



Ruthanne Fuller  
Mayor

Barney Heath  
Director of  
Planning & Development

Malcolm Lucas  
Housing Planner

*Members*

Esther Schlorholtz, Chair  
Donna Rigg, Vice-Chair  
Judy Korzenowski  
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## CITY OF NEWTON, MASSACHUSETTS

### Fair Housing Committee

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## MEETING AGENDA

Date: February 7, 2024

Time: 8:30 a.m.

Place: Virtual (Zoom)

**Zoom Online Meeting:** <https://newtonma-gov.zoom.us/j/87651277807>

The Fair Housing Committee will hold this meeting as a virtual meeting on Wednesday, February 7, 2024, at 8:30 am. No in-person meeting will take place at City Hall. To view and participate in this virtual meeting on your smartphone, download the “ZOOM Cloud Meetings” app in any app store or visit [www.zoom.us](http://www.zoom.us). At the above date and time, click on “Join a Meeting” and enter the following:  
**Meeting ID: 876 5127 7807.**

You may also join the meeting from your smartphone by dialing 1(646) 931-3860 and entering 87651277807# For audio only, call 1(646) 931-3860 and enter **Meeting ID: 876 5127 7807.**

To view and participate in this virtual meeting on your computer, at the above date and time, either copy the attached link into your browser or visit [www.zoom.us](http://www.zoom.us), click “Join a Meeting” and enter the following **Meeting ID: 876 5127 7807.**

To view meeting documents, click [here](#).

1. **Approval of January 2024 minutes**
2. **Affordable Housing Priorities Task Force**
3. **Chapter 40B Safe Harbor**
4. **MBTA Communities Act Update**
5. **FY25 Annual Action Plan Presentation**
6. **Fair Housing Training**
7. **Resident Experience Update**
8. **Discussion of 2024 Committee Priorities**

## **9. Subcommittee Updates**

- **Lottery Results & Lease-ups Sub-Committee**
- **Membership & Nominating Sub-Committee**
- **Fair Housing Award Sub-Committee**

## **10. Fair Housing Committee Priorities Discussion**

### **FH Protected Groups**

- **Promote housing choice for diverse populations to advance Affirmatively Furthering Fair Housing (AFFH), with focus on race/ethnicity, public subsidy, and disability**
- **Promote Diversity, Equity, Inclusion and Belonging in Newton**
- **Promote effective processes/practices for new affordable homeownership and resales**
- **Promote improved practices for real estate professionals to achieve more housing choice for diverse populations**
- **Identify and work to overcome barriers to successful tenancies and to improve processes/practices for tenant selection in lottery and market rate multifamily rental housing**

### **Learning/Teaching**

- **Enhance FH literature and website information and access for the public**
- **Promote FH training for real estate professionals, landlords, tenants, the public and committee members**

### **Data and Analysis**

- **Promote data collection on multi-family rental and new homeownership occupancy**
- **Enhance Project Review of Housing Developments to advance AFFH**
- **Support AI/Consortium Fair Housing Testing and FH testing in Newton**

### **Collaboration**

- **Collaborate with Related Newton Commissions and Committees to increase affordable housing for households of various sizes and lower incomes and to encourage increased funding for affordable housing**
- **Promote affordable housing production in coordination with other City commissions and committees**
- **Support federal, state and city initiatives that promote AFFH**
- **Collaborate with Human Rights Commission on Fair Housing Complaint Process**
- **Contribute to Newton's FH-related plans**
- **Address committee membership appointments with representation from Human Rights Commission and legal counsel with FH specialty**

**Next meeting Wednesday, March 6, 2024**

\*Supplementary materials are available for public review in the Planning Department of City Hall (basement) the Friday before the meeting. For more information contact **Malcolm Lucas at 617.796.1149**. The location of this meeting/event is wheelchair 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/Section 504 Coordinator, Jini Fairley, at least two business days in advance (2 weeks for ASL or CART) of the meeting/event: [jfairley@newtonma.gov](mailto: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



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## CITY OF NEWTON, MASSACHUSETTS

### Fair Housing Committee

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## MEETING MINUTES

Date: January 3, 2024

Time: 8:30 a.m.

Place: Virtual (Zoom)

**Members Present:** Esther Schlorholtz, Chair

Donna Rigg, Vice Chair

Judy Korzenowski

Josephine McNeil

Tatjana Meschede

Steve West

Alex Weiffenbach

**Members Absent:**

**Staff Present:**

Malcolm Lucas, Housing Planner

Jini Fairley, ADA/Sec. 504 Coordinator

Lara Kritzer, Director of Housing and Community  
Development

Shaylyn Davis-Iannaco

**Public Present:**

Sharyn Roberts, League of Women Voters Newton

Amy Dain, Dain Research

Steve Burnham

Julia Malakie, Council

Andreae Downs, Council

Malcolm Lucas, Housing Planner served as recorder, Esther Schlorholtz, Chair, called the meeting to order at 8:30 a.m.

To view meeting documents, [click here](#).

**1. Approval of December 2023 minutes**

- Upon a motion by TM, SW seconded the motion. The December 2023 minutes were approved 6-1-0, with 1 abstention, with planning



making the correction from “our committee” to the Lottery & Lease ups Sub-committee in section 5 of the minutes, TM recommended.

## 2. Fair Housing for Real Estate Professionals Training

- ES noted the upcoming fair housing training for real estate professionals with Attorney Kelly Viera at Suffolk Law on January 17. She thanked JK for promoting the event and ML for helping with the invitation process. She said that LK, JF and she met to discuss the future process of collecting RSVPs for training and other committee events, and that Planning proposes to have the City manage it going forward. JM stated that she would forward the information to Greg Reibman, Chamber Real Estate Group.

## 3. Exclusion By Design Report with Amy Dain

- TM introduced Amy Dain who is an independent consultant on public policy and focuses on urban and suburban planning. She has deep expertise on zoning in Massachusetts and has extensive experience with many policies and think tank entities in the state. AD published a study in 2019 on the state of zoning and multi-family housing in Greater Boston. AD is invited today to speak with the FHC about her latest work on exclusionary actions taken by Massachusetts communities that was prepared for Boston Indicators as a part of The Boston Foundation this past November 2023, called *Exclusionary by Design*. See [presentation](#).
- AD thanked TM and stated that she is from Newton, MA. She gave some background on what she does, including growing up in the City, serving on the planning board and on the board of the arts and cultural organization, Newton Community Pride. She stated that her presentation will focus on a subset of her larger study, the history of zoning that covers 100 years of zoning history. She will present her investigation into zoning’s purposes in the 1970s in Massachusetts. In the early 1970s most of the Boston suburbs voted to eliminate apartment zoning or highly restrict it. This raised a question for her why this happened and was the impetus for her research.
- She explained that during the two decades before the 1970s, the supporters of zoning for apartments identified the need for housing, and cited the fiscal benefits, including more tax revenues and fewer children living in apartments that would not add to school costs. Those opposed were concerned about socio-economic and class status of their communities, with one community saying that apartments were “ultimately going to take the town down a notch” and would affect the social ranking of the community in the metropolitan area. During this time, municipal plans were explicit that zoning was considered a tool for recruiting and retaining wealthy people and for discouraging lower income people.
- AD reviewed her research using original documents on local planning, master plans and housing plans for cities and town throughout Massachusetts, including more than 100 in the metropolitan area. Newton was part of the study. There were a number of communities in the mid-century era that considered the pros and cons and decided to ban apartments completely or almost completely. Weston, Carlisle, Dover, Duxbury, Wenham and other municipalities made up an “executive belt” of a state zoning policy. These communities figured they could forego the fiscal benefits of apartments for the sake of economic and social status.

- AD continued to go over dates and the history of zoning and racism. She said that many communities banned apartments, but that more cities and towns allowed them in the mid-century, primarily for fiscal reasons, than banned them. She said that Newton allowed apartments, and many were built, including one where she lived. She described “the Big Downzone” in the early 1970s, especially 1972 and 1973, when most communities voted to ban apartments. This was a remarkable level of concerted action, requiring major votes by cities and towns. In Newton, she said it was a bit different and described a slowdown of permitting that reduced the number of apartments, but which was not an explicit vote to ban apartments or down-zone. This was a significant shift in Newton’s policies, with permitting approvals apparently becoming more controlled and discretionary. In fact, permitting approvals dropped in subsequent years.
- She reviewed reasons for the Big Downzone in the whole municipal region that happened almost all at once, including the environmental movement, anti-growth, anti-highway expansion and growth pains resulting from rapid growth in the metropolitan area. She said that these issues were important but said that if these growth pains were the cause, cities and towns could have used “smart growth” policies, which were available to them at the time, to manage growth effectively. Instead, they chose to ban apartments everywhere, even though there were fiscal benefits to having them. She said that class elitism played a key role. She said that racism played a very significant role. She noted the historical context that the 1960s were a time of racial change, civil rights victories and calls for desegregation in schools and neighborhoods. She said this was the time of the Selma marches and when Martin Luther King came to Boston speaking out about segregation in the north as a new form of slavery. She gave the example of Weston to illustrate its actions. Weston was 99% white and mostly affluent. In 1965, Weston banned apartments. Among their stated goals, the City included a “Social Goal: Accommodate further moderate population growth in a manner consistent with the present characteristics of Weston.”
- AD focused on the issue of racism and its key role in the Big Downzone. She stated that many Black people in the 1960s and 1970s moved to Boston for opportunity. She stated that many of them were looking for apartments. In Boston the region's racial characteristics were changing, urban areas were diversifying, and most suburbs were 99% white. The movement organized persistent calls for desegregation, for diverse housing for diverse people across the suburbs. In 1968, the City of Newton’s housing report called out racism and said: “Inherent in the controversy, but not often openly articulated, is the notion that to open a community’s low-income housing developments to other than local residents signals a major influx of black families fleeing the oppressive conditions of the core City ghettos.” In 1968, after the assassination of Martin Luther King, Congress passed the federal Fair Housing Act of 1968. Civil rights leaders understood the central need for housing as part of civil rights and desegregation. In the following years, Newton, and many other communities, organized efforts to promote civil rights and desegregation, many led by clergy. In the 1970s busing became a major source of conflict, with the Boston School Committee’s meeting minutes showing explicit racism and legal action requiring desegregation of Black schools. There was significant white flight from Boston’s neighborhoods into surrounding communities. Ultimately this white flight affected zoning and permitting policies in suburbs.
- AD said that zoning policy and its role in segregation is complex and difficult to explain to broad audiences how it affects segregation. She described her original source research from the early 1970s on the State legislature’s efforts to require local policy growth statements, which she said were designed to be conciliatory to promote growth and change in cities and

towns. Each community's committee had to work to make recommendations to the State. She said it was most instructive how local communities explained the motivations for their Big Downzone policies. She said no-growth policies, income and class status policies were consistently cited, but not race. She gave examples from Quincy, Melrose, Milton, Belmont and others that explicitly sought to preserve and protect their "unique characteristics." Belmont's plan said, "This town will remain a relatively expensive place to live and so will attract only those families so economically situated."-She highlighted Needham's Local Growth Policy that said, "Needham's goals may be defined as preventing major changes to the physical character of the community as a whole." However, AD found an appendix to this statement which said that the Growth Policy Committee did not agree with "the efforts of certain members of the Congregational Church of Needham and does not represent the consensus opinion of the committee nor is said appendix endorsed by the Growth and Policy Committee." The appendix to which the committee objected said, "The moral and human costs of segregation are intolerable. Opening up our town and others like ours is in the interest of all citizens... We picture Needham offering a broad spectrum of housing, from multiple-family dwellings to single-family homes of various sizes and values so that it may have a more heterogeneous population." These examples of growth plans suggested that new housing should serve existing residents and employees and should not be for outsiders. They offer many insight into the exclusionary motivations for the Big Downzone.

- Newton was one of the communities whose goals specified the need for the development of varied densities of housing and the commitment of the City to achieve numbers of units to meet projected demand, in addition to statements about working to achieve integration. Newton was among the minority of communities that said it supported integration, including Scituate and Lexington. AD said that the votes (by aldermen) for housing were not there even when the official statements supported it.
- AD said that at this time there were loud, organized, and persistent calls for desegregation, but that because of the context of what was occurring in urban areas and the changing racial characteristics, suburbs mobilized tools of public policy and laws to maintain the highly segregated status quo. She said that plan after plan stated that new housing should be for current residents and employees, and not for outsiders. She said that her assessment of the history of exclusionary zoning was not primarily about protecting the environment, managing traffic or local budgets, but for reasons of social elitism and racism. She said the laws and policies were designed to protect the advantages of insiders of suburbs, that were generally 99% white. This restricted access to numerous resources available in suburban communities. She said that this was all done in the context of the Fair Housing Act which explicitly prohibited this discriminatory behavior. The actions of cities and towns created areas of concentrated wealth and areas of concentrated poverty in the metropolitan area. The zoning undermined social mobility and opportunity. AD highlighted that the Big Downzone also led directly to the severe housing shortage, high housing costs and segregated wealth patterns in the Boston metropolitan area. AD said that she covered more history and examples in her report, *Exclusionary by Design*. She thanked the committee for its work on these important issues and opened the meeting for questions from the FHC.
- ES asked is it possible that based on disparate impact analysis of communities in response to the MBTA Communities Act, could there be a class action suit that could be brought based on disparate impact results in communities. She said that disparate impact analysis does not require identification of motivation. AD stated that she is not a lawyer but from a historical perspective it is important to look at motivations, because it impacts what kind of

interventions in public policy will work. She said that over decades, fiscal concerns were identified particularly, but that after 1976, it became taboo to identify that a community was using zoning for “class sorting.” Because communities continued to identify fiscal growth as their primary concern over the years, the state established other interventions like Chapter 40R which paid communities based on additional student costs resulting from new apartments. This had limited effectiveness. She acknowledged that pieces of the overall picture can be explained by fiscal, environmental and traffic impacts, but there is still an unspoken issue of socio-economic and race status that exists. She said she is glad there is a taboo on people explicitly saying they want to keep out poor people and people of color, but it is important to address these forms of discrimination. She agreed that disparate impact does not require identification of motivation. She cited examples of disparate impact resulting from local actions related to families with children, age restricted housing, and lower bedroom requirements. She said that developers understand that the approval process is discretionary and that they will get better results in the permitting process if they create fewer bedrooms. She noted that this concern correlates with discrimination against Black households which tend to rent at higher rates and have larger average household sizes. She said that this results in disparate impact by race. AD said that there may be legal and court interventions that are required. She said that the history of zoning restrictions shows the need for stronger action by the state because the local community governance does not generally support diversification. ES stated that she worked in banking for almost 30 years and the concept of disparate impact is that the legal analysis does not have to get to motivation, it goes to what is the impact. This resulted in a sea change effect on banks and how they've lent to protected classes. She said that it is a very important and valuable tool.

- SW said that since the Big Downzone and partly because of social pressure, those opposed to inclusionary zoning and multi-family housing haven't needed to be careful about identifying racism or classism because the status quo is in their favor. They have been winning in terms of slowing down or preventing new housing. He said that those opposed to more housing know that talking about race is not acceptable and keep that hidden. At the same time, he has heard people say that they do not want poor people to move into Newton because it will affect their property values, and noted correlations between race, class, and income. He asked whether the requirement to respond to the MBTA Communities Act is forcing more open discussions on racism and classism. AD acknowledged SW's comments saying she plans to examine official deliberations on developments and permitting more closely related to zoning and multi-family housing, including for MBTA Communities. She noted that Katie Einstein at Boston University has been researching deliberations on zoning and permitting for the past five years and acknowledged her valuable research. She discussed that in suburban communities, those that attend zoning and permitting meetings (“neighborhood defenders”) tend to be homeowners, white, wealthier, and older than the metropolitan area population. This population tends to identify traffic and parking first as the reasons for opposition. She said that it is important to acknowledge racism (even though she prefers that it continue to be unacceptable to be racist) and to consider the kind of policies and actions at state and federal levels as well as court actions that could be taken to address discrimination.
- JM asked about the influence of the state's affordable housing law, Chapter 40B, and its influence on desegregation in suburbs. AD said that 40B is very important in the history of zoning and permitting in the state. It was adopted in 1969, with general recognition that housing was a central aspect of segregation and that zoning changes could reduce segregation. She discussed the background of why this law passed despite its requirements that every City and town achieve at least 10% affordability of its housing stock, and therefore,



requiring suburban communities to open up their communities to low-income people. She said that during this time, the City of Boston was required by law to desegregate its primarily Black schools, but that primarily white schools in suburban communities were not required to desegregate. Boston had a higher number of legislators at the time than they do today, and they voted for 40B essentially to make suburban communities be affected too by legal action in Boston as a form of retaliation. She also noted that liberal proponents of desegregation in the legislature joined with Boston legislators to pass the law. AD said that 40B has had a huge impact on housing production, leading to thousands of units being built that otherwise probably would not have been built. She described an example from the early 1970s in Newton, led by clergy and the City, to propose building 500 affordable units in 10 projects. She said the proposals were rejected by the aldermen, which then led to the state holding 42 hearings. She said this opposition exhausted the nonprofit's resources and, in the end, only 50 units were built.

- JM discussed the demographics in Newton and other suburban communities that include a small number of Blacks. She asked why AD focused her research on Blacks. She asked how focusing on small Black populations in suburbs would play into a legal disparate impact action in Newton. She noted as an aside that this is why the FHC needs a civil rights attorney on the committee. She also said that poverty in Newton must be highlighted, regardless of race. She noted that she believes the MBTA Communities Act will not directly increase the number of poor and people of color. AD said that zoning as a tool of exclusion only works based on wealth and income, and not as explicitly racist, but the extent of correlation means zoning policies effectively exclude racial groups, families with children, and other protected classes. She said her research focused on Blacks because of its historical importance in the history of Massachusetts. Committee members thanked her for her valuable work.

#### **4. Newton Lottery Process Follow-up**

- SDI presented responses to questions that were identified in the September meeting of the committee. She said that JF, the City's ADA/504 Coordinator, and she will be meeting to discuss her important review of development plans at an earlier stage so that issues JF identifies on accessibility and affordability can be caught earlier in the review process. She noted the FHC questions regarding an example of an incomplete City review of a fair marketing plan. She said that, at this time, they rely primarily on complying with state approval of these plans, and the City must defer to the state to ask developers to make changes, but they will review the process Planning currently follows and recommend any changes. She said that the City is undertaking a look-back review of the Inclusionary Zoning (IZ) ordinance requirements. She said this is done every five years and that the review is due in 2024. She said the review will include considering how affordable units in projects of less than seven units will be treated, among other issues. She said that her expectation is to accomplish this estimated in draft form in the summer months. ES invited her to update the committee on progress as this review goes along. JM asked that anything affecting the lottery process should be broadly and comprehensively reviewed, and she asked her to present to the subcommittee on lottery and lease-ups among other groups. Councilor AD asked for clarification regarding the IZ assessment. She asked if the focus of the assessment will be on the effectiveness of IZ to get projects built or will it be on the effectiveness of the lottery process. SDI responded that the lottery and marketing process is part of the IZ ordinance and compliance with state requirements as part of the look-back. She said the lottery and marketing process will be reviewed as part of consideration for any changes that may be proposed. Councilor AD said that the last review was about six years ago and there have been many changes since that time, including changes in the market, feasibility, costs and other issues. She said she looks forward to getting the data.

