



OKM Associates, Inc.  
164 Canal Street, Boston, MA 02114 (617) 742-8616

28 October 1988

Ms. Naomi McManus  
Acton Community Housing Corporation  
P.O. Box 681  
Acton, Massachusetts 01720

RE: Long-Range Planning Session Summary Report

Dear Betty:

Enclosed please find my Summary Report from the CHC's Long Range Planning Meeting held on Thursday, October 27, 1988. It was my pleasure to serve as facilitator, and I hope you found my participation to be useful.

As stated previously, my report is a summary analysis of the discussion rather than minutes. I have tried to identify the key issues and activities suggested by the discussions. I will be glad to make any changes or corrections the Board may require.

I have begun work on a letter to MHFA and MHP reflecting the criticisms of the HOP program as discussed in the meeting, and hope to forward that to you soon.

Sincerely,

Monte Franke

encl.

**SUMMARY OF THE  
ACTON COMMUNITY HOUSING CORPORATION  
LONG-RANGE PLANNING MEETING**

October 27, 1988

**CHC Mission**

The consensus statement of mission among the Board of Directors is that the Acton CHC exists to enable creation of, or create, affordable housing, primarily ownership opportunities for moderate income families, with priority to Acton residents, former Acton residents, and employees working in Acton.

Most Board members were reluctant to define moderate income within a strict range because income levels change regularly. However, ensuing discussions broadly suggested a range from the low \$20,000 to almost \$50,000. This range is based on the assumption that families below \$20,000 annual income can be served through the Housing Authority. The upper income limit is less easily defined; it depends on market conditions (e.g., prices and interest rates) and the income needed to afford a home in Acton.

The Board members agreed strongly that the HOP Program funding cycle has dictated schedules and dominated activities of the CHC to date. The Board would like to reduce the CHC's dependence on the HOP Program, and in addition to its role of reviewing HOP development proposals, would like to see the CHC consider some or all of the following activities:

- o direct development with and without State funds (particularly if HOP and other programs shut down or prove not to meet needs);
- o fundraising to assist families (with downpayments, etc);
- o advocacy on local affordable housing issues (such as inclusionary zoning); and
- o community education/outreach to remove the stigma of affordable housing.

It is a very important concern of the Board members that the CHC not pursue affordable housing projects to the exclusion of other community values, concerns, and objectives, particularly environmental concerns. It is also very important to board members that the project restrictions be imposed and enforced to ensure long-term affordability.

## CHC Activities/Accomplishments

Board members identified the following as the most positive accomplishments of the CHC to date:

- o The CHC has approved a successful HOP application, getting funding for affordable units as part of the Barker's Pond project;
- o The CHC has played an instrumental role in obtaining grant funds from the State for staff and Strategic Planning;
- o The CHC has built its credibility in the eyes of the Town, the State, and developers; and it is building a broader base of people who are aware of legitimate affordable housing needs; and
- o The group has worked together well and remained focused on affordable housing without significant disruption, and has maintained a stable membership.

The most disappointing or negative aspects of the CHC's performance to date has been:

- o The HOP Proposal Review Process has put the CHC into a reactive posture, responding to unreasonable time frames. This has prevented the CHC from pursuing a broader agenda.
- o Although there was general agreement that the CHC negotiated successfully for affordable housing goals on Barker's Pond, a few of the members felt there were unsatisfactory results from first project based on environmental concerns and the strain in relations with various Town agencies and boards.
- o Members expressed concern generally about how the Board operates. While individual members are quite committed, the Board hasn't been well organized nor has it used its members well, which could lead to alienation by some and burnout by others. Special concern was expressed about the excessive commitment by Betty as the result of a lack of staffing.

Board members reported on average 6 to 8 hours per month spent on CHC business, an amount of time which seemed reasonable to most. Betty reported spending approximately 120 hours per month on CHC business. Board members unanimously agreed that this was excessive, and that responsibilities taken on by Betty needed to be shifted to staff and other Board members.

## The Development Proposal Review Process

Much of the discussion focused on the HOP development proposal review process, since it has dominated the activities of the CHC. The following observations were made:

- o The overall level of effort in reviewing proposals is generally acceptable, but the time frame is unreasonable. Board members would like to have time to work out more details of the proposal with the developers and other Town agencies.
- o Most Board members felt that CHC should not assist the developer through the permit process, expressing no obligation beyond answering questions and providing input to the Town on affordable housing aspects.
- o Members expressed concern about relations with other Town agencies as a result of the Barker's Pond review process.

The members acknowledged that the process adopted for the North Acton Woods proposal now under consideration was much improved. Betty has solicited reactions to the proposal from the various Town agencies in advance of consideration by the CHC. Members want the Board to acknowledge the comments in its letter of recommendation to HOP, stating that these issues will have to be resolved as part of the Comprehensive Permit process.

CHC actions which can address the problem are to:

1. Place deadlines and other restrictions on developers who wish to have their proposals considered for endorsement for HOP funding.
2. Continue the coordination with Town agencies for comments prior to issuing letters of endorsement for HOP funding.
3. Develop list of certain environmental thresholds which must be met before the CHC will consider a HOP proposal (e.g., the CHC will not consider projects on the aquifer until and unless it has been reviewed and approved by the appropriate town agencies).

## Organizational Changes

The discussion of how the Board operates and should operate resulted in several recommended organizational changes:

1. The long-term goal is hire permanent staff to reduce burdens on the Board and phase out the use of consultants. As an interim step, the Board members wish to utilize the circuit rider strategic planner as allowed within scope of EOCD contract. The Board should also

begin fundraising to support a fulltime position. One member thinks that the CHC's Director ultimately could play a broader role as Director of Housing for the Town.

2. Once staff are hired, the Board should assume its intended role of making policy and overseeing implementation.
3. To make better use of its Board members and to give opportunities to participate to people who are not on the Board, the use of committee structure was recommended, with key committees including:

Executive Committee (kitchen cabinet)  
Development Project Review Committee  
Unit Marketing and Monitoring Committee  
Fundraising Committee  
Membership Committee  
Community Education Committee

4. The CHC should try to broaden membership for political support and for assistance on the committees.
5. The Board should provide a training or orientation program for new Board members as they are elected.
6. Several Board members expressed concern over potential liability of the CHC and individual members in their negotiations with developers and decisions on development proposals. While the Town has provided Special Municipal Employee status to the CHC and its Directors, the Board should examine the extent of their protection with Town Counsel and also explore carrying Directors and Officers liability insurance directly.

