



Finance Committee Agenda

City of Newton In City Council

Monday, October 15, 2018

6:45 PM
Room 211

#507-18 Reappointment of Jeffrey Silton as a Constable

HER HONOR THE MAYOR reappointing JEFFREY SILTON, 120 Cherry Street, West Newton as a CONSTABLE for a term of office to expire on October 25, 2021.

Referred to Land Use and Finance Committees

#454-18 Appropriate \$3 million in CPA Funds for an affordable rental development

COMMUNITY PRESERVATION COMMITTEE recommending the appropriation of three million dollars (\$3,000,000) from the Community Preservation Fund to the Planning & Development Department for a grant to the Newton Housing Authority to create Haywood House, a permanently affordable rental development consisting of 55 one-bedroom units for seniors in a new building to be located on John F. Kennedy Circle, as described in the proposals submitted to the Community Preservation Committee in January and June 2018.

Land Use Approved 7-0 on 10/02/18

Referred to Land Use and Finance Committees

#169-18 Appropriate \$2.5 million in CPA Funds for affordable rental housing for seniors

COMMUNITY PRESERVATION COMMITTEE recommending the appropriation of two million five hundred thousand dollars (\$2,500,000) from the Community Preservation Fund to the control of the Planning & Development Department for a grant to the Newton Housing Authority to create 42 one-bedroom units of permanently affordable rental housing for seniors in a new, 55-unit development on John F. Kennedy Circle, as described in the Authority's December 2017 proposal to the Community Preservation Commission and subject to the conditions in the Community Preservation Committee's February 2018 funding recommendation to the City Council.

Land Use Voted No Action Necessary 7-0 on 10/02/18

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.

Referred to Zoning & Planning and Finance Committees

#509-18

Community Preservation Fund appropriation for services for Webster Woods

COMMUNITY PRESERVATION COMMITTEE recommending the appropriation of one hundred thousand dollars (\$100,000) to the control of the Law Department, for professional services related to the protection of open space at 300 Hammond Pond Parkway, as described in the proposal submitted by the Conservation Commission to the Community Preservation Committee in August – September 2018.

Zoning & Planning Approved 6-0 on 10/10/18

Referred to Public Facilities and Finance Committees

#494-18

\$500,000 bond authorization for air conditioning units at Carr School

HER HONOR THE MAYOR requesting authorization to appropriate five hundred thousand dollars (\$500,000) from bonded indebtedness to fund the installation of air conditioning units at the Carr School.

Public Facilities Approved 6-0-1 (Gentile abstaining) on 10/03/18

Referred to Public Facilities and Finance Committees

#511-18

Appropriate \$800,000 to replace the roof at Crafts Street Garage

HER HONOR THE MAYOR requesting authorization to appropriate eight hundred thousand dollars (\$800,000) from bonded indebtedness for the purpose of funding the replacement of the roof at the Crafts Street Garage.

Public Facilities Approved 6-0 (Kelley not Voting) on 10/03/18

Respectfully submitted,

Leonard J. Gentile, Chair



Ruthanne Fuller
Mayor

City of Newton, Massachusetts
Office of the Mayor

#507-18

Telephone
(617) 796-1100

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(617) 796-1113

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(617) 796-1089

Email
rfuller@newtonma.gov

September 26, 2018

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

RECEIVED
Newton City Clerk
2018 SEP 24 PM 3:57
David A. Olson, Clerk
Newton, MA 02459

To the Honorable City Councilors:

I am pleased to reappoint Jeffrey Silton of 120 Cherry Street, Newton as a Constable for the City of Newton. His term of office shall expire on October 25, 2021 and his appointment is subject to your confirmation.

Thank you for your attention to this matter.

Warmly,

Ruthanne Fuller
Mayor

INTERNATIONAL SURETIES, LTD.
701 POYDRAS ST, STE. 420
NEW ORLEANS, LOUISIANA 70139
TELEPHONE: 504-581-6404
FAX: 504-581-1876

RECEIVED
Newton City Clerk
2018 MAR 30 AM 9:46
DAVID A. OLSON, CMC
NEWTON, MA 02459

March 26, 2018

JEFFREY D. SILTON
120 CHERRY STREET
NEWTON, MA 02465-1239

RE: CONTINUATION CERTIFICATE
Bond #: 00105746460

Dear Sir:

Enclosed you will find the continuation certificate for your
Massachusetts Constable Bond.

If you have any questions, or if I can be of any further
assistance, please do not hesitate to contact me at 1-800-749-6404.

Sincerely,

INTERNATIONAL SURETIES, LTD.

Elizabeth C. Duker
ELIZABETH C. DUKES

IMPORTANT DISCLOSURE NOTICE OF TERRORISM INSURANCE COVERAGE

On November 26, 2002, President Bush signed into law the Terrorism Risk Insurance Act of 2002 (the "Act"). The Act establishes a short-term program under which the Federal Government will share in the payment of covered losses caused by certain acts of international terrorism. We are providing you with this notice to inform you of the key features of the Act, and to let you know what effect, if any, the Act will have on your premium. Under the Act, insurers are required to provide coverage for certain losses caused by international acts of terrorism as defined in the Act. The Act further provides that the Federal Government will pay a share of such losses. Specifically, the Federal Government will pay 90% of the amount of covered losses caused by certain acts of terrorism which is in excess of Travelers' statutorily established deductible for that year. The Act also caps the amount of terrorism-related losses for which the Federal Government or an insurer can be responsible at \$100,000,000.00, provided that the insurer has met its deductible. Please note that passage of the Act does not result in any change in coverage under the attached policy or bond (or the policy or bond being quoted). Please also note that no separate additional premium charge has been made for the terrorism coverage required by the Act. The premium charge that is allocable to such coverage is inseparable from and imbedded in your overall premium, and is no more than one percent of your premium.

CONTINUATION CERTIFICATE
SURETY BOND

TRAVELERS CASUALTY AND SURETY COMPANY OF AMERICA
HARTFORD, CONNECTICUT

In Consideration of \$100.00 Dollars renewal premium
the term of Bond No. 00105746460 in the amount of \$7,500 issued
on behalf of JEFFREY D. SILTON
located at 120 CHERRY STREET
NEWTON, MA 02465-1239
in favor of CITY OF NEWTON, STATE OF MASSACHUSETTS
in connection with CONSTABLE BOND
is hereby extended for a period beginning JUNE 2, 2018 to JUNE 2, 2021
subject to all covenants and conditions of said bond.

This certificate is designed to extend only the life of the bond. It does not increase the amount which may be payable thereunder. The aggregate liability of the Company under the said bond together with this certificate shall be exactly the same as, and no greater than it would have been, if the said bond had originally been written to expire on the date to which it is now being extended.

*Signed, sealed and dated
MARCH 26, 2018

TRAVELERS CASUALTY AND SURETY COMPANY OF AMERICA

By: Elizabeth C. Duker

ELIZABETH C. DUKES, Attorney-in-Fact

RECEIVED
Newton City Clerk
2018 MAR 30 AM 9:46
David A. Olson, CMC
Newton, MA 02459



Travelers Casualty and Surety Company of America
Travelers Casualty and Surety Company
St. Paul Fire and Marine Insurance Company

POWER OF ATTORNEY

KNOW ALL MEN BY THESE PRESENTS: That Travelers Casualty and Surety Company of America, Travelers Casualty and Surety Company, and St. Paul Fire and Marine Insurance Company are corporations duly organized under the laws of the State of Connecticut (herein collectively called the "Companies"), and that the Companies do hereby make, constitute and appoint Elizabeth C. Dukes, of New Orleans, Louisiana, their true and lawful Attorney-in-Fact to sign, execute, seal and acknowledge any and all bonds, recognizances, conditional undertakings and other writings obligatory in the nature thereof on behalf of the Companies in their business of guaranteeing the fidelity of persons, guaranteeing the performance of contracts and executing or guaranteeing bonds and undertakings required or permitted in any actions or proceedings allowed by law.

IN WITNESS WHEREOF, the Companies have caused this instrument to be signed, and their corporate seals to be hereto affixed, this 3rd day of February, 2017.



State of Connecticut

City of Hartford ss.

By: Robert L. Raney
Robert L. Raney, Senior Vice President

On this the 3rd day of February, 2017, before me personally appeared Robert L. Raney, who acknowledged himself to be the Senior Vice President of Travelers Casualty and Surety Company of America, Travelers Casualty and Surety Company, and St. Paul Fire and Marine Insurance Company, and that he, as such, being authorized so to do, executed the foregoing instrument for the purposes therein contained by signing on behalf of the corporations by himself as a duly authorized officer.

In Witness Whereof, I hereunto set my hand and official seal.

My Commission expires the 30th day of June, 2021



Marie C. Tetreault
Marie C. Tetreault, Notary Public

This Power of Attorney is granted under and by the authority of the following resolutions adopted by the Boards of Directors of Travelers Casualty and Surety Company of America, Travelers Casualty and Surety Company, and St. Paul Fire and Marine Insurance Company, which resolutions are now in full force and effect, reading as follows:

RESOLVED, that the Chairman, the President, any Vice Chairman, any Executive Vice President, any Senior Vice President, any Vice President, any Second Vice President, the Treasurer, any Assistant Treasurer, the Corporate Secretary or any Assistant Secretary may appoint Attorneys-in-Fact and Agents to act for and on behalf of the Company and may give such appointee such authority as his or her certificate of authority may prescribe to sign with the Company's name and seal with the Company's seal bonds, recognizances, contracts of indemnity, and other writings obligatory in the nature of a bond, recognizance, or conditional undertaking, and any of said officers or the Board of Directors at any time may remove any such appointee and revoke the power given him or her; and it is

FURTHER RESOLVED, that the Chairman, the President, any Vice Chairman, any Executive Vice President, any Senior Vice President or any Vice President may delegate all or any part of the foregoing authority to one or more officers or employees of this Company, provided that each such delegation is in writing and a copy thereof is filed in the office of the Secretary; and it is

FURTHER RESOLVED, that any bond, recognizance, contract of indemnity, or writing obligatory in the nature of a bond, recognizance, or conditional undertaking shall be valid and binding upon the Company when (a) signed by the President, any Vice Chairman, any Executive Vice President, any Senior Vice President or any Vice President, any Second Vice President, the Treasurer, any Assistant Treasurer, the Corporate Secretary or any Assistant Secretary and duly attested and sealed with the Company's seal by a Secretary or Assistant Secretary; or (b) duly executed (under seal, if required) by one or more Attorneys-in-Fact and Agents pursuant to the power prescribed in his or her certificate or their certificates of authority or by one or more Company officers pursuant to a written delegation of authority; and it is

FURTHER RESOLVED, that the signature of each of the following officers: President, any Executive Vice President, any Senior Vice President, any Vice President, any Assistant Vice President, any Secretary, any Assistant Secretary, and the seal of the Company may be affixed by facsimile to any Power of Attorney or to any certificate relating thereto appointing Resident Vice Presidents, Resident Assistant Secretaries or Attorneys-in-Fact for purposes only of executing and attesting bonds and undertakings and other writings obligatory in the nature thereof, and any such Power of Attorney or certificate bearing such facsimile signature or facsimile seal shall be valid and binding upon the Company and any such power so executed and certified by such facsimile signature and facsimile seal shall be valid and binding on the Company in the future with respect to any bond or understanding to which it is attached.

I, Kevin E. Hughes, the undersigned, Assistant Secretary of Travelers Casualty and Surety Company of America, Travelers Casualty and Surety Company, and St. Paul Fire and Marine Insurance Company, do hereby certify that the above and foregoing is a true and correct copy of the Power of Attorney executed by said Companies, which remains in full force and effect.

Dated this 26th day of MARCH, 2018



Kevin E. Hughes
Kevin E. Hughes, Assistant Secretary

To verify the authenticity of this Power of Attorney, please call us at 1-800-421-3880.
Please refer to the above-named Attorney-in-Fact and the details of the bond to which the power is attached.



Ruthanne Fuller
Mayor

City of Newton, Massachusetts

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

#454-18 Phone
(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 HAYWOOD HOUSE/Jackson Road New Senior Housing

date: 26 July 2018
from: Community Preservation Committee
to: The Honorable City Council

PROJECT GOALS & ELIGIBILITY This project will construct a new building served by two elevators, with a community center and 55 one-bedroom rental units restricted to residents at least 62 years old. All units will be permanently income-restricted: 11 units for households at up to 30% of the Area Median Income (AMI), 21 units at up to 60% AMI, and 23 units at up to 99% AMI. 4 units will be designated for households that have been homeless or are at risk of homelessness. The Housing Authority has requested state approval to allocate 70% of the units to current Newton residents. This project is CPA-eligible as the creation of affordable housing.

RECOMMENDED FUNDING On 10 July 2018 by a vote of 8-0 (Planning & Development Board appointment vacant), the Community Preservation Committee recommended appropriating \$3,000,000 from the Community Preservation Fund's current reserve and fund balance for housing, and as needed from its general reserve and fund balance, to the control of the Planning & Development Department for a grant to the Newton Housing Authority for any purposes stated or implied in this summary budget for Haywood House:

| USES | July 2018 | SOURCES | July 2018 |
|--|---------------------|--|---------------------|
| Acquisition | \$1 | Low Income Housing Tax Credits Equity - federal (9%) and state | \$11,000,000 |
| Construction (75% of all costs; includes 4.8% contingency) | \$19,697,160 | other state funds: Affordable Housing Trust Fund, Community Based Housing, Facilities Consolidation Fund, HOME, Housing Stabilization Fund | \$4,000,000 |
| Site Development & Foundations (20% of construction costs) | \$3,757,565 | | |
| Non-Residential Space (5% of construction costs; includes community center, library, laundry, offices, etc.) | \$894,812 | | |
| Residential Space | \$14,106,824 | | |
| Soft Costs (14% of all costs; includes 4.8% contingency) | \$3,699,135 | Newton-controlled public funds | |
| Architectural & Engineering Services (survey, permitting, environmental) | \$1,200,000 | CPA | \$3,000,000 |
| Other Professional Services (legal, accounting, appraisal, market study, marketing, development) | \$875,000 | Inclusionary Zoning | \$625,000 |
| Interest & Insurance | \$837,342 | CDBG | \$625,000 |
| Taxes & Fees | \$421,793 | Deferred Developer Fee | \$656,417 |
| Owner's Project Manager, Security | \$165,000 | Permanent Loan - Bank | \$6,200,000 |
| Furniture, Fixtures, Equipment | \$75,000 | | |
| Reserves | \$470,121 | TOTAL SOURCES | \$26,106,417 |
| Developer Fee + Overhead (9.4%) | \$2,240,000 | | |
| TOTAL USES | \$26,106,417 | | |

website www.newtonma.gov/cpa

contact Alice E. Ingerson, Community Preservation Program Manager

email aingerson@newtonma.gov phone 617.796.1144

SPECIAL ISSUES CONSIDERED BY THE CPC

Funding leverage & project costs: The CPC especially appreciated this project's leverage of non-Newton funding. Of the project's total funding, federal and state tax credits are about 42%, Newton CPA funds are only about 11%, and all Newton public funds combined are only about 16%.

The project's total development cost of \$475,000 per unit is about the maximum for state funding. However, construction costs are about 75% of that total, and about 20% of construction costs are for the intensive sitework and special foundations required by the location's loose soils and steep slope, with another 5% of construction costs for nonresidential spaces, including those described below. Construction costs for the residential space are about \$342,000 per unit, or \$322 per square foot.

Community space & services: Haywood House will have multiple common spaces, including terraces and balconies, a library, and new laundry facilities, which will also serve residents of the existing Jackson Gardens development. The building's new community center will host activities for non-residents as well as services for residents. The Housing Authority has committed to using its developer fee from this project to expand its program of services for residents, including pre-dementia support.

Project design & permitting: Haywood House will have 52 visitable and adaptable units, including 2 adapted for residents with sensory disabilities, and 3 fully accessible units (Group 2B). The building will be curved to fit its site, will be energy-efficient (LEED silver certifiable), and will allow vehicular access only from Kennedy Circle. The existing pedestrian path from Kennedy Circle to Jackson Road will be rebuilt to make it wheelchair-accessible. Existing large trees near the edges of the site will be preserved, and new plantings will be added. In response to neighborhood concerns about parking, the Housing Authority has reduced the project's parking needs by eliminating its previously proposed market-rate units.

ADDITIONAL RECOMMENDATIONS *(funding conditions)*

1. The CPC assumes all recommended funds will be appropriated within 6 months, and project construction will begin within 3 years, after the date of this recommendation. If either of these deadlines cannot be met, the Housing Authority should submit a written request to the CPC to extend that deadline.
2. As soon as practical, the Housing Authority should provide the CPC with a brief written and in-person update on the results of the tax credit application it expects it will be invited to submit in fall 2018/winter 2019. If tax credits have not been committed for the project by 1 September 2020, the Housing Authority should re-start the CPA funding process with an updated proposal.
3. The grant agreement governing the phased release of CPA funds for this project should be executed only after the project's other required funding sources have been committed, particularly the housing tax credits. In addition to the other conditions usual in recent past grants for CPA-funded housing projects, such as permanent affordability and a final report to the CPC, the grant agreement should require an independent "accessibility audit" to ensure as-built compliance with accessibility standards.
4. 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 Newton CPA funds to leverage non-Newton funds and its provision of not only the income-restricted housing but also the supportive services and community activities described in the Housing Authority's proposal.

ATTACHMENTS

(delivered to the clerks of the Programs & Services Committee and Finance Committee)

- Proposal and selected attachments submitted to the CPC in June 2018, plus minor corrections July 2018
- Presentation, updated from January 2018 CPC public hearing
- Copy of CPC project webpage, with links to additional information not attached to this recommendation:

www.newtonma.gov/gov/planning/cpa/projects/housing_authority.asp#Jackson-Sr

webpage:

www.newtonma.gov/gov/planning/cpa/projects/housing_authority.asp

Newton, Massachusetts CPA program project webpage – selected **bold, green text** links to full-text documents

Newton Housing Authority

contacts:

- Amy Zarechian, Executive Director
Newton Housing Authority
82 Lincoln Street, Newton Highlands, MA 02461
email: azarechian@newtonhousing.org
phone: 617.552.5501

projects below:

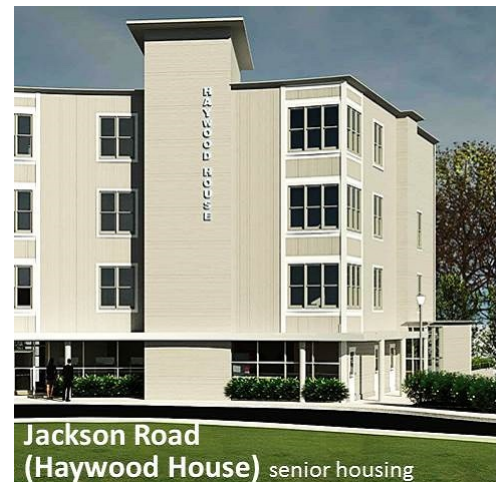
- [Haywood House/Jackson Road New Senior Housing](#)
- [Wyman Street Apartments](#) (omitted on this copy)

Haywood House/Jackson Road New Senior Housing

fronting on John F. Kennedy Circle, Newton Corner, MA 02458; rear facing Jackson Road

Click on the following links to

- go directly to [this project's proposal #3 to the CPC](#) (submitted June 2018) circled in red on this copy
- follow this project's [Special Permit and Comprehensive Permit](#) requests



goals: In a new building with two elevators and community space for utilities and supportive services, create 55, permanently affordable one-bedroom rental units for residents at least 62 years old, restricted by income as follows: 11 units for households with up to 30% of the Area Median Income (AMI); 21 units for households with up to 60% AMI; and 23 units for households at up to 99% of AMI. 3 units will be fully accessible and 4 will be designated for households that have been homeless or are at risk of homelessness.

total funding:

(updated to reflect 7 June 2018 proposal #3 below)

\$3,000,000 CPA request

\$625,000 Newton Inclusionary Zoning Fund

\$625,000 CDBG (Newton-controlled federal funds)

\$6,200,000 permanent loan (bank / public agencies)

webpage:

www.newtonma.gov/gov/planning/cpa/projects/housing_authority.asp

\$11,000,000 9% Low Income Housing Tax Credits (LIHTC) and 4% Massachusetts Housing Tax Credits

\$750,000 MA HOME funds (state-controlled federal funds)

\$1,000,000 MA (DHCD) Affordable Housing Trust Fund (AHTF)

\$750,000 MA Facilities Consolidation Fund (FCF)

\$750,000 MA Housing Stabilization Fund (HSF)

\$750,000 MA Community Based Housing Fund (CBH)

\$656,417 Deferred developer fee

\$26,106,417 Approx. TOTAL PROJECT COST

Funding Process

2016-17

26 February 2016 - **pre-proposal** (\$1 million in CPA funding)

10 March 2016 - **minutes of the CPC's pre-proposal discussion**

22 March 2017 - **Newton Housing Authority update to CPC**

15-31 May 2017 - **revised pre-proposal** (\$2 million in CPA funding)

16 June 2017 - **phase 2 site environmental assessment**

16 June 2017 - **market analysis** (estimating effective demand for these units)

7 July 2017 - **full proposal #1**, requesting \$2 million in CPA funding for 42 units

- **project overview**, including: project description, photos, maps, budgets, environmental mitigation plans, and procurement process (added 2 August 2017)
- **project design** (elevations and basic floor plans); **detailed floor plans** (separate file)
- **accessibility**: accessible features of this project; Housing Authority reasonable accommodation/modification policies for tenants with disabilities
- **project marketing analysis & plans**: summary of full **market analysis** above, plus affirmative marketing & tenant selection plans for this project
- **project team qualifications**: Housing Authority fair housing record, Board of Commissioners, staff qualifications; experience and resumes for project development consultant, owner's project manager, and project architect
- project sponsor capacity: Housing Authority **financial statements** and **operating budgets**

4 August 2017 - **letters to the CPC about this proposal** (League of Women Voters, Council on Aging, Fair Housing Committee)

2017-18

20 December 2017 - 9 January 2018 - **full proposal #2**, requesting \$2.5 million in CPA funding for 55 units; including project budgets, sponsor finances, design & construction summary,

webpage:

www.newtonma.gov/gov/planning/cpa/projects/housing_authority.asp

zoning & permitting summary, letters of support submitted by sponsor, and **updated project images & floor plans**

25 January 2018 - **community letters received to date** (not submitted by proposal sponsor)

19 February 2018 - **CPC proposal #2 funding recommendation**, held based on **the Housing Authority's 4 April 2018 request**

7-21 June 2018 (minor corrections July 2018) - **full proposal #3**, requesting \$3 million in CPA funding for 55 units, including: updates on site control & permitting, project budgets, slightly updated site & floor plans (showing two elevators), project accessibility, fair housing, sponsor finances, and letters of support submitted by sponsor