- TM asked about the data that developers collect that the Lottery Results & Lease-Ups Sub-Committee has been collecting and have been successful with the bigger developers. She said this lottery and lease-ups subcommittee would like to have further discussion with Planning on how this data is collected and analyzed to encourage fair housing. SDI stated that she could attend one of their meetings.
- JF asked about the need to provide more affordability and accessibility to reach people with disabilities at under 50% of Area Median Income (AMI). She said that they require rental subsidies to make the units affordable at these levels, otherwise the rent levels are inaccessible. She described challenges for people with disabilities in terms of unit designs and access to amenities, such as laundry facility access. She asked that the IZ review include consideration for more extremely low-income people with disabilities as well as review of unit lay-outs. She encouraged review of the IZ by more departments as well as the groups identified. SDI said that she would like to see more extremely low-income units but that feasibility will need to be considered. She talked about the need to also address people that are unhoused. JF agreed that there needs to be improved accessibility and affordability for people with disabilities that are both housed or not housed.

## **5. Discussion of 2024 Committee Priorities**

- ES said that as the IZ ordinance review and proposed changes are being made, this is also a good time to review the FHC's project review matrix and the document called Reviewing Consideration of City Fair Housing Goals. She said that it is important to get clarity on how that fits in Planning's project review process, including JF's accessibility and affordability review. She said that it is preferable to identify issues and concerns for developers early in the review process so that costs and delays are minimized. She also said that the City's oversight of the Subsidized Housing Inventory including IZ, and all permitted affordable housing, is another area that we have had some discussion about enhancing and this should remain a priority. She said that responding to exclusionary zoning policies and actions should also be part of our priority list.

## **6. Subcommittee Updates**

- **Lottery Results & Lease-ups Sub-Committee**
- **Membership & Nominating Sub-Committee**
  - DR stated that the FHC has a potential new member that JK recommended. Steve Burnham is the prospect, and he is currently participating in this meeting. DR stated that he has another meeting to attend to show interest and then he will be able to start the application process. JK said that she would follow up with SB. ES mentioned that the committee still needs a fair housing lawyer, as JM has also stressed.
- **Fair Housing Award Sub-Committee**
  - ES requested nominations for the award. She said that we would like to have a nomination for the next meeting. JM asked for written criteria and ES said she would share it with the committee. It was crafted around Sheila Mondschein's fair housing work.

## **7. Fair Housing Committee Priorities Discussion**

### **FH Protected Groups**

- Promote housing choice for diverse populations to advance Affirmatively Furthering Fair Housing (AFFH), with focus on race/ethnicity, public subsidy, and disability
- Promote Diversity, Equity, Inclusion and Belonging in Newton
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- Contribute to Newton's FH-related plans
- Address committee membership appointments with representation from Human Rights Commission and legal counsel with FH specialty

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# Newton Housing Priorities Task Force Progress Report **for the FHC**

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SUMMARY OF MEETING 1, NOV 30, 2023 &  
MEETING 2, JAN 11, 2024

***FEEDBACK & INPUT FROM COMMITTEES IS  
WELCOME!***

# Task Force Members

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Fair Housing Committee    Josephine McNeil

Housing Partnership        Charles Eisenberg & David Rockwell

Housing Trust                Ann Houston & Susan Albright

*The committees were encouraged to nominate 2 representative; the FHC is encouraged to add an additional member*

# Goals

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- ❑ Articulate priorities to meet affordable housing needs that reflect the perspectives of the Fair Housing Committee, the Housing Partnership, and the Housing Trust, and are grounded in current data
- ❑ Shared priorities will support better targeting and leverage of resources
- ❑ Committee Representatives are responsible for sharing the Task Force work with their respective committees in order to insure cross-fertilization of thinking between committees
- ❑ The Committees are not bound by the priorities
- ❑ Identify ways to educate residents about housing needs and priorities
- ❑ Provide a foundation to update a housing implementation strategy
- ❑ Complete work in 6 months

# How will the priorities be used?

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- ❑ Provide a foundation to update a housing implementation strategy
- ❑ Guidance for committees and prospective developers about the housing mix Newton desires to achieve, recognizing that priorities are not rules
- ❑ Guidance for the Trust in its investments, especially in establishing priorities for flexible investments.

# Approach: 1<sup>st</sup> review the data

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## Supply / Inventory

- ❑ City Investment data
- ❑ Supportive Housing Inventory projects, including 40B and Inclusionary Zoning properties
- ❑ Newton Housing Authority Portfolio
- ❑ Inventory of City land (~70 parcels)

## Demand / Need

- ❑ Update key portions of *Newton Leads 2040 Plan*



# Supply / Investments

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Analyzed investments over past 10 years (2014-2024)

- Leverage primarily about having enough scale to attract state-managed resources, especially LIHTC
- Production more affordable than Preservation
- Cost comparisons skewed by high construction inflation
- Other includes group homes and mixed projects (small #)

	# Project	# Aff Units	Total City \$\$	Avg City \$/A unit	TDC total	TDC Avg/unit	Leverage Ratio	City \$ /A unit	City \$ as % of TDC
Projects <10 units	4	19	6,681,207	351,642	9,182,648	483,297	1.37	351,642	73%
Projects 11-49 units	4	153	9,797,666	64,037	44,052,916	287,928	4.50	64,037	22%
Projects 50-100 units	2	115	9,852,075	85,670	70,470,139	612,784	7.15	85,670	14%
Projects +100 units	1	144	6,768,215	47,001	31,698,215	220,126	4.68	47,001	21%
Production	4	200	16,744,741	83,724	110,175,717	550,879	6.58	83,724	15%
Preservation	5	216	11,617,654	53,785	38,121,692	176,489	3.28	53,785	30%
Other	2	15	4,736,768	315,785	7,106,509	473,767	1.50	315,785	67%



# Newton Leads 2040 Update

Judi Barrett



## DEMOGRAPHICS

### Need:

- More data on race and ethnicity; would owners share that information?
- Data on needs for people with disabilities
- Important: look at SMSA and not just Newton

- Household size is relatively stable over 20 year span
- Age: shifts need to be confirmed: appears 25-44 shrinking over 20 years, 45-64 gains in 2011, shifting to the 64+ in 2021: *meaning, losing young adults, gaining seniors*
- People living alone are distributed equally homeowners and renters

### Information from Census Reporter:

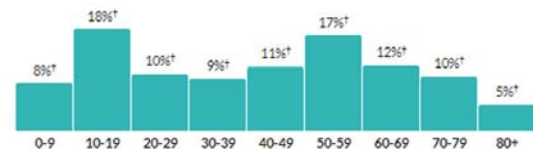
Age

## 44

Median age

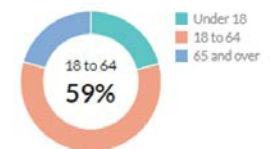
about 10 percent higher than the figure in the Boston-Cambridge-Newton, MA-NH Metro Area: 39.5  
about 10 percent higher than the figure in Massachusetts: 40.3

Population by age range



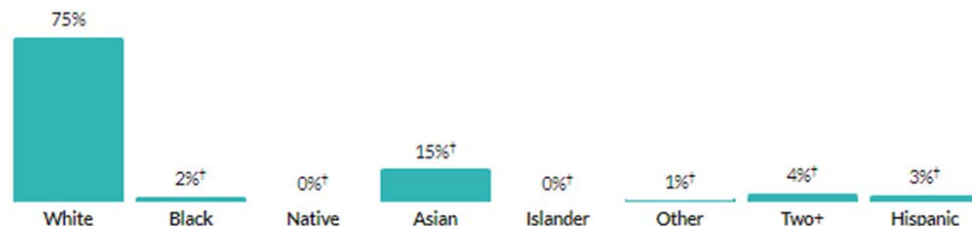
Show data / Embed

Population by age category



Hide data / Embed

### Race & Ethnicity



\* Hispanic includes respondents of any race. Other categories are non-Hispanic.

Show data / Embed

# Newton Leads 2040 Update

Judi Barrett



## HOUSING STOCK

- Analyze rental and home ownership separately
  - Analyze the SHI by age of property, population served, affordability levels (add to Inventory)
  - Ditto for NHA portfolio
  - Important to update inventory analysis by population served & by affordability
  - Is it possible to id both project based and voucher rental subsidies (Sec 8 & MRVP) by property>; would owners share information?
  - Layer in mobile vouchers if possible
- Of the 876 units produced (market and affordable) between 2015-2022, 31% single family, 0.5% were 3-4 family, and 66.4% were multi-family. *Meaning: significant growth in multi-family*
  - Newton is at Safe Harbor; *meaning, strategy needs to address lack of 40B leverage*
  - 55% of SHI are affordable; *assume high % of senior housing on list (majority of 100% affordable private housing is senior) – test!*
  - Some of the data needs further research
    - Shifts in types of housing and average size of units need review
    - Types of affordable housing needs review
    - Size of units needs review

# Newton Leads 2040 Update

*Judi Barrett*

~

## AFFORDABILITY

- Analyze rent by bedroom size
- Update cost burden data and pair rent costs with average wage for jobs
- FY23 Median family income is \$149,300 \* (or \$163,074 per Census Reporter)
- Median sales price \$1.7Million, a 264% increase in median single family sales price 2003-2023
- Income of \$417,360 needed to buy median priced home;
- Average rent in 2024 is \$3,491, based on review of 4 leading analysts.
- Need income of \$143,280 to support rent
- Data needing further research
  - Cost burden data needs second look



**Ruthanne Fuller**  
Mayor

**City of Newton, Massachusetts**  
Department of Planning and Development  
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**Barney S. Heath**  
Director

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## MEMORANDUM

Date: January 4, 2024

TO: Zoning Board of Appeals Members  
Barney Heath, Director of Planning & Development Department  
Alissa Giuliani, City Solicitor

FROM: Jonah Temple, Deputy City Solicitor  
Jennifer Caira, Deputy Director, Planning & Development Department  
Lara Kritzer, Director of Housing and Community Development  
Katie Whewell, Chief Planner for Current Planning

CC: Mayor Ruthanne Fuller  
Jonathan Yeo, Chief Operating Officer  
City Council Members

SUBJECT: Update on Chapter 40B Safe Harbor Status

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The purpose of this memorandum is to update the Zoning Board of Appeals (“ZBA”) on the most recent calculation of the Chapter 40B statutory safe harbors, as of the filing of the Comprehensive Permit application at 78 Crafts Street on December 11, 2023. Safe harbor status is available to municipalities that have met either the *General Land Area Minimum*, achieved when housing units eligible for inclusion on the state’s Subsidized Housing Inventory (“SHI”) exist on sites comprising 1.5% or more of a municipality’s total land area; or the *Housing Unit Minimum*, achieved when a municipality’s SHI Eligible Housing units exceed 10% of its total housing units.

As an initial note of clarification, SHI Eligible Housing units are often referred to as “affordable units” (including in past versions of this memorandum); however, not all units on the City’s SHI are deed-restricted units affordable to households up to 80% of the Area Median Income (“AMI”). The Massachusetts Executive Office of Housing and Livable Communities (“EOHLC”) Chapter 40B Guidelines provide that if 25% of units in a rental development are affordable up to 80% AMI, or if 20% of units are affordable up to 50% AMI, then all units in the development—including the market rate units—are included on the SHI (e.g. Northland Charlemont, where 25% of the units are affordable at 80% AMI,

meaning all 370 units, including market rate units, are counted on the SHI). As a result, the City's SHI Eligible Housing includes both affordable units and market rate units. Therefore, while the City need only attain 10% SHI Eligible Housing units to reach the Housing Unit Minimum safe harbor, that does not represent the actual percentage of the City's affordable units. Currently, approximately 5.5% of the City's housing stock is actually deed-restricted housing affordable to households earning up to 80% AMI.

City staff previously calculated Newton's progress towards these safe harbors in August 2022. Those calculations were reported to the ZBA in a memorandum dated August 24, 2022. At that time, Newton's Land Area Minimum calculation equaled 1.35% and its Housing Unit Minimum calculation equaled 9.80%.

The August 2022 calculation utilized the 2010 Census data for year-round housing units as the 2020 data was not released until this year. This current calculation utilizes the year-round housing units from the 2020 Census and the recent approval of 370 units from the Northland Charlemont 40B by the ZBA this past October. The updated calculations show that Newton has yet to satisfy either safe harbor threshold: the Land Area Minimum calculation (with a 1.5% threshold) is **1.41%** and the Housing Unit Minimum calculation (with a 10% threshold) is **9.94%**.

### **Overview of the Chapter 40B Safe Harbors**

#### **A. Background**

- Chapter 40B, also known as the Comprehensive Permit Law, is a state law enacted in 1969 to facilitate construction of affordable housing by removing obstacles and streamlining the permitting process for certain development projects. Under Chapter 40B, affordable housing is defined as a housing unit that is affordable to households with annual gross median incomes up to 80% of the AMI. The law provides that, in municipalities with an insufficient supply of affordable housing, a developer of a project that has a minimum percentage of affordable units may apply for a single Comprehensive Permit from the ZBA, rather than seeking separate approval from each local board with jurisdiction over the project. Chapter 40B also gives the ZBA authority to waive zoning and other local permitting requirements for such projects.
- Chapter 40B also allows municipalities to invoke various safe harbors if they are providing their fair share of affordable housing, which act as an exemption from the Chapter 40B framework. If and when the City creates enough affordable housing to meet a safe harbor, the provisions of the Chapter 40B law may be lifted, meaning a decision made by the ZBA concerning a comprehensive permit application—whether it is to deny the permit, approve the permit, or approve it with conditions—will be upheld on appeal as a matter of law.
- Achievement of a safe harbor, however, does not deprive the ZBA of the ability to grant additional comprehensive permits to developers seeking to construct housing. Even if the City has met a safe harbor, comprehensive permit applications may still be submitted to the ZBA and the ZBA must determine whether to invoke the safe harbor within 15 days after opening a public hearing. For example, there may be future 40B projects that the ZBA

determines do not necessitate the invocation of a safe harbor even if the City has reached one. Additionally, if the ZBA does invoke a safe harbor, a full public hearing will still proceed and the ZBA may ultimately issue a comprehensive permit.

## B. SHI Eligibility

- The safe harbor calculations are not static and routinely fluctuate. Housing properties are routinely added and removed from the City's list of SHI Eligible Housing units in accordance with EOHLC regulations and guidelines. EOHLC's regulations and guidelines dictate when units first become eligible for inclusion on the SHI and thus can be counted in the City's safe harbor calculations.
- For 40B projects approved by the ZBA, SHI eligibility begins on the date that the comprehensive permit is issued and filed with the City Clerk. Thereafter, 40B projects that have received approval lose SHI eligibility if a building permit is not issued within one year of receiving local permitting approval—though the project will regain eligibility after a building permit is issued. As an example, the Haywood House expansion received a comprehensive permit on July 26, 2018. At that time the project was SHI eligible and counted in the City's safe harbor calculations. The project then lost eligibility and was removed from the calculations in July 2019 as a year had passed and the building permit was not yet issued. As a building permit was issued for the project in December 2020, it was once again SHI eligible and the now completed and occupied units are again part of the safe harbor calculations.
- For special permit projects approved by the City Council, SHI eligibility does not begin until the project receives approval from EOHLC. Under EOHLC regulations, affordable units created through the special permit process are called "Local Action Units" ("LAU") and require approval by EOHLC, which is known as "LAU Approval." The purpose of this approval process is for EOHLC to confirm that the Local Action Units are affordable, subject to a long-term affordability deed restriction, subject to a fair housing marketing plan, and subject to ongoing monitoring. In contrast, affordable units created by a Chapter 40B comprehensive permit and approved by the ZBA do not require EOHLC LAU Approval because those projects already have approval from a state subsidizing agency before applying for a comprehensive permit. As a result, comprehensive permit projects are immediately SHI eligible while special permit projects must wait until final LAU Approval before any units are SHI eligible. This means that projects such as Riverside that have been issued a special permit but have not yet been approved by EOHLC as Local Action Units, cannot be counted yet in the City's safe harbor calculations. The standard practice for the City is to apply for LAU Approval (jointly with the project developer) sometime after commencement of construction but prior to completion and marketing of any units.
- Given the fluctuation of the number of the City's SHI Eligible Housing units, it is important to understand that the City's attainment of safe harbor status is based on the City's calculation on the date that a comprehensive permit application is filed with the ZBA. The safe harbor calculations are made anew each time a comprehensive permit application is filed and are based on the current state of SHI Eligible Housing units at the time of the filing.



The City will again determine its safe harbor status when a future comprehensive permit application is filed, or when there is a change that would result in the City reaching one of the safe harbor thresholds. The City also updates its calculations on other occasions to provide the ZBA and the public with an update or when important information becomes available (e.g., upon receipt of new census data on the number of housing units in Newton).

C. The Housing Unit Minimum (10%) Safe Harbor

- The housing unit minimum safe harbor available to the City can be achieved when Newton’s SHI Eligible Housing units exceed 10% of its total housing units. The 10% calculation requires dividing the total number of housing units that are inventoried or eligible to be inventoried on the City’s SHI (the *numerator*) by the total number of year-round housing units in the City (the *denominator*). The total number of housing units used for this calculation is the number reported in the most recent federal (decennial) census.
- The Executive Office of Housing and Livable Communities (EOHLC) provided an updated SHI with the 2020 year-round housing units on June 29, 2023. According to the 2020 Census, Newton has 33,116 year-round housing units, an increase of 770 from the 2010 Census.

D. The General Land Area Minimum (1.5%) Safe Harbor

- The 1.5% calculation requires dividing the land area of affordable housing sites that are inventoried or eligible to be inventoried on the City’s SHI (the *numerator*) by the total developable land area in the City that is zoned for residential, commercial or industrial use (the *denominator*). In conducting this calculation, the City is required to follow the prescribed methodology and technical instructions that were enacted by EOHLC in 2018.
- In calculating the land area of affordable housing sites (*numerator*), only the proportion of each site that is occupied by SHI Eligible Housing units (including impervious and landscaped areas directly associated with such units) can be counted. For example, if 15% of all units in a development are affordable up to 80% AMI, such as Washington Place, the City can count 15% of the total acreage of the site (that is directly associated with the housing units) towards the numerator. For rental developments, if at least 25% of units are affordable up to 80% AMI or if at least 20% of units are affordable up to 50% AMI, then the entire acreage of the site directly associated with the housing will count towards the City’s 1.5% numerator.

**Current Safe Harbor Calculations as of December 11, 2023**

A. 10% Calculation

- The City’s current percentage of SHI Eligible Housing units equals 9.94%.

$$\text{New Calculation} = \frac{3,292 \text{ SHI Eligible Housing units}}{33,116 \text{ total housing units}} = 9.94\%$$

- The City currently has 2,879 housing units officially inventoried on the most recent SHI published by EOHLC. In accordance with EOHLC regulations, the City is also allowed to count units that are SHI “eligible” but that have not yet been officially inventoried on the SHI. Currently the City has approximately 416 additional eligible units not listed on the published SHI. As a result, the City currently has 3,292 SHI Eligible Housing units.
- The total year-round housing units has increased by 770 units from 32,346 in the 2010 Census to 33,116 in the 2020 Census, resulting in 9.94% of the City’s housing units being SHI eligible.
- Based on this calculation, the City needs approximately 20 additional SHI units to reach the 10% safe harbor.

B. 1.5% Calculation

- The City’s current land area percentage of SHI Eligible Housing equals 1.41%.<sup>1</sup>

$$\text{New Calculation} = \frac{108.67 \text{ acres}}{7,713.99 \text{ acres}} = 1.41\%$$

- The City currently has 108.67 acres of SHI Eligible Housing units. A summary of which projects have been added and removed from this calculation in the last year is set forth in the next section. There has been no change to the City’s total land area of developable land since the last calculation. This is normally a static number, though it had previously been reduced by the taking and subsequent rezoning of Webster Woods in 2019.
- Based on this calculation, the City needs approximately 7 additional acres of SHI housing in order to reach the 1.5% safe harbor.

