



Ruthanne Fuller
Mayor

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

(For staff use)
date rec'd:

11/20/20

PRE-PROPOSAL

PROPOSAL

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

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

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

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

Project TITLE	Coleman House Senior Housing Preservation				
Project LOCATION	Full street address (with zip code), or other precise location. 677 Winchester Street, Newton MA 02461				
Project CONTACT(S)	Name & title or organization	Email	Phone	Mailing address	
Project Manager	Elise Selinger, 2Life Communities	eselinger@2lifecommunities.org	617-912-8438	30 Wallingford Rd. Brighton MA 02135	
Project FUNDING	A. CPA funds requested: \$4,214,622	B. CDBG funds requested: \$400,000	C. HOME funds requested: \$130,000	D. Other funds: \$24,830,000 (2Life) \$100,000 (Rebates) \$818,519 (WestMetro)	E. Total project cost: \$30,493,141
Project SUMMARY	Explain how the project will use the requested CPA, CDBG, and City of Newton HOME funds. You may provide more detail in attachments, but your PROJECT SUMMARY MUST FIT IN THE SPACE BELOW. Use a cover letter for general information about the sponsoring organization's accomplishments.				
<p>Coleman House I and II provide deed-restricted, permanent affordable housing and supportive services to 146 very low and extremely low income older adult households in Newton MA. The proposed comprehensive rehabilitation and preservation of 2Life's Coleman House I and II will be the fourth major preservation and occupied rehabilitation project of 2Life's older 202 portfolio in the past five years, demonstrating 2Life's depth of experience and a strong track record.</p> <p>Coleman I was refinanced in 2018 and \$24,830,000 was made available for rehabilitation and preservation. As a non-profit, 2Life Communities is investing these funds back into the property not just for capital improvements but also, as the long-term operators, to meet the highest possible sustainability and resiliency standards and redesign the apartments for enhanced adaptability, above and beyond what is typical in the rehabilitation of 30+ year old brick buildings. The scope will include: reconfiguring 100% of the apartments to meet 2Life's adaptable design standards and accessibility requirements to support people in their apartments as their physical needs change, a life-cycle investment to preserve building systems (masonry, roof, windows, HVAC, electrical and plumbing) and redesign of the program spaces to serve as a village center for residents. In particular, according to a Capital Needs Assessment completed in 2018, Coleman II requires the reconfiguration of the kitchen and bathrooms to comply with Fair Housing access codes. Also, the proposed scope is responsive to COVID-related design needs. Seniors are the most at-risk population for contracting and dying from COVID. The significant upgrade to the HVAC system will further support the environmental health in the building and, as an electric system, is better for the environment. 2Life is committed to sustainability and this renovation will achieve Enterprise Green Communities standards.</p> <p>In order to fund this scope, in addition to 2Life funds, we are seeking CPA, CDBG and local HOME funds from the City of Newton. Altogether, these local sources are projected to make up approximately 18% of the project's total development costs. The CPA funds will be allocated to the following building preservation components: masonry repairs and a new roof and windows. The CDBG funds will be used for relocation soft costs. HOME funds will be used to pay for the rehabilitation of the major building systems. We will create a sources tracking sheet and share it with the City.</p>					

Project TITLE	Coleman House Senior Housing Preservation		
USE of CPA and HOME Funds	COMMUNITY HOUSING	Preservation	
COMMUNITY NEEDS	From each of at least 2 plans linked to the Guidelines & Forms page of www.newtonma.gov/cpa , provide a brief quote with plan title, year, and page number, showing how this project meets previously recognized community needs. You may also list other community benefits not mentioned in any plan.		
<p>This Coleman Housing preservation project will meet the building-specific <i>Housing Criteria for a Livable and Friendly Newton for Everyone</i> created by the Newton Council on Aging and Newton Department of Senior Services in the following categories: Overall Home Environment, Entryways and Exits, Bedroom, Kitchen, Bathroom, Stairways and Halls, Laundry and the list of Additional Recommendations. http://www.newtonma.gov/civicax/filebank/documents/77002</p>			
<p>The Coleman House Senior Housing Preservation project also meets multiple Newton HIGH priority needs in the FY16-20 Consolidated Plan (SP-25, p. 113):</p>			
<p>1) Additional accessible rental units - The project improves the housing to be better suited to seniors with disabilities and physical frailty by modernizing the current ADA units and making the other 132 units fully adaptable. With 29% of elderly persons in Newton having some type of disability, including 16% of this group reporting an ambulatory difficulty, the adaptability and accessibility goals of this renovation will make 100% of the existing housing far more adaptable (MA-35 p. 94). Coleman residents have a median household income of \$12,000 per year, the median age is 82 years old and 53% need some level of assistance for their activities of daily living, making the adaptable improvements particularly important so Coleman residents can continue to live with us as their physical needs change over time.</p>			
<p>2 & 3) Affordable housing near amenities and within mixed-use developments - The Coleman community is located in the Oak Hill Park section of Newton on the campus of the Leventhal-Sidman JCC and across the street from the Wells Avenues Office Park. There are many indoor and outdoor amenities available within walking distance for residents including the programs and services at the JCC, Nahanton Park, the Newton Community Farm and the Boat Launch on the Charles River. The project will modernize and reconfigure the ground floor program areas with inviting and accessible programs spaces that will also be ready for future integration with 2Life’s proposed senior middle market development called Opus that will be connected to Coleman House, creating an income inclusive community with many more amenities and services including a dining program and additional resident services navigation and care-related supports.</p>			
<p>Finally, while not indicated as a HIGH need on the Consolidated Plan, 1,075 low income senior renters (30-50% AMI) in Newton are housing cost burdened, spending more than 50% of their income on housing and in addition, 50% of elderly homeowners earning less than 30% of AMI have a similar cost burden (B. Housing Needs Tables, p. 33). The proposed renovation will preserve and enhance this existing stock of affordable housing in a village center setting, with adaptable features, resident services and supports for low income seniors in the City of Newton. http://www.newtonma.gov/civicax/filebank/documents/66466</p>			
COMMUNITY CONTACTS	List at least 3 Newton residents or organizations willing and able to comment on the project and its manager’s qualifications. No more than 1 should be a supervisor, employee or current work colleague of the project manager or sponsor. For housing projects, at least 2 contacts should reside in or near the project’s neighborhood.		
Name & title or organization	Email	Phone	Mailing address
Jayne Colino, Director Newton Department of Senior Services and Council on Aging	jcolino@newtonma.gov	617-796-1671	345 Walnut St Newtonville, MA 02460
Kait Rogers, Chief Finance and Administrative Officer	krogers@jccgb.org	617-558-6503	333 Nahanton St, Newton, MA 02459
Joan Slaby, Coleman House resident		617-916-9210	677 Winchester St. #221, Newton MA 02459

