | | | | |
| 1 BR | 14 | 20 | | | 1 rent free RM | 35 |
| 2 BR | | | | | | |
| 3 BR | | | | | | |
| B. Supplements to PROJECT FINANCES | | | | | | |
| always | X | Market analysis: including prevailing/trending rents or prices & target population | | | | |
| rental only | X | Rental subsidy, if any: sources, commitment letters or application/decision schedules | | | | |
| ownership only | N/A | Cost of ownership analysis: including proposed sales prices, owners' estimated total housing costs, % interest of affordable units & proposed condominium association budget | | | | |
| C. Supplements to SPONSOR FINANCES & QUALIFICATIONS | | | | | | |
| sponsor: check all that apply | | Non-profit X | Certified CHDO | Public Agency | Project LLC | Private for-profit |
| always | X | Organization mission & current housing portfolio, including how this project fits both; summary of previous similar projects completed, with photographs | | | | |
| nonprofits | X | Board of Directors: including skills, experience, tenure & City board/commission affiliations | | | | |
| D. Supplement to COMMUNITY OUTREACH | | | | | | |
| always | X | Community outreach plan & efforts to date | | | | |
| E. FAIR HOUSING, ACCESSIBILITY, RELOCATION | | | | | | |
| always | X | Affirmative marketing & resident selection plan | | | | |
| | X | Fair housing: training completed, summary of any past complaints & their resolution | | | | |
| | X | Reasonable accommodation/reasonable modification policy | | | | |

| | | |
|-----------|-----|-----------------------------------|
| as needed | N/A | Relocation plans/ budget/ notices |
|-----------|-----|-----------------------------------|

Nonantum Village Senior Housing Preservation

Nonantum Village Place (NVP) Application for CDBG and CPA
Funding Request

ATTACHMENTS



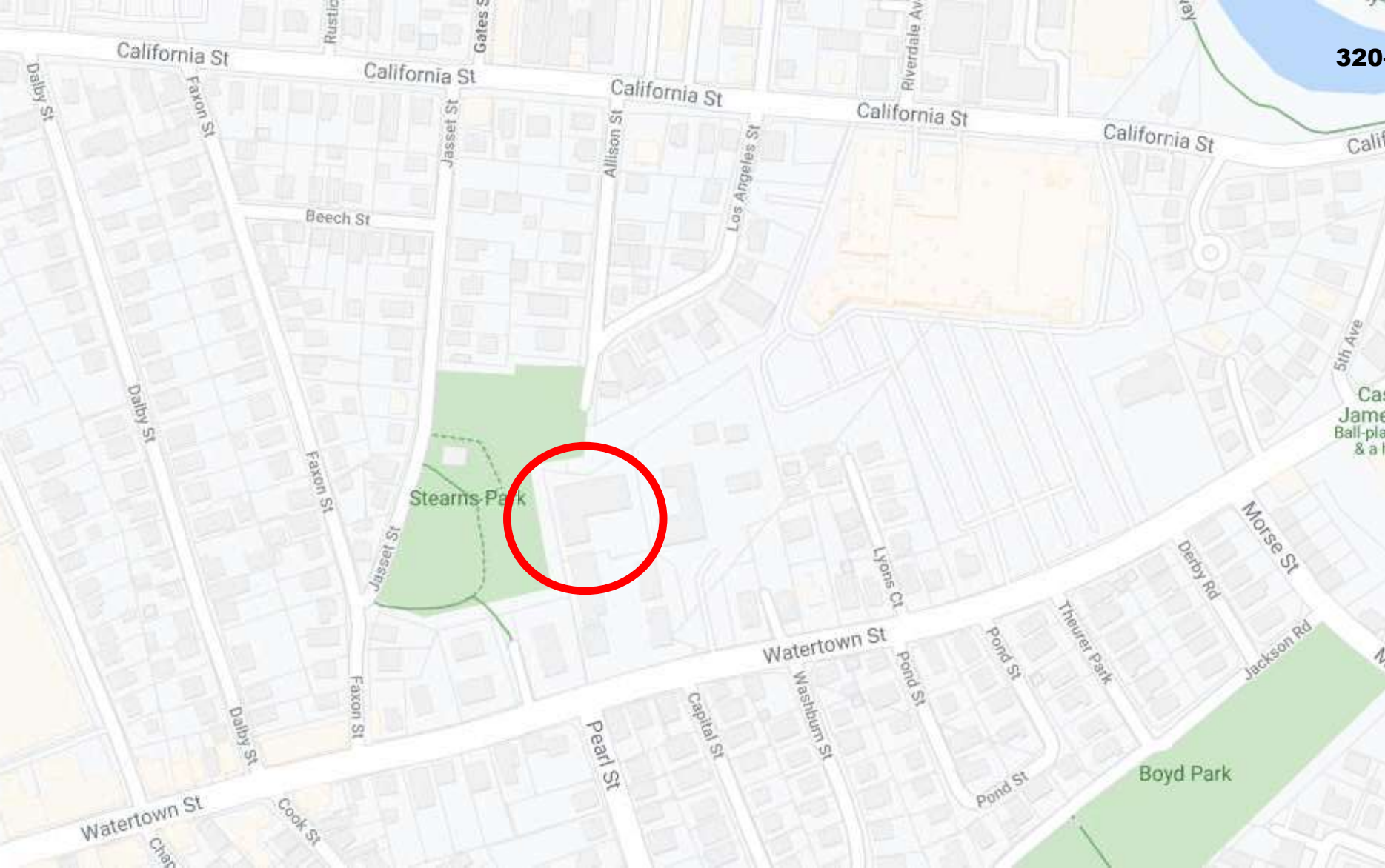
FIRE EQUIPMENT INC
Serving Fire since 1925