C. Summary of Current SHI Eligibility

- The following project has been approved since the last safe harbor calculations and is currently counted as SHI Eligible Housing:
  - > Northland Charlemont Comprehensive Permit (160 Charlemont St.) – 370 units (25% affordable)

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<sup>1</sup> The final required step in calculating the area of each affordable housing site requires calculating the maximum number of residential units that would be permitted at that site under the Newton Zoning Ordinance. The land area devoted to affordable housing must then be further reduced if the total number of units on site is less than the maximum permitted. As this number varies based on the zoning district and building type (and will change if new zoning is adopted as part of Zoning Redesign), and would only further reduce the affordable housing acreage, this final step in the 1.5% calculation has not been undertaken. As the City nears the 1.5% safe harbor, staff will further refine the numerator by completing this calculation.

- The previously approved comprehensive permit for 292 units at Dunstan East does not currently count as SHI Eligible Housing, because it has been more than one year since it received approval from the ZBA and a building permit has not been issued for construction of the housing. It is anticipated that a building permit will be issued in the very near future, at which time the City will exceed the 10% housing minimum safe harbor.

### **Looking Forward**

- Newton has made significant progress towards achieving the Housing Unit Minimum safe harbor based on the current calculation of 9.94%. Presently, Newton needs 20 more SHI eligible units to achieve safe harbor. There are three 40B applications currently before the ZBA: 198 units proposed at 528 Boylston Street, 16 units proposed at 41 Washington Street, and 307 units proposed at 78 Crafts Street. Additionally, Dunstan East has initiated a building permit application for 292 units.
- In the same vein, there is likely to be additional movement of the safe harbor calculations in both directions moving forward. As examples, the Armory project may lose SHI eligibility if a building permit is not issued in January and the Northland special permit project may achieve SHI eligibility for some or all of its units in the next year if LAU Approval and building permits are issued. SHI eligibility for other previously approved projects will also ebb and flow and new projects will also be approved.
- As an outlook summary, the most likely scenario is Newton will achieve the 10% safe harbor at some point in the next month. But as various projects gain or lose SHI eligibility, the City's calculation will fluctuate and at times may dip or crest depending on the date of the calculation. What this means for future development in Newton, and in particular for projects planning to seek a comprehensive permit, is that the ZBA's ability to invoke a safe harbor for any given project remains dependent on the City's exact calculation on the date that a comprehensive permit application is filed with the ZBA. City staff will remain transparent as to this calculation and will continue to provide additional updates.

Data has some challenges; comparisons are not always 100% equivalent  
 Timing questions: are entries a mix of FY and Calendar year? Award date or draw date? Func  
 How can we accurately measure impact of projects that get multiple investments (e.g., CANI  
 "mixed" projects crossed boundaries - pop or PvP, so just lumped together

	2014-2018		
<b>Total Affordable Units</b>	134		
<b>Total Units</b>	142		
<b>Avg Affordable Units per year</b>	26.8		
		<b>% of total</b>	
<b>Family</b>	4	3.0%	
<b>Senior</b>	115	85.8%	
<b>Mixed</b>	15	11.2%	
<b>Production</b>	115	85.8%	
<b>Preservation</b>	4	3.0%	
<b>Mixed</b>	15	11.2%	
		<b>% of total</b>	<b>per unit avg</b>
<b>Total City Investments</b>	\$ 13,556,207		\$ 101,166
<b>Average City \$/year</b>	\$ 1,355,621		\$ 50,583
<b>Family</b>	\$ 1,944,439	14%	\$ 486,110
<b>Senior</b>	\$ 6,875,000	51%	\$ 59,783
<b>Mixed</b>	\$ 4,736,768	35%	\$ 315,785

<b>Production</b>	\$ 6,875,000	51%	\$ 59,783
<b>Preservation</b>	\$ 1,944,439	14%	\$ 486,110
<b>Mixed</b>	\$ 4,736,768	35%	\$ 315,785

*Note: City \$ = Local \$ including CDBG, HOME, ARPA etc.*

Project	Year Funded	Applicant	New or Rehab?
Myrtle Village	2014	Myrtle Village	Fam, N & P
Taft Avenue	2015	CANDO	Presv
10-12 Cambria Road	2016	CANDO	Presv
Auburn Street	2017, 2018	CANDO	Mixed pop, New
Golda Meir	2018, 2020	2Life Comm	New
Haywood House	2018, 2020	NHA	New
NHA Acq of CANDO Portfolio	2020	NHA	Presv
Coleman House	2021, 2024	2Life Comm	Presv
Nonan Village Place Rehab	2021	CASCAP	Presv
West Newton Armory	2022	MWCD/ Civico	New
West Newton Navigation Ctr	2024	Family Aid	New

	# Projects	# Aff Units	Total City \$\$
<b>Projects &gt;10 units</b>	4	19	6,681,207
<b>Projects 11-49 units</b>	4	153	9,797,666
<b>Projects 50-100 units</b>	2	115	9,852,075
<b>Projects +100 units</b>	1	144	6,768,215
<b>Production</b>	4	200	16,744,741
<b>Preservation</b>	5	216	11,617,654
<b>Other</b>	2	15	4,736,768



being awarded from a prior year's allocation?  
 (DO projects also NHA Acquisition)?

2019-2024		Period Total: 2014-20	
412		431	
422		441	
82.4		43.1	
	<b>% of total</b>		<b>% of total</b>
118	29%	122	28%
294	71%	294	68%
0	0%	15	3%
200	49%	200	46%
212	51%	216	50%
0	0%	15	3%
<b>Count by Expenditure</b>			
	<b>% of total</b>	<b>per unit avg</b>	<b>% of total</b>
\$ 19,542,956		\$ 47,434	\$ 33,099,163
\$ 4,885,739			\$ 3,309,916
\$ 9,197,666	47%	\$ 77,946	\$ 11,142,105 34%
\$ 10,345,290	53%	\$ 35,188	\$ 17,220,290 52%
0			\$ 4,736,768 14%

\$ 9,869,741	51%	\$ 49,349	\$ 16,744,741	51%
\$ 9,673,215	49%	\$ 45,628	\$ 11,617,654	35%
0			\$ 4,736,768	14%

Number of Affordable Project Units	Leverage Ratio (TDC: City \$)	City \$ / afford unit	Local \$ as % of TDC
7	1.66	264,837	60%
2	1.08	544,515	93%
2	1.06	427,705	94%
8	1.40	360,364	72%
60	8.51	79,167	12%
55	5.89	92,765	17%
33	1.50	69,848	67%
144	4.68	47,001	21%
35	1.49	17,143	67%
43	5.02	131,225	20%
42	9.10	29,762	11%

Avg City \$/A unit	TDC total	TDC Avg/unit	Leverage Ratio	City \$ /A unit
351,642	9,182,648	483,297	1.37	351,642
64,037	44,052,916	287,928	4.50	64,037
85,670	70,470,139	612,784	7.15	85,670
47,001	31,698,215	220,126	4.68	47,001

83,724	110,175,717	550,879	6.58	83,724
53,785	38,121,692	176,489	3.28	53,785
315,785	7,106,509	473,767	1.50	315,785





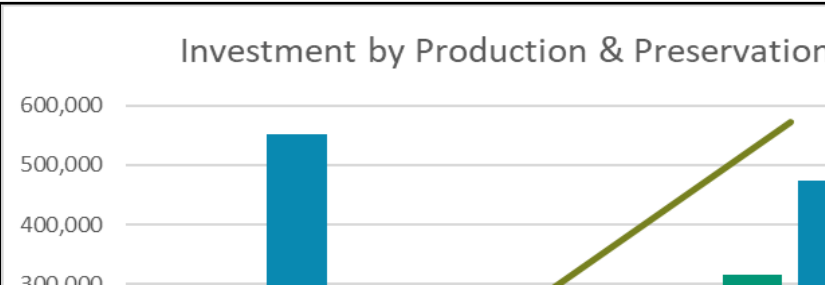
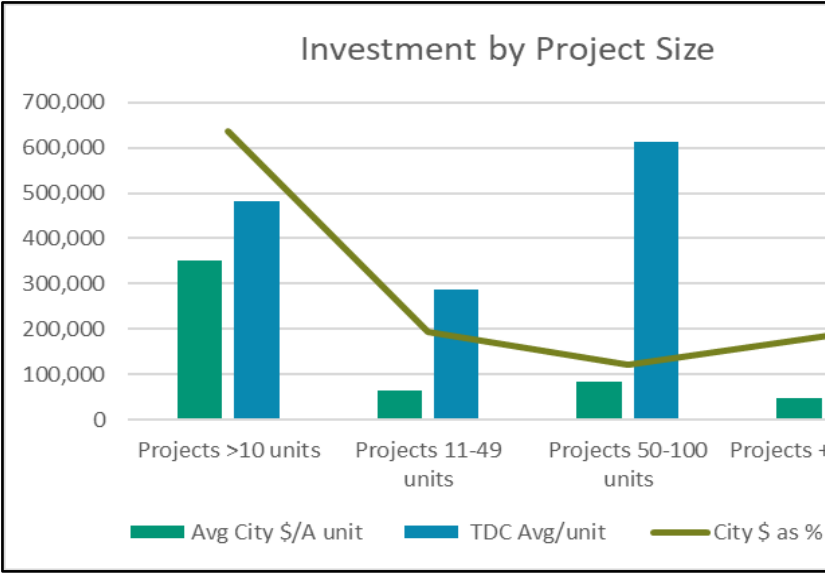


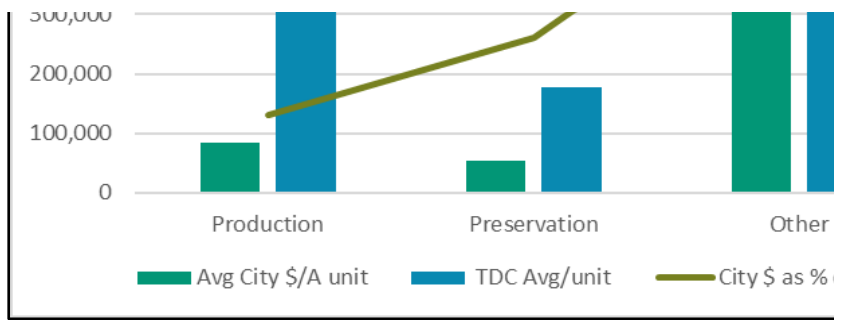
\$	83,724
\$	53,785
\$	315,785



**All about LIHTC**

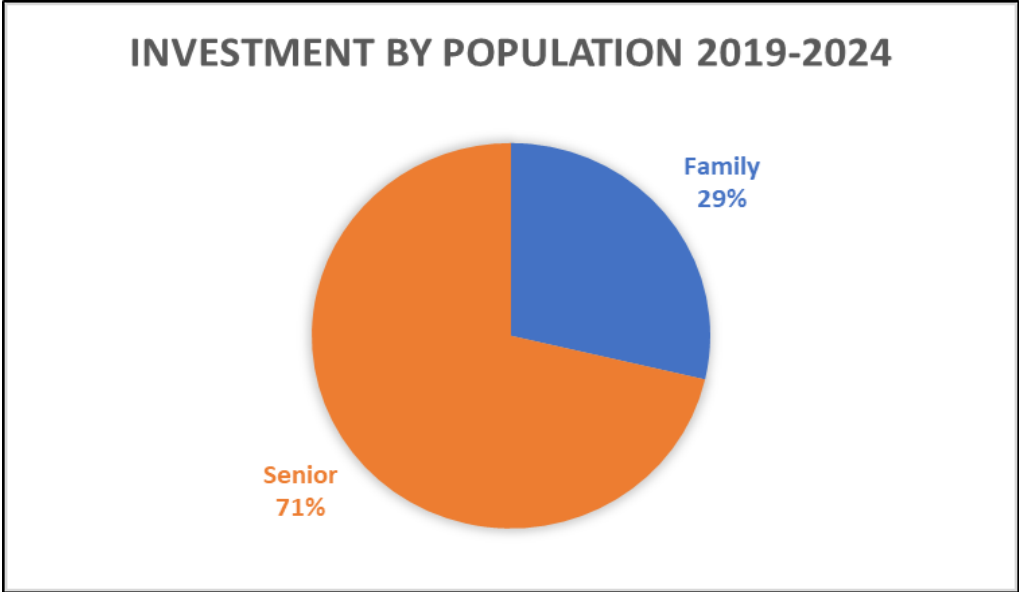
City \$ as % of TDC	
	73%
	22%
	14%
	21%
	15%
	30%
	67%



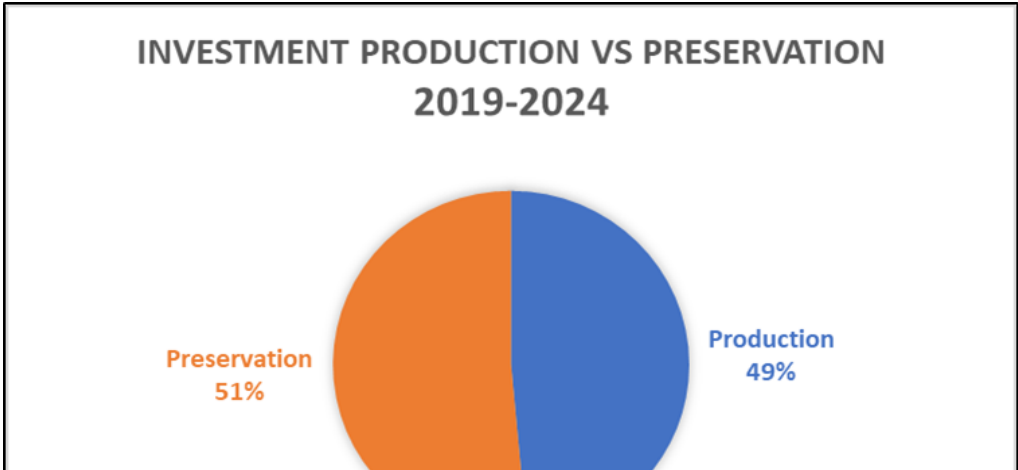


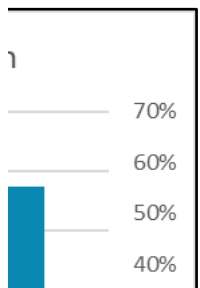
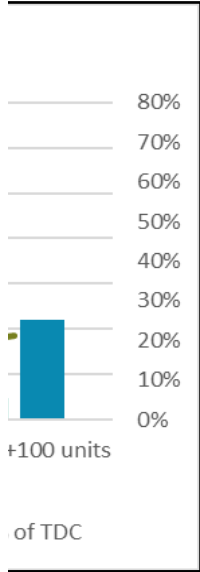


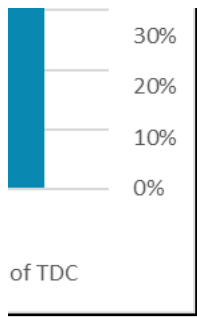
2018



24

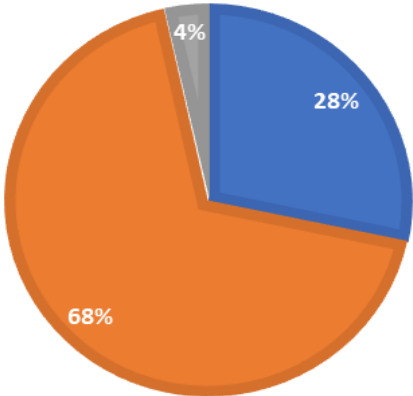






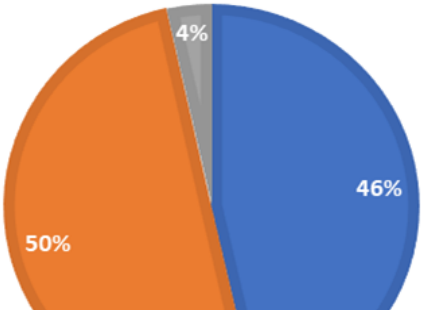
### INVESTMENT BY POPULATION 2014-2024

■ Family ■ Senior ■ Mixed



### INVESTMENT BY PROD VS PRESERV 2014-2024

■ Production ■ Preservation ■ Mixed

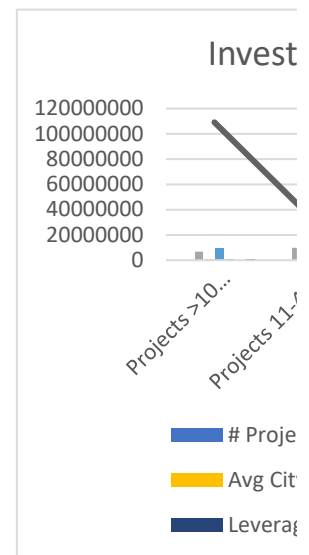
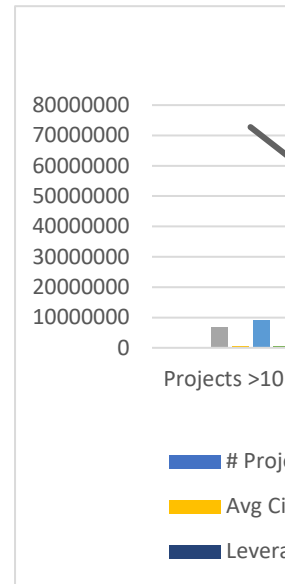








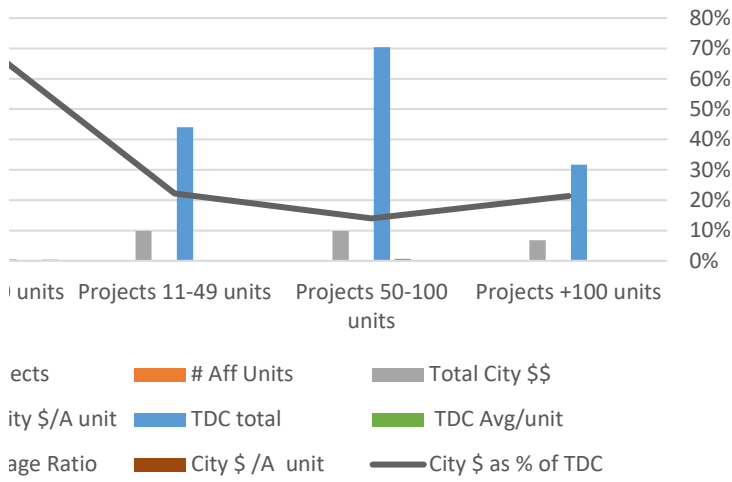
# ORIGINAL



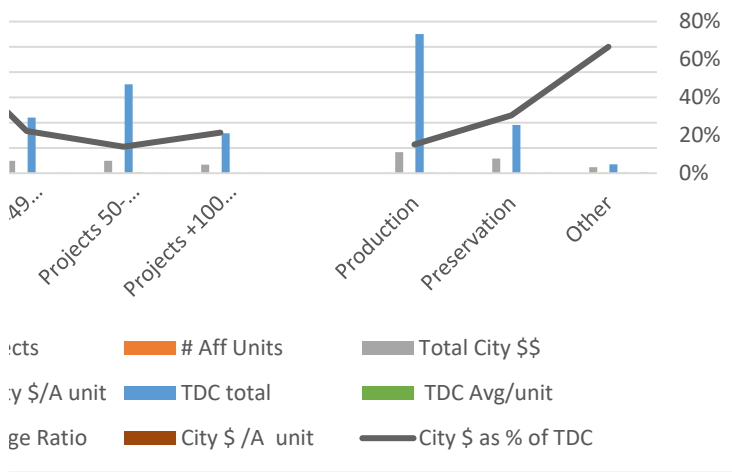




### Investment by Project Size



### Investment by Production & Preservation



### 2014-2018 units by Production vs. Preservation



- Total Affordable Units
- Total Units
- Avg Affordable Units per year
- Family
- Senior
- Mixed
- Production
- Mixed