### Long-Term Business Plan

Accomplishment of CHC goals, expansion of activities, desired organizational changes should be guided by a business plan. The Strategic Planning Grant includes a Task (or Phase) 3 which is designed to yield a business plan for the CHC. (In addition, the Strategic Planning grant also provides for additional coordination among Town agencies and the collection and analysis of housing needs information, both of which will be directly useful to the CHC).

1. The Town has asked for two CHC representatives to the Task Force overseeing the Strategic Planning consultant. The products are directly relevant to the CHC, so participation by the CHC is highly recommended. Board members suggested assignment of the new staffperson as one of its representatives, but should also designate a Board member interested in guiding the Business Plan.

2. Create a temporary Board committee to monitor the business plan developed by the circuit riding planner and the Strategic Planning consultant, and to communicate on its progress to the Board.

### Other Activities

1. Marketing. In response to the questionnaire, one person said the CHC should have no role in marketing, nine people said the CHC should review and approve marketing plans, two believe that the CHC should keep lists of eligible families, five felt the CHC should set priorities for who is selected to reside in new housing, and no one believes the CHC should have direct approval of buyers and direct marketing of units.

The board (or one of its committees) should discuss the options and develop a consensus policy for its role in marketing of affordable housing units.

Also, it was agreed that MHFA should be contacted to challenge its statements that local agencies had no power to approve marketing plans. (Monte Franke will draft a memo or letter).

2. Direct development. Board members discussed the possibility of the CHC directly developing housing, or entering into joint ventures with private developers to develop housing. Key opportunities exist when there is publicly owned land suitable for development.

A subcommittee of the Board should evaluate this issue and make recommendations to the Board regarding the conditions under which direct development should occur.

3. Outreach & waiting lists. Board members expressed a desire to have a better understanding of the needs for affordable housing in Acton, for understanding whether or not those families can afford the HOP style ownership projects (or need downpayment loans or other assistance), and for knowing that the demand will exist when affordable units become available.

The Board should consider assembling lists of families in need of affordable housing, or other means of understanding and tracking housing needs.

4. Education/advocacy. Several Board members expressed a desire to expand the CHC's education and advocacy role, so that neighbors and abutters will not resist affordable housing projects. A committee should examine this matter.

### Recommended Steps

In order to evaluate this report and commence with implementing the recommendations discussed at the long-range planning session, the following immediate activities are suggested:

1. The Board should review this report, and prioritize the activities and recommendations contained herein.
2. The Board should immediately develop a job description for the circuit riding planner to act as the interim staffperson of the CHC. This description of duties should be developed from Betty's list of activities.
3. The Board should decide if it wishes to adopt the recommended committee structure, and establish the initial committees.
4. The Board should become active in the Strategic Planning project and encourage immediate implementation of the business plan task (Phase 3).
5. Subsequent to submission of the December 6 HOP applications, the Board should adopt strict deadlines and threshold environmental criteria for proposal review in future rounds, and formalize procedures for securing town input based upon its experience with North Acton Woods.



## Proposed Work Tasks to Develop a Management Plan for the ACHC

Task 1: Research funding sources for ACHC operations and investments. Such research will include the feasibility of: utilizing state and federal grant programs; obtaining Town support; charging developer fees; obtaining corporate financial support; using the recapture of public subsidies upon the sale of affordable housing units, and fees earned from developers for activities relating to the selling of affordable housing units.

Task 2: Propose a schedule of items to be discussed and decisions to be made in order to complete development of a management plan. Confirm desired functions and future directions of the ACHC. Determine the feasibility of the desired functions and future directions.

Task 3: Develop short- and long-term plans of action for the ACHC, based upon the feasibility of funding sources and the desired direction of ACHC future activities as determined in Task 2.

Task 4: Determine staff, volunteer, and other resources needed to carry out the plan of action, during the first year of operation, and in future years.

Task 5: Determine the cost of the short- and long-term plans and determine the resources needed to most efficiently use volunteer time.

Task 6: Develop budgets which serve as management plans for the ACHC.

*Early June*  
Task <sup>7</sup> ~~6~~: Provide training to ACHC members on the use of budgets as management tools. Provide training on the use of budgets as tools for monitoring performance in meeting short- and long-term goals.

Task ~~6~~: Develop an operating budget which provides for the short term (one-year) plan of action. The budget should be balanced and should match expenses with revenues.

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Task 6.3: Develop a longer-term operating and development plan/budget based on long-term goals and on revenues to be generated over future years, including resale restrictions and subsidy recaptures (if feasible), fundraising, and corporate resources.

These tasks will require frequent input from members of the ACHC. Each of the tasks #2 through #6 will require initial input from ACHC members, consultant development of draft working documents, and ACHC review and approval of documents leading to final short- and long-term management plans and budget/plans.



## INITIAL FINDINGS REGARDING POTENTIAL SOURCES OF "SEED MONEY" AND ON-GOING SUPPORT FOR A SELF-SUFFICIENT ACHC

### Introduction

This memorandum summarizes Community Opportunities Group, Inc.'s findings regarding sources of funding for self-sufficient local housing development corporations. Our research has shown that it is unlikely that Acton will be able to use state or federal grant programs. Because of its income levels, Acton does not qualify for programs that other towns have used, such as Community Development Grants (CDBG), and grants provided by the state's Community Development Assistance Corporation (CEDAC). Also because of its income levels, and with state budget cuts, Acton will probably not be able to compete against lower income communities for limited state grants.

It is COG's opinion that, to become self-sufficient, ACHC needs a two-phase plan, with different financial resources provided for each phase:

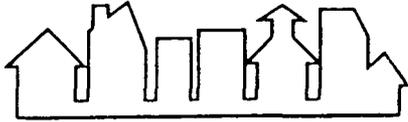
- Phase I: The first phase is "start-up", for which the ACHC needs "seed money" to hire a staff person and pay for initial office costs - including space, telephone, supplies, etc.
- Phase II: According to COG's research, the most viable second phase for "self-sufficiency" is to serve as a developer of affordable housing, and to support itself with "developer fees", just as a private developer does. In order to ensure the affordability of the units, ACHC would need to limit its developer fees to a minimal level. As such, ACHC may need to look for additional on-going support from local churches and synagogues, foundations, and corporations.

### Experiences in Other Communities

The experiences of the Town of Weston, and of the cities and towns in the Merrimac Valley seem most relevant to Acton's situation.

#### Town of Weston

Because of the income level of its residents, Weston is not eligible for grant programs available to other cities and towns. Weston supports its affordable housing activities with grants from the Town itself. In its first year of existence, the Weston Housing Needs Committee received a \$20,000 grant from Town Meeting. Town Meeting provided \$30,000 to the Committee in its second year. The Housing Needs Committee has a particular town-owned site in mind for



development of affordable housing, and is using the funds from Town Meeting to hire a consultant to assist in the development of the site.