23 January 2018, update July 2018 - **presentation to CPC public hearing**

26 July 2018 - **CPC proposal #3 funding recommendation to City Council**

Project News

1874-1929 - **historic maps of the project area**

7 May 2018 - **City Council revision of prior Jackson Gardens Special Permit**, required for current Haywood House project to proceed

26 July 2018 - Haywood House project **Comprehensive Permit**

Haywood House Newton Housing Authority

Originally presented to Newton Community Preservation Committee
January 23, 2018; updated July 2018

Vincent O'Donnell, Commissioner, Newton Housing Authority
Marvin Siflinger, Eleanor White, and Charles Eisenberg, Housing Partners, Inc.
Ahmed Idris, Baker Wohl Architects



Haywood House

Newton Housing Authority

Newton Housing Authority (NHA)

- Established in 1959
- Largest provider of affordable housing in Newton
- Over 1300 residents
- 500 public housing units
- 441 Section vouchers
- 57 management properties

Mission of the NHA

- Provide a high standard of housing
- Create a sense of community for residents
- Increase affordable housing opportunities
- Expand social services

Jackson Gardens

- One of the four original public housing developments in Newton
- Built in 1963, Federally-assisted
- 64 one-bedroom units for elders and persons with disability



Haywood House Development Team

Newton Housing Authority

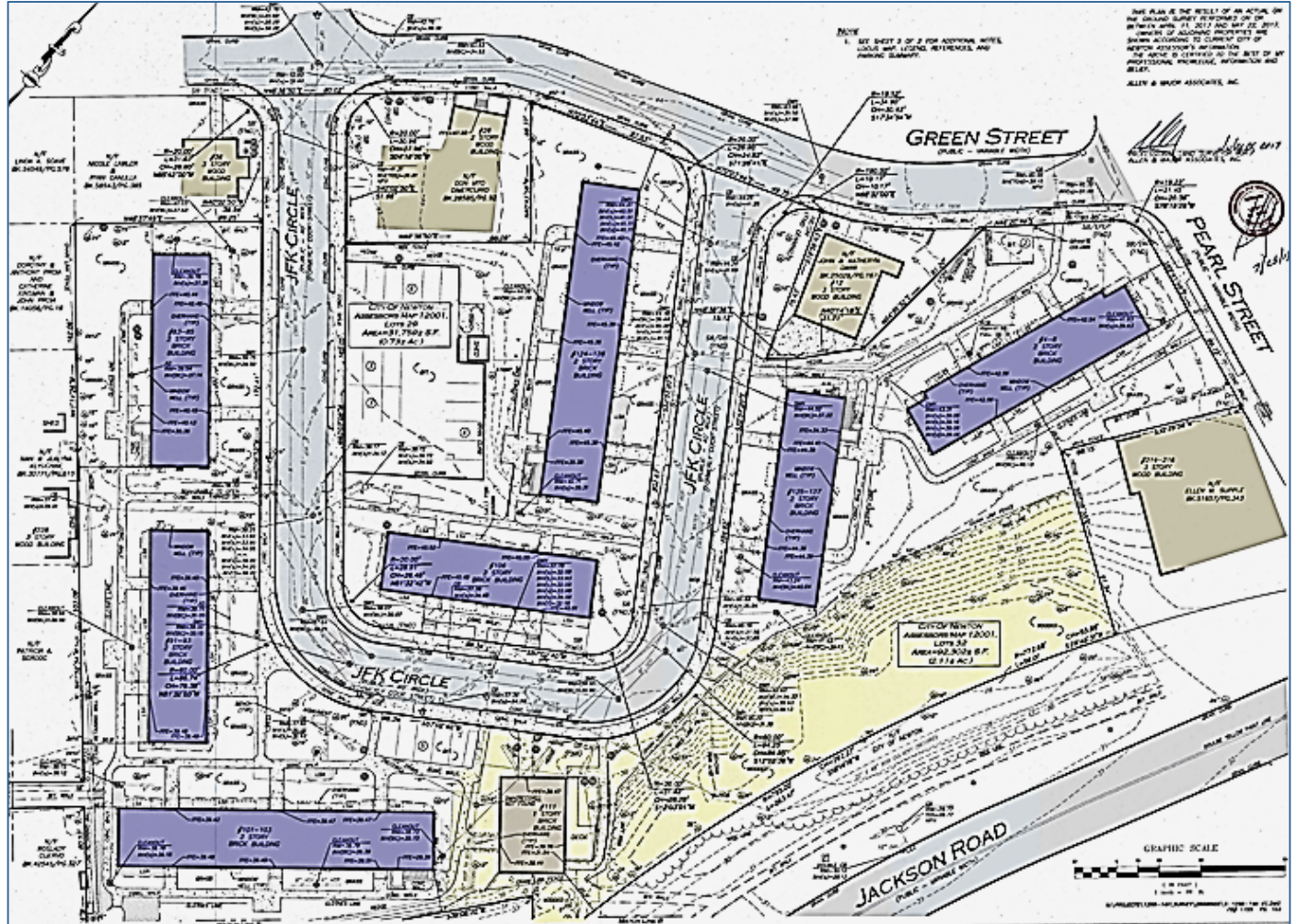
- Board of Commissioners (unpaid)
 - Rick Kronish, Chairman
 - Howard Haywood, Vice Chairman
 - Mary Panaggio, Treasurer
 - Tom Turner, Commissioner
 - Vincent O'Donnell, Commissioner
- Amy Zarechian, Executive Director

- Development Consultant: Housing Partners, Inc.
- Owner's Project Manager: Pinck & Co.
- Designer: Baker-Wohl Architects
- Construction Manager at Risk: Colantonio
- Zoning and Permitting Attorney: Alan Schlesinger
- Tax Credit Attorney: Klein Hornig LLP
- Property Manager: Maloney Properties, Inc.

Haywood House Project Summary

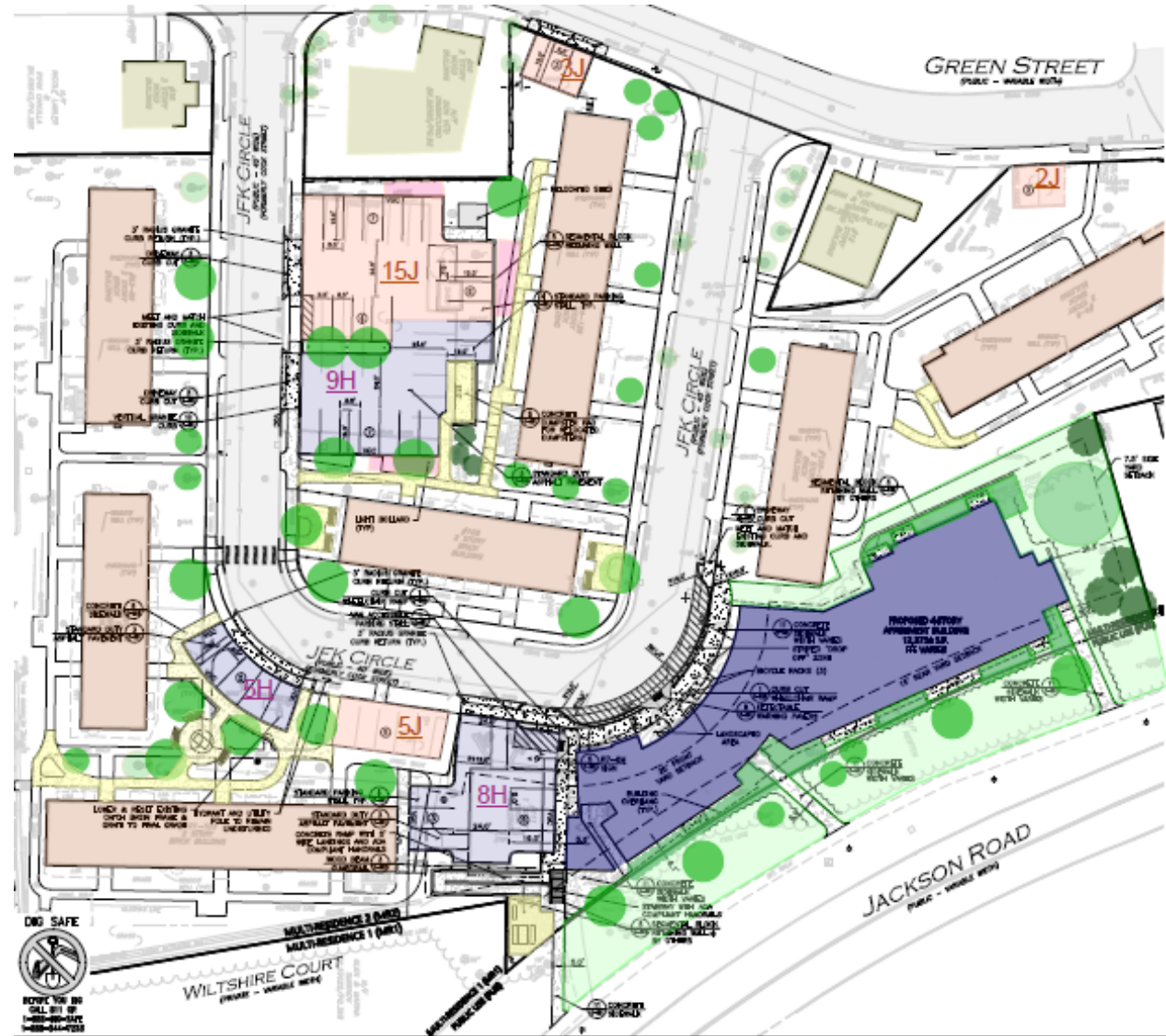
- 55 one-bedroom units for elders over the age of 62
- 70% preference for Newton residents (subject to fair housing laws)
- all units permanently affordable:
 - 11 units for households with income below 30% of Area Median Income (AMI)
 - 21 units for households below 60% AMI
 - 23 units for households up to 99% AMI
- 4 units designated for individuals currently or at risk of being homeless (including 3 under state Facilities Consolidation Fund -- FCF)
- 3 units fully accessible for individuals with mobility impairments (under Community Based Housing -- CBH)
- all units adaptable and visitable
- addresses need to be identified by City of Newton and NHA

Haywood House Existing Site Plan



Haywood House Proposed Site Plan

- Existing 25 spaces for Jackson Gardens remain
- 22 new parking spaces provided for Haywood House
- 50" caliper copper beech tree will be protected
- Evergreens are placed at north side of property to screen Supple house
- New large-caliper deciduous trees are provided along Jackson Road



Haywood House Kennedy Circle - Sidewalk Level



Haywood House Jackson Road – Birds Eye View



Haywood House Jackson Road – Sidewalk Level



Haywood House

Sources of Funds

| | |
|---|---------------------|
| • 9% Federal and MA Low Income Housing Tax Credits Equity | \$11,000,000 |
| • Permanent Loan | \$6,200,000 |
| • Newton CPA Funds | \$3,000,000 |
| • Newton Inclusionary Zoning | \$625,000 |
| • Newton CDBG | \$625,000 |
| • state (DHCD) Affordable Housing Trust Fund | \$1,000,000 |
| • state Housing Stabilization Fund | \$750,000 |
| • state Facilities Consolidation Fund (FCF) | \$750,000 |
| • state Community Based Housing (CBH) | \$750,000 |
| • state HOME | \$750,000 |
| • Deferred Developer Fee | \$656,417 |
| Total Sources | \$26,106,417 |

Haywood House

Uses of Funds

| | <u>Total</u> | <u>Per Unit</u> |
|--|---------------------|------------------|
| Acquisition | \$1 | \$0 |
| Construction | \$19,697,160 | \$358,130 |
| Soft Costs | \$3,699,135 | \$67,257 |
| Dev. Fees/overhead/req. reserves (all fees available to NHA will support resident services programming) | \$2,710,121 | \$49,275 |
| Total Development Cost | \$26,106,417 | \$474,662 |

Per Unit Cost w/o Common Space:

\$455,915

Haywood House Outreach

Outreach:

- Mayor and City Councilors
- Planning Department and Development Review Team
- Jackson Gardens Community Meetings
- Abutters, Nonantum Neighborhood Association, Jackson Homestead
- Neighborhood Community Meetings
- Parks and Recreation Commission
- Newton Senior Center

Housing and Urban Development (HUD) Approvals Received:

- Boston Office
- Special Application Center

HAYWOOD HOUSE - 55 UNITS
COMMON AREA ALLOCATION



| | | | Total Estimated Breakout Cost |
|--|---------------|-----------|----------------------------------|
| Building - Residential Space | | | |
| Subtotal | 55,590 | SF | \$14,106,824 |
| Building - Community/Shared Space | | | |
| Community Center | 1015 | SF | \$337,007 |
| Fitness Room | 290 | SF | \$96,288 |
| Laundry Room | 300 | SF | \$99,608 |
| Common Studio | 140 | SF | \$46,484 |
| Level 1 Trash/Storage Room | 435 | SF | \$144,432 |
| Material Lift | 90 | SF | \$29,882 |
| Public Bathrooms | 100 | SF | \$33,203 |
| Subtotal | 2,370 | SF | \$786,903 |
| Building - Admin & Operations | | | |
| Managers Office's | 325 | SF | \$107,909 |
| Subtotal | 325 | SF | \$107,909 |
| Existing Conditions, Site Development & Foundations | | | |
| Subtotal | N/A | SF | \$3,757,565 |
| <hr/> | | | |
| Total Building Area | 58,285 | SF | \$18,759,200 |



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

June 7, 2018

Community Preservation Committee
c/o Alice E. Ingerson, Community Preservation Program Manager
Planning and Development Department
City of Newton
1000 Commonwealth Ave.
Newton, MA 02459

Re: NHA Jackson Road Senior Housing

Dear Ms. Ingerson,

Over the past six months, several changes have taken place in the Haywood House project. The unit mix has been revised in part to accommodate parking and in response to City Council comments. Costs have increased primarily due to the addition of a second elevator at the recommendation of DHCD. Interest rates and tax credit pricing has changed as have some funding sources.

The most significant difference is the removal of several parking spaces. This was the result of the rejection of certain spaces based on size or location by the Planning Department and Land Use Committee. As a result, there are now twenty-two spaces specifically for tenants of Haywood House.

In addition, a number of comments by the City Council and others led us to convert the market rate units to 99% AMI units. This provides more affordability in the middle price range which is very underrepresented in the Newton rental market, but reduces net income available for debt service, resulting in a lower permanent mortgage.

Costs have increased during this period as well. DHCD strongly recommended the inclusion of a second elevator and we concur with their suggestion. It is always best to have a backup in a multistory senior facility. General construction costs have also gone up particularly materials due to demand from hurricane relief and results of the tariff wars. The soft cost increases are all related to the hard cost increases (insurance) or the changes in the debt amount (loan fee, MIP, reserves). Finally, the change in the Developer Fee is the result of all these changes which impact the formula for calculating the maximum amount.

Sources have changed both because of rate changes, decreased debt and increased costs. The permanent loan is now \$6,200,000 reflecting the decrease in rent resulting from the conversion of the market units to 99% AMI units. We also raised the interest rates based on changes in the debt market. On the tax credit side, the basis changed but the 9% credits are still capped so the final amount stayed the same. State credits were able to increase some.

The increased costs and smaller permanent loan required additional sources. This will come from three places. We are asking CPA for additional funds in part because we have increased the number of 99% AMI units. The NHA is contributing the \$625,000 in Inclusionary Zoning funds that it is receiving from the City and the Mayor has agreed to provide an additional \$625,000 in either CDBG or local HOME funds.

On the operating side, revenue is significantly lower due to the conversion of thirteen market rate units to 99% AMI units. The change in the MIP line relates to the decrease in the permanent loan amount, as does the change in debt service.

The Comprehensive Permit process has just begun and this may result in other changes to the project. We will keep you apprised of these as and if they occur.

Sincerely,

A handwritten signature in blue ink that reads "Amy Zarechian". The signature is fluid and cursive, with the first name "Amy" and last name "Zarechian" clearly distinguishable.

Amy Zarechian
Executive Director
Newton Housing Authority
82 Lincoln Street
Newton Highlands, MA 02461



AFFORDABLE HOUSING PROPOSAL FORM FY15 or FY16

(For staff use)
date rec'd:

PRE-PROPOSAL

PROPOSAL

Custom form last updated 10 August 2017.

Please complete this form in consultation with staff & submit it as an editable file (not as a PDF).

Rec'd
7 June 2018

Ruthanne Fuller
Mayor

| | | | | | |
|---|--|--|---|--|--------------------|
| Project TITLE | Newton Housing Authority Jackson Road Senior Housing | | | | |
| Project LOCATION | Jackson Road, Newton Corner, MA 02458 (83-127 Kennedy Circle, Newton Corner MA 02458) | | | | |
| Project CONTACT | | | | | |
| Name & title | | Email | Phone | Mailing address | |
| Amy Zarechian, Exec. Director, Newton Housing Authority | | azarechian@newtonhousing.org | 617-552-5501 | 82 Lincoln Street Newton Highlands, MA 02461 | |
| Sponsoring Org. (check all that apply) | Non-profit | Certified CHDO | <input checked="" type="checkbox"/> Public Agency | <input checked="" type="checkbox"/> Project LLC | Private for-profit |
| Project FUNDING | A. Newton CPA funds: \$3,000,000 | B. Total other funds: \$23,106,417 | C. Total project cost: \$26,106,417 | | |
| Project SUMMARY & NEEDS | See detailed instructions, but please cover location, rehab vs. new construction, rental vs. ownership, target population, unit composition, and needs identified in community-wide plans. | | | | |
| <p>The proposed site of the Jackson Road Senior Housing Development is approximately 25,200 square feet of undeveloped, wooded property owned by the Newton Housing Authority (NHA), next to its existing Jackson Gardens Federal Public Housing development. The proposed development will consist of fifty-five one-bedroom units of new construction rental housing. Thirty-two of the units will be designated for low-income seniors with income at or below 60% of AMI. Eleven of these units will be occupied by households with income at 30% of AMI or below. In addition, twenty-three of the units will be designated for residents with income between 80% and 99% of AMI. Four of the units will be set aside for homeless or at risk of being homeless individuals. The project will include parking and new community spaces to be utilized by residents of the development and others in the community. The development will be funded primarily by leveraging Low Income Housing Tax Credits.</p> <p>The NHA recognizes the need for affordable housing in Newton and currently has extensive waiting lists for all of its housing programs. As described in the City of Newton's Consolidated Plan, the number of older adults is expected to increase dramatically over the next twenty years and, with it, the demand for affordable and accessible multifamily rental housing in the City of Newton. The proposed development will meet the needs of this growing population by providing thirty-two units of affordable and accessible housing within the NHA's current extensive housing portfolio. In addition, the NHA has identified a need for affordable housing for moderate-income households as described in City of Newton's Consolidated Plan, which states that over half of Newton households with income between 80% and 100% of AMI are cost burdened. This need is also described in the City of Newton's Housing Strategy, which recognizes rental units as the best opportunity to address the growing lack of affordable housing options in the City for low and moderate-income households.</p> | | | | | |

You may adjust spaces, but the combined answers to all questions on this page must fit on this page.

| SOURCES OF FUNDS <i>Check all that apply and identify if funds are committed or proposed.</i> | | | | | | |
|---|--|--|--|-----------|---------|-------------|
| Deferred Dev. Fee | \$656,417 | 9% and MA Low Income Housing Tax Credits | \$11,000,000 | | | |
| HOME funds | \$750,000 | MA (DHCD) Affordable Housing Trust Fund | \$1,000,000 | | | |
| CPA funds | \$3,000,000 | Housing Stabilization Fund | \$750,000 | | | |
| FCF | \$750,000 | CBH | \$750,000 | | | |
| Inclusionary Zoning Funds | \$625,000 | Permanent Loan | \$6,200,000 | | | |
| CDBG | \$625,000 | D. TOTAL (should equal C. on page 1 of this form) | \$26,106,417 | | | |
| USES OF FUNDS <i>Check all that apply.</i> | | | | | | |
| New construction | <input checked="" type="checkbox"/> | Site preparation/ remediation | <input checked="" type="checkbox"/> (under CPA) Creation <input checked="" type="checkbox"/> | | | |
| TARGET POPULATION & SPECIAL FEATURES <i>Check all that apply.</i> | | | | | | |
| Individual/Family <input checked="" type="checkbox"/> | Seniors <input checked="" type="checkbox"/> | Homeless/At Risk of Homelessness <input checked="" type="checkbox"/> | | | | |
| <p>Special needs/disabilities (identify population & provider of support services, if any): <input checked="" type="checkbox"/> The development will have at least three accessible units specifically designed for mobility impaired residents and all units will be designed to be visitable and potentially adaptable. In addition, all common and community spaces will be fully accessible to all residents. The NHA will be coordinating the provision of social services through partnerships with a variety of local service providers based on the needs of the residents.</p> | | | | | | |
| <p>Special features (historic preservation, sustainability, etc.): The project architect is looking to incorporate as many energy efficient features as possible into the design of the building.</p> | | | | | | |
| TYPE OF HOUSING <i>Check all that apply.</i> | | | | | | |
| Rental <input checked="" type="checkbox"/> | Individual/single family <input checked="" type="checkbox"/> | | | | | |
| UNIT COMPOSITION <i>List the development's number of units in each category.</i> | | | | | | |
| | Total | ≤ 30% AMI | ≤ 60% AMI | ≤ 80% AMI | 99% AMI | Market-rate |
| 1 BR | 55 | 11 | 21 | | 23 | |
| OUTREACH <i>Summarize efforts to date to communicate with abutters, neighborhood residents & City Councilors.</i> | | | | | | |
| <p>The Newton Housing Authority (NHA) has met extensively with abutters and neighborhood residents, City Councilors, City of Newton Planning Department staff, and Mayors Warren and Fuller regarding its proposed project. The NHA has attended multiple meetings of the Nonantum Neighborhood Association and shared the proposed plans for the development, including unit mix and affordability, resident services spaces, and project timelines. The NHA presented plans for the development to its residents at Jackson Gardens, the Council on Aging, the Jackson Homestead Historic Neighborhood Association, the League of Women Voters, Livable Newton and other community groups and stakeholders.</p> | | | | | | |
| <p>The NHA also engaged with individuals in the community by embarking on an extensive effort to communicate one-on-one with neighbors and community members by visiting hundreds of homes in the surrounding neighborhood, sharing the plans of the project, building awareness, and soliciting comments and concerns. Through this process, over 180 neighbors and community members signed a statement of support of the project.</p> | | | | | | |