		2011-2015	
<b>Total Affordable Units</b>			
		14	
<b>Total Units</b>			
		14	
<b>Avg Affordable Units per year</b>			
		2.8	
<b>% of total</b>			
<b>Family</b>		14	100.0%
<b>Senior</b>		0	
<b>Mixed</b>		0	
<b>Production</b>			
		14	100.0%
<b>Preservation</b>			
		0	
<b>Mixed</b>			
		0	
<b>% of total per unit avg</b>			
<b>Total City Investments</b>	\$	5,022,209	100% \$ 358,729
<b>Average City \$/year</b>	\$	1,004,442	
<b>Family</b>	\$	5,022,209	100% \$ 358,729
<b>Senior</b>			
<b>Mixed</b>			
<b>Production</b>	\$	5,022,209	100% \$ 358,729
<b>Preservation</b>	\$	-	
<b>Mixed</b>	\$	-	



2016-2020			2021-2024 (3.5 yrs)	
<b>Count by Unit</b>				
158			297	
166			299	
31.6			59.4	
	<b>% of total</b>			<b>% of total</b>
35	22%		118	40%
115	73%		179	60%
8	5%		-	
125	79%		85	29%
33	21%		212	71%
0			-	
<b>Count by Expenditure</b>				
	<b>% of total</b>	<b>per unit avg</b>		<b>% of total</b>
\$ 15,895,395	100%	\$ 100,604	\$ 16,565,881	100%
\$ 3,179,079				
3,160,410	20%	\$ 90,297	\$ 9,197,666	56%
9,852,075	62%	\$ 85,670	\$ 7,368,215	44%
2,882,910	18%	\$ 360,364		
13,590,395	85%	\$ 108,723	\$ 6,892,666	42%
2,305,000	15%	\$ 69,848	\$ 9,673,215	58%
		\$ -		

<b>per unit avg</b>
\$ 55,777
\$ 77,946
\$ 41,163
\$ 81,090
\$ 45,628

## 2011-2015

Project	Year Funded
Pearl Street	2011
Eddy Street	2012
Myrtle Village	2014
Taft Avenue	2015

## 2016-2020

Project	Year Funded
10-12 Cambria Road	2016
Auburn Street	2017, 2018
Golda Meir	2018, 2020
Haywood House	2018, 2020
NHA Acquisition of CANDO Portfolio	2020

2021-2024 (3.5 yrs)

Project	Year Funded
NHA Acquisition of CANDO Portfolio	2020
Coleman House	2021 2024
Nonantum Village Place Rehap	2021
West Newton Armory	2022
West Newton Navigation Center	2024

Applicant	New or Presv?	Number of Affordable Project Units	Total Project Units
CANDO	New Rehab	3	3
CANDO	New Rahab	2	2
Myrtle Village LLC	New Rehab	7	7
CANDO	New Rehab	2	2
		<b>14</b>	<b>14</b>

Applicant	New or Presv?	Number of Affordable Project Units	Total Project Units
CANDO	New Rehab	2	2
CANDO	New	8	8
2Life Communities	New	60	68
Newton Housing Authority	New	55	55
Newton Housing Authority	Presv	33	33
		<b>158</b>	<b>166</b>

Applicant	New or Presv?	Number of Affordable Project Units	Total Project Units
Newton Housing Authority	Presv	33	33
2Life Communities	Presv	144	146
CASCAP	Presv	35	35
MWCD/ Civico	New	43	43
Family Aid	New Rehab	42	42
		<b>297</b>	<b>299</b>

pres  
prod

Type	Level of Affordability	Ownership or Rental?
Family	60% AMI	Rental
Family	1 @ 50% AMI, 1 @ 80% AMI	Rental
Family	2 @ 50% AMI, 2 @ 70% AMI, 3 @ 85% AMI	Rental
Family	1 @ 80% AMI, 1 @ 50% AMI	Rental

Type	Level of Affordability	Ownership or Rental?
Family	80% AMI	Rental
Family, Group Home	3 @ 60% AMI; 5 Congregate @ 30% AMI	Rental
Senior	20 @ 30% AMI, 25 @ 50% AMI, 5 @ 60% AMI, 10 @ 100%	Rental
Senior	11 @ 30% AMI, 21 @ 60% AMI, 23 @ 99% AMI	Rental
Family	Up to 80% AMI	Rental

<b>Type</b>	<b>Level of Affordability</b>	<b>Ownership or Rental?</b>
Family	Up to 80% AMI	Rental
Senior	50% AMI	Rental
Senior	50% AMI	Rental
Family	60% AMI (some 30% AMI)	Rental
Family - transitional	>30% ami	Rental



CPC Funds	CDBG Funds	HOME Funds	Trust Funds	Other City Funds
665,500	190,684	289,316	0	0
243,572	690,250	0	0	0
910,179	604,679	339,000	0	0
584,029	380,000	125,000	0	0
<b>2,403,280</b>	<b>1,865,613</b>	<b>753,316</b>	-	-

CPC Funds	CDBG Funds	HOME Funds	Trust Funds	Other City Funds
471,117	189,293	195,000	0	0
977,700	1,172,939	732,271	0	0
4,494,857	0	255,143	0	0
3,077,900	875,000	0	0	1,149,175
1,105,000	1,200,000	0	0	
<b>10,126,574</b>	<b>3,437,232</b>	<b>1,182,414</b>	-	<b>1,149,175</b>

<b>CPC Funds</b>	<b>CDBG Funds</b>	<b>HOME Funds</b>	<b>Trust Funds</b>	<b>Other City Funds</b>
1,105,000	1,200,000	0	0	
4,214,622	411,898	641,695	1,500,000	0
500,000	100,000	0	0	0
3,000,000	930,000	822,666	0	890,000
0	750,000	0	500,000	0
<b>8,819,622</b>	<b>3,391,898</b>	<b>1,464,361</b>	<b>2,000,000</b>	<b>890,000</b>

<b>Total City Ask</b>	<b>Total City Funds per affordable unit</b>	<b>Tax Credit Funding</b>	<b>State,Federal, Foundation Grants</b>	<b>Developer Contribution</b>
1,145,500	381,833	0	50,000	0
933,822	466,911	0	50,000	0
1,853,858	264,837	0	0	632,000
1,089,029	544,515	0	81,700	0
<b>5,022,209</b>	<b>1,658,096</b>	<b>-</b>	<b>181,700</b>	<b>632,000</b>

<b>Total City Ask</b>	<b>Total City Funds per affordable unit</b>	<b>Tax Credit Funding</b>	<b>State,Federal, Foundation Grants</b>	<b>Developer Contribution</b>
855,410	427,705	0	50,000	0
2,882,910	360,364	0	695,995	0
4,750,000	79,167	14,162,000	12,242,000	1,235,400
5,102,075	92,765	11,850,000	3,200,000	1,282,064
2,305,000	69,848	0	250,000	250,000
<b>15,895,395</b>	<b>1,029,849</b>	<b>26,012,000</b>	<b>16,437,995</b>	<b>2,767,464</b>

Total City Ask	Total City Funds per affordable unit	Tax Credit Funding	State,Federal, Foundation Grants	Developer Contribution
2,305,000	69,848	0	250,000	250,000
6,768,215	47,001	0	0	24,830,000
600,000	17,143	0	50,000	140,000
5,642,666	131,225	11,485,627	6,357,186	0
1,250,000	29,762	0	8,734,895	393,704
<b>16,565,881</b>	<b>294,980</b>	<b>11,485,627</b>	<b>15,392,081</b>	<b>25,613,704</b>

9,673,215

6,892,666

Other Funding	Total Project Budget	OpEx	OpEx per unit
175,000	1,370,500	27,615	9,205
120,000	1,103,822	19,721	9,861
591,746	3,077,604	45,660	6,523
0	1,170,729	26,186	13,093
<b>886,746</b>	<b>6,722,655</b>	<b>119,182</b>	<b>38,681</b>

Other Funding	Total Project Budget	OpEx	OpEx per unit
0	905,410	23,341	11,671
450,000	4,028,905	600,900	75,113
8,046,600	40,436,000	787,000	13,117
8,600,000	30,034,139	583,284	10,605
650,000	3,455,000		
<b>17,746,600</b>	<b>78,859,454</b>	<b>1,994,525</b>	<b>110,505</b>

<b>Other Funding</b>	<b>Total Project Budget</b>	<b>OpEx</b>	<b>OpEx per unit</b>
650,000	3,455,000		
100,000	31,698,215	2,134,248	14,821
102,338	892,338	435,440	12,441
4,841,500	28,326,979	491,701	11,435
1,000,000	11,378,599		
<b>6,693,838</b>	<b>75,751,131</b>	<b>3,061,389</b>	<b>38,697</b>

Project	Year Funded	Applicant
Myrtle Village	2014	Myrtle Village LLC
Taft Avenue	2015	CANDO
10-12 Cambria Road	2016	CANDO
Auburn Street	2017, 2018	CANDO
Golda Meir	2018, 2020	2Life Communities
Haywood House	2018, 2020	Newton Housing Authority
NHA Acq of CANDO Portfolio	2020	Newton Housing Authority
Coleman House	2021, 2024	2Life Communities
Nonantum Village Place Rehab	2021	CASCAP
West Newton Armory	2022	MWCD/ Civico
West Newton Navigation Ctr	2024	Family Aid

New or Rehab?	Number of Affordable Project Units	Total Project Units	Type	CPC Funds
Fam, Mixed N & P	7	7	Family	910,179
Presv	2	2	Family	584,029
Presv	2	2	Family	471,117
Mixed pop, New	8	8	Family, Group Home	977,700
New	60	68	Senior	4,494,857
New	55	55	Senior	3,077,900
Presv	33	33	Family	1,105,000
Presv	144	146	Senior	4,214,622
Presv	35	35	Senior	500,000
New	43	43	Family	3,000,000
New	42	42	Family - transitional	0
	<b>431</b>	<b>441</b>		<b>19,335,404</b>

Presv Senior	179	181	4,714,622
Presv Family	37	37	2,160,146
Mixed	15	15	1,887,879
New Senior	115	123	7,572,757
New Family	85	85	3,000,000
	<b>431</b>	<b>441</b>	<b>19,335,404</b>



CDBG Funds	HOME Funds	Newton Trust	Other City Funds: IZ and ARPA	Total City Investment
604,679	339,000	0	0	1,853,858
380,000	125,000	0	0	1,089,029
189,293	195,000	0	0	855,410
1,172,939	732,271	0	0	2,882,910
0	255,143	0	0	4,750,000
875,000	0	0	1,149,175	5,102,075
1,200,000	0	0	0	2,305,000
411,898	641,695	1,500,000	0	6,768,215
100,000	0	0	0	600,000
930,000	822,666	0	890,000	5,642,666
750,000	0	500,000	0	1,250,000
<b>6,613,809</b>	<b>3,110,775</b>	<b>2,000,000</b>	<b>2,039,175</b>	<b>33,099,163</b>
511,898	641,695	1,500,000	-	7,368,215
1,769,293	320,000	-	-	4,249,439
1,777,618	1,071,271	-	-	4,736,768
875,000	255,143	-	1,149,175	9,852,075
1,680,000	822,666	500,000	890,000	6,892,666
<b>6,613,809</b>	<b>3,110,775</b>	<b>2,000,000</b>	<b>2,039,175</b>	<b>33,099,163</b>

Total City Funds per affordable unit	Tax Credit Funding	State,Federal, Foundation Grants	Developer Contribution	Other Funding
264,837	0	0	632,000	591,746
544,515	0	81,700	0	0
427,705	0	50,000	0	0
360,364	0	695,995	0	450,000
79,167	14,162,000	12,242,000	1,235,400	8,046,600
92,765	11,850,000	3,200,000	1,282,064	8,600,000
69,848	0	250,000	250,000	650,000
47,001	0	0	24,830,000	100,000
17,143	0	50,000	140,000	102,338
131,225	11,485,627	6,357,186	0	4,841,500
29,762	0	8,734,895	393,704	1,000,000
<b>2,064,331</b>	<b>37,497,627</b>	<b>31,661,776</b>	<b>28,763,168</b>	<b>24,382,184</b>
64,144	-	50,000	31,838,215	202,338
1,042,068	-	381,700	250,000	650,000
625,201	-	695,995	632,000	1,041,746
171,932	26,012,000	15,442,000	2,517,464	16,646,600
160,987	11,485,627	15,092,081	393,704	5,841,500
<b>2,064,331</b>	<b>37,497,627</b>	<b>31,661,776</b>	<b>35,631,383</b>	<b>24,382,184</b>

Total Project Budget	OpEx	OpEx per unit
3,077,604	45,660	6,523
1,170,729	26,186	13,093
905,410	23,341	11,671
4,028,905	600,900	75,113
40,436,000	787,000	13,117
30,034,139	583,284	10,605
3,455,000		
31,698,215	2,134,248	14,821
892,338	435,440	12,441
28,326,979	491,701	11,435
11,378,599		
<b>155,403,918</b>	<b>5,127,760</b>	<b>168,818</b>
#REF!	2,569,688	27,262
5,531,139	49,527	24,764
7,106,509	646,560	81,635
70,470,139	1,370,284	23,722
39,705,578	491,701	11,435
<b>#REF!</b>	<b>5,127,760</b>	<b>168,818</b>

Leverage Ratio (TDC: City \$)	City \$ / afford unit
1.66	264,837
1.08	544,515
1.06	427,705
1.40	360,364
8.51	79,167
5.89	92,765
1.50	69,848
4.68	47,001
1.49	17,143
5.02	131,225
9.10	29,762

**Local & as % of  
TDC**

60%

93%

94%

72%

12%

17%

67%

21%

67%

20%

11%







Project	Year Funded	Applicant
Myrtle Village	2014	Myrtle Village LLC
Taft Avenue	2015	CANDO
10-12 Cambria Road	2016	CANDO
Auburn Street	2017, 2018	CANDO
Golda Meir	2018, 2020	2Life Communities
<b>Golda Meir</b>	<b>FY19</b>	
<b>Golda Meir</b>	<b>FY21</b>	
Haywood House	2018, 2020	Newton Housing Authority
<b>Haywood House</b>	<b>FY19</b>	
<b>Haywood House</b>	<b>FY21</b>	







New or Rehab?	Number of Affordable Project Units	Total Project Units	Type	CPC Funds
Fam, Mixed N & P	7	7	Family	910,179
Rehab	2	2	Family	584,029
Rehab	2	2	Family	471,117
Mixed pop, New	8	8	Family, Group Home	977,700
New	60	68	Senior	4,494,857
<b>FY19</b>				<b>3,250,000</b>
<b>FY21</b>				<b>1,244,857</b>
New	55	55	Senior	3,077,900
<b>FY19</b>				<b>3,000,000</b>
<b>FY21</b>				<b>77,900</b>

**2014-2018 funding only**

Rehab Fam	4	4	1,055,146
Mixed	15	15	1,887,879
New Senior	115	123	6,250,000
New Family	0	0	-
	<b>134</b>	<b>142</b>	<b>9,193,025</b>
			<b>1,838,605</b>

**Total Funding, regardless of year**

Rehab Fam	4	4	1,055,146
Rehab/new F /I	15	15	1,887,879
New Senior	115	123	7,572,757

New Family	0	0	-
	<b>134</b>	<b>142</b>	<b>10,515,782</b>

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**Funding 2019-2024 Haywood and Golda**

New Senior	115	123	1,322,757
New Family	0	0	0
	<b>115</b>	<b>123</b>	<b>1,322,757</b>

10,515,782

10,515,782

CDBG Funds	HOME Funds	Newton Trust	Other City Funds: IZ and ARPA	Total City Ask
604,679	339,000	0	0	1,853,858
380,000	125,000	0	0	1,089,029
189,293	195,000	0	0	855,410
1,172,939	732,271	0	0	2,882,910
0	255,143	0	0	4,750,000
				<b>3,250,000</b>
	<b>255,143</b>			<b>1,500,000</b>
875,000	0	0	1,149,175	5,102,075
<b>625,000</b>				<b>3,625,000</b>
<b>250,000</b>			<b>1,149,175</b>	<b>1,477,075</b>

13,179,424

569,293	320,000	-	-	1,944,439
1,777,618	1,071,271	-	-	4,736,768
625,000	-	-	-	6,875,000
-	-	-	-	-
<b>2,971,911</b>	<b>1,391,271</b>	-	-	<b>13,556,207</b>
<b>594,382</b>	<b>278,254</b>	-	-	<b>2,711,241</b>

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569,293	320,000	-	-	1,944,439
1,777,618	1,071,271	-	-	4,736,768
875,000	255,143	-	1,149,175	9,852,075

-	-	-	-	-
<b>3,221,911</b>	<b>1,646,414</b>	-	<b>1,149,175</b>	<b>16,533,282</b>

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250,000	255,143	0	1,149,175	2,977,075
0	0	0	0	0
<b>250,000</b>	<b>255,143</b>	-	<b>1,149,175</b>	<b>2,977,075</b>

3,221,911	1,646,414	-	1,149,175	16,533,282
3,221,911	1,646,414	-	1,149,175	16,533,282

Total City Funds per affordable unit	Tax Credit Funding	State,Federal, Foundation Grants	Developer Contribution	Other Funding
264,837	0	0	632,000	591,746
544,515	0	81,700	0	0
427,705	0	50,000	0	0
360,364	0	695,995	0	450,000
79,167	14,162,000	12,242,000	1,235,400	8,046,600
92,765	11,850,000	3,200,000	1,282,064	8,600,000

972,220	-	131,700	-	-
625,201	-	695,995	632,000	1,041,746
171,932	26,012,000	15,442,000	2,517,464	16,646,600
-	-	-	-	-
<b>1,769,352</b>	<b>26,012,000</b>	<b>16,269,695</b>	<b>3,149,464</b>	<b>17,688,346</b>
<b>353,870</b>	<b>5,202,400</b>	<b>3,253,939</b>	<b>629,893</b>	<b>3,537,669</b>

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972,220	-	131,700	-	-
625,201	-	695,995	632,000	1,041,746
171,932	26,012,000	15,442,000	2,517,464	16,646,600

-	-	-	-	-
<b>1,769,352</b>	<b>26,012,000</b>	<b>16,269,695</b>	<b>3,149,464</b>	<b>17,688,346</b>

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171,932	26,012,000	15,442,000	2,517,464	16,646,600
0	0	0	0	0
<b>171,932</b>	<b>26,012,000</b>	<b>15,442,000</b>	<b>2,517,464</b>	<b>16,646,600</b>

1,941,283  
1,769,352  
1,769,351

Total Project Budget	OpEx	OpEx per unit
3,077,604	45,660	6,523
1,170,729	26,186	13,093
905,410	23,341	11,671
4,028,905	600,900	75,113
40,436,000	787,000	13,117
30,034,139	583,284	10,605

2,076,139	49,527	24,764
7,106,509	646,560	81,635
70,470,139	1,370,284	23,722
-	-	-
<b>79,652,787</b>	<b>2,066,371</b>	<b>130,121</b>
<b>15,930,557</b>	<b>413,274</b>	<b>26,024</b>

2,076,139	49,527	24,764
7,106,509	646,560	81,635
70,470,139	1,370,284	23,722



-	-	-
<b>79,652,787</b>	<b>2,066,371</b>	<b>130,121</b>

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70,470,139	1,370,284	23,722
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0	0	0
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<b>70,470,139</b>	<b>1,370,284</b>	<b>23,722</b>
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Project	Year Funded	Applicant
Golda Meir	2018, 2020	2Life Communities
<b>Golda Meir</b>	<b>FY19</b>	
<b>Golda Meir</b>	<b>FY21</b>	
Haywood House	2018, 2020	Newton Housing Authority
<b>Haywood House</b>	<b>FY19</b>	
<b>Haywood House</b>	<b>FY21</b>	
NHA Acquisition of CANDO Portfolio	2020	Newton Housing Authority
Coleman House	2021, 2024	2Life Communities
Nonantum Village Place Rehab	2021	CASCAP
West Newton Armory	2022	MWCD/ Civico
West Newton Navigation Center	2024	Family Aid