#### Merrimac Valley Housing Partnership

The MVHP grew out of a coalition of churches in the Merrimac Valley. Forty religious organizations paid a one time membership fee of \$500, and the MVHP also received some start up grants from foundations. MVHP supports itself through developer fees. However, in order to keep housing as affordable as possible, MVHP charges minimal developer fees, and relies on on-going support from project-specific foundation grants, and from a core group of churches that hold special fund-raising events and collections. MVHP also has the support of local banks, which provide below market-rate conventional mortgages, contributing to the affordability of the housing.

#### Other Potential Sources of Funding

COG recommends that ACHC consider the following potential sources of funding, in addition to seeking funds from Town resources, local churches, foundations, and corporations.

- Share expenses with surrounding communities: Although Acton has experienced a very high level of affordable housing development over the recent past, the continued level of development may slow down, and a full-time staff person may not be needed for activity in Acton alone. Rather than taking on the financial burden of a full-time staff person, Acton may want to consider sharing an "Executive Director" for affordable housing development with surrounding homes, under a model similar to the shared Housing Partnership Planner.
- ✓ - Provide "In-Kind" Town Support: Acton may want to consider using Town resources to provide for at least part of the cost of operating the ACHC. Such support could include use of Town office space, telephone, postage, copying, typing, office supplies, etc.
- "Sell" Town-owned Land for Affordable Housing Sites: If the Town owns any land that would be appropriate for development of affordable housing, Acton may want to consider:
  1. Donating land to the ACHC for it to develop, contributing to the affordability of the project and enabling the ACHC to take out a higher developer fee, or
  2. Selling the land to a private affordable housing developer, and using the proceeds from the sale to support the activities of the ACHC.

Long Term Plan  
and  
Future Activities  
of  
Acton Community Housing Corporation

LONG-TERM PLAN - YEAR 2 (1990) THROUGH YEAR 6 (1995)

A five year plan for 1990 through 1995 should be a working document, which can be revised and updated each year as the ACHC reviews its progress toward meeting the goal of 5% deed-restricted affordable housing in Acton. While ACHC may take a more "pro-active" role in affordable housing development over the long term, many of the Year 1 functions (revised and updated as appropriate) will need to continue throughout the life of the ACHC. The following lists Year 1 tasks that will need to continue. (Revisions and updates from the Year 1 task descriptions are underlined).

1. If necessary, continue work to obtain non-profit status for the ACHC.
2. Investigate and implement revenue generating functions for the ACHC.
3. Continue corporate fundraising. (In Year 2 to complete the drive for a \$100,000 permanent endowment by the end of 1990. After Year 2 for general support of ACHC's affordable housing goal).
4. Continue to coordinate the Comprehensive Permitting Process for HOP and other projects that include affordable housing units, in accordance with affordable housing guidelines approved by the Selectmen and adopted by the ACHC.
5. Continue to work with other Town entities to update affordable housing target populations.
6. Continue to act to expedite the processing of private development proposals that include an affordable housing component.
7. Continue to educate the community about affordable housing needs, and about who affordable housing serves.
8. Continue to serve as an information clearinghouse for households seeking affordable housing in Acton.
9. Continue to review, approve and monitor marketing plans for affordable units.
10. Continue to maintain a list of households eligible for the affordable units and notify them when units become available in Acton and surrounding communities.
11. Continue to work with local banks to support affordable housing by offering favorable mortgage rates and closing costs.
12. Administer controls for preserving the affordability of units.

13. Continue to support zoning amendments that would encourage affordable housing development.

14. As needed, review and revise a governance structure to carry out the functions of the ACHC.

15. If necessary, follow procedures for the ACHC to receive any resale proceeds in the event that affordable units are sold at market rates because qualified moderate-income buyers are unavailable.

In addition to these essential on-going tasks, following are other functions that housing CDCs have undertaken or considered:

16. Administer an Acton Housing Fund if one is created (most likely through an inclusionary zoning amendment).

17. Evaluate ACHC purchase of units built by a private developer, and rent or sell them as affordable housing units.

18. Evaluate ACHC purchase and development of property for affordable housing units, by sub-contracting to an experienced affordable housing developer - either a for-profit firm, or a non-profit organization.

19. Evaluate an ACHC role as a land-broker - to purchase land, or receive land from the Town, and offer it free or at low cost to developers who will build projects with a high proportion of affordable units.

BUDGET FOR YEARS 2 - 6 (1990 - 1995)  
(To be determined by June 5, 1989)

## The Development Proposal Review Process

Much of the discussion focused on the HOP development proposal review process, since it has dominated the activities of the CHC. The following observations were made:

- o The overall level of effort in reviewing proposals is generally acceptable, but the time frame is unreasonable. Board members would like to have time to work out more details of the proposal with the developers and other Town agencies.
- o Most Board members felt that CHC should not assist the developer through the permit process, expressing no obligation beyond answering questions and providing input to the Town on affordable housing aspects.
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begin fundraising to support a fulltime position. One member thinks that the CHC's Director ultimately could play a broader role as Director of Housing for the Town.

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4. The Board should become active in the Strategic Planning project and encourage immediate implementation of the business plan task (Phase 3).
5. Subsequent to submission of the December 6 HOP applications, the Board should adopt strict deadlines and threshold environmental criteria for proposal review in future rounds, and formalize procedures for securing town input based upon its experience with North Acton Woods.

HIGHLIGHTS OF OKM SUMMARY  
ACHC 10/27/88 LONG RANGE PLANNING MEETING

PURPOSE OF ACHC:

To create or enable creation of affordable housing for moderate income families; primarily homeownership, through a broad, "pro-active" agenda.

POSSIBLE ACHC ACTIVITIES:

- Review HOP development proposals
- Direct development (with and without government programs)
- Organize fundraising to assist moderate income families with "entrance costs" such as downpayments, etc.
- Provide advocacy services on affordable housing issues, such as inclusionary zoning
- Educate the community about affordable housing needs, and about who affordable housing serves.

OPERATING AREAS NEEDING IMPROVEMENT:

-Strain in relations with other Town boards - define ACHC's role relative to other town entities

-Organization of the ACHC and effective use of members - staffing, committee structure, broaden membership, membership training

YEAR 1 (1989) MANAGEMENT PLAN  
OF THE ACTON COMMUNITY HOUSING CORPORATION

The Year 1 (1989) Management Plan of the Acton Community Housing Corporation is based on the following major objective:

- TO ASSIST THE TOWN OF ACTON IN ACHIEVING A NUMBER OF DEED-RESTRICTED AFFORDABLE HOUSING UNITS THAT IS EQUAL TO 5% OF THE TOWN'S HOUSING STOCK IN 1995. -

The Year 1 Management Plan includes ACHC tasks that will: lead to self-sufficiency over the long-term; foster development of affordable housing by private developers; service households needing affordable housing; and service the units currently being developed, and to be developed in future projects.