Many required attachments were submitted with the July & December 2017 proposals and have not changed. Some of these previous submissions are listed below, ~~others are listed on the following pages.~~ All are available from:

www.newtonma.gov/gov/planning/cpa/projects/housing_authority.asp#Jackson-Sr

| ATTACHMENTS | | |
|--|----------------------|---|
| Required | Check if included | Review full instructions thoroughly with staff prior to submission. |
| required | ✓ | A3. TIMELINE including financing, permitting, construction & occupancy –include major steps for tax credits and Comprehensive Permit. |
| B. SITE CONTROL & PROJECT FINANCES | | |
| required | ✓ | Developer commitment to pursue permanent affordability |
| | ✓ | Status of requested HUD approval for disposition of project site. |
| | ✓ | Non-Newton funding: sources, commitment letters or application/decision schedules |
| | none submitted | Rental subsidy, if any: sources, commitment letters or application/decision schedules |
| | ✓ | Project development pro forma |
| | ✓ | Project 10-year operating budget |
| C. DESIGN & CONSTRUCTION | | |
| required | previously submitted | Scope of construction work , supported by professional cost estimates |
| | | Materials & finishes; highlight “green” or sustainable features or proposed certification |
| | | Detailed site & floor plans, elevations for major new construction – See information submitted with December 2017 proposal ; no newer information is available. |
| | ✓ | Architectural access worksheet (see below) |
| D. RELOCATION, FAIR HOUSING & ACCESSIBILITY | | |
| required | previously submitted | Affirmative marketing & resident selection plan See information submitted with December 2017 proposal ; no newer information is available. |
| | ✓ | Fair housing: training completed, past complaints & their resolution |
| E. SITE REVIEW, ZONING & PERMITTING | | |
| required | previously submitted | Environmental mitigation plan See information submitted with July 2017 proposal ; no newer information is available. |
| | ✓ | Confirmation of review by Development Review Team (DRT) – |
| F. DEVELOPER CAPACITY & QUALIFICATIONS | | |
| Required | previously submitted | Most recent audited annual financial statement of parent company or organization See audited financials as of December 2015 , submitted with July 2017 proposal; as of June 2018, no newer audit is available. |
| nonprofits only | ✓ | Most recent annual organizational operating budget |
| optional | ✓ | G. LETTERS or PETITIONS of SUPPORT , if available |

NEWTON HOUSING AUTHORITY
82 Lincoln Street
Newton Highlands, Massachusetts 02461

#454-18
updated
24 July 2018

Telephone: (617) 552 - 5501
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Amy Zarechian
Executive Director

Jackson Road Senior Housing /
Haywood House
Funding and Development Timeline

| | |
|-------------------|--|
| February 2018 | File for Comprehensive Permit following receipt of Project Eligibility Letter |
| June 6, 2018 | Zoning Board of Appeals Public Hearing (Comprehensive Permit) |
| July 10, 2018 | Newton Community Preservation Committee funding vote |
| July 16, 2018 | Zoning Board of Appeals Public Hearing |
| Summer- Fall 2018 | Submit Application for FY21 Newton CDBG funds |
| | Newton City Council CPA funding consideration and appropriation vote |
| | Newton Planning & Development Board/Mayoral consideration and contingent Commitment of FY21 CDBG funds |
| Fall 2018 | Submit DHCD pre-application for LIHTC program |
| Early Spring 2019 | Submit DHCD One-Stop Application for LIHTC program |
| August 2019 | Receive state funding commitment |
| February 2020 | Initial closing |
| March 2020 | Construction start |
| November 2021 | Full occupancy |



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Newton Highlands, Massachusetts 02461**

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**Amy Zarechian
Executive Director**

B. Site Control and Project Finances

Developer Commitment to Pursue Permanent Affordability

The Newton Housing Authority commits to pursue permanent affordability for all of the units in the Haywood House development, at the income levels identified, for the life of the project. This is incorporated in the mission and central function of the NHA to provide affordable housing in the City of Newton and the NHA will take all possible steps to apply for and keep in place all public subsidies to maintain affordability of all its units.

Status of HUD approval

The Newton Housing Authority received approval of its Inventory Removal Application for disposition of the vacant land and the community building from the Housing and Urban Development Special Application Center on May 2, 2018.

Non-Newton Funding

A pre-application for Low Income Housing Tax Credits was submitted to DHCD in October of 2017. The NHA was not invited to submit a full proposal in the spring of 2018, based on the fact that disposition and zoning approvals were still pending. The NHA plans to submit another pre-application for funding to DHCD in the fall of 2018, with a full application expected in the spring of 2019. Commitment of state funding is expected in August of 2019.

Rec'd by Newton CPC
7 June 2018

Jackson Road/Haywood House Project Budgets

Minor
corrections
25 July 2018



- ♦ Budget summary
- ♦ Budget assumptions
- ♦ Financing assumptions
- ♦ Tax credit calculations
- ♦ Development cost projections
- ♦ Operating statement
- ♦ Operating pro forma (15-year)
- ♦ ~~Construction loan cashflow~~
- ♦ Developer fee

Proposal v.3 to Newton CPC,
submitted 7 June 2018

| HAYWOOD HOUSE-55 UNITS w On-Grade parking | | | | | | |
|--|--|------------------|--|---------------------|--------------------|-----------|
| Newton, Massachusetts | | | | | | |
| SUMMARY | | | | | | |
| April 20, 2018 | | | | | | |
| 55 One Bedroom Units | NET DEVELOPMENT FEE \$1,583,583 | | | | | |
| 32- tax credit, 23-99% | | | | | | |
| 22 New Parking Spaces | NET ACQUISITION PAYMENT \$1 | | | | | |
| 9% Tax Credits @ \$0.95 | | | | | | |
| Taxable Financing-5%; 40 yrs | | | | | | |
| UNITS | 0 BR | 1 BR | 2 BR | 3 BR | 4 BR | |
| 30% AMI PBV | 0 | 11 | 0 | 0 | 0 | 11 |
| 50% AMI PBV | 0 | 0 | 0 | 0 | 0 | 0 |
| 60% AMI | 0 | 21 | 0 | 0 | 0 | 21 |
| 99% AMI | 0 | 23 | 0 | 0 | 0 | 23 |
| Market | 0 | 0 | 0 | 0 | 0 | 0 |
| TOTAL | 0 | 55 | 0 | 0 | 0 | 55 |
| SOURCES | P/U | | USES | P/U | | |
| Cash | \$0 | \$0 | Acquisition | \$1 | \$0 | |
| Federal LIHTC | \$9,500,000 | \$172,727 | Construction | \$19,697,160 | \$358,130 | |
| State LIHTC | \$1,500,000 | \$27,273 | Soft Costs | \$3,699,135 | \$67,257 | |
| Federal HTC | \$0 | \$0 | Fees | \$2,710,121 | \$49,275 | |
| FCF | \$750,000 | \$13,636 | TOTAL | \$26,106,417 | \$474,662 | |
| State HOME | \$750,000 | \$13,636 | GAP | \$0 | | |
| City Inclusionary | \$625,000 | \$11,364 | Per Unit Residential Cost | \$474,662 | | |
| AHTF | \$1,000,000 | \$18,182 | Per Unit Resid. \$ w/o Comm Space | \$455,915 | | |
| CDBG | \$625,000 | \$11,364 | | | | |
| HSF | \$750,000 | \$13,636 | | | | |
| CPA | \$3,000,000 | \$54,545 | | | | |
| Deferred Developer Fee | \$656,417 | \$11,935 | 29.30% | | | |
| CBH | \$750,000 | \$13,636 | | | | |
| Permanent Loan | \$6,200,000 | \$112,727 | | | | |
| TOTAL | \$26,106,417 | \$474,662 | | | | |
| ANNUAL INCOME | P/U | | ANNUAL OPERATING BUDGET | P/U | | |
| Rental Income | \$948,936 | \$17,253 | Management Fee | \$44,949 | \$817 | |
| Other Income | \$91,934 | \$1,672 | Administration | \$79,790 | \$1,451 | |
| (Vacancy) | (\$42,014) | (\$764) | Maintenance | \$82,000 | \$1,491 | |
| Net Income | \$998,857 | \$18,161 | Utilities | \$97,500 | \$1,773 | |
| Operations | (\$581,489) | (\$10,573) | Services | \$120,000 | \$2,182 | |
| NOI | \$417,368 | \$7,589 | Taxes | \$82,500 | \$1,500 | |
| Debt Service | (\$358,754) | (\$6,523) | Insurance | \$30,000 | \$545 | |
| Net Cashflow | \$58,614 | \$1,066 | Replacement Res. | \$19,250 | \$350 | |
| Coverage ratio | 1.16 | | Other | \$25,500 | \$464 | |
| | | | TOTAL | \$581,489 | \$10,572.52 | |
| PF33 | | | | | | |

| | | | | | | | |
|---|------------------|---------------|------------|--|------------|-----------|--|
| | | | | | | | Proposal v.3 to Newton CPC, submitted 7 June 2018, minor corrections July 2018 |
| HAYWOOD HOUSE-55 UNITS w On-Grade parking | | | | | | | |
| ASSUMPTIONS | | | | | | | |
| April 20, 2018 | | | | | | | |
| UNIT RENTS | | | | | | | |
| | 0 BRS | 1 BR | 2 BRs | 3 BRs | 4 BRS | | |
| PBV FMR | \$0 | \$1,372 | \$0 | \$0 | \$0 | | |
| 50% AMI | \$0 | \$1,372 | \$0 | \$0 | \$0 | | |
| 60% AMI | \$0 | \$1,104 | \$0 | \$0 | \$0 | | |
| 99% AMI | \$0 | \$1,774 | \$0 | \$0 | \$0 | | |
| Market | \$0 | \$2,300 | \$0 | \$0 | \$0 | | |
| Utility Allowance | | | | | | | |
| Hot Water | \$0 | \$0 | \$0 | \$0 | \$0 | | |
| Appliances | \$0 | \$0 | \$0 | \$0 | \$0 | | |
| Other Electric/Gas | \$0 | \$0 | \$0 | \$0 | \$0 | | |
| Total | \$0 | \$0 | \$0 | \$0 | \$0 | | |
| # of Units | | | | | | | |
| 30% AMI PBV | 0 | 11 | 0 | 0 | 0 | | |
| 50% AMI PBV | 0 | 0 | 0 | 0 | 0 | | |
| 60% AMI | 0 | 21 | 0 | 0 | 0 | | |
| 99% AMI | 0 | 23 | 0 | 0 | 0 | | |
| Market | 0 | 0 | 0 | 0 | 0 | | |
| Total | 0 | 55 | 0 | 0 | 0 | 55 | |
| Size (NSF) | | 683 | | | 0 | | |
| Vacancy Rate | 5% | | | | | | |
| Per Cent Affordable | 58.2% | | | | | | |
| Commercial Rent | NA | Per SF | | | | | |
| Net Square Footage | | | | | | | |
| Residential | 37,565 | | | | | | |
| Common Area | 3,081 | | | | | | |
| Administrative and Operations | 2,137 | | | | | | |
| Commercial | 0 | | | | | | |
| Interior Parking | | | | | | | |
| Deck Parking | 0 | 0 | | | | | |
| Exterior Parking | 8,800 | 22 | | | | | |
| Other | 0 | | | | | | |
| Building Construction Cost Per Gross Square Foot | | | | | | | |
| | \$322 | | << | cost/sq ft and total gross sq ft corrected by CPC staff based on info. from Housing Authority, 21 June 2018 and 25 July 2018 | | | |
| Loss Factor | 36% | | | | | | |
| Gross S.F. | 58,285 | | << | | | | |
| Construction Period | 16 Months | | | | | | |
| Lease Up Period | 6 Months | | | | | | |
| FINANCING FEES | | | | | | | |
| Con. Orig. Fee | 2.30% | | | | | | |
| Perm. Orig. Fees | 0.00% | | | | | | |
| TAX RATES | | | | | | | |
| Income Tax Rate | 35% | | | | | | |
| Capital Gains Tax Rate | 25% | | | | | | |
| INFLATION FACTORS | | | | | | | |
| Revenue Inflation | 102% | | | | | | |
| Expense Inflation | 103% | | | | | | |
| Cap Rate | 7.00% | | | | | | |
| Vacancy Rate | 5% | | | | | | |
| Investors | | | | | | | |
| Ownership Percentage | 99% | | | | | | |

| | | | |
|--|-------------------|--|-------------|
| | | Proposal v.3 to Newton CPC, submitted 7 June 2018 | |
| <i>HAYWOOD HOUSE-55 UNITS w On-Grade parking</i> | | | |
| FINANCING ASSUMPTIONS | | | |
| April 20, 2018 | | | |
| PERMANENT LOAN | | | |
| | Annual Rate | 5.00% | |
| | Monthly Rate | 0.0042 | |
| | Amort. Period | 480 | Months |
| | Term | 40 | Years |
| | Cov. Ratio | 1.16 | |
| | Loan/Value | 23.75% | |
| | Loan Amount | \$6,200,000 | |
| | Debt Service | (\$29,896) | (\$358,754) |
| | Bond Issue Amount | \$0 | |
| CONSTRUCTION LOAN | | | |
| | Loan Amount | \$15,000,000 | |
| | Interest Rate | 0.0038 | Monthly |
| | Term | 22 | Months |
| PURCHASE MONEY NOTE | | | |
| | Loan Amount | \$0 | |
| | Interest Rate | | 0 |
| | Term | 0 | |
| | Amort Period | 0 | |
| | Debt Service | \$0 | \$0 |
| SOFT LOANS AND GRANTS | | | |
| | DHCD HOME | \$750,000 | |
| | LOCAL CDBG | \$625,000 | |
| | AHTF | \$1,000,000 | |
| | HSF | \$750,000 | |
| | CBH | \$750,000 | |
| | FCF | \$750,000 | |
| | City Inclusionary | \$625,000 | |
| OTHER | | | |
| | CPA | \$3,000,000 | |

| | | | |
|---|--|--------|--|
| | Proposal v.3 to Newton CPC, submitted 7 June 2018 | | |
| <u>HAYWOOD HOUSE-55 UNITS w On-Grade parking</u> | | | |
| <u>TAX CREDIT CALCULATIONS</u> | | | |
| <u>April 20, 2018</u> | | | |
| | | | |
| | | | |
| <u>FEDERAL LIHTC</u> | | | |
| Basis | \$24,079,211 | | |
| Basis Deductions | \$2,000,000 | | |
| % Affordable | 58% | | |
| Basis Boost | 100% | DDA | |
| Final Basis | \$12,846,087 | | |
| Applicable Rate | 9.00% | | |
| Annual Allocation | \$1,156,148 | | |
| Annual Limit | \$1,000,000 | | |
| Price | \$0.95 | | |
| Allowed Amount | \$9,500,000 | | |
| | | | |
| | | | |
| <u>STATE LIHTC</u> | | | |
| Basis | \$12,846,087 | | |
| Price | \$0.75 | | |
| Annual Limit (Total) | \$1,156,148 | | |
| Annual Limit (Units) | \$384,000 | | |
| Calculated Amount | \$4,335,554 | | |
| Units Amount | \$1,440,000 | | |
| Amount | \$1,500,000 | 400000 | |
| | | | |
| | | | |
| <u>FED HISTORIC</u> | | | |
| Basis | \$0 | | |
| Price | | | |
| Calculated Amount | \$0 | | |
| | | | |
| | | | |
| <u>STATE HISTORIC</u> | | | |
| Basis | \$0 | | |
| Price | | | |
| Calculated Amount | \$0 | | |

| Proposal v.3 to Newton CPC, submitted 7 June 2018 | | | | | | |
|--|---------------------|---------------------|--------------------|-----------------------|---------------------|-------------------|
| HAYWOOD HOUSE-55 UNITS w On-Grade parking | | | | | | |
| DEVELOPMENT COST PROJECTIONS | | | | | | |
| April 20, 2018 | | | | | | |
| PERMANENT SOURCES | | | | | | |
| Cash | \$0 | | | | | |
| Federal LIHTC | \$9,500,000 | \$0.95 | | | | |
| State LIHTC | \$1,500,000 | \$400,000 | | | | |
| Federal HTC | \$0 | | | | | |
| FCF | \$750,000 | | | | | |
| State HOME | \$750,000 | | | | | |
| City Inclusionary | \$625,000 | | | | | |
| AHTF | \$1,000,000 | | | | | |
| CDBG | \$625,000 | | | | | |
| HSF | \$750,000 | | | | | |
| CPA | \$3,000,000 | | | | | |
| Deferred Developer Fee | \$656,417 | 29.30% | | | | |
| CBH | \$750,000 | | | | | |
| Permanent Loan | \$6,200,000 | 5.00% | | | | |
| TOTAL SOURCES | \$26,106,417 | | | | | |
| GAP | \$0 | | | | | |
| Construction Loan | \$15,000,000 | | | | | |
| USES | | | | | | |
| Acquisition Cost | TOTAL | Residential | Commercial | IN LIHTC BASIS | IN HTC BASIS | 4 % Credit |
| Land | \$1 | \$1 | \$0 | \$0 | \$0 | |
| Parking | \$0 | \$0 | \$0 | \$0 | \$0 | |
| Building | \$0 | \$0 | \$0 | \$0 | \$0 | 0.41290323 |
| Subtotal Acquisition | \$1 | \$1 | \$0 | \$0 | \$0 | |
| Construction/Rehabilitation | | | | | | |
| Parking | | \$0 | \$0 | \$0 | \$0 | |
| Community Center (Shared Space) | | \$0 | \$0 | \$0 | \$0 | 2,232 3.98% |
| Second Elevator | \$440,938 | \$423,389 | \$0 | \$0 | \$0 | |
| Buildings | \$18,759,200 | \$18,012,578 | \$746,622 | \$16,751,698 | \$0 | |
| Bond | | \$0 | \$0 | \$0 | \$0 | |
| General Conditions | | \$0 | \$0 | \$0 | \$0 | |
| Overhead and Profit | | \$0 | \$0 | \$0 | \$0 | |
| Cost of Construction/Rehabilitation | \$18,759,200 | \$18,012,578 | \$746,622 | \$18,012,578 | \$0 | \$334.51 |
| Contingency | \$937,960 | \$900,629 | \$37,331 | \$900,629 | \$0 | 5% |
| Subtotal Construction | \$19,697,160 | \$18,913,207 | \$783,953 | \$18,913,207 | \$0 | 96% |
| | \$358,130 | | | | | |
| Soft Costs | | | | | | |
| Construction Interest | \$618,750 | \$594,124 | \$24,626 | \$556,875 | \$0 | 4.50% |
| Architect & Engineering | \$1,100,000 | \$1,056,220 | \$43,780 | \$1,056,220 | \$0 | 6% |
| Survey & Permit | \$25,000 | \$24,005 | \$995 | \$24,005 | \$0 | |
| Environmental/Geotech | \$75,000 | \$72,015 | \$2,985 | \$72,015 | \$0 | |
| Legal | \$300,000 | \$288,060 | \$11,940 | \$250,000 | \$0 | |
| Title & Recording | \$25,000 | \$24,005 | \$995 | \$50,000 | \$0 | |
| Accounting | \$70,000 | \$67,214 | \$2,786 | \$56,000 | \$0 | |
| Construction Insurance | \$187,592 | \$180,126 | \$7,466 | \$180,126 | \$0 | |
| Marketing and Rent Up | \$200,000 | \$200,000 | \$0 | \$0 | \$0 | |
| Real Estate Taxes | \$20,000 | \$19,204 | \$796 | \$20,000 | \$0 | |
| Inspection Fees | \$30,000 | \$28,806 | \$1,194 | \$28,806 | \$0 | |
| Bond Premium | \$0 | \$0 | \$0 | \$0 | \$0 | |
| Appraisal & Market Study | \$30,000 | \$28,806 | \$1,194 | \$28,806 | \$0 | |
| Consultants | \$250,000 | \$240,050 | \$9,950 | \$240,050 | \$0 | |
| Security | \$25,000 | \$24,005 | \$995 | \$24,005 | \$0 | |
| Permanent Financing Fee | \$62,000 | \$59,532 | \$2,468 | \$0 | \$0 | 1.0% |
| Construction Financing Fee | \$150,000 | \$144,030 | \$5,970 | \$144,030 | \$0 | 1% |
| Syndication | \$50,000 | \$48,010 | \$1,990 | \$0 | \$0 | |
| Relocation | \$0 | \$0 | \$0 | \$0 | \$0 | |
| Tax Credit Fee | \$109,793 | \$105,423 | \$4,370 | \$0 | \$0 | |
| MIP | \$31,000 | \$29,766 | \$1,234 | \$29,766 | \$0 | 0.25% |
| OPM | \$140,000 | \$134,428 | \$5,572 | \$134,428 | \$0 | |
| FFE | \$75,000 | \$72,015 | \$2,985 | \$0 | \$0 | |
| Contingency | \$125,000 | \$120,025 | \$4,975 | \$120,025 | \$0 | 3.38% |
| Subtotal Soft Costs | \$3,699,135 | \$3,559,868 | \$139,267 | \$3,015,156 | \$0 | |
| Reserves | \$470,121 | \$451,410 | \$18,711 | \$0 | \$0 | Six Months |
| Developer Overhead | \$1,120,000 | \$1,075,424 | \$44,576 | \$1,075,424 | \$0 | |
| Developer's Fee | \$1,120,000 | \$1,075,424 | \$44,576 | \$1,075,424 | \$0 | |
| Subtotal Fees,Reserves and Overhead | \$2,710,121 | \$2,602,258 | \$107,864 | \$2,150,847 | \$0 | |
| TOTAL USES | \$26,106,417 | \$25,075,334 | \$1,031,083 | \$24,079,211 | \$0 | |
| Per Unit | | \$474,662 | | | | |
| w/o Shared Community Space | | \$455,915 | | | | |