COVID-19 Emergency Housing Assistance	2020, 2021	City of Newton
Homebuyer Assistance/BuyDown Program	Multiple	City of Newton
Crescent St Site Assessment, Feasibility & Design	2016, 2017	City of Newton
Newton Affordable Housing Trust	2023	Newton Affordable Housing Trust

New or Rehab?	Number of Affordable Project Units	Total Project Units	Type
New	60	68	Senior
<b>FY19</b>			
<b>FY21</b>			
New	55	55	Senior
<b>FY19</b>			
<b>FY21</b>			
Presv	33	33	Family
Presv	144	146	Senior
Presv	35	35	Senior
New	43	43	Family
New	42	42	Family - transitional

**412**

**422**

**2019-2024**

Presv Fam	33	33
New Fam	85	85
Presv Senior	179	181
New Senior	115	123
	<b>412</b>	<b>422</b>

% total units

118

118

28.6%

294	304	73.8%
200	208	50.5%
200	208	
212	214	51.9%

NA	256 households	256	Family
New			Family
New	TBD	TBD	TBD
TBD	TBD	TBD	TBD

Level of Affordability	Ownership or Rental?	CPC Funds
20 @ 30% AMI, 25 @ 50% AMI, 5 @ 60% AMI, 10 @ 100% AMI	Rental	4,494,857
		<b>3,250,000</b>
		<b>1,244,857</b>
11 @ 30% AMI, 21 @ 60% AMI, 23 @ 99% AMI	Rental	3,077,900
		<b>3,000,000</b>
		<b>77,900</b>
Up to 80% AMI	Rental	1,105,000
50% AMI	Rental	4,214,622
50% AMI	Rental	500,000
60% AMI (some 30% AMI)	Rental	3,000,000
>30% ami	Rental	0

1,105,000

3,000,000

4,714,622

1,322,757

**10,142,379**

**per year**

**2,028,476**

55% households less than 50% AMI, 27% less than 50% AMI, 10% less than 65% AMI, 0% less	Both	2,724,124
80% AMI	Ownership	2,404,050
TBD	TBD	153,378
TBD	TBD	1,948,056

CDBG Funds	HOME Funds	Newton Trust	Other City Funds	Total City Ask
0	255,143	0	0	4,750,000
				<b>3,250,000</b>
	<b>255,143</b>			<b>1,500,000</b>
875,000	0	0	1,149,175	5,102,075
<b>625,000</b>				<b>3,625,000</b>
<b>250,000</b>			<b>1,149,175</b>	<b>1,477,075</b>
1,200,000	0	0	0	2,305,000
411,898	641,695	1,500,000	0	6,768,215
100,000	0	0	0	600,000
930,000	822,666	0	890,000	5,642,666
750,000	0	500,000	0	1,250,000

**19,542,956**

				<b>3,908,591</b>
1,200,000	-	-	-	2,305,000
1,680,000	822,666	500,000	890,000	6,892,666
511,898	641,695	1,500,000	-	7,368,215
250,000	255,143	-	1,149,175	2,977,075
<b>3,641,898</b>	<b>1,719,504</b>	<b>2,000,000</b>	<b>2,039,175</b>	<b>19,542,956</b>
<b>728,380</b>	<b>343,901</b>	<b>400,000</b>	<b>407,835</b>	<b>3,908,591</b>

500,000	0	0	0	3,224,124
0	0	0	0	2,404,050
0	0	0	100,000	253,378
0	0	0	0	1,948,056



Total City Funds per affordable unit	Tax Credit Funding	State,Federal, Foundation Grants	Developer Contribution
79,167	14,162,000	12,242,000	1,235,400
92,765	11,850,000	3,200,000	1,282,064
69,848	0	250,000	250,000
193,378	24,830,000	100,000	31,698,215
17,143	0	50,000	140,000
131,225	11,485,627	6,357,186	0
29,762	0	8,734,895	393,704

69,848	-	250,000	250,000
160,987	11,485,627	15,092,081	393,704
210,520	24,830,000	150,000	31,838,215
171,932	26,012,000	15,442,000	2,517,464
<b>613,287</b>	<b>62,327,627</b>	<b>30,934,081</b>	<b>34,999,383</b>

#REF!

#REF!

#REF!

12,594	0	0	0
NA	NA	NA	NA
#VALUE!	NA	NA	NA

Other Funding	Total Project Budget	OpEx	OpEx per unit
8,046,600	40,436,000	787,000	13,117
8,600,000	30,034,139	583,284	10,605
650,000	3,455,000		
14%	78%		
102,338	892,338	435,440	12,441
4,841,500	28,326,979	491,701	11,435
1,000,000	11,378,599		

650,000	3,455,000	-	-
5,841,500	39,705,578	491,701	11,435
102,338	892,339	435,440	12,441
16,646,600	70,470,139	1,370,284	23,722
<b>23,240,438</b>	<b>114,523,056</b>	<b>2,297,425</b>	<b>47,598</b>

0	3,224,124		
NA	NA		
NA	NA	NA	NA

**City:Public**

13.8%

21.6%

256.1%

393.9%

24.9%

256.1%

21.3%

29.4%

5.1%



<b>City: Developer</b>	<b>City:TDC</b>
------------------------	-----------------

384%	11.7%
------	-------

398%	17.0%
------	-------

922%	66.7%
------	-------

429%	67.2%
#DIV/0!	19.9%

922%	66.7%
1751%	17.4%
23%	825.7%
118%	4.2%







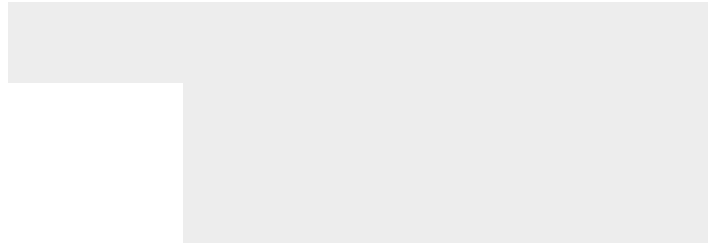
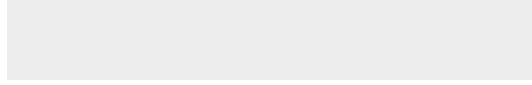
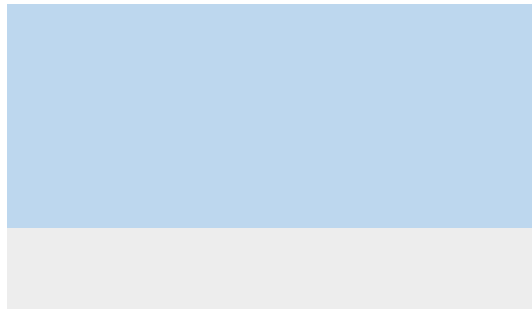






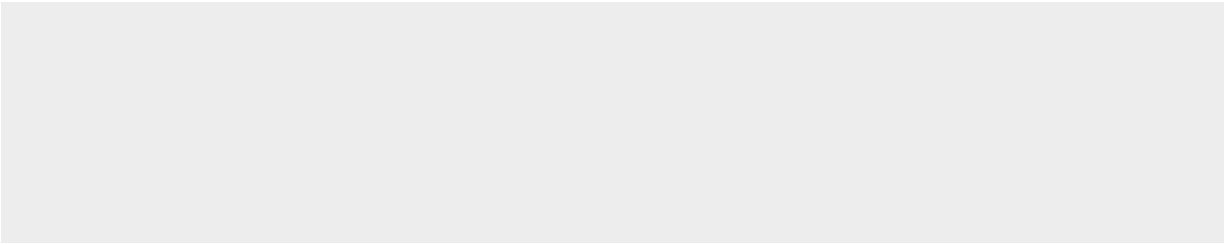
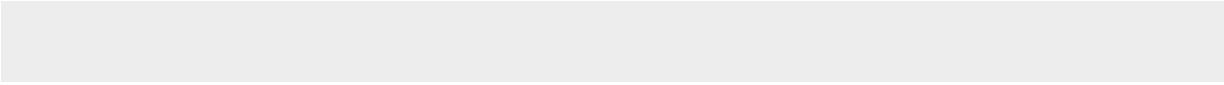




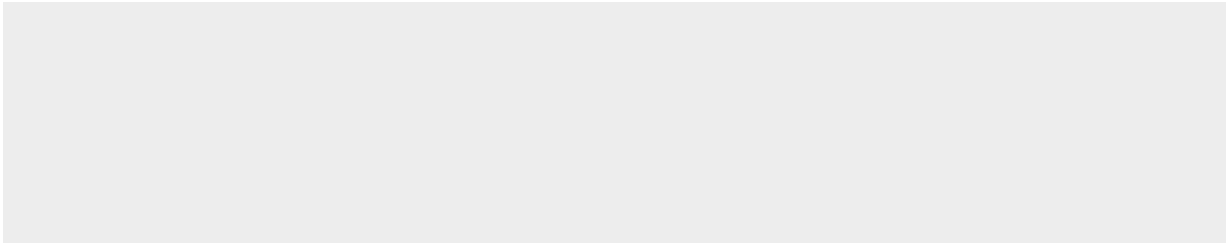
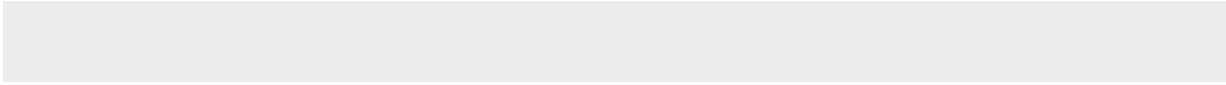




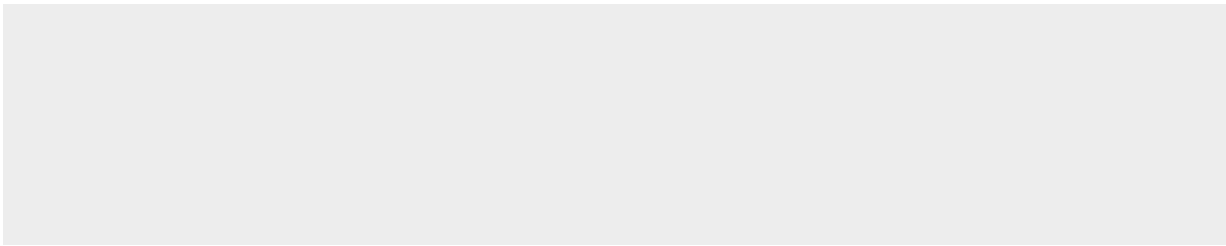
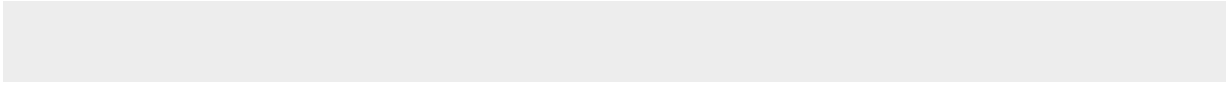
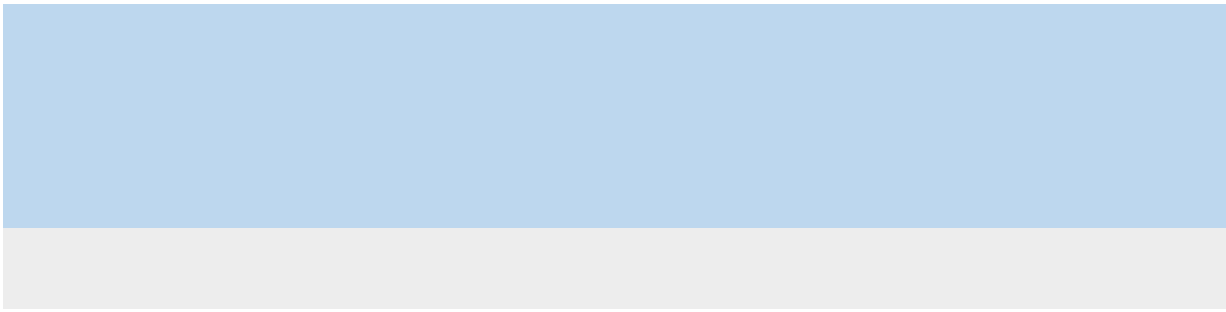




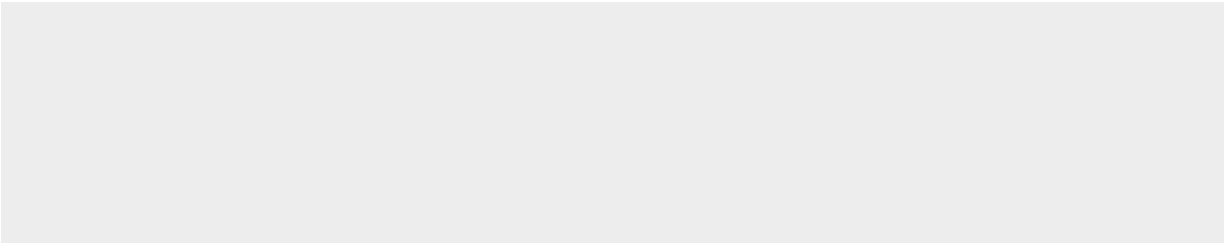
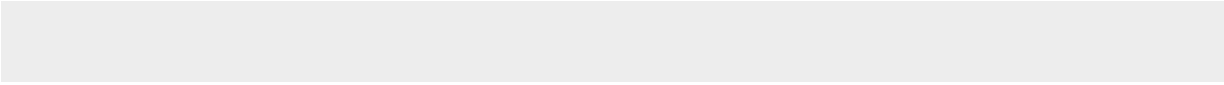
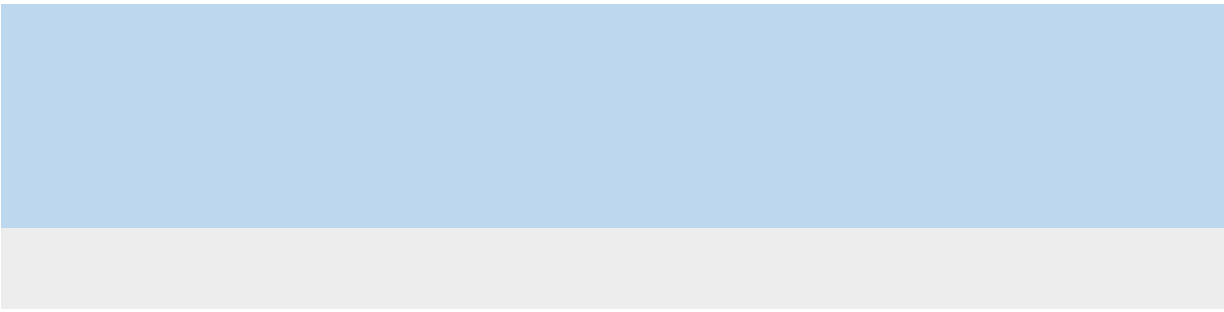






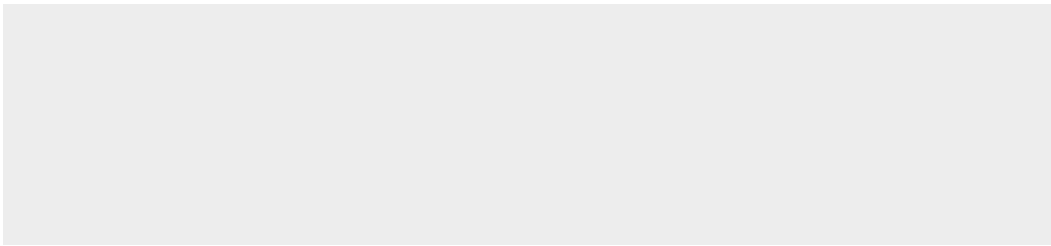
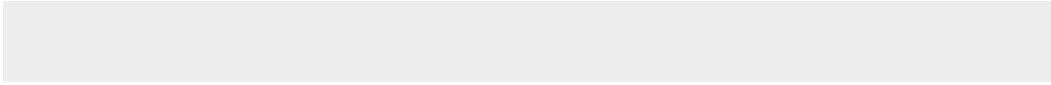
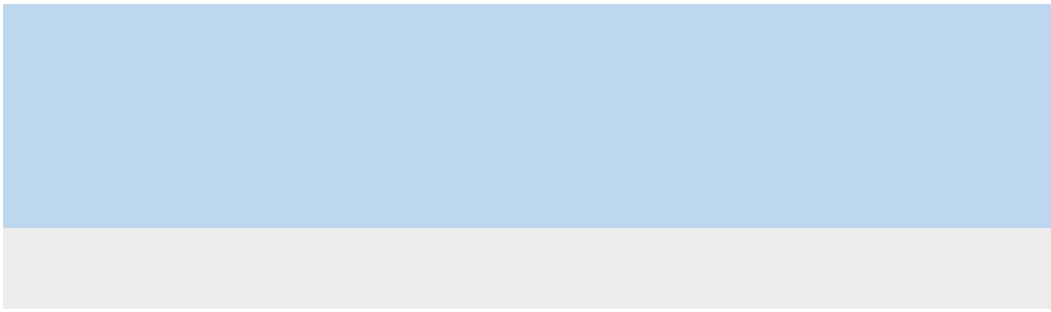












Project	Year Funded
West Street	2004
Coleman House	2021
Golda Meir	2018, 2020
Comm Ave Covenant Residences	2006
10-12 Cambria Road	2016
11-13 Cambria Road	2006
163 Jackson and 20-22 Falmouth Road	2005
18-20 Cambria Road	2003
Auburn Street	2017, 2018
Chestnut Street/ Millhouse Commons	2005
Comm Ave Veteran House	2010
Eddy Street	2012
Elliot Street Linden Green	2004
Pearl Street	2011
Taft Avenue	2015
Nonantum Village Place Construction	2003
Nonantum Village Place Rehabilitation	2021

West Newton Armory	2022
Myrtle Village	2014
Forte Property	2004
Haywood House	2018, 2020
NHA Acquisition of CANDO Portfolio	2020
Pelham Street	2004, 2005
Wyman Street Apartments	2005
Lexington Street/Parkview Homes	2009

Applicant	New or Rehab?	Number of Affordable Project Units	Total Project Units	Type
Advocates Inc.	Rehab	5	5	Group Home
2Life Communities	Rehab	146	146	Senior
2Life Communities	New	60	68	Senior
B'nai B'rith Housing New England	New and Rehab	15	57	Family
CANDO	Rehab	2	2	Family
CANDO	Rehab	2	2	Family
CANDO	New	4	4	Family
CANDO	Rehab	2	2	Family
CANDO	New	8	8	Family, Group Home
CANDO	New	4	6	Family
CANDO	Rehab	2	2	Family
CANDO	Rehab	2	2	Family
CANDO	New and Rehab	3	5	Family
CANDO	Rehab	3	3	Family
CANDO	Rehab	2	2	Family
CASCAP	New	35	35	Senior
CASCAP	Rehab	35	35	Senior

MWCD/ Civico	New	43	43	Family
Myrtle Village LLC	New and Rehab	7	7	Family
Newton Housing Authority	New and Rehab	3	3	Family
Newton Housing Authority	New	55	55	Senior
Newton Housing Authority	Rehab	33	33	Family
Newton Housing Authority	Rehab	10	10	Senior
Newton Housing Authority	Rehab	10	10	Family
SEB, LLC	New	10	10	Family