The Management Plan will be implemented:

- within the context of the affordable housing component of the Master-Plan;
- consistent with the growth policy established by the Town;
- consistent with the results of the affordable housing study; and
- with due consideration to the conservation of natural resources and the environment.

In the short-term, ACHC will establish itself as a self-sufficient entity, with specific functions for fostering and supporting affordable housing, and for planning a more "pro-active" role over the long-term. The specific tasks to be undertaken in Year 1 (1989) are as follows:

1. Obtain non-profit status for the ACHC.
2. Investigate revenue generating functions for the ACHC.
3. Begin fundraising to establish a \$100,000 permanent endowment by the end of 1990.
4. Continue to coordinate the Comprehensive Permitting Process for HOP and other projects that include affordable housing units, in accordance with affordable housing guidelines approved by the Selectmen and adopted by the ACHC.
5. Work with other Town entities to establish affordable housing target populations (renters or homebuyers; low-income or moderate income; families or elders), and to determine a method for updating the targets annually.
6. Act to expedite the processing of private development proposals that include an affordable housing component.
7. Educate the community about affordable housing needs, and about who affordable housing serves.
8. Serve as an information clearinghouse for households seeking affordable housing in Acton.
9. Review, approve and monitor marketing plans for affordable units.
10. Maintain a list of households eligible for the affordable units and notify them when units become available in Acton and surrounding communities.
11. Work with local banks to support affordable housing by offering favorable mortgage rates and closing costs.
12. Develop and administer controls for preserving the affordability of units.
13. Support zoning amendments that would encourage affordable housing development.
14. Evaluate and establish a governance structure to carry out the functions of the ACHC.
15. Investigate means and establish procedures for the ACHC to receive any resale proceeds in the event that affordable units are sold at market rates because qualified moderate-income buyers are unavailable.

## BUDGET FOR YEAR 1 - 1989

Community Opportunities Group estimates that the tasks outlined for Year 1 can be accomplished by a staff person in 15 hours per week. The Acton Housing Authority will likely continue to offer the use of its offices, office supplies, telephone, copying, postage, etc. The costs to be covered by ACHC are a staff person's salary and fringe, as well as travel and other necessary costs. ACHC has access to the services of Bryan Wyatt, throughout 1989 under a state grant. He currently spends about two days per week for Acton, and will be available to perform these Year 1 functions (with assistance from ACHC members) through the end of 1989.

ACTON COMMUNITY HOUSING CORPORATION

LONG-TERM MANAGEMENT PLAN - YEAR 2 (1990) THROUGH YEAR 6 (1995)

The long-term (Year 2 - 6) plan for 1990 through 1995 provides for the ACHC to: continue supporting affordable housing through the Year 1 tasks; implement tasks to foster its self-sufficiency; and evaluate, and possibly undertake, a more pro-active role in affordable housing development in order to meet its 5% goal by 1995. The five year plan for 1990 through 1995 is a working document, which can be revised and updated each year as the ACHC reviews its progress toward meeting the goal of 5% deed-restricted affordable housing in Acton. The plan will be updated, as needed, to ensure consistency with the Town's Strategic Plan. This Plan is subject to the approval of the Acton Selectmen.

1. If necessary, continue work to obtain non-profit status for the ACHC.
2. Investigate and implement revenue generating functions for the ACHC.
3. Continue corporate fundraising. (In Year 2 to complete the drive for a \$100,000 permanent endowment by the end of 1990. After Year 2 for general support of ACHC's affordable housing goal).
4. Continue to coordinate the Comprehensive Permitting Process for HOP and other projects that include affordable housing units, in accordance with affordable housing guidelines approved by the Selectmen and adopted by the ACHC.
5. Continue to work with other Town entities to update affordable housing target populations.
6. Continue to act to expedite the processing of private development proposals that include an affordable housing component.
7. Continue to educate the community about affordable housing needs, and about who affordable housing serves.
8. Continue to serve as an information clearinghouse for households seeking affordable housing in Acton.
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10. Continue to maintain a list of households eligible for the affordable units and notify them when units become available in Acton and surrounding communities.
11. Continue to work with local banks to support affordable housing by offering favorable mortgage rates and closing costs.

12. Administer controls for preserving the affordability of units.
13. Continue to support zoning amendments that would encourage affordable housing development.
14. As needed, review and revise a governance structure to carry out the functions of the ACHC.
15. If necessary, follow procedures for the ACHC to receive any resale proceeds in the event that affordable units are sold at market rates because qualified moderate-income buyers are unavailable.
16. Administer an Acton Housing Fund if one is created.
17. Evaluate ACHC purchase of units built by a private developer, and rent or sell them as affordable housing units.
18. Evaluate ACHC purchase and development of property for affordable housing units, by sub-contracting to an experienced affordable housing developer - either a for-profit firm, or a non-profit organization.
19. Evaluate an ACHC role as a land-broker - to purchase land, or receive land from the Town, and offer it free or at low cost to developers who will build projects with a high proportion of affordable units.

DRAFT BUDGET FOR YEAR 2 (1990) OF THE ACHC

EXPENSES:

PERSONNEL:

Salaries: Half-time Executive Director	\$15,000
Fringe: FICA (7.51%)	\$1,127
Federal Unemployment Insurance (6.2% on first \$7,000)	\$434
State Unemployment Insurance (3.01% on first \$7,000)	\$211
Workers Comp. Insurance (estimate)	\$120
Health Insurance (100% of individual)	\$4,500

OTHER:

Travel	\$150
Supplies, postage	\$500
Telephone (long distance)	\$350

TOTAL EXPENSES \$22,391

This budget assumes that the AHA continues to provide ACHC with office space, copying, and use of telephone (except for long distance charges).

INCOME:

REVENUE GENERATING FUNCTIONS:

(To be determined in Year 1 (1989) when revenue generating functions are investigated and implemented).

INTEREST INCOME ON ENDOWMENT

(To be determined, based on the size, and other uses, of the endowment fund).

OTHER

(To be determined based on work in Year 1 - may include income generated through zoning amendments).



**MEMORANDUM**

To: Acton Community Housing Corporation Board Members  
From: Cynthia Lacasse, Monte Franke, OKM Associates  
Date: March 29, 1988  
Re: Future CHC Activities

We'd like to take this opportunity to let you know how much we've enjoyed working with the Acton CHC -- it is rare that we work with groups as active and committed to their task. The CHC has accomplished a lot during the past two months.