Several silver cars parked in a row.

320-21







Nonantum Village Place
Sources and Uses of Funds
6/7/2021

Sources

Soft Debt

| | Total | Per Unit | |
|-----------------------|--------------|-----------------|-------------|
| City of Newton - CPA | 500,000 | 14,286 | Anticipated |
| City of Newton - CDBG | 100,000 | 2,857 | Anticipated |

Other Sources

| | | | |
|---------------------|---------|-------|-------------|
| LEAN Grant | 102,338 | 2,924 | Anticipated |
| Replacement Reserve | 140,000 | 4,000 | Committed |
| Charlesbank | 50,000 | 1,429 | Committed |

Total Perm Sources

| |
|----------------|
| 892,338 |
|----------------|

Uses

| | Total | Per Unit | |
|------------------------|----------------|-----------------|-------------------------------|
| Construction | 725,000 | 20,714 | Hard Costs % of Uses 93.4% |
| Contingency | 108,750 | 3,107 | |
| Construction: Subtotal | 833,750 | 23,821 | |

| | | | |
|-------------------------------|---------------|--------------|---|
| Architecture and Engineering | 11,500 | 329 | \$4K for LISC energy audit; \$7.5K for architect/engineers time |
| Survey and Permits | 14,500 | 414 | |
| Legal | 6,000 | 171 | |
| Title & Recording | 4,000 | 114 | |
| Development Consultant | 15,000 | 429 | |
| Lender Legal | 3,500 | 100 | |
| Soft Cost Contingency | 4,088 | 117 | Soft Costs % of uses 6.57% |
| General Development: Subtotal | 58,588 | 1,674 | |

Total Uses

| | |
|----------------|---------------|
| 892,338 | 25,495 |
|----------------|---------------|

Sources Over/(Under) Uses

-

| Nonantum Village Place Construction Scope Detail | | | |
|---|----------------------|-----------------|---|
| 6/8/2021 | | | |
| Scope Item | Budgeted Cost | Per Unit | Notes |
| Replace Upper Roof Area w/ additional Insulation | 100,000 | 2,857 | Est. \$22/sq.ft. remove existing roofing to substrate. Insulate to R-50. Install white TPO roofing |
| Replace Middle and Lower Roofs w/ additional insulation | 120,000 | 3,429 | Existing roofing removed to substrate and reinsulated to R-50. Install white TPO roofing. bids received |
| Replace siding and trim, as needed | 70,000 | 2,000 | Replacing trim and clapboard where damaged with hardiplank siding and composite trim. Bids received |
| Paint entire building | 45,000 | 1,286 | bids received |
| Replacing Split system air conditioning for each apartments 35 units to heat pumps to provide both heating and cooling. with more efficient system. | 350,000 | 10,000 | Replace 35 A/C units (SEER 10) with heat pumps. 20 SEER cooling split system and COP heating 3.08. Replacing Condensers significant step to decarbonizing the building. In unit air handler replaced. Bids received |
| Common Area Air Conditioning- 3 Roof Top units (RTU's) gas fired | 40,000 | 1,143 | Replace 3 rooftop A/C units for common area |
| construction | 725,000 | 20,714 | |
| contingency | 108,750 | 3,107 | 15% contingency. Global market supply chain issues- high volatility in supply pricing |
| Total Hard Costs | 833,750 | 23,821 | |