Level of Affordability	Ownership or Rental?	CPC Funds Requested
80% AMI	Rental	263,000
50% AMI	Rental	4,214,622
20 @ 30% AMI, 25 @ 50% AMI, 5 @ 60% AMI 10 @ 100%	Rental	4,494,857
80% AMI	Ownership	907,825
80% AMI	Rental	471,117
80% AMI	Rental	351,025
4 @ 80% AMI	Rental	550,000
80% AMI	Rental	200,000
3 @ 60% AMI; 5 Congregate @ 30% AMI	Rental	977,700
80% AMI	Ownership	738,383
80% AMI	Rental	375,000
1 @ 50% AMI, 1 @ 80% AMI	Rental	243,572
2 @ 80% AMI, 1 @ 100% AMI	Ownership	618,600
60% AMI	Rental	665,500
1 @ 80% AMI, 1 @ 50% AMI	Rental	584,029
50% AMI	Rental	850,000
50% AMI	Rental	500,000

60% AMI (some 30% AMI)	Rental	3,021,270
2 @ 50% AMI, 2 @ 70% AMI, 3 @ 85% AMI	Rental	910,179
80% AMI	NHA Rental, Habitat for Humanity Ownership	377,400
11 @ 30% AMI, 21 @ 60% AMI, 23 @ 99% AMI	Rental	3,077,900
Up to 80% AMI	Rental	1,105,000
80% AMI	Rental	311,936
50% AMI	Rental	1,000,000
6 @ 100% AMI; 4 @ 80% AMI	Ownership	2,004,554

<b>CDBG Funds Requested</b>	<b>HOME Funds Requested</b>	<b>Newton Housing Rehab Funds</b>	<b>Other City Funds</b>	<b>Total City Ask</b>
337,000	0	0	0	600,000
400,000	948,519	0	0	5,563,141
0	255,143	0	0	4,750,000
0	0	0	0	907,825
189,293	195,000	0	0	855,410
280,000	0	0	0	631,025
400,000	0	225,500	0	1,175,500
341,417	0	0	0	541,417
1,172,939	732,271	0	0	2,882,910
575,000	0	0	0	1,313,383
300,000	0	0	0	675,000
690,250	0	0	0	933,822
200,000	76,319	0	0	894,919
190,684	289,316	0	0	1,145,500
380,000	125,000	0	0	1,089,029
815,000	0	0	0	1,665,000
100,000	0	0	0	600,000



930,000	340,000	0	890,000	5,181,270
604,679	339,000	0	0	1,853,858
0	0	0	500,000	877,400
875,000	0	0	0	3,952,900
1,200,000	0	0	0	2,305,000
1,419,122	17,535	0	0	1,748,593
17,995	0	0	1,550,000	2,567,995
173,000	867,727	0	0	3,045,281

Total City Funds per unit	Tax Credit Funding	State,Federal, Foundation Grants	Developer Contribution	Other Funding
120,000	0	0	76,400	0
38,104	0	0	24,830,000	100,000
79,167	14,162,000	12,242,000	1,235,400	8,046,600
60,522	0	500,000	0	16,222,886
427,705	0	50,000	0	0
315,513	0	40,000	0	140,000
293,875	0	1,050,000	2,533	700,000
270,709	0	65,000	0	400,000
360,364	0	695,995	0	450,000
328,346	0	0	170,000	3,173,000
337,500	0	100,000	0	175,000
466,911	0	50,000	0	120,000
298,306	0	0	4,479	1,405,596
381,833	0	50,000	0	175,000
544,515	0	81,700	0	0
47,571	0	4,367,000	178,092	200,924
17,143	0	50,000	140,000	102,338

120,495	11,485,627	6,357,186	0	4,841,500
264,837	0	0	632,000	591,746
292,467	0	0	400,000	729,349
71,871	11,850,000	3,200,000	1,282,064	8,600,000
69,848	0	250,000	250,000	650,000
174,859	0	990,778	0	178,428
256,800	0	0	0	1,000,000
304,528	0	0	0	2,235,300

Total Project Budget	OpEx	OpEx per unit
676,400	NA	NA
30,493,141	2,134,248	14,618
40,436,000	787,000	13,117
17,630,711	NA	NA
905,410	23,341	11,671
811,025	14,124	7,062
2,928,033		
1,006,417	22,830	11,415
4,028,905	600,900	75,113
4,656,383	NA	NA
950,000	21,068	10,534
1,103,822	19,721	9,861
2,304,994	NA	NA
1,370,500	27,615	9,205
1,170,729	26,186	13,093
6,411,016	435,440	12,441
892,338	435,440	12,441

27,865,583	491,701	11,435
3,077,604	45,660	6,523
2,006,749	NA	NA
28,884,964	583,284	10,605
3,455,000		
2,917,799	NA	NA
3,567,995	NA	NA
5,280,581	32,200	3,220

**Private For-Profit and Non-Profit Developers L**

---

Affordable Units (% AMI)					
<u>&lt;30</u>	<u>31-50</u>	<u>51-60</u>	<u>61-80</u>	<u>81-100</u>	<u>101-120</u>
x	x	x	x	x	x

**Standard Zoning (Special Permits and Inclusions)**

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IZ Units (% AMI)					
<u>&lt;30</u>	<u>31-50</u>	<u>51-60</u>	<u>61-80</u>	<u>81-100</u>	<u>101-120</u>
x	x	x	x	x	x

# POSSIBLE FORMAT for DATA INVENTORY of AFFORDABLE

Organized by "Source of Development"

**Using 40B**

<u>Total Affd</u>	<u>Market Units</u>	<u>Public Housing Units</u>			<u>Total</u>
		<u>&lt;30</u>	<u>31-50</u>	<u>51-60</u>	
sum x	x	x	x	x	

**Special Zoning)**

Can we count the number of mobile vouchers

<u>Total Affd</u>	<u>Special Permit Market Units</u>
sum x	x

# ABLE UNIT COUNT IN NEWTON

nt"

## Newton Housing Authority

---

Scattered Site Units						C
<u>&lt;30</u>	<u>31-50</u>	<u>51-60</u>	<u>Total</u>	<u>&lt;30</u>	<u>31-50</u>	
x	x	x		x	x	

in the private market?



*D Rockwell*  
*12/9/2023*

---

LANDO Units

---

<u>51-60</u>	<b>Total</b>
--------------	--------------

x

Project	Year Funded
18-20 Cambria Road	2003
Nonantum Village Place Construction	2003
West Street	2004
Elliot Street Linden Green	2004
Forte Property	2004
Pelham Street	2004, 2005
Chestnut Street/ Millhouse Commons	2005
163 Jackson and 20-22 Falmouth Road	2005
Wyman Street Apartments	2005
Comm Ave Covenant Residences	2006
11-13 Cambria Road	2006
Lexington Street/Parkview Homes	2009
Comm Ave Veteran House	2010
Pearl Street	2011
Eddy Street	2012
Myrtle Village	2014
Taft Avenue	2015
10-12 Cambria Road	2016
Auburn Street	2017, 2018

Golda Meir	2018, 2020
Haywood House	2018, 2020
NHA Acquisition of CANDO Portfolio	2020
Coleman House	2021 2024
Nonantum Village Place Presvilitation	2021
West Newton Armory	2022
West Newton Navigation Center	2024

Key

Presv Fam
Presv Senior
Presv Mixed /other
New Fam
New Senior
New/Presv fam

Familly

Senior

new

Presv

COVID-19 Emergency Housing Assistance	2020, 2021
Homebuyer Assistance/BuyDown Program	Multiple
Crescent St Site Assessment, Feasibility & Design	2016, 2017
Newton Affordable Housing Trust	2023

Applicant	New or Presv?	Number of Affordable Project Units	Total Project Units
CANDO	Presv	2	2
CASCAP	New	35	35
Advocates Inc.	Presv	5	5
CANDO	New and Presv	3	5
Newton Housing Authority	New and Presv	3	3
Newton Housing Authority	Presv	10	10
CANDO	New	4	6
CANDO	New	4	4
Newton Housing Authority	Presv	10	10
B'nai B'rith Housing New England	New and Presv	15	57
CANDO	Presv	2	2
SEB, LLC	New	10	10
CANDO	Presv	2	2
CANDO	Presv	3	3
CANDO	Presv	2	2
Myrtle Village LLC	New and Presv	7	7
CANDO	Presv	2	2
CANDO	Presv	2	2
CANDO	New	8	8

2Life Communities	New	60	68
Newton Housing Authority	New	55	55
Newton Housing Authority	Presv	33	33
2Life Communities	Presv	144	146
CASCAP	Presv	35	35
MWCD/ Civico	New	43	43
Family Aid	New	42	42

541

**per year**

**25.8**

58      58  
189      191  
~~13~~      ~~13~~  
103      105  
150      158  
28      72

---

541

528

189

339

253

275

City of Newton	NA	256 households	256
City of Newton	New		
City of Newton	New	TBD	TBD
Newton Affordable Housing Trust	TBD	TBD	TBD

Type	Level of Affordability	Ownership or Rental?
Family	80% AMI	Rental
Senior	50% AMI	Rental
Group Home	80% AMI	Rental
Family	2 @ 80% AMI, 1 @ 100% AMI	Ownership
Family	80% AMI	NHA Rental, Habitat for Humanity Ownership
Senior	80% AMI	Rental
Family	80% AMI	Ownership
Family	4 @ 80% AMI	Rental
Family	50% AMI	Rental
Family	80% AMI	Ownership
Family	80% AMI	Rental
Family	6 @ 100% AMI; 4 @ 80% AMI	Ownership
Family	80% AMI	Rental
Family	60% AMI	Rental
Family	1 @ 50% AMI, 1 @ 80% AMI	Rental
Family	2 @ 50% AMI, 2 @ 70% AMI, 3 @ 85% AMI	Rental
Family	1 @ 80% AMI, 1 @ 50% AMI	Rental
Family	80% AMI	Rental
Family, Group Home	3 @ 60% AMI; 5 Congregate @ 30% AMI	Rental



Senior	20 @ 30% AMI, 25 @ 50% AMI, 5 @ 60% AMI, 10 @ 100%	Rental
Senior	11 @ 30% AMI, 21 @ 60% AMI, 23 @ 99% AMI	Rental
Family	Up to 80% AMI	Rental
Senior	50% AMI	Rental
Senior	50% AMI	Rental
Family	60% AMI (some 30% AMI)	Rental
Family - transitional	>30% ami	Rental

11.0%

35.8%

2.5%

why did we delete this?

19.5%

28.4%

5.3%

102.5%

35.8%

64.2%

47.9%

52.1%

Family	55% households less than 30% AMI, 27% less than 50% AMI,	Both
Family	80% AMI	Ownership
TBD	TBD	TBD
TBD	TBD	TBD

CPC Funds	CDBG Funds	HOME Funds	Trust Funds	Other City Funds
200,000	341,417	0	0	0
850,000	815,000	0	0	0
263,000	337,000	0	0	0
618,600	200,000	76,319	0	0
377,400	0	0	0	500,000
311,936	1,419,122	17,535	0	0
738,383	575,000	0	0	0
550,000	400,000	0	0	225,500
1,000,000	17,995	0	0	1,550,000
907,825	0	0	0	0
351,025	280,000	0	0	0
2,004,554	173,000	867,727	0	0
375,000	300,000	0	0	0
665,500	190,684	289,316	0	0
243,572	690,250	0	0	0
910,179	604,679	339,000	0	0
584,029	380,000	125,000	0	0
471,117	189,293	195,000	0	0
977,700	1,172,939	732,271	0	0

4,494,857	0	255,143	0	0
3,077,900	875,000	0	0	1,149,175
1,105,000	1,200,000	0	0	
4,214,622	411,898	641,695	1,500,000	0
500,000	100,000	0	0	0
3,000,000	930,000	822,666	0	890,000
0	750,000	0	500,000	0

avg per year

4,995,243	3,589,639	609,316	-	1,550,000
5,026,558	1,931,020	659,230	1,500,000	-
1,240,700	1,509,939	732,271	-	-
6,292,937	2,828,000	1,690,393	500,000	1,115,500
8,422,757	1,690,000	255,143	-	1,149,175
2,814,004	804,679	415,319	-	500,000

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2,724,124	500,000	0	0	0
2,404,050	0	0	0	0
153,378	0	0	0	100,000
1,948,056	0	0	0	0

Total City Ask	Total City Funds per affordable unit	Tax Credit Funding	State,Federal, Foundation Grants	Developer Contribution
541,417	270,709	0	65,000	0
1,665,000	47,571	0	4,367,000	178,092
600,000	120,000	0	0	76,400
894,919	298,306	0	0	4,479
877,400	292,467	0	0	400,000
1,748,593	174,859	0	990,778	0
1,313,383	328,346	0	0	170,000
1,175,500	293,875	0	1,050,000	2,533
2,567,995	256,800	0	0	0
907,825	60,522	0	500,000	0
631,025	315,513	0	40,000	0
3,045,281	304,528	0	0	0
675,000	337,500	0	100,000	0
1,145,500	381,833	0	50,000	0
933,822	466,911	0	50,000	0
1,853,858	264,837	0	0	632,000
1,089,029	544,515	0	81,700	0
855,410	427,705	0	50,000	0
2,882,910	360,364	0	695,995	0

4,750,000	79,167	14,162,000	12,242,000	1,235,400
5,102,075	92,765	11,850,000	3,200,000	1,282,064
2,305,000	69,848	0	250,000	250,000
6,768,215	47,001	0	0	24,830,000
600,000	17,143	0	50,000	140,000
5,642,666	131,225	11,485,627	6,357,186	0
1,250,000	29,762	0	8,734,895	393,704

51,821,823

**2,467,706**

10,744,198	3,071,333	-	686,700	250,000
9,116,808	239,004	-	1,040,778	24,970,000
3,482,910	480,364	-	695,995	76,400
12,426,830	1,087,736	11,485,627	16,142,081	566,237
11,517,075	219,503	26,012,000	19,809,000	2,695,556
4,534,002	916,132	-	500,000	1,036,479

---

51,821,823

3,224,124	12,594	0	0	0
2,404,050				
253,378	NA	NA	NA	NA
1,948,056	#VALUE!	NA	NA	NA



Other Funding	Total Project Budget	OpEx	OpEx per unit
400,000	1,006,417	22,830	11,415
200,924	6,411,016	435,440	12,441
0	676,400	NA	NA
1,405,596	2,304,994	NA	NA
729,349	2,006,749	NA	NA
178,428	2,917,799	NA	NA
3,173,000	4,656,383	NA	NA
700,000	2,928,033		
1,000,000	3,567,995	NA	NA
16,222,886	17,630,711	NA	NA
140,000	811,025	14,124	7,062
2,235,300	5,280,581	32,200	3,220
175,000	950,000	21,068	10,534
175,000	1,370,500	27,615	9,205
120,000	1,103,822	19,721	9,861
591,746	3,077,604	45,660	6,523
0	1,170,729	26,186	13,093
0	905,410	23,341	11,671
450,000	4,028,905	600,900	75,113

8,046,600	40,436,000	787,000	13,117
8,600,000	30,034,139	583,284	10,605
650,000	3,455,000		
100,000	31,698,215	2,134,248	14,821
102,338	892,338	435,440	12,441
4,841,500	28,326,979	491,701	11,435
1,000,000	11,378,599		

2,660,000      14,340,898

380,766      35,508,352

450,000      4,705,305

11,949,800      52,570,575

16,847,524      76,881,155

18,949,577      25,020,058

---

0	3,224,124		
NA	NA		
NA	NA	NA	NA

CPA Funded Affordable Housing Projects, 2003-2022

Project	Year Funded	Applicant	New or Preservation *?	Number of Affordable Project Units	Total Project Units	Type	Level of Affordability	Ownership or Rental?	CPC Funds Requested	CDBG Funds Requested	HOME Funds Requested	Newton Housing Trust Funds	Other City Funds Including N Aff Hsg Preservation	Total City Ask	Total City Funds per unit	Tax Credit Funding	State, Federal, Foundation Grants	Developer Contribution
Auburn Street	2017, 2018	CANDO	New	8	8	Family, Group Home	3 @ 60% AMI; 5 Congregate @ 30% AMI	Rental	977,700	1,172,939	732,271	0	0	2,882,910	360,364	0	695,995	0
10-12 Cambria Road	2016	CANDO	Preservation *	2	2	Family	80% AMI	Rental	471,117	189,293	195,000	0	0	855,410	427,705	0	50,000	0
11-13 Cambria Road	2006	CANDO	Preservation *	2	2	Family	80% AMI	Rental	351,025	280,000	0	0	0	631,025	315,513	0	40,000	0
18-20 Cambria Road	2003	CANDO	Preservation *	2	2	Family	80% AMI	Rental	200,000	341,417	0	0	0	541,417	270,709	0	65,000	0
Chestnut Street/ Millhouse Commons	2005	CANDO	New	4	6	Family	80% AMI	Ownership	738,383	575,000	0	0	0	1,313,383	328,346	0	0	170,000
Coleman House	2021 2024	2Life Communities	Preservation *	144	146	Senior	50% AMI	Rental	4,214,622	411,898	641,695	1,500,000	0	6,768,215	47,001	0	0	24,830,000
Comm Ave Covenant Residences	2006	B'nai B'rith Housing New England	New and Preservation *	15	57	Family	80% AMI	Ownership	907,825	0	0	0	0	907,825	60,522	0	500,000	0
Comm Ave Veteran House	2010	CANDO	Preservation *	2	2	Family	80% AMI	Rental	375,000	300,000	0	0	0	675,000	337,500	0	100,000	0
COVID-19 Emergency Housing Assistance	2020, 2021	City of Newton	NA	256 households	256	Family	55% households less than 30% AMI, 27% less than 50% AMI, 10% less than 65% AMI, 9% less than 80% AMI	Both	2,724,124	500,000	0	0	0	3,224,124	12,594	0	0	0
Crescent Street Site Assessment, Feasibility and Design	2016, 2017	City of Newton	New	TBD	TBD	TBD	TBD	TBD	153,378	0	0	0	100,000	253,378	NA	NA	NA	NA
Eddy Street	2012	CANDO	Preservation *	2	2	Family	1 @ 50% AMI, 1 @ 80% AMI	Rental	243,572	690,250	0	0	0	933,822	466,911	0	50,000	0
Elliot Street Linden Green	2004	CANDO	New and Preservation *	3	5	Family	2 @ 80% AMI, 1 @ 100% AMI	Ownership	618,600	200,000	76,319	0	0	894,919	298,306	0	0	4,479
Forte Property	2004	Newton Housing Authority	New and Preservation *	3	3	Family	80% AMI	NHA Rental, Habitat for Humanity Ownership	377,400	0	0	0	500,000	877,400	292,467	0	0	400,000
Golda Meir	2018, 2020	2Life Communities	New	60	68	Senior	20 @ 30% AMI, 25 @ 50% AMI, 5 @ 60% AMI, 10 @ 100% AMI	Rental	4,494,857	0	255,143	0	0	4,750,000	79,167	14,162,000	12,242,000	1,235,400
Haywood House	2018, 2020	Newton Housing Authority	New	55	55	Senior	11 @ 30% AMI, 21 @ 60% AMI, 23 @ 99% AMI	Rental	3,077,900	875,000	0	0	0	3,952,900	71,871	11,850,000	3,200,000	1,282,064
Homebuyer Assistance/BuyDown Program	Multiple	City of Newton	New			Family	80% AMI	Ownership	2,404,050	0	0	0	0	2,404,050				
163 Jackson and 20-22 Falmouth Road	2005	CANDO	New	4	4	Family	4 @ 80% AMI	Rental	550,000	400,000	0	0	225,500	1,175,500	293,875	0	1,050,000	2,533
Lexington Street/Parkview Homes	2009	SEB, LLC	New	10	10	Family	6 @ 100% AMI; 4 @ 80% AMI	Ownership	2,004,554	173,000	867,727	0	0	3,045,281	304,528	0	0	0
Myrtle Village	2014	Myrtle Village LLC	New and Preservation *	7	7	Family	2 @ 50% AMI, 2 @ 70% AMI, 3 @ 85% AMI	Rental	910,179	604,679	339,000	0	0	1,853,858	264,837	0	0	632,000
Newton Affordable Housing Trust	2023	Newton Affordable Housing Trust	TBD	TBD	TBD	TBD	TBD	TBD	1,948,056	0	0	0	0	1,948,056	#VALUE!	NA	NA	NA
Newton Housing Authority Acquisition of CANDO Portfolio	2020 2021 2024	Newton Housing Authority	Preservation *	33	33	Family	Up to 80% AMI	Rental	1,105,000	1,200,000	0	0	0	2,305,000	69,848	0	250,000	250,000
Nonantum Village Place Construction	2003	CASCAP	New	35	35	Senior	50% AMI	Rental	850,000	815,000	0	0	0	1,665,000	47,571	0	4,367,000	178,092
Nonantum Village Place Preservation *ilitation	2021	CASCAP	Preservation *	35	35	Senior	50% AMI	Rental	500,000	100,000	0	0	0	600,000	17,143	0	50,000	140,000
Pearl Street	2011	CANDO	Preservation *	3	3	Family	60% AMI	Rental	665,500	190,684	289,316	0	0	1,145,500	381,833	0	50,000	0