In its two contracts with OKM, the CHC asked us to take on four tasks:

1. Prepare developer proposal submission guidelines
2. Hold a Comprehensive Permit Workshop
3. Research possible funding sources for CHC activities
4. Evaluate the Parker Street Development Proposal

Tasks 1., 2., and 4., have been completed. Funding recommendations possibilities are discussed in the second section of this memo.

**Suggested Spring and Summer Policy Discussion Topics**

We have been thinking about policy discussions to take place within the context of your meetings that will prepare the CHC for the next HOP round as well as other future activities. These topics are listed along with recommended steps for carrying them out.

**Strategic Planning Grants:** EOCD recently issued guidelines for funding applications for its Strategic Planning Program. The program offers grants of up to \$30,000 to enable communities to address "the management of growth or change which accommodates such local concerns as affordable housing, natural resources protection, economic development, cultural resource protection or

land use management." This is an action-oriented program in which communities develop and implement strategies to address specific issues. We recommend that you apply for funding under this program. Spending some of the remaining funds in the technical assistance contract for OKM to help you outline your goals and write the proposal/application would probably make sense at this point. The application deadline is May 6, so you have a month to put the application together.

**Affordable Housing Strategies for Acton:** We know that you and many others in Acton want affordable housing in the community but have legitimate concerns about the consequences of development. - Acton needs to formulate affordable housing strategies that take into account water, sewer, septic, open space and other environmental issues. Affordable housing and environmental preservation goals do not necessarily have to conflict. We understand that there is some sort of Land Use or Growth Management Committee in Acton. The ACHC should start talking to this committee and others to ensure that you're not unintentionally "sabotaging" each others goals. I think that the Comprehensive Permit Workshop was a good starting point for this type of discussion. These "Strategy Discussions" can take place in the context of preparing a Strategic Planning Grant application.

**An Affordable Housing Needs Study:** Concurrent with holding affordable housing/growth management discussions in a larger forum, the CHC should conduct a housing needs assessment that looks at what type of housing Acton needs and how much it should cost. Data will be needed on incomes, home prices, rent prices, and ownership and rental housing availability. Some of this information has already been collected (Betty gave me current town employee salary information). It just needs to be organized and analyzed. Again, this study can be part of the Strategic Planning Grant Proposal.

With a better idea of what kind of affordable housing the town needs and wants, you will be better able to start "proactively planning." Proactive planning doesn't mean that the CHC needs to become a housing developer. There are many ways to encourage different kinds of affordable housing development in different parts of Acton. Part of your planning process will be to determine which will work best to meet all your needs (affordable housing, environmental preservation, community character protection, and so on).

Recommended first steps for the Strategic Planning Grant application process include:

1. Decide whether or not you want to take on the task of assessing housing needs in Acton and then figuring out what to do about it. Is this the CHC's role as you see it? Whatever solutions you come up with will require recommending changes to the rest of the community.

2. If you decide that you want to apply for a grant, you should approach other individuals/groups such as the Growth Management Committee, the Planning Board and the Selectmen for input. It is the town that will formally submit the application to the state designating the CHC as the its agent to administer the grant.

3. Put together all the data/information you have on housing needs and growth and change in Acton.

4. Decide what the focus of the grant will be (i.e., assessing needs; researching zoning options, inclusionary zoning, linkage, or other mechanisms; developing strategies on a community-wide basis, and so on.)

OKM has prepared successful Strategic Planning Grant applications for other communities. We would be more than happy to help you with this process and put the application together.

**The CHC's Role in Marketing Affordable Units:** Acton has two active HOP developments that may be funded by the state as early as May. The Board should have a Marketing Policy developed by the time the projects receive a go-ahead from MHP. The Board needs to have a policy discussion about the CHC's involvement in marketing affordable units in all future private affordable housing developments in Acton. You have many options: You may decide to allow the developer's marketing agent to market the units subject to CHC approval of eligibility guidelines and the selection process. On the other extreme, you may decide that you want to market the units yourselves and take a fee for your services. In any case, we recommend that you come up with a general policy and negotiate with each developer using that policy as a starting point.

**Preparing for the October HOP Round:** Whether or not you choose to support HOP development proposals for October will depend upon many factors. However, since you will have to consider and evaluate proposals, you should be in the position to dictate terms and schedules instead of following the developers' schedules. We recommend that you look at the Developer Submission Requirements as well as the evaluation process conducted with the two current HOP developers with your "experienced eyes" to determine if you want to make any changes or additions. (For example, Sandy mentioned that its helpful for the site plan to have contour lines). We recommend the following schedule: 1. Update guidelines and the evaluation/negotiation process - May. 2. Solicit Proposals - June (You do not have to actively solicit proposals; you just need to advertise that those developers intending to submit proposals in October must follow your submissions and scheduling guidelines). 3. Developer Proposals due - July 15. This will give you at least two full months to evaluate the proposals and negotiate with developers.

**Board Proposal Analysis Training:** In our original proposal, we suggested pro forma analysis training for Board members. It appears that you have decided to hire a consultant to evaluate future development proposals. However, the Board still should be able to communicate clear evaluation guidelines to consultants and critically evaluate their work. These "guidelines" can be developed (or refined) as a preparation for the next HOP funding round discussed above. In addition, we believe that it is not cost effective in the long run to use consultants for repetitive activities.

## **Funding Recommendations**

I have done some preliminary research on funding possibilities. Many CDCs receive a portion of their general operating funds through the CEED program. However, it appears that Acton does not qualify for this funding because the town's median income is too high. In addition to receiving funds from the state to hire the shared staff person, there are five key areas to consider to meet your immediate and long-term funding needs.

1. **Collect Developer Fees for Project Negotiations:** You have already collected a developer fee to cover your and consultant costs for one project. You should evaluate the "success" of this practice and consider developing a general policy applicable to all developers.
2. **Go After Project-Specific Grants:** I have already discussed the Strategic Planning Grant application. In the future, you may want to consider other programs such as the Challenge Grant program. It important to know that this type of grant should not be expected to cover ongoing CHC general expenses.
3. **Earning Marketing Fees:** If the CHC chooses to be involved in marketing affordable units, it should be compensated for its efforts. This issue is discussed in more detail in the first section of this memo.
4. **Soliciting Corporate Donations:** We suggest that you try to get small grants from large employers in the area (such as Digital) who have a stake in the availability of affordable housing for their employees. Before you approach these firms, you probably need to have a clearer sense of the CHC's goals and objectives over the next year or two. They will want to know what their money is being spent on. First steps for this task are: 1. Have a brainstorming session to come up with a list of companies. 2. Board members should try to come up with personal contacts in each of the organizations to approach as a first step. We would be glad to work with you on approach and follow-up strategies.
5. **Recapture Subsidies on Resale of Affordable Units:** Many non-profit organizations require that a portion of appreciation

upon sale of affordable units be paid back to them. (This is over and above the amount to be repaid to the state.) This would obviously be a source of long-term and not immediate income but is something you may want to consider. This decision needs to be made before you begin marketing your first HOP units.