| | | | | | | | | |
|--|--------------------|--|-----------------|--|--|--|--|--|
| | | Proposal v.3 to Newton CPC, submitted 7 June 2018 | | | | | | |
| HAYWOOD HOUSE-55 UNITS w On-Grade parking | | | (2 pages) | | | | | |
| OPERATING STATEMENT | | | | | | | | |
| April 20, 2018 | | | | | | | | |
| | PER YEAR | PER UNIT | COMMENTS | | | | | |
| EXPENSES | | | | | | | | |
| | TOTAL | Per Unit | | | | | | |
| MANAGEMENT FEE | \$44,949 | \$817 | 4.5% | | | | | |
| ADMINISTRATION | | | | | | | | |
| Payroll and Taxes | \$40,000 | \$727 | | | | | | |
| Benefits | \$0 | \$0 | | | | | | |
| Legal | \$5,000 | \$91 | | | | | | |
| Audit | \$12,500 | \$227 | | | | | | |
| Marketing | \$2,500 | \$45 | | | | | | |
| Telephone | \$2,500 | \$45 | | | | | | |
| Office Expense | \$5,000 | \$91 | | | | | | |
| Accounting and Data processing | \$8,640 | \$157 | | | | | | |
| Investor Servicing Fee | \$2,000 | \$36 | | | | | | |
| OTHER: DHCD Fee | \$1,650 | \$30 | | | | | | |
| OTHER: Miscellaneous | \$0 | \$0 | | | | | | |
| ADMINISTRATIVE SUBTOTAL | \$79,790 | \$1,451 | | | | | | |
| OPERATIONS | | | | | | | | |
| Payroll and Taxes | \$20,000 | \$364 | | | | | | |
| Benefits | \$0 | \$0 | | | | | | |
| Supplies | \$3,000 | \$55 | | | | | | |
| Landscaping | \$1,000 | \$18 | | | | | | |
| Redecorating | \$9,000 | \$164 | | | | | | |
| Repair | \$5,000 | \$91 | | | | | | |
| Elevator Maintenance | \$12,000 | \$218 | | | | | | |
| Trash Removal | \$8,000 | \$145 | | | | | | |
| Snow Removal | \$6,000 | \$109 | | | | | | |
| Extermination | \$3,000 | \$55 | | | | | | |
| Recreation | \$5,000 | \$91 | | | | | | |
| Other Maintenance Contracts | \$10,000 | \$182 | | | | | | |
| OTHER: Parking | \$0 | \$0 | | | | | | |
| OPERATIONS SUBTOTAL | \$82,000 | \$1,491 | | | | | | |
| SECURITY | \$10,000 | \$182 | | | | | | |
| RESIDENT SERVICES | \$120,000 | \$2,182 | | | | | | |
| UTILITIES | | | | | | | | |
| Electricity | \$27,500 | \$500 | | | | | | |
| Heat and Hot Water | \$55,000 | \$1,000 | | | | | | |
| Water and Sewer | \$15,000 | \$273 | | | | | | |
| UTILITY SUBTOTAL | \$97,500 | \$1,773 | | | | | | |
| OTHER EXPENSES | | | | | | | | |
| Taxes | \$82,500 | \$1,500 | | | | | | |
| Insurance | \$30,000 | \$545 | | | | | | |
| MIP | \$15,500 | \$282 | | | | | | |
| Replacement Reserve | \$19,250 | \$350 | | | | | | |
| OPERATING EXPENSES | \$581,489 | \$10,573 | | | | | | |
| NET OPERATING INCOME | \$417,368 | \$7,589 | | | | | | |
| DEBT SERVICE | (\$358,754) | (\$6,523) | | | | | | |
| CASHFLOW | \$58,614 | \$1,066 | | | | | | |
| COVERAGE RATIO | 1.16 | | | | | | | |

| | | | | | | | | | | |
|--|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|
| Proposal v.3 to Newton CPC, submitted 7 June 2018 | | | | | | | | | | |
| HAYWOOD HOUSE-55 UNITS w On-Grade parking | | | | | | | | | | |
| CASHFLOW PROJECTIONS | | | | | | | | | | |
| April 20, 2018 | | | | | | | | | | |
| (2 pages) | | | | | | | | | | |
| | <u>2018</u> | <u>2019</u> | <u>2020</u> | <u>2021</u> | <u>2022</u> | <u>2023</u> | <u>2024</u> | <u>2025</u> | <u>2026</u> | <u>2026</u> |
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| Revenue | | | | | | | | | | |
| Rental Assisted | \$181,104 | \$184,726 | \$188,421 | \$192,189 | \$196,033 | \$199,953 | \$203,953 | \$208,032 | \$212,192 | \$216,436 |
| 50% AMI | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 60% AMI | \$278,208 | \$283,772 | \$289,448 | \$295,237 | \$301,141 | \$307,164 | \$313,307 | \$319,574 | \$325,965 | \$332,484 |
| 99% AMI | \$489,624 | \$499,416 | \$509,405 | \$519,593 | \$529,985 | \$540,584 | \$551,396 | \$562,424 | \$573,673 | \$585,146 |
| Market | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| Commercial | \$86,434 | \$88,163 | \$89,926 | \$91,725 | \$93,559 | \$95,430 | \$97,339 | \$99,286 | \$101,272 | \$103,297 |
| Other | \$5,500 | \$5,500 | \$5,500 | \$5,500 | \$5,500 | \$5,500 | \$5,500 | \$5,500 | \$5,500 | \$5,500 |
| Gross Revenue | \$1,040,870 | \$1,061,578 | \$1,082,699 | \$1,104,243 | \$1,126,218 | \$1,148,632 | \$1,171,495 | \$1,194,815 | \$1,218,601 | \$1,242,863 |
| Vacancy | (\$42,014) | (\$42,854) | (\$43,711) | (\$44,585) | (\$45,477) | (\$46,386) | (\$47,314) | (\$48,261) | (\$49,226) | (\$50,210) |
| Total Revenue | \$998,857 | \$1,018,724 | \$1,038,988 | \$1,059,658 | \$1,080,741 | \$1,102,246 | \$1,124,181 | \$1,146,554 | \$1,169,376 | \$1,192,653 |
| Expenses | | | | | | | | | | |
| Management Fee | \$44,949 | \$45,843 | \$46,754 | \$47,685 | \$48,633 | \$49,601 | \$50,588 | \$51,595 | \$52,622 | \$53,669 |
| Administration | \$79,790 | \$82,184 | \$84,649 | \$87,189 | \$89,804 | \$92,498 | \$95,273 | \$98,132 | \$101,076 | \$104,108 |
| Operations | \$82,000 | \$84,460 | \$86,994 | \$89,604 | \$92,292 | \$95,060 | \$97,912 | \$100,850 | \$103,875 | \$106,991 |
| Security | \$10,000 | \$10,300 | \$10,609 | \$10,927 | \$11,255 | \$11,593 | \$11,941 | \$12,299 | \$12,668 | \$13,048 |
| Resident Services | \$120,000 | \$123,600 | \$127,308 | \$131,127 | \$135,061 | \$139,113 | \$143,286 | \$147,585 | \$152,012 | \$156,573 |
| Utilities | \$97,500 | \$100,425 | \$103,438 | \$106,541 | \$109,737 | \$113,029 | \$116,420 | \$119,913 | \$123,510 | \$127,215 |
| MIP | \$15,500 | \$15,500 | \$15,500 | \$15,500 | \$15,500 | \$15,500 | \$15,500 | \$15,500 | \$15,500 | \$15,500 |
| Other Expenses | \$131,750 | \$135,703 | \$139,774 | \$143,967 | \$148,286 | \$152,734 | \$157,316 | \$162,036 | \$166,897 | \$171,904 |
| Total Expenses | \$581,489 | \$598,014 | \$615,026 | \$632,539 | \$650,568 | \$669,129 | \$688,237 | \$707,908 | \$728,160 | \$749,008 |
| Net Operating Income | \$417,368 | \$420,710 | \$423,962 | \$427,119 | \$430,173 | \$433,117 | \$435,944 | \$438,646 | \$441,216 | \$443,645 |
| Debt Service | (\$358,754) | (\$358,754) | (\$358,754) | (\$358,754) | (\$358,754) | (\$358,754) | (\$358,754) | (\$358,754) | (\$358,754) | (\$358,754) |
| | 1.16 | 1.17 | 1.18 | 1.19 | 1.20 | 1.21 | 1.22 | 1.22 | 1.23 | 1.24 |
| Pre-Tax Cashflow | \$58,614 | \$61,956 | \$65,208 | \$68,365 | \$71,418 | \$74,362 | \$77,189 | \$79,892 | \$82,461 | \$84,890 |

| | | | | | | | | | | | | |
|--|---|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|--------------------|
| Proposal v.3 to Newton CPC, submitted 7 June 2018 | | | | | | | | | | | | |
| HAYWOOD HOUSE-55 UNI CASHFLOW PROJECTION | | | | | | | | | | | | |
| April 20, 2018 | | | | | | | | | | | | |
| (2 pages) | | | | | | | | | | | | |
| | | <u>2028</u> | <u>2029</u> | <u>2030</u> | <u>2031</u> | <u>2032</u> | <u>2033</u> | <u>2034</u> | <u>2035</u> | <u>2036</u> | <u>2037</u> | <u>2038</u> |
| | 0 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| Revenue | | | | | | | | | | | | |
| Rental Assisted | | \$220,765 | \$225,180 | \$229,684 | \$234,277 | \$238,963 | \$243,742 | \$248,617 | \$253,589 | \$258,661 | \$263,834 | \$269,111 |
| 50% AMI | | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| 60% AMI | | \$339,134 | \$345,917 | \$352,835 | \$359,892 | \$367,090 | \$374,431 | \$381,920 | \$389,558 | \$397,350 | \$405,297 | \$413,402 |
| 99% AMI | | \$596,849 | \$608,786 | \$620,962 | \$633,381 | \$646,048 | \$658,969 | \$672,149 | \$685,592 | \$699,304 | \$713,290 | \$727,556 |
| Market | | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 |
| Commercial | | \$105,363 | \$107,470 | \$109,620 | \$111,812 | \$114,048 | \$116,329 | \$118,656 | \$121,029 | \$123,449 | \$125,918 | \$128,437 |
| Other | | \$5,500 | \$5,500 | \$5,500 | \$5,500 | \$5,500 | \$5,500 | \$5,500 | \$5,500 | \$5,500 | \$5,500 | \$5,500 |
| Gross Revenue | | \$1,267,611 | \$1,292,853 | \$1,318,600 | \$1,344,862 | \$1,371,649 | \$1,398,972 | \$1,426,841 | \$1,455,268 | \$1,484,264 | \$1,513,839 | \$1,544,006 |
| Vacancy | | (\$51,214) | (\$52,239) | (\$53,284) | (\$54,349) | (\$55,436) | (\$56,545) | (\$57,676) | (\$58,829) | (\$60,006) | (\$61,206) | (\$62,430) |
| Total Revenue | | \$1,216,396 | \$1,240,614 | \$1,265,316 | \$1,290,513 | \$1,316,213 | \$1,342,427 | \$1,369,166 | \$1,396,439 | \$1,424,258 | \$1,452,633 | \$1,481,576 |
| Expenses | | | | | | | | | | | | |
| Management Fee | | \$54,738 | \$55,828 | \$56,939 | \$58,073 | \$59,230 | \$60,409 | \$61,612 | \$62,840 | \$64,092 | \$65,368 | \$66,671 |
| Administration | | \$107,231 | \$110,448 | \$113,761 | \$117,174 | \$120,690 | \$124,310 | \$128,040 | \$131,881 | \$135,837 | \$139,912 | \$144,110 |
| Operations | | \$110,201 | \$113,507 | \$116,912 | \$120,420 | \$124,032 | \$127,753 | \$131,586 | \$135,534 | \$139,600 | \$143,787 | \$148,101 |
| Security | | \$13,439 | \$13,842 | \$14,258 | \$14,685 | \$15,126 | \$15,580 | \$16,047 | \$16,528 | \$17,024 | \$17,535 | \$18,061 |
| Resident Services | | \$161,270 | \$166,108 | \$171,091 | \$176,224 | \$181,511 | \$186,956 | \$192,565 | \$198,342 | \$204,292 | \$210,421 | \$216,733 |
| Utilities | | \$131,032 | \$134,963 | \$139,012 | \$143,182 | \$147,477 | \$151,902 | \$156,459 | \$161,153 | \$165,987 | \$170,967 | \$176,096 |
| MIP | | \$15,500 | \$15,500 | \$15,500 | \$15,500 | \$15,500 | \$15,500 | \$15,500 | \$15,500 | \$15,500 | \$15,500 | \$15,500 |
| Other Expenses | | \$177,061 | \$182,373 | \$187,844 | \$193,479 | \$199,284 | \$205,262 | \$211,420 | \$217,763 | \$224,296 | \$231,024 | \$237,955 |
| Total Expenses | | \$770,472 | \$792,569 | \$815,318 | \$838,738 | \$862,849 | \$887,673 | \$913,229 | \$939,539 | \$966,627 | \$994,515 | \$1,023,227 |
| Net Operating Income | | \$445,924 | \$448,045 | \$449,999 | \$451,775 | \$453,364 | \$454,755 | \$455,937 | \$456,900 | \$457,630 | \$458,118 | \$458,349 |
| Debt Service | | (\$358,754) | (\$358,754) | (\$358,754) | (\$358,754) | (\$358,754) | (\$358,754) | (\$358,754) | (\$358,754) | (\$358,754) | (\$358,754) | (\$358,754) |
| | | 1.24 | 1.25 | 1.25 | 1.26 | 1.26 | 1.27 | 1.27 | 1.27 | 1.28 | 1.28 | 1.28 |
| Pre-Tax Cashflow | | \$87,170 | \$89,291 | \$91,244 | \$93,021 | \$94,609 | \$96,000 | \$97,183 | \$98,145 | \$98,876 | \$99,363 | \$99,594 |

| | | | |
|--|--|---------------------|--------------|
| | Proposal v.3 to Newton CPC, submitted 7 June 2018 | | |
| HAYWOOD HOUSE-55 UNITS w On-Grade parking | | | |
| April 20, 2018 | | | |
| | | | |
| Maximum Allowable Developer Fee | | 720000 | |
| TDC | | 26,000,000 | |
| - Developer Overhead | | 1,120,000 | |
| - Developer Fee | | 1,120,000 | |
| - Consultant Fees | | 250,000 | |
| - Syndication Costs | | 50,000 | |
| - Acquisition | | 1 | |
| - Reserves | | 470,121 | |
| | Repl. Cost | \$22,989,878 | |
| \$1-3 mil @ 15% | | 450,000 | \$3,000,000 |
| \$3-5 mil @ 12.50% | | 250,000 | \$2,000,000 |
| \$5 mil + up @ 10% | | 1,798,988 | \$17,989,878 |
| | Max. Allowable Fee-Rehab. | 2,498,988 | |
| Acquisition Costs | | 1 | |
| Acquisition Costs @ 2.5% | | 0 | |
| | Max. Allowable Fee-Acq. | 0 | |
| TOTAL MAXIMUM ALLOWABLE FEE | | 2,498,988 | |
| Requested Fee Per One-Stop | | 2,490,000 | |
| | | \$ (8,988) | |



**82 Lincoln Street
Newton Highlands, Massachusetts 02461**

**Telephone: (617) 552-5501
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TD: (617) 332-3802**

**Amy Zarechian
Executive Director**

D. Relocation, Fair Housing & Accessibility

Fair Housing Trainings and Complaints

All staff of the Newton Housing Authority receive frequent fair housing and reasonable accommodation training through programs offered by the Metropolitan Boston Housing Partnership, MassHousing, and other housing industry training groups. The NHA has established Reasonable Accommodation and Reasonable Modification policies, as well as a Tenant Harassment Policy, all of which govern its response to fair housing and reasonable accommodation requests.

As a public entity administering public housing programs, the NHA is subject to various legal claims, including fair housing complaints. The NHA has successfully navigated fair housing complaints in the past, most often through findings of no probable cause and occasionally through settlement as recommended by the Housing Authority Risk Retention Group Insurance when there is a finding of probable cause. In the past five years, there have been three findings of probable cause in cases brought to the Massachusetts Commission Against Discrimination, which represents .2% of NHA residents. There are no current or pending fair housing complaints against the NHA.

| Newton Housing Authority | | | | | | | | | | | | | | | | |
|-----------------------------------|--|----------------|---------------|----------------|--------------------|----------------------------|---|---------------------|----------------|--|-------------------------------------|----------------|--------|-------------------|-------------------|----------------|
| Consolidated Operating Budget | | | | | | | | | | | | | | | | |
| Budget Revision Fiscal Year 2018 | | | | | | | | | | | | | | | | |
| | 101 units | 42 units | 10 units | 7 units | 24 units | 32 units | 226 units | 36 units | 36 units | 441 units | 25 units | 55 units | 1035 | Total Budget | Prior | Change |
| | Echo Ridge, Hampton Place, Century Village, Scattered Sites | Hamilton Grove | Walnut Street | Central Street | New Hyde School | State Leased Housing | ParkerHouse, Jackson Garden,Horace Mann, | Nonantum Village | Echo Ridge | Housing Choice Vouchers Section 8 | Newton Corner Place Section 8 | MGMT | | FYE 2018 | Budget 2017 | |
| REVENUES | 400-1 | 667-2 (A) | 689-1,2 | 689-C (689-4) | 400-9 (689-3) | MRVP | MA036-1 | MA036-2 | MA036-3 | HCV | SRO | | | | | |
| Rental Income | 522,000 | 121,488 | 27,684 | 24,912 | 77,100 | | 809,280 | 127,740 | 173,520 | | | 270,611 | | 2,154,335 | 2,138,808 | 15,527 |
| Rental Income - Federal Section 8 | | 363,420 | | | | | | | | | | | | 363,420 | 363,420 | - |
| Section 8 Rent Subsidy | | | | | | | | | | | | | | 513,643 | 469,100 | 44,543 |
| Interest Income | 1,500 | 15,000 | 25 | 300 | 320 | 100 | 21,000 | 188 | 688 | 1,300 | 100 | 17,000 | | 57,520 | 47,065 | 10,455 |
| Misc. Income | 3,000 | 2,000 | | | 1,080 | | 29,464 | 4,736 | 5,359 | 4,180 | | 24,125 | | 73,944 | 85,519 | (11,575) |
| MRVP Admin Fee | | | | | | 12,480 | | | | | | | | 12,480 | 12,480 | - |
| Operating Subsidy-DHCD | 341,087 | | | | 141,814 | | | | | | | | | 482,900 | 389,649 | 93,251 |
| HAP Subsidy HUD/DHCD | | | | | | 173,088 | | | | 6,245,465 | 111,000 | | | 6,529,553 | 6,529,553 | - |
| HUD Operating Subsidy | | | | | | | 942,151 | 127,190 | 121,763 | | | | | 1,191,105 | 1,192,303 | (1,198) |
| HUD Section 8 Subsidy-Admin Fee | | | | | | | | | | 505,237 | 28,903 | | | 534,140 | 518,584 | 15,556 |
| Capital Fund Administrative fee | | | | | | | 40,000 | | | | | | | 40,000 | 40,000 | - |
| | | | | | | | | | | | | | | 0 | - | - |
| TOTAL REVENUES | 867,587 | 501,908 | 27,709 | 25,212 | 220,314 | 185,668 | 1,841,895 | 259,854 | 301,330 | 6,756,182 | 140,003 | 825,378 | | 11,953,040 | 11,786,481 | 166,559 |
| EXPENDITURES | | | | | | | | | | | | | | | | |
| Administration: | | | | | | | | | | | | | | | | |
| Salaries | 81,078 | 54,261 | 7,641 | 5,664 | 20,764 | 8,363 | 339,997 | 38,171 | 37,276 | 266,446 | 13,349 | 112,239 | | 985,250 | 860,057 | 125,193 |
| Legal | 17,750 | 2,500 | 250 | 250 | 2,500 | 0 | 6,500 | 3,000 | 500 | 3,000 | 750 | 3,000 | | 40,000 | 51,100 | (11,100) |
| Travel | 1,359 | 565 | 135 | 94 | 323 | 0 | 3,042 | 485 | 485 | 5,936 | 336 | 2,740 | | 15,500 | 14,000 | 1,500 |
| Accounting | 3,250 | 1,351 | 322 | 225 | 772 | 0 | 7,272 | 1,158 | 1,158 | 14,189 | 804 | 1,770 | | 32,272 | 31,340 | 932 |
| Audit Services | 4,850 | 0 | 0 | 0 | 0 | 0 | 2,500 | 600 | 600 | 2,550 | 750 | 1,250 | | 13,100 | 13,100 | - |
| Sundry Office | 22,391 | 5,153 | 1,227 | 859 | 2,944 | 0 | 27,726 | 4,417 | 4,417 | 89,103 | 3,067 | 6,748 | | 168,050 | 161,050 | 7,000 |
| | | | | | | | | | | | | | | 0 | - | - |
| Total Administration | 130,678 | 63,831 | 9,574 | 7,092 | 27,304 | 8,363 | 387,037 | 47,831 | 44,435 | 381,224 | 19,057 | 127,746 | | 1,254,172 | 1,130,647 | 123,525 |
| Tenant Services: | | | | | | | | | | | | | | | | |
| Salaries | | | | | | | 74,641 | 7,029 | 8,786 | | | | | 90,456 | 59,371 | 31,085 |
| Other | 606 | 250 | | | | | 1,000 | 500 | 500 | | | | | 2,856 | 2,750 | 106 |
| Total Tenant Services | 606 | 250 | 0 | 0 | 0 | 0 | 75,641 | 7,529 | 9,286 | 0 | 0 | 0 | | 93,312 | 62,121 | 31,191 |
| Utilities | | | | | | | | | | | | | | | | |
| Water and Sewer | 99,000 | 33,250 | 3,500 | 3,500 | 14,630 | | 206,300 | 59,910 | 28,130 | | | | 53,475 | 501,695 | 435,668 | 66,027 |
| Electric | 20,160 | 32,970 | 0 | 0 | 28,275 | | 171,290 | 29,050 | 73,086 | | | | 25,800 | 380,630 | 378,058 | 2,572 |
| Gas | 11,700 | 26,250 | 0 | 0 | 7,650 | | 259,930 | 22,180 | 0 | | | | 11,150 | 338,860 | 313,323 | 25,537 |
| | | | | | | | | | | | | | | | | |
| Total Utilities | 130,860 | 92,470 | 3,500 | 3,500 | 50,555 | 0 | 637,520 | 111,140 | 101,216 | 0 | 0 | 90,425 | | 1,221,185 | 1,127,049 | 94,136 |
| Maintenance | | | | | | | | | | | | | | | | |
| Labor | 76,720 | 133,737 | 6,691 | 5,900 | 45,911 | | 302,875 | 48,151 | 48,151 | | | 50,358 | | 718,493 | 656,642 | 61,852 |
| Materials & Supplies | 18,595 | 7,940 | 1,730 | 1,196 | 4,856 | | 28,646 | 4,442 | 4,484 | | | 3,350 | | 75,239 | 72,610 | 2,629 |
| Contract Costs | 81,750 | 32,900 | 900 | 1,000 | 21,800 | | 82,550 | 24,450 | 20,950 | | | 45,290 | | 311,590 | 292,479 | 19,111 |
| Condominium fees | 257,261 | | | | | | | | | | | 38,111 | | 295,372 | 294,719 | 653 |
| Total Maintenance | 434,326 | 174,576 | 9,321 | 8,096 | 72,567 | 0 | 414,071 | 77,043 | 73,585 | 0 | 0 | 137,109 | | 1,400,695 | 1,316,450 | 84,245 |