Nonantum Village Place
Operating Budget
6/8/2021

| | PBV | Market | Affordable Total |
|--------------------|-----------|----------|---------------------|
| 1 BR | 34 | 1 | 35 |
| <i>Rent</i> | 1,127 | - | |
| Total Units | 34 | 1 | 35 |
| <i>% Units</i> | 97% | 3% | |
| <i>Monthly GPR</i> | 38,318 | - | |
| <i>Vacancy</i> | 5.00% | | |
| <i>Monthly EGI</i> | 36,402 | - | |

Residential Effective Annual Gross Income 436,825

| Other Income | Commercial | Laundry | Parking |
|--------------|------------|---------|---------|
| <i>Total</i> | - | 1,000 | - |

Commercial Effective Annual Gross Income 1,000

Total Revenue **437,825**

Operating Expenses

Subtotal: Renting Expenses **420**

Subtotal: Administrative **80,623**

Subtotal: Maintenance **87,148**

Subtotal: Resident Services **25,327**

Subtotal: Utilities **53,481**

Subtotal: Taxes & Insurance **72,566**

Replacement Reserves 115,875

Total Operating Expenses 319,565

Net Operating Income **2,385**

Debt service, first mortgage P&I

Cash flow **2,385**

PUPY
3,219
8,876.81

* Current rent is \$980; awaiting HUD review of Budget Based Rent Increase request would be effective in July

320-21

Nonantum Village Senior Housing Preservation

Nonantum Village Place
241 Watertown Street
Newton, MA 02458

History of Nonantum Village Place (NVP)

- Cascap -a local non-profit that has over 220 units in greater Boston area.
 - 100% are affordable, permanent housing, and the majority are service enriched.
- Local leaders and the Newton Housing Authority (NHA) invited Cascap to develop Nonantum Village Place (NVP)
 - Cascap expertise with the HUD 202 Supportive Housing for the Elderly.
 - State, city, and private foundation funding played a significant role in addition to HUD 202 funds.
- 2003 recipient of Newton Community Preservation Act (CPA) funds. Additional Newton funding through CDBG and NHA IZ funds.
- 2005 construction completed: 35 one -bedroom units for elders of limited means. 7 units are fully handicapped accessible, and all have handicapped accessible features. Communal dining room, kitchen, living room, laundry room. Offices for service coordinator. Resident Manager on site.

Who makes up the NVP community?

- NVP is **100%** affordable.
 - Residents must have incomes below 50% of Area Median Income (AMI), and 40% of the units at NVP are set aside for residents with incomes less than 30% of (AMI).
 - In general, residents incomes range from \$9,000 to \$21,000.
- Residents must be 62 years or older, and resident's ages range from 60's to late 80's. Several residents have a disability or are frail.

Ensuring a diverse and welcoming community

| Multifamily housing | White | African-American | Asian/Pacific Islander | Other | Documented Disability |
|------------------------------------|-------|------------------|------------------------|-------|-----------------------|
| Cascap portfolio- open referral | 55.5% | 32.3% | 4.8% | 7.3% | 60% |
| Cascap closed referral through DMH | 67.4% | 18% | 9.4% | 4.4% | 100% |
| NVP | 68% | 20% | 12% | 0% | 50% |
| NVP waiting list-applicants | 66% | 29% | 0% | 4.8% | 29% |

- Outreach to the Newton Senior Center, local non- profits and religious groups, ensures diverse groups of seniors know about NVP. Critical documents are translated for those with Limited English Proficiency (LEP). Residents with Hispanic ethnicity are 6% for Cascap portfolio, and .3% at NVP.
- The residents have created a community, decorating the common areas for different events or holidays, and welcoming those who are newer residents. Prior to the pandemic, residents had pot- luck dinners, and were teaching informal art classes.
- A part time resident services coordinator provides important assistance: advocating on behalf of residents, connecting them to services, encouraging healthy lifestyles, and setting up activities/educational programs.