**Guidelines for Affordable Housing in Acton**

**Part I**

**The Review Process**

## **Guidelines for Affordable Housing in Acton**

### **Process**

The Town of Acton looks forward to working with developers very early in the planning process, even before a preliminary site approval request has been submitted to the State. The Acton Community Housing Corporation (ACHC) has been designated by the Board of Selectmen to act as the "first stop" for interested developers of affordable housing. The ACHC will conduct an initial review of the proposed development concept and work closely with Town boards and committees to identify health, safety and other issues. The ACHC will primarily concentrate its review upon issues of affordability, rather than assume responsibility for analyzing such issues as infrastructure, site planning and environmental considerations which are best addressed by existing boards and committees charged with those responsibilities.

The purpose of these guidelines is to spell out the review criteria and process for affordable housing development so that health, safety, and affordable housing issues may be worked out prior to the start of the Board of Appeals hearings. Both the ACHC and the Board of Selectmen will then be able to make an informed recommendation relating to a State funding application. Support of an application does not constitute Town approval of the plan. The Board of Appeals is the decision-making body for Comprehensive Permits (Chapter 774 of the Acts of 1969 codified in Massachusetts General Laws as Chapter 40B). The steps may vary somewhat on a project-by-project basis, depending on the specific issues of the proposed plans.

#### **Step 1. Initial Contact**

(Developer receives a copy of the Guidelines for Affordable Housing from the ACHC or Town Hall.) Developer contacts the ACHC to schedule the introductory meeting.

#### **Step 2. First Meeting with the ACHC**

The purpose of this meeting is to introduce the project. The developer should be prepared to present an overview of the project concept. The ACHC will decide whether or not to support the concept at this meeting.

Two weeks prior to the scheduled meeting, the developer must submit 13 copies of all materials to the ACHC to allow time for review. The Planning Department staff will assist the ACHC in this initial review.

Submittal requirements are:

- a. Location of project, name of applicant, form of entity (i.e. partnership, corporation, etc.) and owner of record.
- b. Existing conditions plan showing topography and environmental features.

- c. Conceptual site plan showing building footprints, parking roads, drives, buffers and major environmental features.
- d. Density.
- e. Housing types.
- f. Proposed subsidy program.
- g. Number and percentage of affordable units.
- h. Zoning and Subdivision Rules and Regulations conformity analysis.
- i. Preliminary development proforma.
- j. Preliminary traffic analysis, including trip generation and distribution data and site drive evaluation, in order to determine scope of detailed traffic study required under step 4.

### **Step 3. Introductory Meeting with Department Heads and Water District**

- a) The Town Manager will schedule a brief introduction of the project by the developer at a regular departmental meeting to be held within one month of submittal of the concept plan. The ACHC will distribute the initial submission materials to the various departments. The purpose is to "flag" technical issues and concerns generated by the proposed project. At this time the developer is encouraged to submit an application to the state for grant funding for technical review as may be required by the Town. Participating departments include planning, conservation, selectmen, health, building, engineering, fire, police and tree warden. Written comments will be sent to the ACHC.
- b) The developer is responsible to meet with the Water District Manager. The Water District will comment to the ACHC.

### **Step 4. Development of Preliminary Plans**

Following comment by the ACHC and departments, the developer should prepare preliminary plans. These plans must be sufficiently detailed to permit meaningful review by the applicable board/department. Preliminary plans must include:

- a. General information, including name, locus map at a scale of 1" = 1200', number of units, owner, proposed lender, commitment or letter of interest from the lender, attorney, contact person, resumes of development team, and name of development.
- b. Resume of past projects.
- c. Development proforma.
- d. Project description, including unit mix with respect to ownership/rental, bedrooms, subsidized/market sales, subsidized/market rental, proposed density, total site area, total buildable site area, total building coverage of site, site coverage for walks, parking and roads, open space on site at completion and amenities.

- e. Architectural elevations and unit floor plans.
- f. Site plan delineating boundaries, lotlines, wetlands, watercourses, floodplains, groundwater protection zones, and proposed/existing topography, building footprints, parking, roads and drives.
- g. Sewer/septic location and preliminary design.
- h. Proposed drainage location and design.
- i. Traffic impact analysis, including LOS analysis and proposed mitigation of impact.
- j. Preliminary environmental impact data, including specific responses to the Site Development Evaluation Guide.
- k. Water impact report
- l. Streets: all information required by Subdivision Rules and Regulations (i.e. cross sections, profile, details, etc.)
- m. Name of site engineer with appropriate seal.
- n. Certified abutters list.
- o. Identification of housing subsidy program to be utilized.
- p. Zoning and other variances needed.

#### **Step 5. Public Participation**

The developer is responsible for soliciting community concerns relevant to the proposed project. A public meeting will be held by the ACHC. The developer is responsible to directly notify abutters within 300' by certified mail, return receipt to ACHC. The ACHC will assist the developer to coordinate this activity as necessary. This meeting will take place within three weeks of submittal of complete Preliminary Plans. The ACHC will submit concerns identified at this meeting to the appropriate board/department.

#### **Step 6. Informal Staff Review Working Session(s)**

Joint review will be undertaken by staff, including ACHC, Planning, Conservation, Health, Engineering, Fire and the Water District. These working sessions will be coordinated by the Planning Department staff. The plan may also undergo independent technical review coordinated through the ACHC and Planning Department relating to affordability and any other issues identified by Town staff. The developer is responsible for funding this review through a state grant program or his/her own resources. Clarifications or refinements of the plan may be requested from the developer during this phase. Any items identified earlier as points of negotiations will be discussed at this time.

#### **Step 7. Site Plan Review by Planning Board and Conservation Commission Representatives**

If applicable, Planning Department staff will coordinate a joint review with representatives of the Planning Board and Conservation Commission.

The purpose is to ensure a coordinated review process through increased interaction.

**Step 8. Informational Presentation(s) to Town Boards**

The developer will meet with the ACHC, Planning Board, Conservation Commission, Board of Health and the Board of Selectmen. This meeting will be scheduled as a joint meeting to the degree feasible.

**Step 9. ACHC Meeting with Developer**

The ACHC will meet with the developer to "negotiate" project trade-offs. Options will be clarified.

The intent at this point in the process is to have substantial agreement on the design. This agreement, "negotiated" in the process described above, will form the basis of the Comprehensive Permit submission to the Board of Appeals.