| Newton Housing Authority Consolidated Operating Budget Budget Revision Fiscal Year 2018 | | | | | | | | | | | | | | | | |
|---|--|----------------|---------------|----------------|--------------------|----------------------------|--|---------------------|------------|-------------------------------|------------------------|-----------|------------|--------------------------|-------------------------|--------|
| Page 2 of 2 | | | | | | | | | | | | | | | | |
| | Echo Ridge, Hampton Place, Century Village, Scattered Sites | Hamilton Grove | Walnut Street | Central Street | New Hyde School | State Leased Housing | ParkerHouse , Jackson Garden,Horace Mann, | Nonantum Village | Echo Ridge | Housing Choice Vouchers | Newton Corner Place | | | Total Budget FYE 2018 | Prior Budget 2017 | Change |
| | 400-1 | 667-2 (A) | 689-1,2 | 689-C (689-4) | 400-9 (689-3) | MRVP | MA036-1 | MA036-2 | MA036-3 | HCV | SRO | MGMT | | | | |
| | | | | | | | | | | | Section 8 | | | | | |
| General Expense | | | | | | | | | | | | | | | | |
| Insurance | 16,685 | 14,119 | 1,610 | 1,176 | 4,819 | 272 | 79,624 | 11,577 | 11,621 | 24,431 | 647 | 43,778 | 210,360 | 182,684 | 27,676 | |
| Payment in Lieu of Taxes | | | | | | | 0 | | 0 | | | | 0 | - | - | |
| Employee Benefits | 52,386 | 62,146 | 4,761 | 3,832 | 21,962 | 2,790 | 229,074 | 30,861 | 31,141 | 87,164 | 4,402 | 54,137 | 584,655 | 604,536 | (19,881) | |
| Housing Assistance Payments | | | | | | | | | | 6,245,465 | 111,000 | | 6,529,553 | 6,529,553 | - | |
| Interest expense | | 23,550 | | | | | | | | | | 86,026 | 109,576 | 112,435 | (2,859) | |
| Other General Expense | | | | | | | | | | 5,880 | | | 5,880 | 5,880 | - | |
| Total General Expense | 69,071 | 99,815 | 6,371 | 5,008 | 26,781 | 176,149 | 308,699 | 42,438 | 42,762 | 6,362,940 | 116,049 | 183,940 | 7,440,024 | 7,435,088 | 4,936 | |
| Total Routine Expenses | 765,541 | 430,943 | 28,766 | 23,697 | 177,207 | 184,512 | 1,822,968 | 285,980 | 271,284 | 6,744,164 | 135,106 | 539,221 | 11,409,387 | 11,071,355 | 338,032 | |
| Net Income (Loss) before Non-Routine Expenses | 102,046 | 70,965 | (1,057) | 1,515 | 43,107 | 1,156 | 18,927 | (26,126) | 30,047 | 12,019 | 4,897 | 286,157 | 543,653 | 715,126 | (171,473) | |
| Nonroutine Expenditures | | | | | | | | | | | | | | | | |
| Extraordinary Maintenance | 64,500 | 43,000 | | 1,000 | 8,000 | | 31,000 | 26,500 | 7,500 | | | 62,000 | 243,500 | 159,750 | 83,750 | |
| Equipment Replacements | 10,000 | 5,200 | | | 2,650 | | 7,220 | 3,110 | 3,110 | | | 6,500 | 37,790 | 39,185 | (1,395) | |
| Equipment Additions | 0 | 40,000 | | | | | 18,640 | 4,180 | 4,180 | | | 159,000 | 226,000 | 144,000 | 82,000 | |
| Collection Losses | 5,000 | 1,000 | | | | | 4,046 | 639 | 868 | | | | 11,553 | 11,512 | 41 | |
| Total Nonroutine Expenditures | 79,500 | 89,200 | 0 | 1,000 | 10,650 | 0 | 60,906 | 34,429 | 15,658 | 0 | 0 | 227,500 | 518,843 | 354,447 | 164,396 | |
| NET INCOME | 22,546 | (18,235) | (1,057) | 515 | 32,457 | 1,156 | (41,980) | (60,555) | 14,389 | 12,019 | 4,897 | 58,657 | 24,810 | 360,679 | (335,869) | |
| Payment Towards Mortgage Principle | 0 | 64,150 | | | | | | | | | | 66,348 | 130,498 | 130,498 | - | |
| Surplus (Deficit) | 22,546 | (82,385) | (1,057) | 515 | 32,457 | 1,156 | (41,980) | (60,555) | 14,389 | 12,019 | 4,897 | (7,690) | (105,687) | 230,182 | | |
| UNRESTRICTED NET ASSETS ANALYSIS | | | | | | | | | | | | | | | | |
| Unrestricted Operating Reserve 12/31/2016 | 364,275 | 1,191,005 | 20,601 | 88,381 | 81,348 | 47,550 | 2,261,785 | 164,823 | 268,487 | 374,062 | 212,163 | 827,889 | 5,902,369 | | | |
| FY 2017 Actual increase (decrease) | 16,871 | 11,840 | (1,344) | 3,240 | (455) | 2,175 | (66,114) | 5,495 | (13,951) | 31,720 | 16,960 | 57,385 | 63,822 | | | |
| Projected Balance 12/31/2017 | 381,146 | 1,202,845 | 19,257 | 91,621 | 80,893 | 49,725 | 2,195,671 | 170,318 | 254,536 | 405,782 | 229,123 | 885,274 | 5,966,191 | | | |
| Estimated transfer to Capital Reserves | | | | | | | | | | | | (120,000) | (120,000) | | | |
| Projected Balance 12/31/2017 | 381,146 | 1,202,845 | 19,257 | 91,621 | 80,893 | 49,725 | 2,195,671 | 170,318 | 254,536 | 405,782 | 229,123 | 885,274 | 5,966,191 | | | |
| Projected increase (decrease) FY 2018 | 22,546 | (82,385) | (1,057) | 515 | 32,457 | 1,156 | (41,980) | (60,555) | 14,389 | 12,019 | 4,897 | (7,690) | (105,687) | | | |
| Estimated transfer to Capital Reserves | | | | | | | | | | | | (120,000) | (120,000) | | | |
| Projected Balance 12/31/2018 | 403,692 | 1,120,460 | 18,200 | 92,136 | 113,350 | 50,881 | 2,153,691 | 109,763 | 268,925 | 417,801 | 234,020 | 757,584 | 5,740,504 | | | |
| Maximum Reserve | 422,520 | 260,071 | 14,383 | 12,348 | 93,928 | N/A | 627,958 | 106,803 | 95,647 | N/A | N/A | N/A | | | | |
| Percent of Maximum | 95.54% | 430.83% | 133.89% | 741.97% | 86.12% | | 342.97% | 102.77% | 281.16% | | | | | | | |

Livable Newton

Coalition for inclusive, sustainable development

BY ELECTRONIC MAIL

February 25, 2018

To: Councilor Greg Schwartz, Land Use Committee Chair
Members of the Land Use Committee

RE: In support of Haywood House at Jackson Gardens

We believe the proposal to create 55 new mixed income residential units for seniors at Jackson Gardens will be a positive addition to Newton's housing stock. As indicated in many recent studies and the City's 2016 Housing Strategy, the City needs more housing for low- and moderate-income households, including for seniors. This project will provide a quality living environment for its residents and offer benefits to the community at large including:

- Optimal use of existing land for affordable housing;
- Ample accommodations for the disabled;
- A new community center for use by residents and community at large;
- A gym and exercise programs for residents of the facility and community;
- Improved site lighting;
- Use of existing infrastructure and improved drainage; and
- Landscaping with native trees and shrubs.

In the spirit of informing future review of this "friendly 40B" we recommend some refinements we believe will further integrate the structure into the fabric of the neighborhood:

- Utilize architectural articulation, detailing, colors and materials of the building creatively to minimize its apparent height and interface it with existing topography while maintaining the proposed number of new units;
- Further develop usable outdoor space to create enjoyable connections with the outdoors that also complement the site design and building;
- Create a pedestrian-friendly streetscape with mature vegetation;
- Affirm how parking meets the needs of the facility, such as convenient parking for caregivers, family members and other visitors.

We are pleased to support housing that will make a positive difference in the lives of many who live in our community now and in the future. Securing these features through a "friendly 40B" will enable development that is appropriate in this location that would not otherwise be possible within the existing special permit, yet will leave provisions of the original special permit intact. We ask that the Council support creation of a separate parcel for this purpose and will also forward our recommendations to the ZBA for consideration. Thank you for the opportunity to comment on this important project.

Sincerely,

**Engine 6
Progressive Newton
U-CHAN
Bike Newton**

Katherine Ballou
Bryan Barash
Bill Baum
Liz Baum
Claudette Belt-Aharon
Kol Chu Birke
Tom Bledsoe
John S. Bliss
Tamara J. Bliss
Kelley Brown
Adam Chaikof
Melissa Birke Chu
Abby Cohen
Isabel Cohen
Nadine Cohen
Ed Dailey
Bill Dain
Ruth Dain
Susan Davidoff
Patrick Dober, *Executive
Director, Brookline
Housing Authority*
Beverly Droz
Sarah Ecker
Mary-Ellen Efferen
Bob Engler
Louise Freedman

Gretchen Friend
Rob Gifford
Nanci Ginty Butler
Fran Godine
Daphne Collins
Hattie Gawande
Neysha Gonzalez
Laurie Hackett
Mary Ann Hill
Kathleen Hobson
Ann Hochberg
Judy Jacobson
Marcia Johnson
Rihanna Kidwell
Marian Knapp
Jason Korb
David Koven
David Knuttunen
Kathy Laufer
Lois A. Levin
Marion Lipson
Patricia Loewy
Arlene Lowney
Sarah Luria
Kevin McCormick
Tatjana Meschede
Susan Mirsky

Nahma Nadich
Kyra Zola Norsigian
Judy Norsigian
James O'Connell
Vince O'Donnell
Ellen Parker
Steve Parker
Susan Paley
Sue Parsons
John Pelletier
James Reichenbach
Kathy Rosen
James Rutenbeck
Susan Sered
Dorothea Sherwood
Geoffrey Sherwood
John Sisson
Celia Snyder
Stuart Snyder
Norma Swenson
Lexi Turner
Judy Weber
Lynne Weissberg
Marianne Ulcickas Yood
Steven Yood
Nancy Zollers

cc: Mayor Ruthanne Fuller, rfuller@newtonma.gov
Barney Heath, Planning Director, bheath@newtonma.gov



Ruthanne Fuller
Mayor

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

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Barney S. Heath
Director

Community Preservation Committee Funding Recommendation for 300 Hammond Pond Parkway - Professional Services

date: 24 September 2018
from: Community Preservation Committee
to: The Honorable City Council

PROJECT GOALS & ELIGIBILITY

This proposal requests \$100,000 in CPA funding for professional services from a team of consultants, to be assembled by contracted counsel, to recommend a strategy and estimate associated costs for protecting the open space character of the rear, wooded portion of the land at 300 Hammond Pond Parkway sold to Boston College in 2015 by Congregation Mishkan Tefila.

Protection of this woodland is identified as a priority in "Action Plan" of the City of Newton's *2014-2020 Open Space and Recreation Plan* and is eligible for CPA funding as the preservation of open space.

RECOMMENDED FUNDING

On 13 September 2018 the Community Preservation Committee voted unanimously 9-0 to recommend appropriating the requested \$100,000 for the purposes stated above, to the control of the Law Department and from the Community Preservation Fund's Fy19 budget reserve for open space.

SPECIAL ISSUES CONSIDERED BY THE CPC

Open space and recreation values: This wooded area, known informally as "Webster Woods," contains a mature forest canopy, healthy understory, significant rock outcroppings, multiple well-established trails and a pristine vernal pool known as "Bare Pond." It has a minimal presence of invasive species and is home to many native species of plants, fungi and insects that are rare in Newton. Its protection is critical for preserving the ecological integrity of the surrounding parcels that are already protected through public ownership.

Required permanent restriction: The Community Preservation Act (MGL Ch 44B) requires that any real property acquired with CPA funds be subject to a permanent restriction "limiting the use of the interest to the purpose for which it was acquired." The Newton Conservators hold such restrictions on other parcels of open space or parkland acquired by the City of Newton with CPA funds. The CPC expects that the City will grant a restriction meeting the statute's full requirements on any land it acquires at 300 Hammond Pond Parkway.

Other issues considered: The professional work for which these CPA funds are requested is critical for answering most of the CPC's additional questions, which focused on: the boundaries of the land to be protected, possible methods of protection, the potential use of matching non-CPA private or public funds, and the project schedule. Chief Environmental Planner Jennifer Steel explained that no City representative had

website www.newtonma.gov/cpa

contact Alice E. Ingerson, Community Preservation Program Manager

email aingerson@newtonma.gov phone 617.796.1144

expressed an interest in City acquisition of rights to the land containing the former buildings and main parking lot for Temple Mishkan Tefila, fronting directly on Hammond Pond Parkway. The proposal as submitted restates the Mayor's goal of ensuring protection of this parcel by the end of calendar 2019.

ADDITIONAL RECOMMENDATIONS *(funding conditions)*

1. The CPC assumes all recommended funds will be appropriated within 3 months, and the professional consultant team will complete its work within 12 months, after the date of this recommendation. If either of these deadlines cannot be met, the Planning and Law Departments should submit to the CPC a written request to extend that deadline.
2. Any CPA funds appropriated but not used for the purposes stated herein will be returned to the Newton Community Preservation Fund.

KEY OUTCOMES

The Community Preservation Committee will evaluate this project based on how well it meets the timeline above and on its recommendations for further action and funding.

ATTACHMENTS

(delivered to the clerks of the Zoning & Planning Committee and Finance Committee)

- Proposal submitted to the CPC August-September 2018
- Public hearing presentation to the CPC on 13 September 2018
- Copy of the CPC's 300 Hammond Pond Parkway webpage, with links to additional information not attached to this recommendation:

www.newtonma.gov/gov/planning/cpa/projects/webster.asp#Webster

Goal

The Protection of “Webster Woods”

- ▶ Precise boundary is yet to be determined
- ▶ Mayor and City Council will determine the boundary, factoring in:
 - ▶ Legal team’s appraisal and assessment
 - ▶ Advisory Panel’s recommendation
 - ▶ Best ecological and recreational result for the larger Webster/Hammond Conservation area
 - ▶ Cost to the City

Funding Request

▶ Contributions

- ▶ \$100,000 from CPC
- ▶ \$5,000 from Law Dept. } Legal team (law, appraisal, envi. science, engineering)
- ▶ Staff time (Mayor's Office, Law Dept., Planning Dept.)
- ▶ Note: Prior City funding for initial Avery appraisal = \$13,500

▶ Process

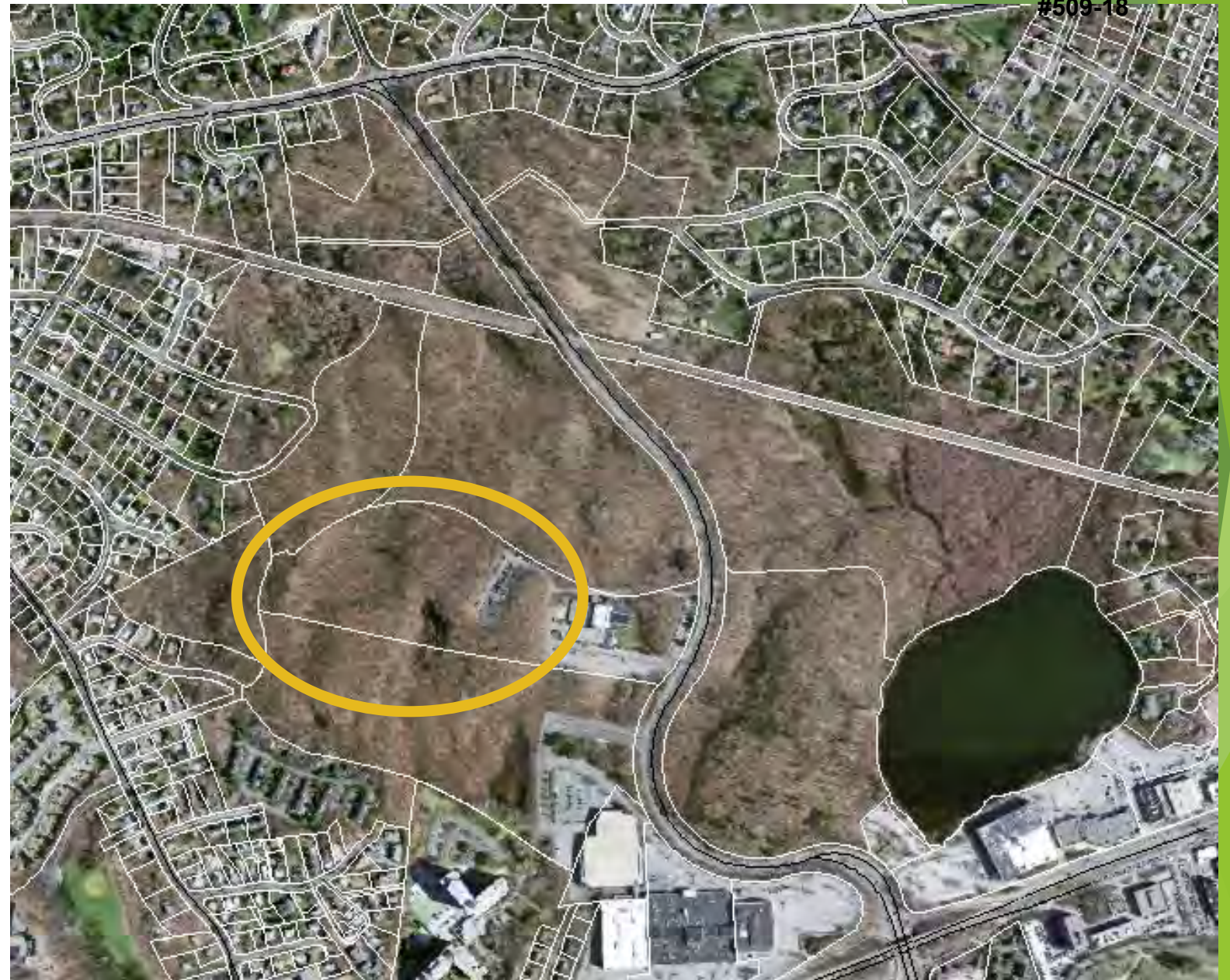
- ▶ Discussion with BC
- ▶ Payment of fair market value

▶ Timeline

- ▶ As soon as possible (Counsel has been retained and is developing the full team)

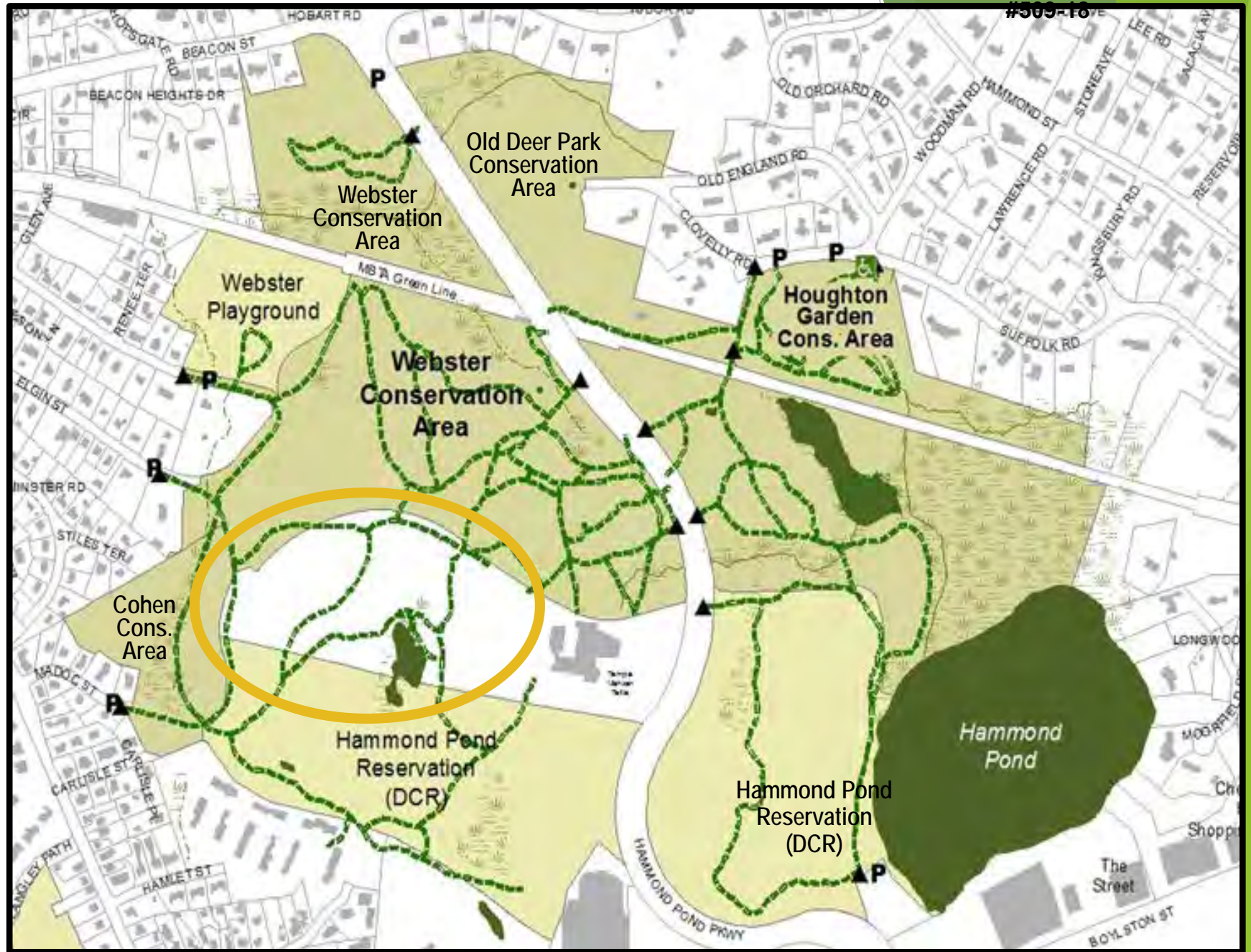
“Webster Woods”

- ▶ The core of ...
 - ▶ Largest protected natural area in all of Newton ...
 - ▶ With significant ecological value
- ▶ Protection has been a priority in the Open Space and Recreation Plan for years



“Webster Woods”

- ▶ 1650 Thomas Hammond began farming
- ▶ 1852 Railroad line was built
- ▶ **Protection has been carefully pieced together over time**
- ▶ 1916 Webster family gave land to the state (MDC)
- ▶ 1954 MDC sold ~22 acres to Congregation Mishkan Tefila (with a 99-year deed restriction)
- ▶ 1968-79 City acquired ~126 ac.
 - ◆ Webster & Deer Park ('68) - em. do.
 - ◆ Cohen ('73-75) - donation
 - ◆ Houghton ('79) - eminent domain
- ▶ 2015 Board of Aldermen resolution -- requested Mayor to “preserve the recreation and conservation character of 300 Hammond Pond Parkway”
- ▶ **Note the currently unprotected central core**



Values: Ecological and Recreational

#509-18



Gorgeous, healthy woodlands -- large trees, diverse understory, ledges, wetlands, ...