Sources and Uses: Request to City of Newton

| Sources | |
|------------|-----------|
| CPA | \$500,000 |
| CDBG | \$100,000 |
| NVP | \$140,000 |
| LEAN | \$102,338 |
| Foundation | \$50,000 |
| Total | \$892,338 |

| Uses | |
|--------------------|------------------|
| Construction | |
| Roof (3 roofs) | \$220,000 |
| Siding | \$115,000 |
| HVAC | <u>\$390,000</u> |
| Construction total | \$725,000 |
| Contingency | \$108,750 |
| Soft costs | \$58,588 |
| Total | \$892,338 |

- NVP funding is project reserves. LEAN funding is a utility grant program for affordable housing energy conservation measures. Foundation funding is through the Charlesbank Foundation.
- Construction bids have been received for Roof, siding and HVAC work.

Nonantum Village Place facades



Project scope: Building envelope rehabilitation and energy conservation measures.



Project scope: Building envelope rehabilitation and energy conservation measures.



Existing roofs must be replaced. The new roof insulation will be increased to R-50, and the new roof will be a white TPO. The existing apartment air conditioning condensers must be removed and all 35 units replaced. These will be replaced with heating/cooling heat pumps to reduce green house gas emissions. Three gas fired Roof Top Units (RTU's) that cool the common areas will be replaced with higher efficiency equipment.

Pictures above show the temporary coatings that have been applied to stop active leaks. The ponding and soft spots on the roof lead to deteriorated roofing.

Project scope: Building envelope rehabilitation and energy conversation measures.



Sections of the siding and trim have extensive damage and must be replaced.

Pictures above show water damaged trim on window and front

Picture to the right is above main entrance and shows extremely weathered façade. The deteriorated wood siding and trim will be replaced with hardiplank and composite trim



320-21

**Thank you to the City of Newton
Comments or questions?**

Nonantum Village Place
241 Watertown Street
Newton, MA 02458



Ruthanne Fuller
Mayor

City of Newton, Massachusetts
Office of the Mayor

#346-21

Telephone
(617) 796-1100
Fax
(617) 796-1113
TDD/TTY
(617) 796-1089
Email
rfuller@newtonma.gov

August 30, 2021

Honorable City Council
Newton City Hall
1000 Commonwealth Avenue
Newton, MA 02459

Honorable City Councilors:

I respectfully submit this docket item to this Honorable Council requesting the distribution of \$643,215 in Inclusionary Zoning Fund monies to the Newton Housing Authority (NHA), in accordance with Section 5.11.5 (E) of the City's Zoning Ordinance, to be used for ongoing affordable housing development activities. These activities will include NHA's development of the Haywood House and the pursuit of other affordable housing opportunities.

As described in the Zoning Ordinance, funds in the Inclusionary Zoning Fund are to be distributed equally between NHA and the City for the "restoration, creation, preservation, associated support services, and monitoring of deed-restricted units." This transfer was approved by the Planning & Development Board, as required, in May, 2021.

Please see the attached letter from NHA Executive Director Amy Zarechian and the Docket Request Form from Planning & Development Director Barney Heath for additional information.

This docket item replaces Docket Item #252-21 regarding NHA and Inclusionary Zoning funds. I respectfully request that you NAN Docket Item #252-21.

Thank you for your consideration of this matter.

Sincerely,

Mayor Ruthanne Fuller

CITY CLERK
NEWTON, MA. 02459

2021 AUG 30 PM 4:53

RECEIVED



NEWTON HOUSING AUTHORITY
82 Lincoln Street
Newton Highlands, Massachusetts 02461

Telephone: (617) 552-5501
Telecopier: (617) 964-8387
TD: (617) 332-3802

Amy Zarechian
Executive Director

August 6, 2021

The Honorable City Council
City of Newton
1000 Commonwealth Avenue
Newton, MA 02459

Re: NHA Inclusionary Zoning Funds

Dear Councilors,

I am writing to request the balance of the Newton Housing Authority (NHA)'s portion of the Inclusionary Zoning Fund, approximately \$643,215, to be used in connection with ongoing affordable housing development activities, including the NHA's Haywood House development, and the pursuit of other affordable housing opportunities in the City of Newton.