CPA Funded Affordable Housing Projects, 2003-2022

Pelham Street	2004, 2005	Newton Housing Authority	Preservation *	10	10	Senior	80% AMI	Rental	311,936	1,419,122	17,535	0	0	1,748,593	174,859	0	990,778	0
Taft Avenue	2015	CANDO	Preservation *	2	2	Family	1 @ 80% AMI, 1 @ 50% AMI	Rental	584,029	380,000	125,000	0	0	1,089,029	544,515	0	81,700	0
West Newton Armory	2022	MWCD/ Civico	New	43	43	Family	60% AMI (some 30% AMI)	Rental	3,000,000	930,000	890,000	0	890,000	5,710,000	132,791	11,485,627	6,357,186	0
West Street	2004	Advocates Inc.	Preservation *	5	5	Group Home	80% AMI	Rental	263,000	337,000	0	0	0	600,000	120,000	0	0	76,400
Wyman Street Apartments	2005	Newton Housing Authority	Preservation *	10	10	Family	50% AMI	Rental	1,000,000	17,995	0	0	1,550,000	2,567,995	256,800	0	0	0

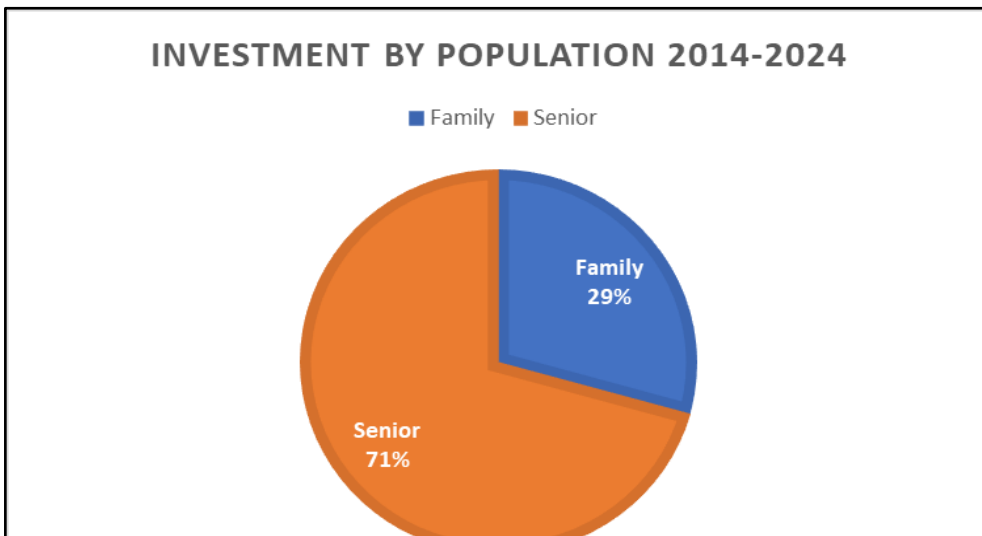
CPA Funded Affordable Housing Projects, 2003-2022

Project	Other Funding	Total Project Budget	OpEx	OpEx per unit
Auburn Street	450,000	4,028,905	600,900	75,113
10-12 Cambria Road	0	905,410	23,341	11,671
11-13 Cambria Road	140,000	811,025	14,124	7,062
18-20 Cambria Road	400,000	1,006,417	22,830	11,415
Chestnut Street/ Millhouse Commons	3,173,000	4,656,383	NA	NA
Coleman House	100,000	31,698,215	2,134,248	14,821
Comm Ave Covenant Residences	16,222,886	17,630,711	NA	NA
Comm Ave Veteran House	175,000	950,000	21,068	10,534
COVID-19 Emergency Housing Assistance	0	3,224,124		
Crescent Street Site Assessment, Feasibility and Design	NA	NA		
Eddy Street	120,000	1,103,822	19,721	9,861
Elliot Street Linden Green	1,405,596	2,304,994	NA	NA
Forte Property	729,349	2,006,749	NA	NA
Golda Meir	8,046,600	40,436,000	787,000	13,117
Haywood House	8,600,000	28,884,964	583,284	10,605
Homebuyer Assistance/BuyDown Program				
163 Jackson and 20-22 Falmouth Road	700,000	2,928,033		
Lexington Street/Parkview Homes	2,235,300	5,280,581	32,200	3,220
Myrtle Village	591,746	3,077,604	45,660	6,523
Newton Affordable Housing Trust	NA	NA	NA	NA
Newton Housing Authority Acquisition of CANDO Portfolio	650,000	3,455,000		
Nonantum Village Place Construction	200,924	6,411,016	435,440	12,441
Nonantum Village Place Preservation *ilitation	102,338	892,338	435,440	12,441
Pearl Street	175,000	1,370,500	27,615	9,205

CPA Funded Affordable Housing Projects, 2003-2022

Pelham Street	178,428	2,917,799	NA	NA
Taft Avenue	0	1,170,729	26,186	13,093
West Newton Armory	4,841,500	28,394,313	491,701	11,435
West Street	0	676,400	NA	NA
Wyman Street Apartments	1,000,000	3,567,995	NA	NA

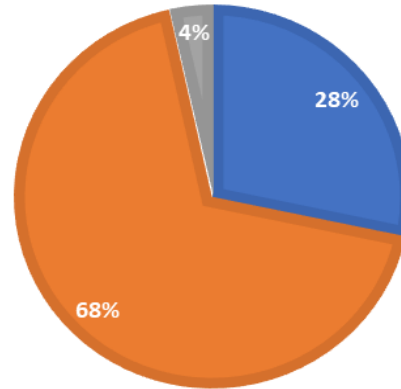
		2014-2018	
<b>Total Affordable Units</b>		134	
<b>Total Units</b>		142	
<b>Avg Affordable Units per year</b>		26.8	
		<b>% of total</b>	
<b>Family</b>	4	3.0%	
<b>Senior</b>	115	85.8%	
<b>Mixed</b>	15	11.2%	
<b>Production</b>	115	85.8%	
<b>Preservation</b>	4	3.0%	
<b>Mixed</b>	15	11.2%	
		<b>% of total</b>	
		<b>per unit avg</b>	
<b>Total City Investments</b>	\$ 13,556,207		\$ 101,166
<b>Average City \$/year</b>	\$ 1,355,621		\$ 50,583
<b>Family</b>	\$ 1,944,439	14%	\$ 486,110
<b>Senior</b>	\$ 6,875,000	51%	\$ 59,783
<b>Mixed</b>	\$ 4,736,768	35%	\$ 315,785
<b>Production</b>	\$ 6,875,000	51%	\$ 59,783
<b>Preservation</b>	\$ 1,944,439	14%	\$ 486,110
<b>Mixed</b>	\$ 4,736,768	35%	\$ 315,785





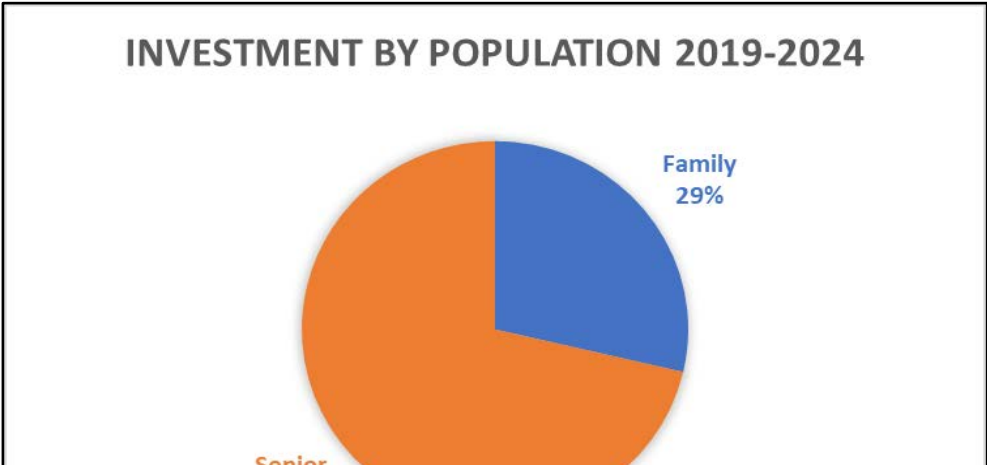
## INVESTMENT BY POPULATION 2014-2024

■ Family ■ Senior ■ Mixed



2019-2024		Period Total: 2014-20	
<b>Count by Unit</b>			
412		431	
422		441	
82.4		43.1	
	<b>% of total</b>		<b>% of total</b>
118	29%	122	28%
294	71%	294	68%
0	0%	15	3%
200	49%	200	46%
212	51%	216	50%
0	0%	15	3%

<b>Count by Expenditure</b>			
	<b>% of total</b>	<b>per unit avg</b>	<b>% of total</b>
\$ 19,542,956		\$ 47,434	\$ 33,099,163
\$ 4,885,739			\$ 3,309,916
\$ 9,197,666	47%	\$ 77,946	\$ 11,142,105
\$ 10,345,290	53%	\$ 35,188	\$ 17,220,290
0			\$ 4,736,768
\$ 9,869,741	51%	\$ 49,349	\$ 16,744,741
\$ 9,673,215	49%	\$ 45,628	\$ 11,617,654
0			\$ 4,736,768

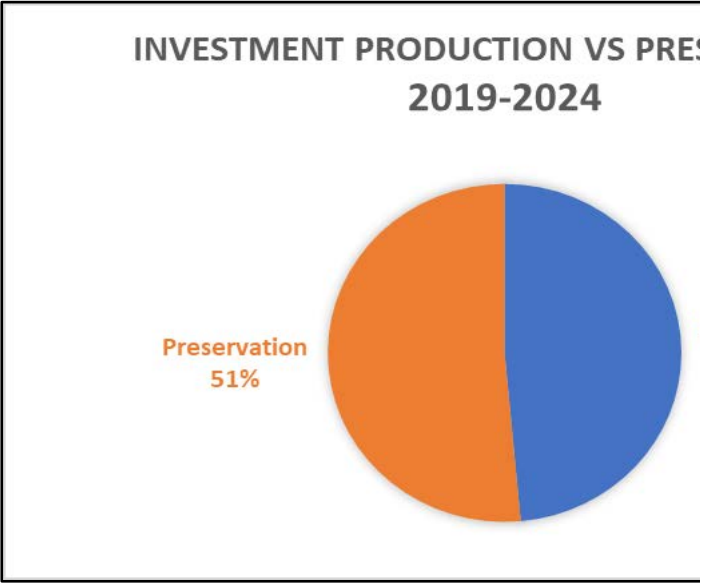
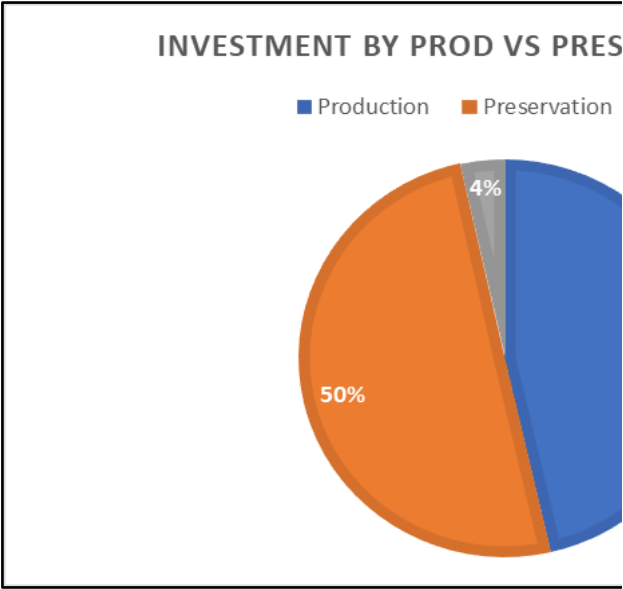
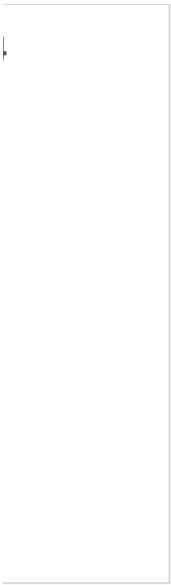


senior  
71%





Senior  
86%



8



## SERV 2014-2024

■ Mixed

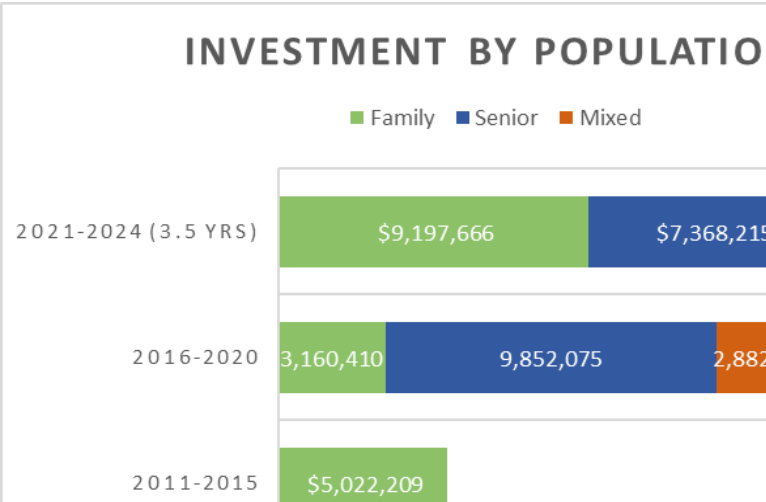


## SERVATION

Production  
49%



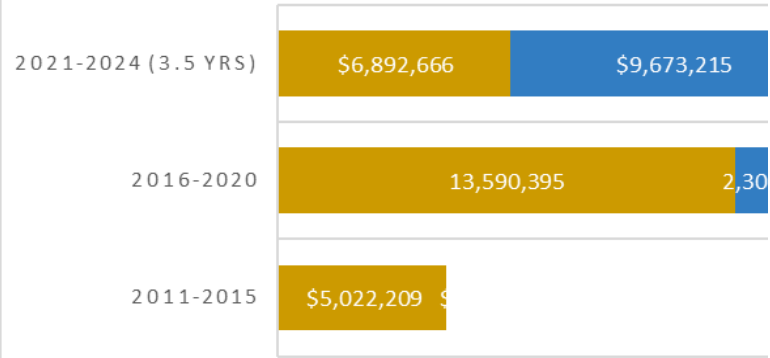
		2011-2015	
<b>Total Affordable Units</b>			
		14	
<b>Total Units</b>			
		14	
<b>Avg Affordable Units per year</b>			
		2.8	
<b>% of total</b>			
<b>Family</b>	14	100.0%	
<b>Senior</b>	0		
<b>Mixed</b>	0		
<b>Production</b>			
	14	100.0%	
<b>Preservation</b>			
	0		
<b>Mixed</b>			
	0		
<b>% of total per unit avg</b>			
<b>Total City Investments</b>	\$ 5,022,209	100%	\$ 358,729
<b>Average City \$/year</b>	\$ 1,004,442		
<b>Family</b>	\$ 5,022,209	100%	\$ 358,729
<b>Senior</b>			
<b>Mixed</b>			
<b>Production</b>	\$ 5,022,209	100%	\$ 358,729
<b>Preservation</b>	\$ -		
<b>Mixed</b>	\$ -		



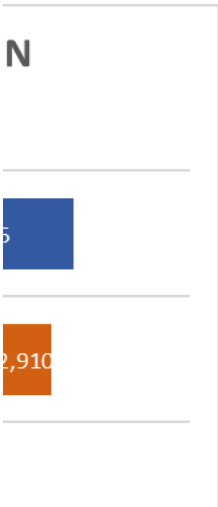
Green bar

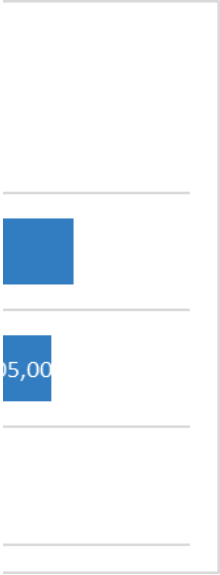
### INVESTMENT BY PRODUCTION V PRESERVATION

■ Production ■ Preservation

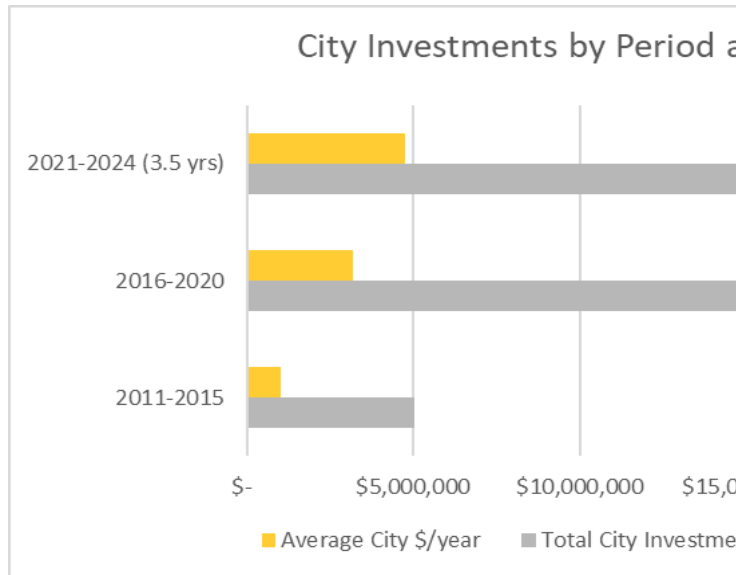
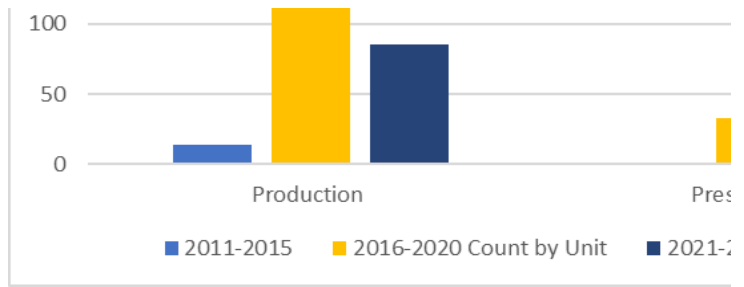