At this point, the Board of Selectmen and the ACHC would be prepared to issue a formal letter of support for project funding, if so decided.

The ACHC will assist the developer through the review process as expeditiously as possible. Assuming that the developer can complete preliminary plans within two months, the process should be completed within six months, depending on the complexity of the project. The process will greatly facilitate the formal Comprehensive Permit review.

**Step 10. Formal Application to the Board of Appeals for a Comprehensive Permit**

The ACHC will act as an "advisory body" to the Board of Appeals to summarize the review process and recommendations. The Planning Director will provide specific technical assistance as necessary.



**Guidelines for Affordable Housing in Acton**

**Part II**

**Site Development Evaluation Guide**

# Site Development Evaluation Guide

## Introduction

The Site Development Evaluation Guide is a tool for Town boards and departments to evaluate development proposals. The Guide will also prove useful to developers and builders as it spells out in detail which aspects of their proposals/plans will be examined closely.

The intent of the Guide is to give order to the development review process, promote high quality residential and other development and ensure that the development will have no adverse impact upon the environment.

The Guide is divided into three sections as follows:

- I. The Environment
- II. Site Design
- III. Affordability Issues

The Guide uses a format of asking a number of questions pertaining to specific aspects of the development proposal. A checklist preceding each question signifies:

  A        B        C  

- A: Not applicable.  
B: Requirements/questions satisfied by proposal.  
C: More information is needed.

# THE SITE DEVELOPMENT EVALUATION GUIDE

## I. ENVIRONMENTAL CHECKLIST

\_\_\_\_\_ Does the project meet all statutory requirements?

### A. GROUNDWATER

1. \_\_\_\_\_ Will the project alter the water cycle (the natural movement of water through the natural system) in any way?
2. \_\_\_\_\_ Will the project adversely impact in any way upon a ZONE OF CONTRIBUTION or existing wells? Future well sites?
3. \_\_\_\_\_ Are there any existing or potential water supply problems in the general area (quality or quantity concerns)?
4. \_\_\_\_\_ Is the project area part of a municipal water distribution system?
5. \_\_\_\_\_ If not, what will be the source of water?
6. \_\_\_\_\_ Will the water supply needs of the completed development be adequately met?
7. \_\_\_\_\_ What is the average depth of the seasonal water table? Minimum and maximum depth?
8. \_\_\_\_\_ Is the percolation rate acceptable?
9. \_\_\_\_\_ Will the project be served by a municipal or other sewer system?
10. \_\_\_\_\_ If not, what will be the method of sanitary waste disposal?
11. \_\_\_\_\_ Are there any existing or potential problems concerning sanitary waste disposal in the general area?
12. \_\_\_\_\_ What is the relationship on site to the provision of water and the disposal of sanitary waste?
13. \_\_\_\_\_ Are any special safeguards necessary to ensure future groundwater protection?

### B. SOILS/SLOPES

1. \_\_\_\_\_ If no sewers, is the soil type conducive to efficient septic system operation?
2. \_\_\_\_\_ What is the depth to bedrock?

3. \_\_\_\_\_ Will the soil type(s) provide good structure support?
4. \_\_\_\_\_ Is the soil subject to erosion? If so, what safeguards will be taken?
5. \_\_\_\_\_ What are the existing drainage patterns? Will or should these be altered?
6. \_\_\_\_\_ Will the topography be changed due to excavating grading or filling? Why?
7. \_\_\_\_\_ Is the degree of slope conducive to development?

C. WETLANDS/SURFACE WATER

1. \_\_\_\_\_ What is the proximity of wetlands or surface water to the project site?
2. \_\_\_\_\_ What is the direction of any surface water flow?
3. \_\_\_\_\_ Are there adequate setbacks from surface water/surface flow?
4. \_\_\_\_\_ Will there be any changes or potential changes in the direction of water movement or the configuration of salt or fresh water bodies?
5. \_\_\_\_\_ Will the project generate pollutants that could damage surface waters or wetlands?
6. \_\_\_\_\_ Is the "track record" of the developer/builders regarding environmental protection sound?
7. \_\_\_\_\_ Is a buffer necessary or recommended to protect environmentally sensitive areas?
8. \_\_\_\_\_ Is wetland vegetation on site or very close to proposed development?
9. \_\_\_\_\_ Is the site flood prone?
10. \_\_\_\_\_ Will construction expose people or property to hazards?
11. \_\_\_\_\_ What is the source of runoff water?
12. \_\_\_\_\_ What is the runoff rate and destination?
13. \_\_\_\_\_ Will the proposed project impair the capacity of the land to serve as a home, breeding, or feeding habit for animal or marine life?

14. \_\_\_\_\_ Is a conservation or other restriction appropriate to ensure the protection of surface water or wetlands?
15. \_\_\_\_\_ Is the stability of coastal or inland bank threatened?

#### D. SIGNIFICANT AND UNIQUE FEATURES

1. \_\_\_\_\_ Will scenic vistas be preserved?
2. \_\_\_\_\_ Will historical landmarks (buildings or sites) be protected?
3. \_\_\_\_\_ Is the site archeologically significant?
4. \_\_\_\_\_ Does the site have unusual mineral or geological formations?
5. \_\_\_\_\_ Are rare plants or animals involved on or near the site?
6. \_\_\_\_\_ Will the site be in close proximity to an existing public recreation area?

#### II. SITE DESIGN CHECKLIST

##### A. THE LANDSCAPE

1. \_\_\_\_\_ Is the project in harmony with the landscape and does it blend in with the natural surroundings?
2. \_\_\_\_\_ Is the project complimentary to the existing character of the neighborhood?
3. \_\_\_\_\_ Will the development pose any conflicting land use concerns?
4. \_\_\_\_\_ Is the scale of the project consistent with the immediate area?
5. \_\_\_\_\_ Will the development block scenic vistas with buildings, signs or parking lots?
6. \_\_\_\_\_ Does the plan keep as much of the existing ground cover as possible?
7. \_\_\_\_\_ Should additional planting be required?
8. \_\_\_\_\_ Will the plan preserve all significant natural features?
9. \_\_\_\_\_ Will the development destroy the natural quality and attractiveness of the area?

10. \_\_\_\_\_ What means will be used to protect the site from poor drainage, erosion, etc.?
11. \_\_\_\_\_ What consideration has been given to construction damage to the site?
12. \_\_\_\_\_ What precautions will be taken to eliminate construction damage both on and off site?