A large vibrant vernal pool (in the spring) ...



... and in the summer



Broad, open trails ...



Narrow, secluded trails ...



We have an opportunity, and an obligation, to protect Webster Woods ...



... for the generations to come.





Ruthanne Fuller
Mayor

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

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Barney S. Heath
Director

To: Community Preservation Committee, c/o Alice Ingerson, Community Preservation Program Manager
From: Jennifer Steel, Chief Environmental Planner
Date: August 13, 2018
Re: Application for Pre-Acquisition Professional Services related to the Protection of Webster Woods

Dear CPC members:

The Newton Conservation Commission is very pleased to submit this application for pre-acquisition professional services associated with the protection of the rear portion of 300 Hammond Pond Parkway.

300 Hammond Pond Parkway, purchased by Boston College in May 2016 (recently owned by the Congregation Mishkan Tefila) contains the largest piece of entirely undeveloped private land in Newton, consisting of wooded land to the rear of the former Temple building, an undeveloped parking area, and other wooded land beyond. This land is the central core of the largest contiguous area of natural open space in Newton. Along with the adjacent parcels to the south (owned by the Massachusetts Department of Conservation and Recreation) and to the north (owned by Newton's Conservation Commission) these woods comprise over 200 acres. Known informally as Webster Woods, this land has important conservation and recreational value. It is also the site of a currently pristine vernal pool.

The parcel, zoned SR-1, currently has the former buildings and parking lots of Congregation Mishkan Tefila. The property is subject to a 99-year deed restriction, recorded in 1954, limiting the use of the site to educational, religious, or nonprofit recreational activities. The restriction expires on August 3, 2053, but most of the land, including the wooded parcel, could be developed now by Boston College for use as dorms, classroom or office buildings, or parking lots. Such development would be a devastating blow to a critical conservation area, as well as to the access enjoyed by the public generally.

For decades, residents have walked the trails that traverse the wooded portion of 300 Hammond Pond Parkway and connect to the adjacent protected areas.

Protection of the wooded portion of this parcel near the vernal pond⁷ is of highest priority on the *Open Space and Recreation Plan* and has the strong support of the City's administration as well as broad public support, including a unanimous vote by the Newton Board of Aldermen in 2015 requesting the Mayor to "work to preserve the recreation and conservation character of 300 Hammond Pond Parkway." The Friends of Webster Woods and the Newton Conservators have worked together to find ways to preserve the much-loved and visited forest, vernal pond, and rock formations.

During her candidacy, Mayor Fuller pledged to protect the wooded portion of the lot and, if possible, an adequate buffer. Upon her election the Mayor created an Advisory Panel (advisory to the Mayor) of 14 residents, representatives of the Conservation Commission, a City Councilor, and City staff. The panel has an Executive Committee of seven. The Planning Department and Law Department are taking the lead on this application process. It is anticipated that once protected, the land will be in the care and custody of the Newton Conservation Commission.

The current CPA funding request is for the cost of professional services to assist the Law Department in protecting this valuable open space. The Law Department will augment the CPC funds with an additional \$5,000. We anticipate coming back to the CPC to request funds for protection/acquisition.

From: Ouida C. M. Young
Sent: Saturday, August 18, 2018 1: 38 PM
To: Alice Ingerson <aingerson@newtonma.gov>
Cc: Jennifer Steel <jsteel@newtonma.gov>; Jonathan Yeo <jyeo@newtonma.gov>
Subject: Webster Woods CPA funding request

Dear Alice,

Please be advised that the Law Department, in consultation with the Planning Department, has agreed to receive the CPA funds appropriated for legal and professional services to support the protection of Webster Woods.

In accordance with City Ordinances, all contracts for outside legal services are made by the City Solicitor.

As noted in the Webster Woods Phase 1. Pre-acquisition CPA Proposal, the Project Manager will be the Conservation Commission. The Law Department will be working with the Project Manager to provide the legal and professional services funded through the CPA Proposal.

Please let me know if you have any questions. Thank you.

Ouida Young
Acting City Solicitor
Newton Law Department
Newton City Hall
1000 Commonwealth Avenue
Newton Centre, MA 02459
617-796-1240
oyoung@newtonma.gov

Newton, Massachusetts Community Preservation Program #509-18

FUNDING REQUEST

City of Newton



Ruthanne Fuller
Mayor

PRE-PROPOSAL

PROPOSAL

(For staff use)
date rec'd:

13 August
2018

Last updated September 2015.

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

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

Community Preservation Program Manager,
City of Newton Planning & Development Department, 1000 Commonwealth Ave., Newton, MA 02459
aingerson@newtonma.gov 617.796.1144

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 | “Webster Woods” Phase 1. Pre-acquisition | | | |
| Project LOCATION | Full street address (with zip code), or other precise location. 300 Hammond Pond Parkway, Chestnut Hill MA 02467 | | | |
| Project CONTACTS | Name & title or organization | Email | Phone | Mailing address |
| Project Manager | Jennifer Steel, Chief Environmental Planner and Agent of the Newton Conservation Commission | jsteel@newtonma.gov | 617.796.1134 | City of Newton, Planning Dept., 1000 Commonwealth Ave., Newton, MA 02459 |
| Other Contacts | Ouida Young, Acting City Solicitor | oyoung@newtonma.gov | 617.796.1245 | City of Newton, 1000 Commonwealth Ave., Newton, MA 02459 |
| Other Contacts | Beth Wilkinson, Chair, Mayor’s Webster Woods Advisory Panel | bethwilkinson@mac.com | 617.966.7491 | 14 Trowbridge Street Newton, MA 02459 |
| Project FUNDING | A. CPA funds requested: \$100,000 (for pre-acq.) | B. Other funds to be used: \$5,000 City Law Dept (pre-acq.) | C. Total project cost (A+B): \$105,000 (pre-acq.) | |
| Project SUMMARY | Explain how the project will use the requested CPA 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>This proposal requests \$100,000 in CPA funding for pre-acquisition professional services (a team to be assembled by contracted counsel) to protect the open space character of the wooded portion of 300 Hammond Pond Parkway, known informally as “Webster Woods.”</p> | | | | |

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 | “Webster Woods” Phase 1. Pre-acquisition | | |
| USE of CPA FUNDS | OPEN SPACE | or | RECREATION LAND |
| Check all | acquire | ✓ | |
| 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>2014-2020 Open Space and Recreation Plan, Section 9 – Seven Year Action Plan. Acquisition of a Conservation Restriction by gift, purchase or negotiation on the following whole or partial parcels: <u>Item #2.</u> Temple Mishkan Tefila Woods - woods, pond, and sensitive habitats.</p> <p>Comprehensive Plan, 2007, page 7-4. Goal #4: <i>To pursue courses of action necessary to protect and preserve remaining large open spaces, including golf courses and parcels owned by institutions and private entities.</i></p> <p>Other Community Benefits</p> <ul style="list-style-type: none"> • Continued public access to existing trail network and Bare Pond (vernal pool) • Protected diverse, healthy, native habitat and habitat connectivity for wildlife • The added ecological value that this central parcel provides to adjacent State and City-owned open space parcels • The parcel’s contribution to a functioning, intact watershed • Climate change mitigation value of forest cover (reduced heat island effect, carbon sink, severe storm mitigation, etc.) • The public health value of a forested landscape • Educational and recreational opportunities for youth and families • Preservation of tranquil space | | | |
| COMMUNITY CONTACTS | List at least 3 Newton residents or organizations willing and able to comment on the project and its manager’s qualifications. Consult staff on the community contacts required for your specific proposal. | | |
| Name & title or organization | Email | Phone | Mailing address |
| Chris Hepburn, Vice President Newton Conservators | john.hepburn@bc.edu | 617-964-1137 | 132 Stanley R. Newton, MA 02468 |
| Lalor (Larry) Burdick, Nahanton Woods, Inc. | l.burdick@comcast.net | 617-969-0414 | 180 Dudley Road Newton, MA 02459 |
| Michele Hanss, Friends of Houghton Garden | m.hanss@comcast.net | 617-730-8122 | 207 Suffolk Road Newton, MA 02467 |
| Jack Wittenberg | jwittenberg@partners.org | 617-969-2657 | 146 Allerton Road Newton, MA 02461 |
| Fred Hochberg | hochbergfred@gmail.com | 617-678-8657 | 18 Clovelly Road Newton, MA 02467 |
| Doug Dickson | doug dickson17@gmail.com | 617-969-8661 | 17 Oxford Road Newton 02459 |
| Julia Malakie Newton Tree Conservancy | malakiephoto@aim.com | 617-610-2509 | 50 Murray Rd Newton, MA 02465 |

You may adjust the space for each question, but the combined answers to all questions on this page must fit on this page.
Full proposals must include separate, detailed budgets in addition to this page.

| Project TITLE | | "Webster Woods" Phase 1. Pre-acquisition | |
|---|--|---|--------------------------|
| SUMMARY CAPITAL/DEVELOPMENT BUDGET | | | |
| Uses of Funds | | | |
| Professional services | | | \$ 105,000 |
| | | | |
| | | | |
| D. TOTAL USES (should equal C. on page 1 and E. below) | | | \$ 105,000 |
| Sources of Funds | | Status (requested, expected, confirmed) | |
| CPA funds | | | \$ 100,000 |
| City of Newton Legal Department funds | | | \$5,000 |
| E. TOTAL SOURCES (should equal C. on page 1 and D. above) | | | \$ 105,000 |
| SUMMARY ANNUAL OPERATIONS & MAINTENANCE BUDGET (cannot use CPA funds) | | | |
| Uses of Funds | | | |
| Trails are well established, the only maintenance anticipated will be occasional clearing of fallen trees | | | \$2,000 |
| | | | |
| F. TOTAL ANNUAL COST (should equal G. below) | | | \$2,000 |
| Sources of Funds | | | |
| Newton Conservation Commission annual General Fund budget, Land Maintenance/Management Funds | | | \$2,000 |
| | | | |
| G. TOTAL ANNUAL FUNDING (should equal F. above) | | | \$2,000 |
| Project TIMELINE | Phase or Task | | Season & Year |
| Phase 1. Pre-acquisition | | | |
| | | | |
| 1. | Hire Lead Counsel | | retained |
| 2. | Develop a strategy and timeline to preserve the wooded portion of the property | | immediately |
| 3. | Begin execution of the strategy | | as soon as appropriate |
| Phase 2. Acquisition | | | |
| | The Mayor would like to ensure protection by December 2019. | | December 2019 |
| | | | |
| | | | |
| | | | |

| Project TITLE | | “Webster Woods” Phase 1. Pre-acquisition | |
|--|---|--|--|
| ↓ Check off submitted attachments here. | | | |
| | ✓ | COVER LETTER | From the Project Manager on behalf of the Conservation Commission |
| PROJECT FINANCES | | | |
| | ✓ | project 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) | |
| | ✓ | non-CPA funding: commitment letters, letters of inquiry to other funders, fundraising plans, etc., including both cash and est. dollar value of in-kind contributions | |
| SPONSOR FINANCES & QUALIFICATIONS, INSTITUTIONAL SUPPORT | | | |
| | ✓ | for sponsoring department, most recent annual operating budget (revenue & expenses) & financial statement (assets & liabilities). | |
| | ✓ | for project manager: relevant training & track record of managing similar projects | |
| | ✓ | Webster Woods Mayor’s Advisory Panel (charge, membership) | |
| | ✓ | CAPITAL IMPROVEMENT PLAN | current listing/ranking & risk factors for this project |
| SITE CONTROL, VALUE & DEED RESTRICTIONS, PROPERTY HISTORY | | | |
| | ✓ | brief property history: at least the last 30 years of ownership & use | |
| | ✓ | PHOTOS | of existing site or resource conditions (2-3 photos may be enough) |
| | ✓ | MAP | of site in relation to nearest major roads |
| OPTIONAL, for full proposal. | ✓ | LETTERS of SUPPORT | from Newton residents, organizations, or businesses |

City of Newton Project Manager

Jennifer Steel, Chief Environmental Planner

Jennifer is the Chief Environmental Planner for the City and Agent of the Conservation Commission. Jennifer has worked in the field of municipal land management and land protection for over 20 years. With the full support of Newton's Executive Office, Law Department, and Planning Department, and in concert with the Executive Committee of the Mayor's Webster Woods Advisory Panel, Jennifer will oversee the process of protection.

Outside Counsel

Lead Counsel

Jeffrey Tocchio, Partner
DT&M Attorneys at Law
Hingham, MA

http://www.dtm-law.com/attorneys_jtocchio.html

Expert in real estate development and eminent domain
Suffolk University Law School, 1988

Team of experts, including an appraiser and other advisors, to be assembled and hired by lead counsel.

300 Hammond Pond Parkway – Conservation Annual Budget FY19

FUND: 01 - GENERAL FUND
DEPARTMENT: 114 - PLANNING DEVELOPMENT

CITY OF NEWTON BUDGET
DEPARTMENT LEGAL LEVEL OF CONTROL

| | ACTUAL 2016 | ACTUAL 2017 | AMENDED 2018 | YTD 4/12/2018 | RECOMMENDED 2019 | CHANGE 2018 to 2019 |
|---------------------------|----------------|----------------|-----------------|------------------|---------------------|------------------------|
| CONSERVATION | | | | | | |
| 51 - PERSONAL SERVICES | 63,977 | 65,635 | 119,853 | 76,011 | 129,494 | 9,641 |
| 52 - EXPENSES | 595 | 1,164 | 2,000 | 423 | 2,000 | 0 |
| 58 - DEBT AND CAPITAL | 92,462 | 57,026 | 25,000 | 0 | 25,000 | 0 |
| 57 - FRINGE BENEFITS | 938 | 1,030 | 11,117 | 1,172 | 2,104 | -9,013 |
| TOTAL CONSERVATION | 157,972 | 124,856 | 157,970 | 77,606 | 158,598 | 628 |

| | ACTUAL FY2016 | ACTUAL FY2017 | AMENDED 2018 | YTD 4/12/2018 | RECOMMENDED 2019 | CHANGE 2018 to 2019 |
|--------------------------------|------------------|------------------|-----------------|------------------|---------------------|------------------------|
| 0111402 - CONSERVATION | | | | | | |
| PERSONAL SERVICES | | | | | | |
| 511001 FULL TIME SALARIES | 63,477 | 65,135 | 118,853 | 75,161 | 128,244 | 9,391 |
| 514001 LONGEVITY | 0 | 0 | 0 | 0 | 750 | 750 |
| 515005 BONUSES | 0 | 0 | 0 | 350 | 0 | 0 |
| 515102 CLEANING ALLOWANCE | 500 | 500 | 1,000 | 500 | 500 | -500 |
| TOTAL PERSONAL SERVICES | 63,977 | 65,635 | 119,853 | 76,011 | 129,494 | 9,641 |
| EXPENSES | | | | | | |
| 5341 POSTAGE | 447 | 936 | 1,000 | 93 | 1,000 | 0 |
| 5342 PRINTING | 0 | 83 | 100 | 0 | 100 | 0 |
| 5420 OFFICE SUPPLIES | 0 | 145 | 200 | 195 | 200 | 0 |
| 5730 DUES & SUBSCRIPTIONS | 148 | 0 | 700 | 135 | 700 | 0 |
| TOTAL EXPENSES | 595 | 1,164 | 2,000 | 423 | 2,000 | 0 |

Webster Woods Advisory Panel

March 2018

Mayor Ruthanne Fuller strongly supports preserving Webster Woods, the largest contiguous parcel of undeveloped, open space in Newton. In March 2018 Mayor Fuller announced the members of the newly formed Webster Woods Advisory Panel, which will review and recommend options to her for the protection of this important natural resource.

- **Lisle Baker:** Ward City Councilor from Ward 7 and a Professor of Law at Suffolk University.
- **Peter Barrer:** Chair of Newton's Design Review Committee. President of the Board of Directors of the Newton Community Farm.
- **Dan Brody:** Director and Website Manager for the Newton Conservators. Wrote the Webster Woods trail descriptions published in the Appalachian Mountain Club's Massachusetts Trail Guide, 10th edition.
- **Kathy Cade:** Associate member of the Newton Conservation Commission. Retired investment banker, vice-chair of the board of trustees of the Carter Center in Atlanta.
- **Suzanne Carleo:** Comptroller of the Charles River Watershed Association.
- **Jeff Goldman:** Abutter and Land Steward for Webster Woods for the City's Conservation Department.
- **Barney Heath:** Director of Planning and Development for the City of Newton.
- **Ken Kimmel:** Co-chair of the Friends of Webster Woods and the President of the Union of Concerned Scientists. Former Commissioner of the MassDEP and the director of a law firm specializing in environmental, energy, and land-use issues.
- **Eric Olson:** Ecologist at Brandeis University. For many years, a leader of walks to the Bare Vernal Pool in Webster Woods.
- **Richard Primack:** Professor of Biology at Boston University and the director of a lab that studies how climate change affects the environment. Writer about and researcher of Webster Woods.
- **Stephen Small:** Nationally known land-protection lawyer. Author of "The Business of Open Space: What's Next?"
- **Jennifer Steel:** Chief Environmental Planner for the City of Newton and, in that role, works with the Conservation Commission.
- **Ira Wallach:** Chair of the Newton Conservation Commission. Recently retired Associate Chief Legal Counsel Massachusetts Port Authority.
- **Beth Wilkinson, Chair:** President of the Board of Directors of the Newton Conservators and a member of the Newton Urban Tree Commission.
- **Jonathan Yeo:** Chief Operating Officer of the City of Newton. Formerly, Director of Water Supply Protection for the Massachusetts Department of Conservation and Recreation.
- **Ouida Young:** City Solicitor for the City of Newton.

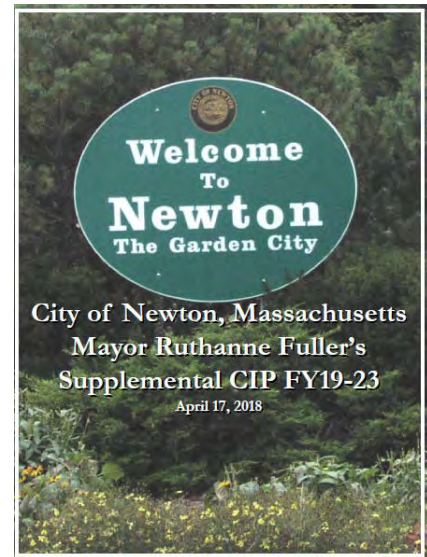
The members of the Advisory Panel were chosen for the knowledge and expertise they will bring to the process of protecting the Woods.

"We had so many more excellent people come forward to serve on this panel than seats available. I encourage all of them, and everyone interested in preserving this important parcel of woods to stay involved and work with the Advisory Panel," Mayor Fuller said.

City Website Link

http://www.newtonma.gov/gov/planning/current/devrev/hip/webster_woods_300_hammond_pond_parkway.asp

**300 Hammond Pond Parkway –
Capital Improvement Plan FY19-23**



Supplemental CIP by Funding Source (CPA) FY 2019-2023

| Priority | Dept | Asset Category | Project Title | Project Description / Justification | Est Cost in FY2018 | Funding Source |
|----------|---------------------------------------|----------------|---------------|--------------------------------------|--------------------|----------------|
| 52 | Planning (Conservation Commission) | Parkland | Webster Woods | Implementation of Webster Woods Plan | Unknown | CPA Eligible |

| Priority | Project Title | Overall Condition 0: Worse to 10: Best | % Life Left 0: Expired to 100: New | City Operations | Programs / Services | Costs/ Savings Ratio | Codes/ Health & Safety |
|----------|---------------|--|------------------------------------|-----------------|---------------------|----------------------|------------------------|
| 52 | Webster Woods | 2 | 0% | 6 | 6 | 2 | 9 |

| Priority | Project Title | Property Damage | Quality of Life | Energy | Dept. Mission or Vision | % Life Left | Condition Likelihood Failure | % Life Left Likelihood failure |
|----------|---------------|-----------------|-----------------|--------|-------------------------|-------------|------------------------------|--------------------------------|
| 52 | Webster Woods | 7 | 9 | 0 | 8 | 30% | 0.80 | 0.70 |

300 Hammond Pond Parkway – Site History

300 Hammond Pond Parkway was part of a much larger parcel donated by Newton’s Webster family to the Metropolitan District Commission (MDC) in 1916 as public open space. The MDC sold the portion of this land that is now identified as 300 Hammond Pond Parkway to Congregation Mishkan Tefila in 1954, subject to a 99-year restriction of the site’s uses to “educational or religious purposes and for non-profit recreational activities in connection therewith.” Congregation Mishkan Tefila subsequently sold its parcel to Boston College in 2015.

For decades, residents from all parts of Newton have walked the trails and other parts of the wooded portion of 300 Hammond Pond Parkway.

The parcel, zoned SR-1, currently has the former buildings and parking lots of Congregation Mishkan Tefila. The existing restriction expires in 2053, but most of the land, including the wooded parcel, could be developed now by Boston College for use as dorms, classroom or office buildings, or parking lots.

In 2015, Newton’s Conservation Commission and Board of Aldermen both expressed to the Mayor and Newton’s Community Preservation Committee their strong support for preserving the land’s open space character. The Board of Aldermen unanimously adopted a resolution asking the Mayor to “work to preserve the recreation and conservation character of 300 Hammond Pond Parkway.”