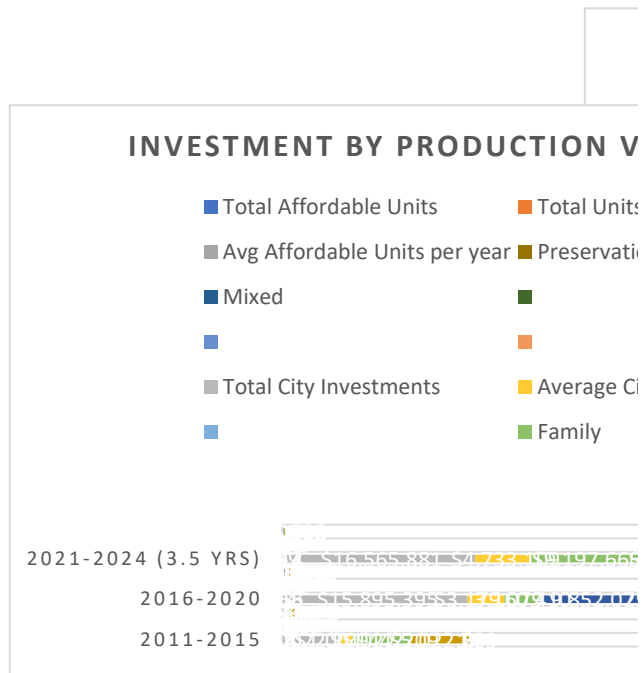
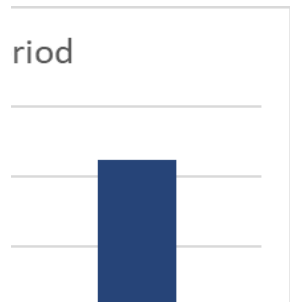
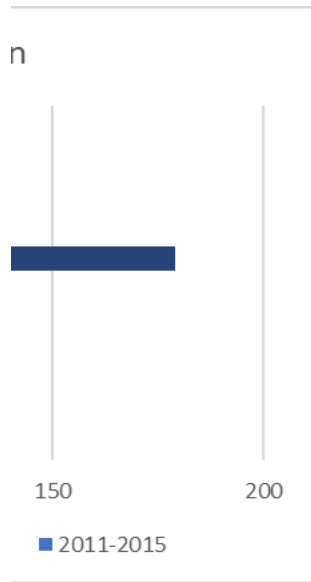
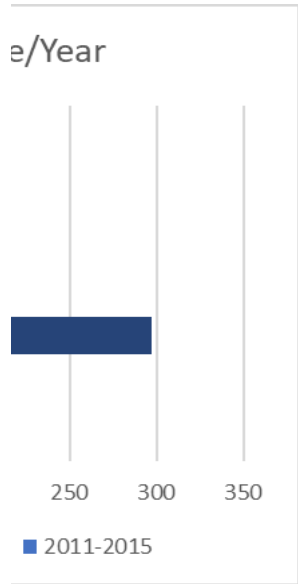
2016-2020			2021-2024 (3.5 yrs)	
<b>Count by Unit</b>				
158			297	
166			299	
31.6			59.4	
	<b>% of total</b>			<b>% of total</b>
35	22%		118	40%
115	73%		179	60%
8	5%		-	
125	79%		85	29%
33	21%		212	71%
0			-	
<b>Count by Expenditure</b>				
	<b>% of total</b>	<b>per unit avg</b>		<b>% of total</b>
\$ 15,895,395	100%	\$ 100,604	\$ 16,565,881	100%
\$ 3,179,079			\$ 4,733,109	
3,160,410	20%	\$ 90,297	\$ 9,197,666	56%
9,852,075	62%	\$ 85,670	\$ 7,368,215	44%
2,882,910	18%	\$ 360,364		
13,590,395	85%	\$ 108,723	\$ 6,892,666	42%
2,305,000	15%	\$ 69,848	\$ 9,673,215	58%
		\$ -		

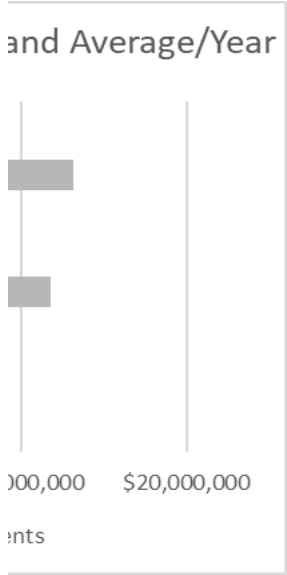
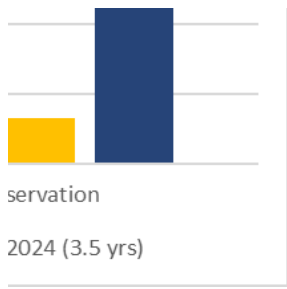






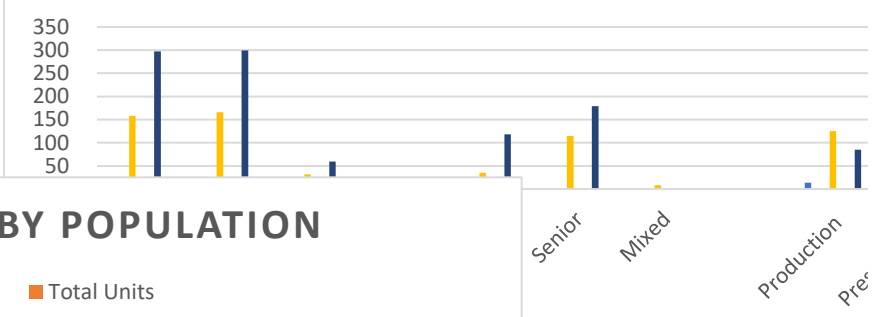








Production v Preservation by period



### INVESTMENT BY POPULATION

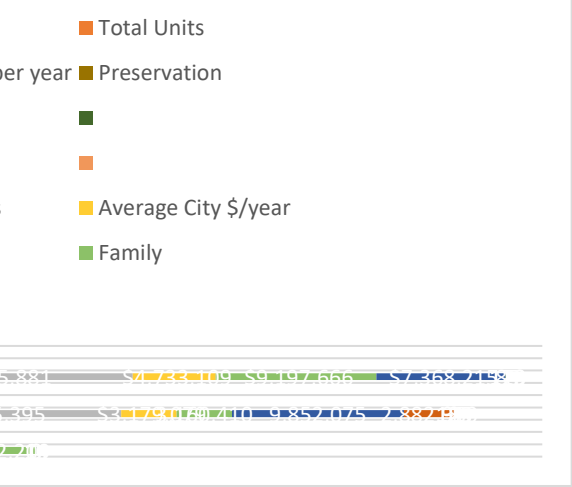
**PRESERVATION**

Number of units per year

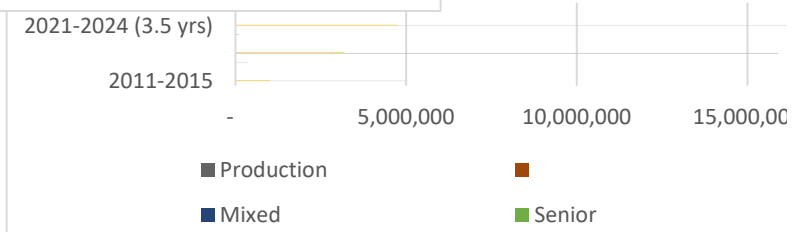
Investment per unit (\$/year)

Family

Period	2011-2015	2016-2020
Production	~100	~120
Mixed	~180	~100
Senior	~100	~120

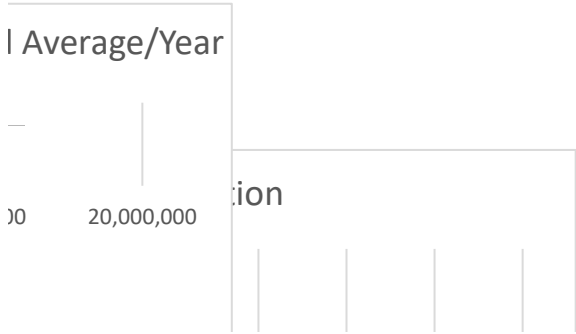
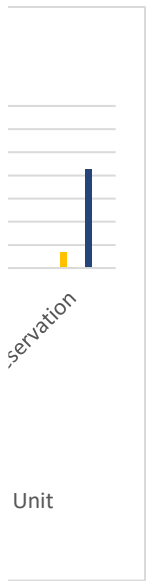


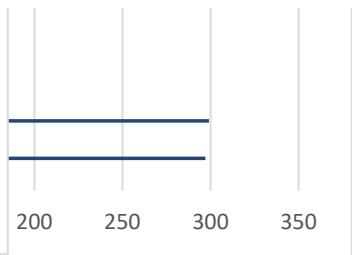
Investments by Period and



- Family
- Average City \$/year
- 
- 
- Total City Investments
- 
- Mixed

- 2021-2024 (3.5 yrs)
- 2016-2020 Count by Unit
- 2011-2015
- 2016
- 2021
- 2011





5-2020 Count by Unit ■ 2016-2020 Count by Unit  
1-2024 (3.5 yrs) ■ 2021-2024 (3.5 yrs)  
1-2015 ■ 2011-2015



# FY25 Annual Action Plan Consultation with the Fair Housing Committee

February 7, 2024

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The City of Newton



# FY25 AAP Timeline

<b>January – March 2024</b>	Housing & CD staff meet with advisory committees to review needs / proposed projects (Newton Housing Partnership, Commission on Disability, Fair Housing Committee, former BNWW Continuum of Care, WestMetro HOME Consortium)
<b>Jan. 3 – Jan. 31, 2024</b>	Human Services and ESG RFP application open for submissions
<b>April 1, 2024</b>	P&D Board Public Hearing on Draft FY25 AAP; start of 30-day public comment period
<b>May, 2024</b>	Submission of FY25 Annual Action Plan
<b>July 1, 2024</b>	Start of FY25 program year

# FY25 Allocation of Funds (estimate)

---

Program	FY25*
Community Development Block Grant (CDBG)	\$1,864,303
HOME Investment Partnerships Program (HOME)**	\$1,652,605
Emergency Solutions Grant (ESG)	\$164,388
<b>Total</b>	<b>\$3,681,296</b>

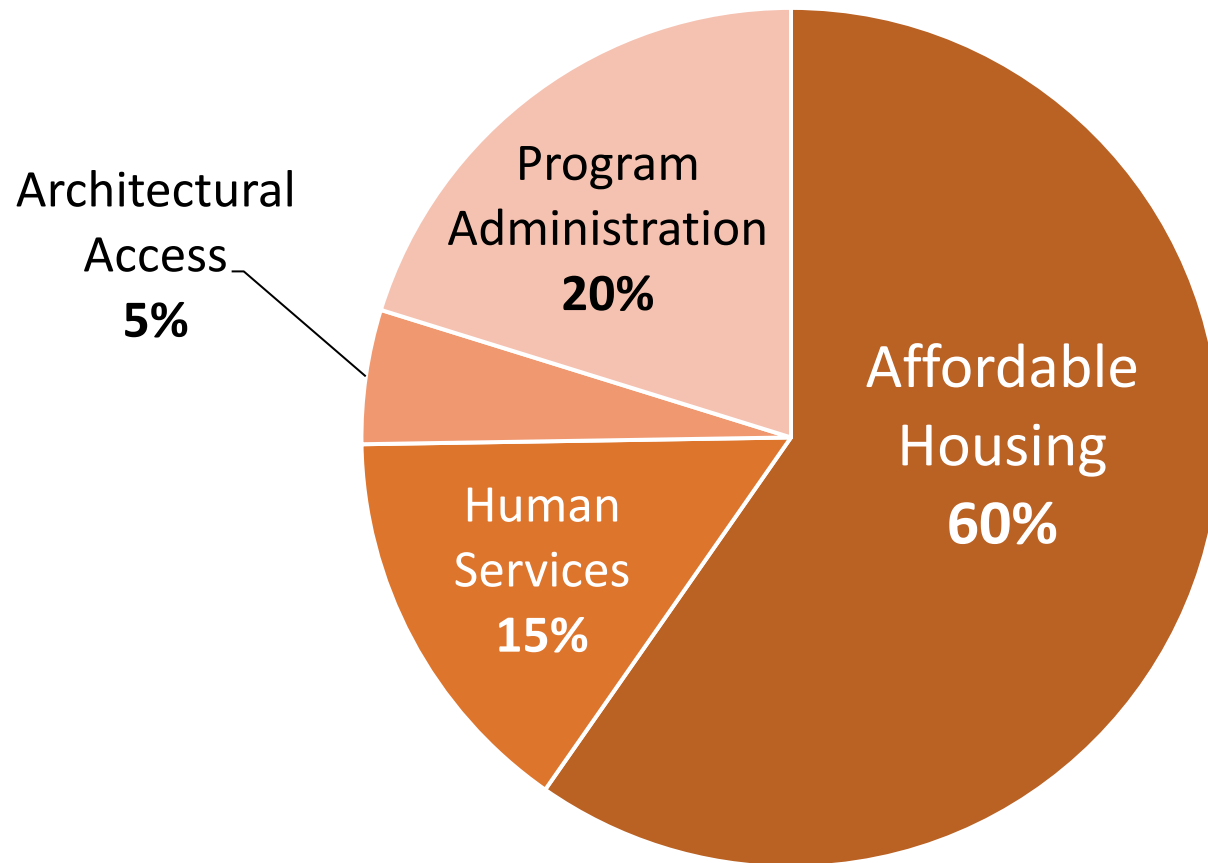
\*Assumes level funding from FY24

\*\*Approx. \$145,000 of total is designated as Newton entitlement HOME funds



# Recommended FY25 CDBG Allocation

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# **FY25 Goals and Activities**

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# Goal #1: Affordable Housing

Create, preserve, and rehabilitate safe, decent, and affordable rental and ownership housing and provide financial support to income-eligible first-time homebuyers.





# Production & Preservation of Affordable Units

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## Ongoing Projects utilizing prior years' funding:

### ✓ **Coleman House Senior Housing Preservation Project**

- Comprehensive rehab and preservation of 146 existing very low- and extremely low-income senior housing units
- Construction began Summer 2021

### ✓ **West Newton Armory**

- Redevelopment into 100% affordable housing
- Metro West / Civico Development Team
- Project received its Comprehensive Permit in January 2023 and received LIHTC funds.
- Construction start estimated in Spring 2025

### ✓ **West Newton Family Navigation Center**

- Rehabilitation of Chetwynde Nursing Home into 42 units of transitional housing for single parents and their children.
- Construction set to begin Spring/Summer 2024.



# Production & Preservation of Affordable Units

---

## **FY25 Housing Projects:**

### **✓ West Newton Armory**

- Redevelopment into 100% affordable housing
- Metro West / Civico Development Team
- Project received its Comprehensive Permit in January 2023 and has applied to the DHCD One Stop Application for LIHTC funds.
- Construction start estimated in Spring 2025

### **✓ Newton Housing Authority's Management Portfolio**

- 57 units at 13 properties Units for low-income families and individuals
- 2019 Capital Needs Assessment revealed \$2,924,044 in recommended Year 1 expenditures

# Rehabilitation of Existing Units

## FY25 Housing Rehabilitation Program

- Support the rehabilitation of affordable homeowner and rental units, including Newton Housing Authority and nonprofit housing units
- Approximately 3 homeowner projects estimated for FY25 (~\$25,000 per project)





# Support Affordable Homeownership

---

## FY25 Downpayment Assistance Program

To provide financial support for low- to moderate-income first-time homebuyers purchasing deed-restricted affordable units through the provision of a \$10,000 grant

- Up to **3 income-eligible homebuyers** estimated to be assisted in FY25

# Goal #2: Fair Housing



Continued education around fair housing laws, regulations and their enforcement are critical to ensuring that every individual and household has equal opportunity and access to affordable housing in Newton and across the WestMetro HOME Consortium.

## ➤ **FY25 Fair Housing Program**

- Collaborate with the FHC and HOME Consortium to increase knowledge about fair housing laws and obligations – Fair Housing Month
- Continue implementation of Analysis of Impediments report
- Fair housing testing program throughout Consortium
- Consider policy changes related to findings from MAPC parking utilization study

# Goal #3: Human Services



Financial support for programs that directly provide stability across the lifespan for Newton's low- to moderate-income population.



*\*Above: Newton Community Development Foundation*



# FY24 Human Service Program Recommended Awards

Agency	Program	Allocation
West Suburban YMCA	Childcare Financial Aid Program	\$24,900.00
Riverside Community Care	Mental Health Services Promoting Economic Mobility	\$21,700.00
Family ACCESS	Social Mobility for Young Families	\$15,000.00
The Second Step	Community Programs for Adult Survivors of DV	\$35,000.00
Newton Housing Authority	Resident Services Program	\$35,000.00
Newton Community Development Foundation	Resident Services Program	\$35,000.00
2Life Communities (formerly JCHE)	CaringChoices and Wellness Nursing for Low-Income Seniors	\$15,000.00
Newton Dept. of Parks, Recreation & Culture	Financial Aid for Summer Camp	\$14,900.00
John M. Barry Boys and Girls Club	Financial Aid for Teens/Families	\$24,900.00
The Carroll Center for the Blind	Career and Vocational Rehab Services	\$13,000.00
Jewish Family & Children's Services	Stabilization & Recovery Services	\$15,300.00
Plowshares Ed. Development Center	Tuition Assistance	\$11,000.00
Jewish Big Brothers & Big Sisters	Mentoring Initiatives	\$10,000.00
<b>Total</b>		<b>\$305,600.00</b>

# Goal #4: Supportive Services for Homeless and At-Risk of Homelessness



Provide supportive services for individuals and families that are homeless or at-risk of homelessness, including financial support for existing emergency and transitional housing.



In FY25, CDBG funds will be used to help construct 42 units of transitional housing at 1650 Washington St. as part of FamilyAid's proposal.

*\*Above (clockwise): Middlesex Human Service Agency, Brookline Community Mental Health Center, and Community Day Center of Waltham.*

# FY24 ESG Program Awards

ESG Category	Agency	Program	Allocation
<b>Emergency Shelter</b>	The Second Step	Residential Shelter Program	\$30,070.00
	REACH Beyond Domestic Violence	Emergency Shelter for Survivors of Domestic Violence	\$25,060.00
	Community Day Center of Waltham	Day Shelter	\$43,180.00
<b>Homelessness Prevention</b>	Brookline Community Mental Health Center	Homelessness Prevention	\$27,290.00
<b>Rapid Re-housing</b>	Brookline Community Mental Health Center	Rapid Re-housing	\$26,460.00
<b>Administration (capped at 7.5%)</b>	City of Newton	Program Administration	\$12,328.00
<b>Total</b>			<b>\$164,388.00</b>

# Goal #5: Architectural Access



Removal of material and architectural barriers restricting mobility and accessibility of elderly or severely disabled persons, through public thoroughfares, public buildings, parks and recreational facilities, and nonprofit agencies.

- Approx. 5% (\$90,000) of FY24 CDBG funds to making exterior pedestrian access improvements to City Hall Campus



# HOME-ARP

- ❖ The WestMetro HOME Consortium has been awarded approximately \$5 million as part of the American Rescue Plan that will be administered through the HOME Investment Partnerships Program (HOME-ARP). HOME-ARP funds will assist individuals and/or households who are experiencing or are at-risk of homelessness and other vulnerable populations.
- ❖ HOME-ARP funds can be used for four eligible activities:
  1. Production or Preservation of Affordable Housing
  2. Tenant-Based Rental Assistance (TBRA)
  3. Supportive Services, Homelessness Prevention Services, Housing Counseling
  4. Purchase and Development of Non-Congregate Shelter
- ❖ HUD requires each recipient of these funds to submit an Allocation Plan before this funding can be accessed. HUD approved the WestMetro HOME Consortium's plan in June 2023, and an RFP for was released on November 9, 2023. Proposals are due February 9, 2024.
- ❖ The WestMetro HOME Consortium will meet March 14, 2024 to discuss proposals and vote on allocations.

# FY25 AAP Public Hearing April 1 P&D Board

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Questions / Comments?

Thank you!