#### B. SUBDIVISION DESIGN

1. \_\_\_\_\_ Does the proposal meet all structural requirements?
2. \_\_\_\_\_ Is the plan well organized for good lot arrangement?
3. \_\_\_\_\_ Does structure siting promote energy conservation?
4. \_\_\_\_\_ Does construction avoid hilltops?
5. \_\_\_\_\_ What is the planned construction sequence and timeable?
6. \_\_\_\_\_ What is the relationship of the project to commercial shopping areas, schools etc.?
7. \_\_\_\_\_ Does the project abut conservation land?
8. \_\_\_\_\_ What precautions will be taken to protect conservation land?
9. \_\_\_\_\_ Is there a buffer that separates the development from major roads, commercial areas or conflicting land uses? Should a buffer be considered?
10. \_\_\_\_\_ Are dwellings placed to look away from unsightly views?
11. \_\_\_\_\_ How much of the site is dedicated to open space? (For aesthetic, safety and privacy reasons)
12. \_\_\_\_\_ Is the open space arrangement good?
13. \_\_\_\_\_ Is an active recreation area planned? (i.e. playground)
14. \_\_\_\_\_ Could setbacks be improved or more effective?
15. \_\_\_\_\_ What are the existing and/or proposed storm drainage systems/structures?
16. \_\_\_\_\_ What is the planned utility placement?
17. \_\_\_\_\_ Are the landscaping plans for structures, parking lots, open space, and buffers sufficient?

18. \_\_\_\_\_ Is the proposed development attractive?
19. \_\_\_\_\_ Are the placement and size of the signs appropriate?

### C. FACILITIES, UTILITIES AND SAFETY

1. \_\_\_\_\_ Does the circulation pattern follow natural contours?
2. \_\_\_\_\_ Are there any traffic safety concerns?
3. \_\_\_\_\_ What is the public access?
4. \_\_\_\_\_ Does the circulation design discourage outside traffic?
5. \_\_\_\_\_ What is the street capacity?
6. \_\_\_\_\_ Does the design meet the projected need?
7. \_\_\_\_\_ Does the traffic plan meet community design standards?
8. \_\_\_\_\_ Are the parking plans for residents and visitors adequate?
9. \_\_\_\_\_ Does the traffic plan provide good vehicular movement?
10. \_\_\_\_\_ Will pedestrian movement be both safe and convenient?
11. \_\_\_\_\_ Are any adverse traffic impacts possible?
12. \_\_\_\_\_ What is the utility capacity of the site?
13. \_\_\_\_\_ What will the energy source be for the development?
14. \_\_\_\_\_ Is emergency access adequate?
15. \_\_\_\_\_ Are the plans for exterior/safety lighting adequate?
16. \_\_\_\_\_ Are there any potentially hazardous areas in the immediate vicinity of the planned development?

### III. AFFORDABILITY ISSUES

1. \_\_\_\_\_ Does the project meet all affordable housing program requirements?
2. \_\_\_\_\_ Does the percentage of affordable units exceed the program requirement?

3. \_\_\_\_\_ Are the sale prices/rent levels calculated to meet the need for housing for low and moderate income families in Acton?
4. \_\_\_\_\_ Are there a wide range of prices/rents to offer a variety of housing opportunities for households of different incomes?
5. \_\_\_\_\_ Does the housing type, number of bedrooms, living space and outdoor space address Town housing needs and objectives as most recently identified?
6. \_\_\_\_\_ Are affordable and market rate units indistinguishable from the exterior?
7. \_\_\_\_\_ Are affordable units dispersed throughout the development?
8. \_\_\_\_\_ Are buildings sited in harmony with the topography, vegetation and any other natural features?
9. \_\_\_\_\_ Is the development complementary to the character of the neighborhood?
10. \_\_\_\_\_ Are all units appropriate in size and do they provide facilities adequate to meet the needs of the households expected to occupy them?
11. \_\_\_\_\_ Are a minimum five percent of all units accessible to physically handicapped persons?
12. \_\_\_\_\_ Are projected sales prices of market units within 10% of recent sales prices of similar housing units in Town or in adjacent Towns?
13. \_\_\_\_\_ Does the cost information reflect industry standards or other HOP or applicable program experience?
14. \_\_\_\_\_ Does the buyer selection plan for marketing the project conform to the Town's guidelines?

HIGHLIGHTS OF INCLUSIONARY ZONING AND SOME EXAMPLES FROM  
LEXINGTON AND NEWTON

HOW DOES INCLUSIONARY ZONING WORK?

To get a special permit for density increases or rezoning,  
developers must provide for affordable housing units by:

- setting aside a certain percentage of units in the development for households at specific low or moderate income levels - OR -
- building a certain number of affordable units elsewhere in the town - OR -
- making a cash contribution to the town for development of affordable housing units - OR -
- a combination of the above.

EXAMPLES - REQUIREMENTS IN LEXINGTON AND NEWTON

LEXINGTON:

For the Town to grant an increase in density, the developer must:

- donate 5% of the units in the development to the Lexington Housing Authority for rental to low-income households - OR -
- offer the Lexington Housing Authority 15% of the units for purchase at prices established by public subsidy programs - OR -
- set aside 25% of the units to be purchased or rented by moderate income households - OR -
- set aside 40% of the units to be purchased by middle-income households - OR -
- provide a selected number of units from the above categories elsewhere in Town - OR -
- make a cash contribution equal to 3% of the sales price of all units in the development to a Housing Trust Fund - OR -
- provide a combination of the above.

NEWTON:

For the Town to grant an increase in density, the developer must:

- set aside 10% of the units in the development for low income family and/or elderly households - OR -
- make a cash payment equal to the value of the units described above to a Housing Trust Fund - OR -
- provide a selected number of units elsewhere in Town - OR -

- provide a combination of the above.

#### IMPLEMENTING INCLUSIONARY ZONING

Following are just a few examples of the issues that need to be addressed in order to implement an inclusionary zoning program:

- Determine affordable housing needs and target inclusionary housing programs to meet those needs - family, elderly, low-income, moderate-income, rental, ownership.
- Determine what incentives will be offered developers to get them to build (or contribute to) affordable housing, such as:
  - expediting the processing of applications for Town permits and licenses
  - coordinating different agencies involved in granting special permits
  - sharing the costs of public improvements with the developer, such as sidewalks, street lights, sewer, etc.
  - waiving or reducing permit and license fees
  - providing for flexibility in site planning and design
  - offering Town-owned land
- Determine what affordable housing options will be made available to developers seeking zoning relief.
- Determine what will happen if one of the developer options is to sell units to the Housing Authority, but the Housing Authority cannot obtain funds to buy the units.
- Determine what will be done with cash contributions to a Housing Trust Fund, and who will administer the fund.
- Create a process to ensure that developers comply with their agreement after they are granted their special permit, and establish a process for what happens if they do not comply.