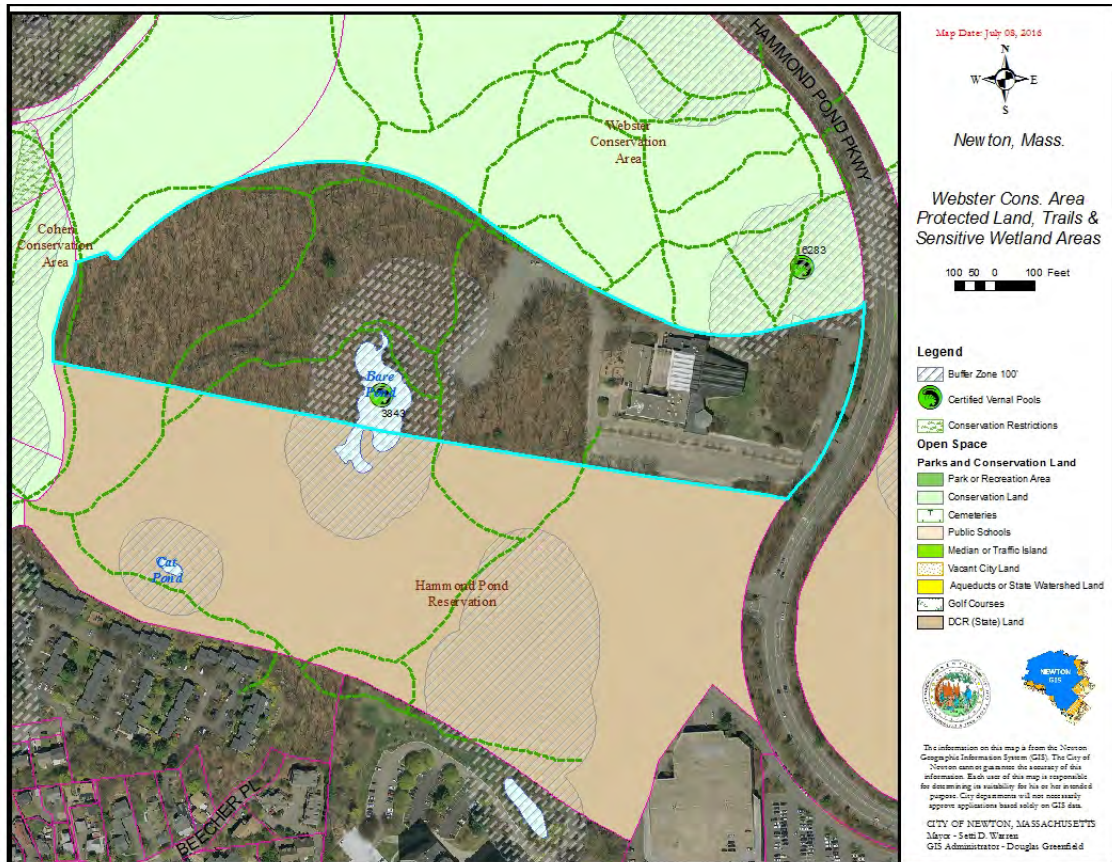
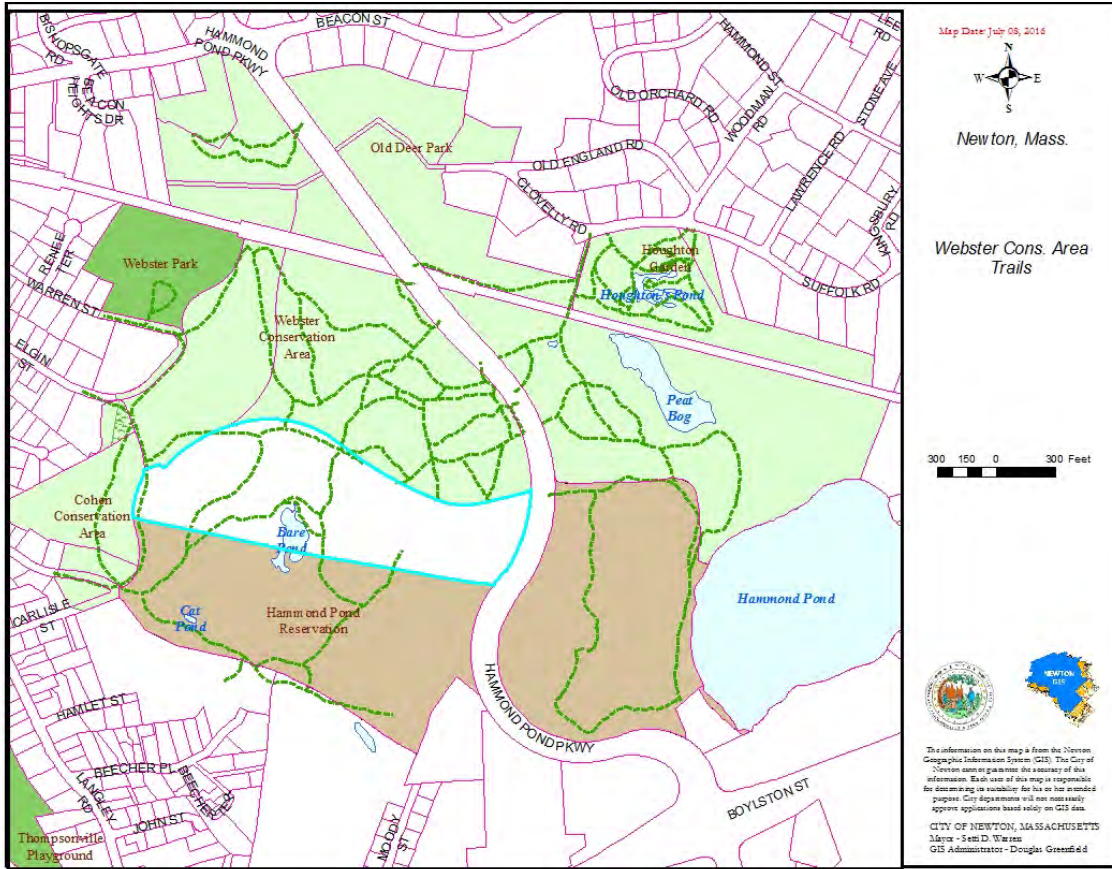
In 2017 the City commissioned an appraisal of 300 Hammond Pond Parkway by Avery Associates.

Additional supporting information not included with this proposal but available from the Newton CPC’s project webpage,

[www.newtonma.gov/gov/planning/cpa/projects/webster.asp#webster#webster:](http://www.newtonma.gov/gov/planning/cpa/projects/webster.asp#webster#webster)

- 1650s-1970s Webster & Cohen conservation areas land use & ownership timeline
- 1874-1953 maps of Hammond Pond Parkway area, including 1917 map showing land owned at that time by the Metropolitan District Commission
- 1954 sale of land by MDC to Congregation Mishkan Tefila (deed, restriction, etc.)
- October-November 2015 - support for open space preservation at 300 Hammond Pond Parkway:
 - Newton Conservation Commission letters to Mayor, Board of Aldermen, CPC
 - Newton Board of Aldermen resolution 195-15(2)
- 2016 sale of 300 Hammond Pond Parkway to Boston College (deed)
- 2017 appraisal of 300 Hammond Pond Parkway for the City of Newton
- 2018 Mayor’s Advisory Panel for 300 Hammond Pond Parkway

Site Maps and Photographs



Statements of Support for the Preservation of Webster Woods



July 4, 2017

Dear Newton Mayoral Candidates:

We are Newton residents who care deeply about Webster Woods, the largest contiguous parcel of open space in Newton. As you may know, most of Webster Woods is owned by the City of Newton and the state Department of Conservation and Recreation. Fortunately, these portions are permanently protected.

However, in the middle of these two protected, publicly owned portions is a twenty-two acre area of wooded open space now owned by Boston College. This privately owned area is an integral part of the woods, with numerous hiking trails running through it that are used regularly by many visitors and that connect to the publicly owned areas to the north and south. This area also contains a vernal pool, a rare resource in Newton, which functions as a breeding pond for tadpoles and salamanders.

Webster Woods is an open space gem. For many years, it has offered Newton residents and many others abundant recreational opportunities, such as hiking, jogging, cross-country skiing, and even cave-visiting. It also has high scientific value. As detailed by biologist Richard Primack, these woods have been used by nearby universities for studies of the biology of pink lady's slipper orchids, wildflower restoration programs, and the effects of climate change.

Given that the privately-owned area is right in the middle of these woods, any development of it would inevitably and seriously degrade the publicly owned open space on both sides and would undermine the public investment that has been made in this open space.

Due to the unique value of these woods, and the threat posed by the potential for future development by a private owner (especially after the expiration of the current restriction on all development that is not educational or religious), the Newton City Council, the Newton Conservators, and the Newton Conservation Commission have all strongly supported the City taking action to permanently protect the portion of the woods owned

by Boston College. And neighbors of these woods have pledged to contribute very significantly to the costs of such protection.

We ask that as a candidate for Mayor, you make the following commitment:

1. You state that it is a top priority of yours that the City permanently protect this area.
2. You form a citizen's advisory group to assist in this effort, and meet with the group on a quarterly basis.
3. Within two years from taking office, you negotiate an agreement with Boston College that includes permanent protection of at least the wooded area.
4. Within two and a half years from taking office, you submit necessary approvals to the Community Preservation Act Committee and the City Council to finalize and implement the agreement with Boston College.
5. If despite your best efforts you are unable to forge an agreement with Boston College, you fully support a taking by eminent domain that ensures no development of this area and continued public use of it.

We appreciate your consideration of this vital open space protection opportunity. Please confirm in writing your agreement with this request. We would appreciate a response within thirty days, and are happy to discuss this further with you if you would like.

Signed,

AnnaMaria Abernathy
 Anna A. Allen
 Rory J. Altman
 Joan Balaban
 Peter Barrer
 Adrian Bradley
 John Chadis
 Sandy Chadis
 Annie Cole
 Josh Coval
 Doug Dickson
 Judith Di Leo

Bev Droz
 Kat Eutsler
 Deena Freed
 Joshua Freed
 Lynne Friedlander
 Steve Garfinkle
 Jeff Goldman
 J. Christopher Hepburn
 Katherine Howard
 David Hruska
 Kenneth Kimmell
 Rebecca Komblatt

Daniel Krasa
 Jonathan Landman
 Rebecca M. Mayne
 Tatjana Meschede
 Steven Miller
 Lucy Ogburn
 Willard Ogburn
 Gordon M. Orloff
 Carol Sklar
 Phil Stern
 Susan Stern
 Beth Wilkinson



Setti D. Warren
Mayor

CITY OF NEWTON, MASSACHUSETTS
Department of Planning and Development

Telephone
(617)-796-1120
Telefax
(617) 796-1086
TDD/TTY
(617) 796-1089

Members

Dan Green
Judy Hepburn
Susan Lunin
Barbara Newman
Norm Richardson
Jane Sender
Ira Wallach, Chair
Jeff Zabel (Alt.)

Conservation Commission

1000 Commonwealth Avenue
Newton, Massachusetts 02459
(617) 796-1134

2 October 2015

Mayor Setti Warren
1000 Commonwealth Ave.
Newton, MA 02459

Board of Aldermen
1000 Commonwealth Ave.
Newton, MA 02459

October 2, 2015

Dear Mayor Warren and Board of Aldermen,

I write as Chair and on behalf of the City of Newton Conservation Commission.

The Commission understands that, as part of a larger transaction, an approximately-13-acre wooded area located off Hammond Pond Parkway, and contiguous with protected City of Newton-owned and state-owned conservation land, is in the process of being sold. Acknowledging that the contemplated transaction is one between private parties and wishing not to interfere with that private transaction, the Newton Conservation Commission encourages and would fully support a City effort to ensure the long-term protection of the contiguous wooded portion of this parcel, for its irreplaceable conservation, ecological and environmental qualities.

This wooded area may be the largest, privately-owned open-space land area remaining in the City of Newton. This private wooded area, joined with the adjacent Department of Conservation and Recreation Hammond Pond Reservation and Newton's Webster Conservation Area, would constitute the largest contiguous piece of protected open space in Newton. It comprises approximately 13 acres of mature hardwood forest with very few invasive species. It provides a tremendous diversity of ecological niches and wildlife habitats, including a large wetland in the interior of the parcel that is a Certified Vernal Pool, recognized by state environmental authorities (and the Commission) as an extremely valuable natural resource. In addition, the wooded area is home to hiking trails that have historically been heavily utilized by the public and which connect to the many miles of trails on the adjacent Department of the Conservation and Recreation and Newton's Conservation land.

The Conservation Commission sees this as an opportunity and an obligation to prevent a virtually irretrievable ecological disappointment, and by this letter expresses its support for the protection of the ecological and recreational qualities of this wooded area. It is an opportunity that should not be squandered and an obligation that should be met. The public interest that would be served by its preservation is manifest. Accordingly, the Commission recommends that the City make every reasonable and practicable effort to protect the ecological and conservation value of this land and create an enduring legacy. The Commission is prepared to participate in efforts to achieve that goal, as well as to assume the stewardship of the results of that effort.

The Commission looks forward to the opportunity to contribute to the dialogue it hopes and expects will take place in the very near future on this important and possibly time-sensitive subject.

Sincerely,

Ira Wallach, Chairman
Newton Conservation Commission



Setti D. Warren
Mayor

CITY OF NEWTON, MASSACHUSETTS

Department of Planning and Development

#509-18

Telephone
(617)-796-1120

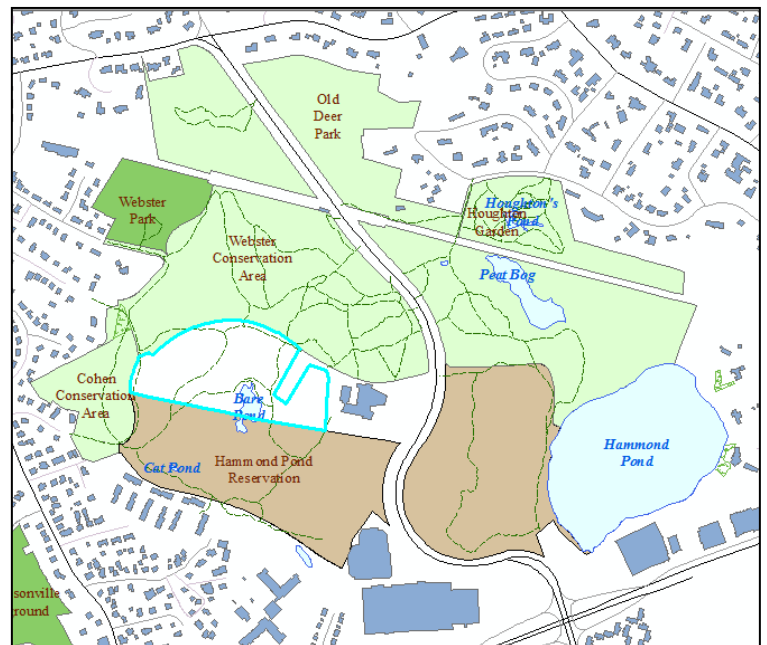
Telefax
(617) 796-1086

TDD/TTY
(617) 796-1089

To: Newton Community Preservation Committee
From: Newton Conservation Commission
Re: Protection of wooded portion of 300 Hammond Pond Parkway
Date: November 10, 2015

The Commission understands that the parcel of land at 300 Hammond Pond Parkway is in the process of being sold, although the timing of that sale has not been made public by either party to it. For that reason, and as a follow-up to the Conservation Commission's October 2, 2015, letter to the Mayor and the Board of Aldermen regarding the preservation of the open space at 300 Hammond Pond Parkway (letter attached), the Conservation Commission would like to meet with the Community Preservation Committee at its earliest convenience.

Aware of the September 23, 2015, and October 5, 2015 resolutions by the Board of Alderman with regard to 300 Hammond Pond Parkway, at its most recent public meeting, the Commission discussed its potential role in any effort the City might undertake to preserve the undeveloped portion of that property as open space. One of the preliminary steps the Commission is considering is applying to the Community Preservation Committee for funds for any appraisal and/or other consulting services that may be necessary or desirable to further the public interest in the permanent protection of the undeveloped portion of 300 Hammond Pond Parkway, should the City choose to do so. While it is not yet certain that funding for that purpose will be necessary, or whether any subsequent protection efforts, would require further CPA funding, the Commission thought it best to inform CPC of the Commission's potential request(s) as early as practicable, to enable the CPC to integrate any such funding into its planning, should it choose to do so.



The wooded portion of the land to be sold is the largest piece of entirely undeveloped private land in all of Newton. Together with the adjacent Department of Conservation and Recreation's parcel and Newton's Webster Conservation Area, these parcels constitute the largest contiguous area of natural open space in Newton. This is, therefore, an unusual and significant opportunity for meaningful preservation of open space.

Municipal Chronology

- Newton Conservation Commission's 10/2/15 letter to Mayor and Newton Board of Aldermen (attached)
- Newton Board of Aldermen docket item #195-15(3) "requesting that, in order to preserve the conservation and recreation values of the land, and to protect existing adjacent public open spaces, the Board of Aldermen vote to acquire for the City of Newton either the undeveloped portion of the land at 300 Hammond Pond Parkway or a conservation restriction on such land. [10/23/15 @ 2:55 PM]"
- This informal letter of interest from the Conservation Commission

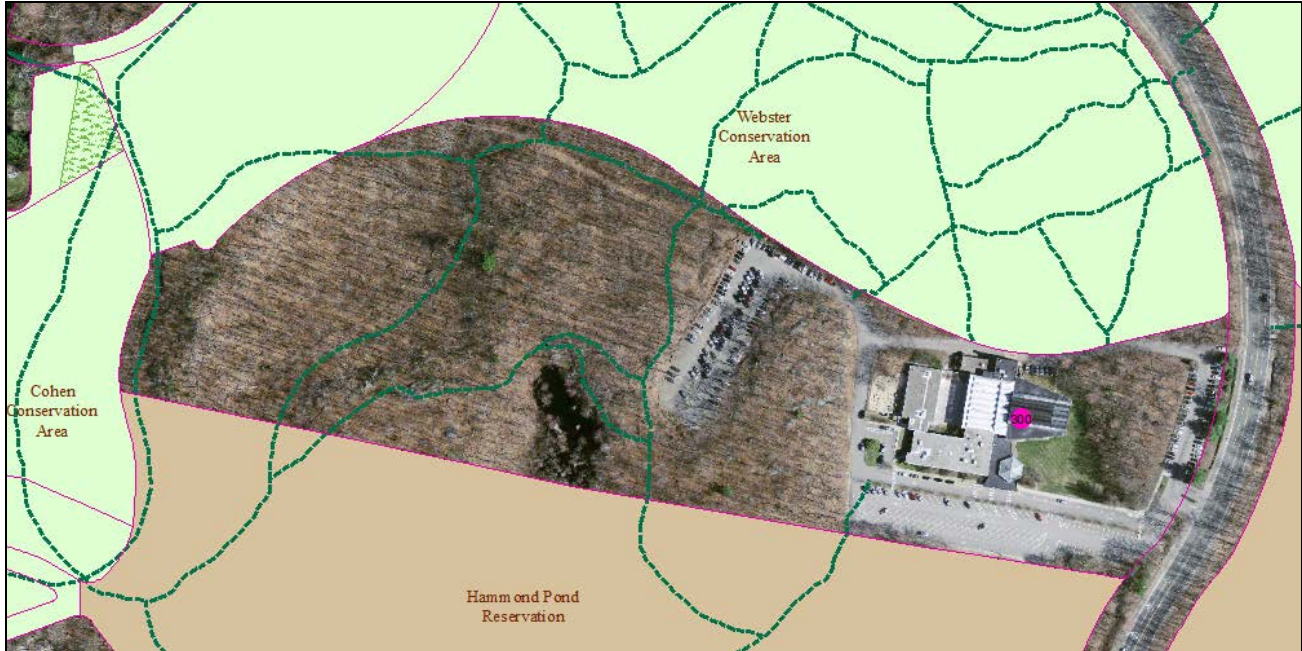
We look forward to working with the Community Preservation Committee to achieve the City's goals to preserve the conservation and environmental and open-space value of this undeveloped land for the benefit of the current and future residents of the City.

Conservation Commission

1000 Commonwealth Avenue, Newton, Massachusetts 02459

Email: jsteel@newtonma.gov

Aerial view of 300 Hammond Pond Parkway with adjacent public open space and trails



Scenes of 300 Hammond Pond Parkway



Vernal Pool



Popular wooded trails

CITY OF NEWTON
IN BOARD OF ALDERMEN

October 5, 2015

BE IT RESOLVED:

That the Board of Aldermen respectfully requests that His Honor the Mayor work to preserve the recreation and conservation character of 300 Hammond Pond Parkway, Chestnut Hill.

Under Suspension of Rules
Readings Waived and Adopted
24 yeas - 0 nays



(SGD) DAVID A. OLSON
City Clerk



September 10, 2015

Mayor Setti Warren
Members of the Board of Aldermen
City of Newton
1000 Commonwealth Avenue
Newton Centre, MA 02459

Officers

Beth Wilkinson, President
George Mansfield, Vice President
AnnaMaria Abernathy, Secretary
Katherine Howard, Treasurer
Beth Schroeder, Past President

Board of Directors

Margaret Albright
David Backer
Dan Brody
Larry Burdick
Mat Calabro
Bonnie Carter
Michael Clarke
Ann Dorfman
Margaret Doris
Henry Finch
Robert Fizek
Maurice Gilmore
Daniel Green
William Hagar
Chris Hepburn
Ted Kuklinski
Jane Sender
Larry Smith
Willis Wang

Advisors

Lisle Baker
Rodney Barker
John Bliss
Octo Barnett
Lee Breckenridge
Lucy Caldwell-Stair
Michael Collora
Modestino Criscitiello
Douglas Dickson
Ann Dorfman
Bart Hague
Judith Hepburn
Duane Hillis
Peter Kastner
Alison Leary
William Leitch
Don Lubin
Eric Olson
Anne Pearson
Richard Primack
Eric Reenstierna
Jon Regosin
Patricia Robinson
William Shaevel
Verne Vance
Brian Yates

Dear Mayor Warren and Members of the Board of Aldermen,

The members of the Board of Directors of the Newton Conservators are concerned that the potential sale of the open space behind Temple Mishkan Tefila will endanger a beautiful 28-acre parcel that has great environmental value. The temple has been a good custodian of the land, and we want to see that care continue. We request that you act to protect that land from development and to preserve it for the citizens of Newton.

The Mishkan Tefila land has environmental features that should be saved: it contains a vernal pool that is home to tadpoles and breeding salamanders in the spring and also notable sandstone ledges and outcroppings of Roxbury puddingstone. Except for the front third of the land that contains the temple buildings and parking lots that are adjacent to the temple, it is wild, open area.

The Mishkan Tefila land is surrounded by conservation areas. Not only is it adjacent to those public spaces, but also it is functionally integral with them. As climate change begins to have greater effects on our environment, having this kind of connection between our conservation areas will become more important, allowing stressed plants and other wildlife to migrate to more hospitable areas in which they will be more likely to survive.

In 1916, Edwin Webster gave this parcel of land to the State. In 1954, the State sold it to Mishkan Tefila for \$1, with the proviso that the land be used for only educational or religious purposes for ninety-nine years. That proviso will be in effect for the next thirty-seven years, but it does not protect the land from development.

The actual vernal pond and the one hundred feet surrounding it have the standard wetlands protection offered by the Conservation Commission, but there is no protection for the rest of the property. A cluster of buildings or parking lots could be constructed around the pond and could cover the rest of the land.

We strongly encourage the City of Newton to take action to protect this unique and irreplaceable tract of land. The following scenarios are possibilities:

- **Buy the entire site outright** from the current owner, Mishkan Tefila, with money obtained through the Community Preservation Act or other public funds.

- **Buy only the open-space part of the site and the western parking lot**, leaving the already-developed area to be used for religious or educational purposes, as mandated by the state regulations.
- **Advocate for a conservation restriction and a public-access easement on all of the undeveloped land as well as on the western parking lot** (which is surrounded by undeveloped land). This would leave the currently built-up land and the adjacent parking lots for the owner to use.