As described in Section 5.11.5(E) of the City of Newton's Inclusionary Zoning ordinance, cash payments to the Inclusionary Zoning Fund are to be distributed equally to the NHA and the City of Newton for the, "restoration, creation, preservation, associated support services, and monitoring of deed-restricted units." In accordance with the Inclusionary Zoning ordinance, the NHA received approval from the Planning and Development Board and the Mayor of Newton for distribution of these funds intended for use by the NHA in May 2021.

Please feel free to contact the NHA with any questions about this request. Thank you for your attention to this matter.

Sincerely,

A handwritten signature in cursive script that reads "Amy Zarechian".

Amy Zarechian
Executive Director
Newton Housing Authority

CITY COUNCIL

CITY OF NEWTON

DOCKET REQUEST FORM

DEADLINE NOTICE: Council Rules require items to be docketed with the Clerk of the Council NO LATER THAN 7:45 P.M. ON THE MONDAY PRIOR TO A FULL COUNCIL MEETING.

To: Clerk of the City Council

Date: 8/13/21

From (Docketer): Director of Planning & Development

Address: 1000 Commonwealth Ave., Newton MA, 02459

Phone: _____ E-mail: bheath@newtonma.gov

Additional sponsors: _____

1. Please docket the following item (it will be edited for length if necessary):

The Director of Planning & Development requesting the appropriation of \$643,215 of Inclusionary Zoning funds to the Newton Housing Authority (NHA). Per Section 5.11.5.E. of the City's Inclusionary Zoning (IZ) ordinance, cash payments made to the City's IZ Fund are to be distributed equally to the Newton Housing Authority and the City of Newton. At this time, the Housing Authority seeks to utilize the remaining balance of its Inclusionary Zoning Funds to support its numerous affordable housing efforts across the City.

2. The purpose and intended outcome of this item is:

- | | |
|--|---|
| <input type="checkbox"/> Fact-finding & discussion | <input type="checkbox"/> Ordinance change |
| <input checked="" type="checkbox"/> Appropriation, transfer, | <input type="checkbox"/> Resolution |
| <input type="checkbox"/> Expenditure, or bond authorization | <input type="checkbox"/> License or renewal |
| <input type="checkbox"/> Special permit, site plan approval, | <input type="checkbox"/> Appointment confirmation |
| <input type="checkbox"/> Zone change (public hearing required) | <input type="checkbox"/> Other: _____ |

3. I recommend that this item be assigned to the following committees:

- | | | |
|--|---|--|
| <input type="checkbox"/> Programs & Services | <input checked="" type="checkbox"/> Finance | <input type="checkbox"/> Real Property |
| <input type="checkbox"/> Zoning & Planning | <input type="checkbox"/> Public Safety | <input type="checkbox"/> Special Committee |
| <input type="checkbox"/> Public Facilities | <input type="checkbox"/> Land Use | <input type="checkbox"/> No Opinion |

4. This item should be taken up in committee:

- Immediately (Emergency only, please). Please state nature of emergency:
- As soon as possible, preferably within a month
- In due course, at discretion of Committee Chair
- When certain materials are made available, as noted in 7 & 8 on reverse
- Following public hearing

PLEASE FILL OUT BOTH SIDES

5. I estimate that consideration of this item will require approximately:

- One half hour or less
- More than one hour
- More than one meeting
- Up to one hour
- An entire meeting
- Extended deliberation by subcommittee

6. The following people should be notified and asked to attend deliberations on this item. (Please check those with whom you have already discussed the issue, especially relevant Department Heads):

City personnel

Citizens (include telephone numbers/email please)

Amanda Berman

Eamon Bencivengo

7. The following background materials and/or drafts should be obtained or prepared by the Clerk's office prior to scheduling this item for discussion:

8. I have or intend to provide additional materials and/or undertake the following research independently prior to scheduling the item for discussion. *

(*Note to docketer: Please provide any additional materials beyond the foregoing to the Clerk's office by 2 p.m. on Friday before the upcoming Committee meeting when the item is scheduled to be discussed so that Councilors have a chance to review all relevant materials before a scheduled discussion.)

Please check the following:

- 9. I would like to discuss this item with the Chairman before any decision is made on how and when to proceed.
- 10. I would like the Clerk's office to contact me to confirm that this item has been docketed. My daytime phone number is:
- 11. I would like the Clerk's office to notify me when the Chairman has scheduled the item for discussion.

Thank you.

Barney Heath
Signature of person docketing the item