For decades, our members and other Newton residents have enjoyed hiking through the woods of the Mishkan Tefila land. Long-time member Octo Barnett is an ardent admirer of the land and wrote that he sees history written in its stones. More recently, Boston University Professor Richard Primack told the attendees at our 2015 annual meeting that he learned how to be a biologist by exploring those same woods. Brandeis University sustainable biologist Dr. Eric Olson leads annual Newton Conservators' walks to find the salamanders in the vernal pond. With Dr. Olson's instruction, the land serves as an important tool to teach children and adults about nature.

It is our concern that if the City does not take action to protect this land now, its treasures might not exist for the citizens of Newton in future decades. Please help us to preserve this very important open space

Sincerely,

Beth Wilkinson, President

On behalf of the Board of Directors
of the Newton Conservators



#509-18

July 26, 2017

Dear Newton Mayoral Candidates,

The mission of the Newton Conservators is to promote “the protection and preservation of natural areas . . . for the enjoyment and benefit of the people of Newton for scientific study, education, and recreation.”

Officers

Beth Wilkinson, President
Chris Hepburn, Vice President
AnnaMaria Abernathy, Secretary
Katherine Howard, Treasurer

Board of Directors

David Backer
Dan Brody
Mat Calabro
Bonnie Carter
Michael Clarke
Margaret Doris
Henry Finch
Robert Fizek
Maurice Gilmore
Daniel Green
William Hagar
Ted Kuklinski
George Mansfield
Ken Mallory
Larry Smith

Advisors

Margaret Albright
Lisle Baker
Rodney Barker
Octo Barnett
John Bliss
Lee Breckenridge
Larry Burdick
Lucy Caldwell-Stair
Michael Collora
Douglas Dickson
Ann Dorfman
Bart Hague
Judith Hepburn
Duane Hillis
Peter Kastner
Alison Leary
William Leitch
Don Lubin
Brooks Mathewson
Eric Olson
Anne Pearson
Richard Primack
Eric Reenstierna
Jon Regosin
Patricia Robinson
Jane Sender
William Shaevel
Verne Vance
Willis Wang
Brian Yates

The middle section of the Webster Woods, currently owned by Boston College, serves all of these purposes. University professors like Richard Primack have done research in the woods; our walk leaders such as Eric Olson have taken students and other residents of Newton into Webster Woods to learn about the plants and animals of the woods; and many of Newton’s citizens love to walk the paths through the woods. There are few other areas of the city where one can feel as much in a forest as here.

For almost two years, the Newton Conservators has worked with the Friends of Webster Woods to preserve this land. The Board of the Newton Conservators fully supports the letter sent to you by the Friends of Webster Woods on July 4. We hope that you will commit to the actions it proposes.

In addition, we would like to clarify our thoughts about what preserving “at least the wooded area” should include.

We believe that the city should take the following steps:

- Acquire outright, or through conservation restriction, the following areas of the Boston College property:

- (1) The wooded area west of the rear parking lot (i.e. the large wooded parcel that contains the Bare Pond vernal pool),

- (2) The rear MASCO parking lot that adjoins Bare Pond, and

- (3) The wooded area between that rear parking lot and the pavement adjacent to the western side of the temple building.

- Restore the rear (west-most) parking lot and its driveway to a natural condition. We believe that the extremely close proximity of this parking lot to Bare Pond threatens the vernal pool itself.

- Grant to the Newton Conservators or another organization a permanent conservation restriction on all city-owned land comprising Webster Woods.

- If the above land is not acquired by the city but is protected by a conservation easement granted by Boston College, arrange that Newton Conservators or another organization hold that conservation restriction.

We believe that including these areas in the acquisition and protection will best preserve Webster Woods, rectify an environmental error made when that parking lot was built, protect the vernal pool, and enhance the overall open space, without detracting from the development potential of the area around the building.

Furthermore, we hope that you will give consideration to removing and restoring the small parking lot immediately adjacent to Hammond Pond Parkway, and to replacing

Newton Conservators, Inc. • PO Box 590011 • Newton Centre • MA

02459 • www.newtonconservators.org

the hazardous driveway access to the site with safer access via the signalized intersection and driveway that now serves the Towers of Chestnut Hill and the Shops at Chestnut Hill. While this would involve coordination with DCR, it is likely that all parties could agree to make this important safety improvement.

We request that you respond to this further clarification of the specific area of the property we think should be preserved.

We will publish the responses from all mayoral candidates on our website as we receive them. On August 21, we will send a message containing the responses (up to 1000 words per candidate) to all of our members.

Please don't hesitate to contact us if you have any questions—either at the PO box on this letter or at President@NewtonConservators.org.

All the best,

Beth Wilkinson, President

On behalf of the Newton Conservators Board

Department of Biology
Boston University
5 Cummington Street
Boston, MA 02215, USA

September 9, 2015



Dear Newton Conservators,

I strongly urge you to take action to preserve the woods area currently owned by Temple Mishkan Tefila. These woods are bordered on three sides by conservation land. At present, these separate parcels of land represent one large block that protects the diversity of species living in the woods and creates a wonderful recreational experience in the middle of a densely settled suburban landscape.

This forest area is especially noteworthy for the protection of spotted salamanders, which breed in Bare Pond and elsewhere in the woods, as well as pink lady slipper orchids and other wildflowers. The woods also has many other noteworthy examples of plant species, forests, land use patterns, and geology. Classes from Boston University, Boston College, and other educational institutions use these woods for class field trips and observations.

If the Temple land were to be developed in some way, this would leave the remaining parcels of land isolated from each other. The result would be a forest that is not as pleasant to walk in, with building and roads constantly visible. It is likely that many forest species of both plants and animals, including the spotted salamanders, would decline in abundance or even die out if the woods were fragmented into smaller pieces by development, leading to lower moisture levels, higher light levels, and more human disturbance.

On a personal note, these woods, which are close to my home of 60 years, had a tremendous influence on me during my childhood (and that of my brother Mark and friends), my university studies, and the growing up of my own children. These woods provided and still provide, a nearby opportunity for children to experience the wonder and excitement of being in nature, with no buildings and roads in sight. In these woods I learned the skills of navigating across a forest landscape that I later used in my career as a plant ecologist at sites around the world. My brother Mark became one of the leading land trust managers in Massachusetts. Also, these woods are where I learned to identify plants and to carry out detailed observations of plant ecology and conservation and where I taught these same skills to many classes of students and neighborhood children. A large number of insights that I developed from these woods have also been incorporated into my scientific articles and my textbooks in conservation biology that are used across the United States and around the world.

If these woods are fragmented and damaged by the development of the Temple land, the value of these woods for the protection and enjoyment of nature will be

diminished for Newton citizens of this and future generations. I urge you to take action to protect these woods.

Sincerely,

Richard Primack
Professor of Biology
primack@bu.edu
1-617-353-2454



July 4, 2017

Dear Newton Mayoral Candidates:

We are Newton residents who care deeply about Webster Woods, the largest contiguous parcel of open space in Newton. As you may know, most of Webster Woods is owned by the City of Newton and the state Department of Conservation and Recreation. Fortunately, these portions are permanently protected.

However, in the middle of these two protected, publicly owned portions is a twenty-two acre area of wooded open space now owned by Boston College. This privately owned area is an integral part of the woods, with numerous hiking trails running through it that are used regularly by many visitors and that connect to the publicly owned areas to the north and south. This area also contains a vernal pool, a rare resource in Newton, which functions as a breeding pond for tadpoles and salamanders.

Webster Woods is an open space gem. For many years, it has offered Newton residents and many others abundant recreational opportunities, such as hiking, jogging, cross-country skiing, and even cave-visiting. It also has high scientific value. As detailed by biologist Richard Primack, these woods have been used by nearby universities for studies of the biology of pink lady's slipper orchids, wildflower restoration programs, and the effects of climate change.

Given that the privately-owned area is right in the middle of these woods, any development of it would inevitably and seriously degrade the publicly owned open space on both sides and would undermine the public investment that has been made in this open space.

Due to the unique value of these woods, and the threat posed by the potential for future development by a private owner (especially after the expiration of the current restriction on all development that is not educational or religious), the Newton City Council, the Newton Conservators, and the Newton Conservation Commission have all strongly supported the City taking action to permanently protect the portion of the woods owned

by Boston College. And neighbors of these woods have pledged to contribute very significantly to the costs of such protection.

We ask that as a candidate for Mayor, you make the following commitment:

1. You state that it is a top priority of yours that the City permanently protect this area.
2. You form a citizen's advisory group to assist in this effort, and meet with the group on a quarterly basis.
3. Within two years from taking office, you negotiate an agreement with Boston College that includes permanent protection of at least the wooded area.
4. Within two and a half years from taking office, you submit necessary approvals to the Community Preservation Act Committee and the City Council to finalize and implement the agreement with Boston College.
5. If despite your best efforts you are unable to forge an agreement with Boston College, you fully support a taking by eminent domain that ensures no development of this area and continued public use of it.

We appreciate your consideration of this vital open space protection opportunity. Please confirm in writing your agreement with this request. We would appreciate a response within thirty days, and are happy to discuss this further with you if you would like.

Signed,

AnnaMaria Abernathy
Anna A. Allen
Rory J. Altman
Joan Balaban
Peter Barrer
Adrian Bradley
John Chadis
Sandy Chadis
Annie Cole
Josh Coval
Doug Dickson
Judith Di Leo

Bev Droz
Kat Eutsler
Deena Freed
Joshua Freed
Lynne Friedlander
Steve Garfinkle
Jeff Goldman
J. Christopher Hepburn
Katherine Howard
David Hruska
Kenneth Kimmell
Rebecca Kornblatt

Daniel Krasa
Jonathan Landman
Rebecca M. Mayne
Tatjana Meschede
Steven Miller
Lucy Ogburn
Willard Ogburn
Gordon M. Orloff
Carol Sklar
Phil Stern
Susan Stern
Beth Wilkinson

#509-18

received by CPC staff 7 September 2018

Webster Woods Advisory Panel
c/o Law Department, Newton City Hall
1000 Commonwealth Ave.
Newton, MA 02459

September 5, 2018

Newton Community Preservation Committee
Newton City Hall
1000 Commonwealth Avenue
Newton, MA 02459

Dear Members of the CPC,

We, the undersigned members of the Webster Woods Advisory Panel, are writing to inform you of our strong support of the "Phase 1. Pre-Acquisition Proposal for 'Webster Woods,'" for which you are holding a hearing on Thursday, September 13.

We believe that the preservation of the wooded portion of the land (potentially with an appropriate buffer as well) at 300 Hammond Pond Parkway is critical for its ecological value and public access. It is the largest privately owned wooded property in Newton. When joined with the adjacent Department of Conservation and Recreation Hammond Pond Reservation and Newton's Webster Conservation Area, it is the core of the largest contiguous piece of open space in Newton. We believe that we must seize this opportunity to ensure that the property is protected from development.

The Newton City Council also recognized the importance of this property in its unanimous 2015 Resolution requesting the Mayor "to work to preserve the recreation and conservation character of 300 Hammond Pond Parkway."

We urge you to approve the proposal for legal counsel and other experts that would help to develop the protection strategy.

With thanks,

Members of the Webster Woods Advisory Panel

Lisle Baker
Peter Barrer
Dan Brody
Kathy Cade
Suzanne Carleo
Jeffrey Goldman
Barney Heath
Ken Kimmel

Eric Olson
Richard Primack
Stephen Small
Jennifer Steel
Ira Wallach
Beth Wilkinson
Jonathan Yeo

webpage:

www.newtonma.gov/gov/planning/cpa/projects/webster.asp

Newton, Massachusetts CPA program project webpage - selected **bold, green text** links to full-text documents

Webster & Cohen Conservation Areas

projects:

- [Elgin Street Conservation Land](#)
- **300 Hammond Pond Parkway (Rear) / Webster Woods**

contacts:

- Newton Conservation Commission
c/o Jennifer Steel, Chief Environmental Planner
Dept. of Planning & Development
City Hall, 1000 Commonwealth Avenue
Newton Centre, MA 02459
phone: 617.796.1134
email: jsteel@newtonma.gov
website:
www.newtonma.gov/gov/planning/conserv/
- (for 300 Hammond Pond Parkway project)
Mayor's Advisory Panel
c/o Beth Wilkinson, Chair
phone: 617.966.7491
email: bethwilkinson@mac.com
website:
www.newtonma.gov/gov/planning/current/devrev/hip/webster_woods_300_hammond_pond_parkway.asp
- (for Elgin Street project)
Newton Conservators
PO Box: 590011
Newton Centre, MA 02459
website: www.newtonconservators.org

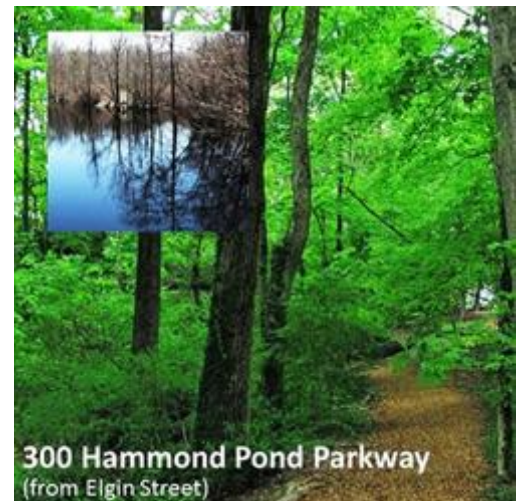
300 Hammond Pond Parkway (Rear) / Webster Woods

Off Hammond Pond Parkway, Chestnut Hill, MA Newton Centre, MA 02467; north of state Dept. of Conservation & Recreation Hammond Pond Reservation, abutting City of Newton Webster & Cohen Conservation Areas accessed from Warren & Elgin Streets, Newton Centre, MA 02459

photos credit: Dan Brody, Newton Conservators
(www.newtonconservators.org/websterphotos.htm)

other online resources:

- **High-Interest Projects page for this project** (under Development Review on Planning & Development Department website)
- **Newton Conservators Webster Woods webpage**
(http://www.newtonconservators.org/webster_preservation.htm)
- **Friends of Webster Woods Facebook page** (<https://www.facebook.com/fowwnewton/>)



goals:

Protect the open space character of the rear portion of this property by acquiring either land or a conservation restriction.

funding:

pre-acquisition

\$100,000 CPA funds requested

\$5,000 City of Newton general fund budget contribution

acquisition (tbd)

Proposal Review & Appropriations

21 June-3 July 2018 - **pre-proposal for funding of pre-acquisition professional services**

August - September 2018 - **proposal for funding of professional services** (including 2015 letters from the Conservation Commission and Board of Aldermen resolution)

13 September 2018 - **community letters received to date** (not submitted by proposal sponsor)

13 September 2018 - **presentation to Newton CPC public hearing**

24 September 2018 - **CPC funding recommendation**

Project Background & News

1650s-1970s - **Webster & Cohen Conservation Areas land use & ownership timeline**

1874-1953 - **Hammond Pond Parkway area maps**; see 1917 map (also displayed below) for land then owned by Metropolitan District Commission (MDC) prior to construction of the Parkway

August 1954 - **300 Hammond Pond Parkway sold by MDC to Congregation Mishkan Tefila** (deed, restriction)

October-November 2015 - support for open space preservation at 300 Hammond Pond Parkway:

- **Newton Conservation Commission letters** to Mayor, Board of Aldermen, CPC
- **Newton Board of Aldermen resolution** 195-15(2)

webpage:

www.newtonma.gov/gov/planning/cpa/projects/webster.asp

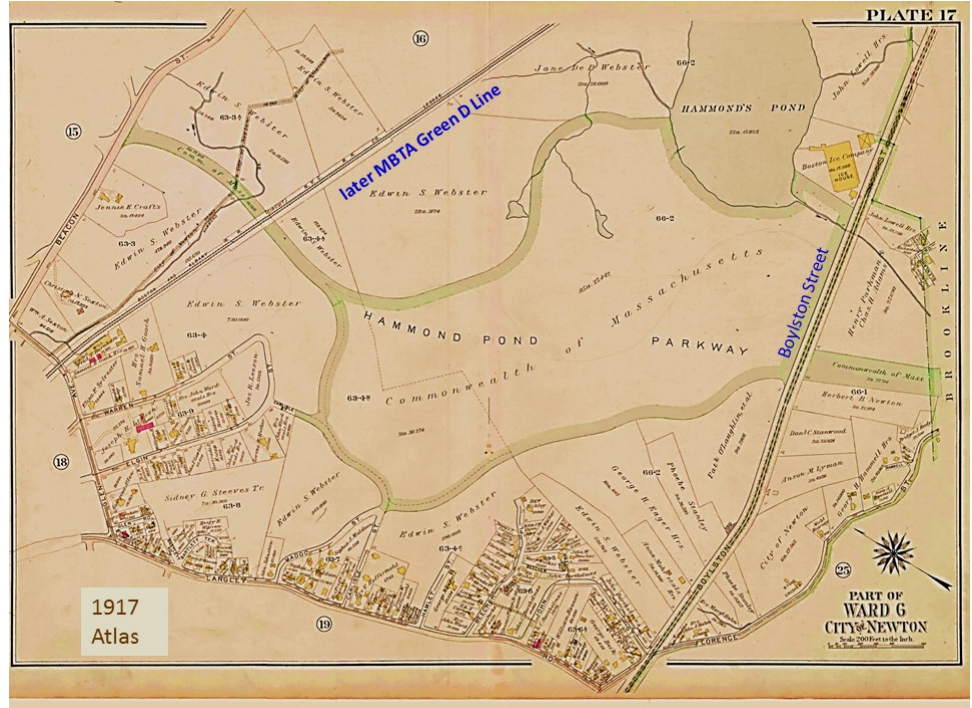
24 Sep 2018 #50948

May 2016 - 300 Hammond Pond Parkway sold by Congregation Mishkan Tefila to Boston College (deed)

August 2017 - appraisal of 300 Hammond Pond Parkway for the City of Newton

March 2018 - Mayor's Advisory Panel for 300 Hammond Pond Parkway

July 2018 - map of trails on this parcel, from Newton's Geographic Information System





RUTHANNE FULLER
MAYOR

City of Newton, Massachusetts
Office of the Mayor

#494-18
Telephone
(617) 796-1100
Telefax
(617) 796-1113
TDD
(617) 796-1089
E-mail
rfuller@newtonma.gov

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

RECEIVED
Newton City Clerk
2018 SEP 10 AM 11:51
September 10, 2018
David A. Olsson, CMG
Newton, MA 02459

Ladies and Gentlemen:

I write to request that your Honorable Council docket for consideration a request to authorize the appropriation of \$500,000 and authorize a general obligation borrowing of an equal amount for the purpose of funding the installation of air conditioning units at the Carr School.

As you know, the Carr School will become the permanent home of the current Horace Mann students. This authorization will enable the Public Buildings Department to have all work completed during the 2019 summer.

Thank you for your consideration of this matter.

Sincerely,

Ruthanne Fuller
Mayor

Carr HVAC Breakdown of Funds

9/20/2018

The Public Buildings Department respectfully requests \$500,000 to install ductless split AC units in the classrooms at the Carr School.

| | Funds Required |
|------------------------|-------------------|
| Designer | 60,000.00 |
| Equipment/Installation | <u>440,000.00</u> |
| Current Request | 500,000.00 |



RUTHANNE FULLER
MAYOR

City of Newton, Massachusetts
Office of the Mayor

#511-18
Telephone
(617) 796-1100
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(617) 796-1113
TDD
(617) 796-1089
E-mail
rfuller@newtonma.gov

September 24, 2018

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

Ladies and Gentlemen:

I write to request that your Honorable Council docket for consideration a request to authorize the appropriation of \$800,000 and authorize a general obligation borrowing of an equal amount for the purpose of funding the replacement of the roof at the Crafts Street Garage.

Thank you for your consideration of this matter.

Sincerely,

Ruthanne Fuller
Mayor

RECEIVED
Newton City Clerk
2018 SEP 24 PM 2:12
David A. Olson, CMO
Newton, MA 02459



CITY OF NEWTON, MASSACHUSETTS

PUBLIC BUILDINGS DEPARTMENT

52 ELLIOT STREET, NEWTON HIGHLANDS, MA 02461

Ruthanne Fuller, Mayor
Josh Morse
Building Commissioner

Telephone (617) 796-1600
Facsimile (617) 796-1601
TDD/tty # (617) 796-1608

September 14, 2018

Ruthanne Fuller, Mayor
Newton City Hall
1000 Commonwealth Avenue
Newton Centre, MA 02459

RE: Funding for the Crafts Street Garage Roof Replacement

Dear Mayor Fuller:

The Public Buildings Department respectfully requests \$800,000 to fund for the replacement of the Crafts Street Garage Roof.

Sincerely,

Josh Morse
Public Buildings Commissioner

cc: Maureen Lemieux, Chief Financial Officer
Alex Valcarce, Deputy Buildings Commissioner

Crafts Street Garage Roof Replacement, 110 Crafts Street

9/14/2018

The existing roofing system at the building was installed as part of the 1986 renovation to the building. Membrane roofs typically have a life expectancy of between 20-25 years depending on the location and the type of system installed, making the system 32 years of age.

After time, the membrane itself tends to lose its elasticity, become brittle and the roof itself will start to crack in every direction. The current condition of the roof is very poor. There are over 200 repair patches in the membrane due to cracks that have occurred over the past 6-7 years. New England's constant changes in temperature have greatly contributed to the loss of the membranes elasticity that has caused the roof to shrink, become brittle and cracks are the result.

There are constant leaks around the roof drains due to the cracks as well as around any of the Roof Top HVAC Equipment. Falling tree branches have also contributed to the leaks when they puncture the brittle membrane. Flashing around the parapets and the roof edge have been pulled away due to the brittleness and membrane shrinkage, again causing leaks. Currently there are a number of leaks that will require repair but due to the condition of the roof these repairs will only be temporary until the next rain or snow. It is our recommendation that this roof be replaced as soon as possible due to its age and poor condition.

With the above as an understanding the Public Building Department requests \$800,000 for the replacement of the roof at the Crafts Street Garage. Please see the breakdown of the cost below:

Funds Required:

| | | |
|----------------------------|----|-------------------|
| Design & CA | \$ | 51,900.00 |
| Masonry | \$ | 15,000.00 |
| Roof demolition & disposal | \$ | 100,000.00 |
| Roof installation | \$ | 245,000.00 |
| Roofing materials | \$ | 350,000.00 |
| 5 % Contingency | \$ | 38,100.00 |
| | \$ | <u>800,000.00</u> |



As you can see in this picture, there are hundreds of repairs and patches that have been made to this roof. The roof is now in a condition that walking on it actually causes it to tear, which makes service and maintenance extremely problematic.

90 Crafts S