Project TITLE		Coleman House Senior Housing Preservation	
SUMMARY CAPITAL/DEVELOPMENT BUDGET			
Uses of Funds			(rounded amounts)
Construction and Construction Contingency			\$25,330,182
Architect/Engineer, Clerk, Permits, Accounting, Legal, Low Voltage, Relocation, Commissioning			\$3,678,998
Soft Cost Contingency			\$183,962
Developer Overhead			\$1,300,000
D. TOTAL USES (should equal C. on page 1 and E. below)			\$ 30,493,141
Sources of Funds		Status (requested, expected, confirmed)	(rounded amounts)
Newton CPA Funds		Requested	\$ 4,214,622
Newton CDBG Funds		Requested	\$400,000
Newton HOME Funds		Requested	\$130,000
WestMetro HOME Consortium FY21		Will be requested	\$400,000
Utility Rebates		Will be requested	\$100,000
WestMetro HOME Consortium FY20		Confirmed	\$418,519
2Life Sponsor Note		Confirmed	\$24,830,000
E. TOTAL SOURCES (should equal C. on page 1 and D. above)			\$30,493,141
SUMMARY ANNUAL OPERATIONS & MAINTENANCE BUDGET (cannot use CPA funds)			
Uses of Funds			(rounded amounts)
Admin/Utilities/Taxes/Insurance/Resident Services			\$1,640,388
Operating & Maintenance			\$493,860
Financial Exp (including debt service)			\$1,018,445
F. TOTAL ANNUAL COST (should equal G. below)			\$3,152,693
Sources of Funds			(rounded amounts)
Rental Income net of vacancies and reserve/partnership expenses			\$3,446,284
			\$
			\$
G. TOTAL ANNUAL FUNDING (should equal F. above)			\$3,446,284
Cashflow			\$313,591

Project TIMELINE	Phase or Task	Season & Year
	Complete Construction Documents and Competitive Subcontractor Bidding	February 2021
	Start relocation in preparation for Construction	March 2021
	Anticipated Construction Start	April 2021
	Anticipated Construction Completion (18 month duration)	October 2022

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

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Newton, Massachusetts Community Preservation Program, CDBG, and HOME Investment Partnerships Program						
FUNDING REQUEST						
These attachments are required for full proposals only. Electronic attachments may be submitted as PDFs. With printed copies, insert this checklist immediately after the main proposal attachments checklist.						
USES OF FUNDS <i>Check all that apply.</i>						
Acquisition	X Rehabilitation / Preservation	New construction	Mortgage buydown/ refinance	Site preparation/ remediation		
TARGET POPULATION, TYPE OF HOUSING, SPECIAL FEATURES – <i>Check & describe all that apply.</i>						
Individuals	Families	X Seniors	Homeless/At Risk of Homelessness			
X Rental	Ownership	Condominium	Cooperative	Group/congregate		
Combination or other (identify): X Elderly/Disabled						
Special needs/disabilities (identify population & provider of support services, if any): 62+ frail elder and disabled population, supportive services provided by 2Life staff as well as Springwell staff.						
Special features (historic preservation, sustainability, etc.): Will pursue Enterprise Green Communities certification, proposed systems will reduce carbon footprint by 66% and heating and cooling costs by almost 50%.						
UNIT COMPOSITION <i>List number of units in each category.</i>						
UNIT TYPE	≤ 30% AMI	≤ 50% AMI	≤ 80% AMI	80-100% AMI	Market-rate	TOTAL
SRO						
Studio						
1 BR		144			1 – Rent free manager unit	145
2 BR					1 – Rent free manager unit	1
3 BR						
B. Supplements to PROJECT FINANCES						
always	X	Market analysis: including prevailing/trending rents or prices & target population				
rental only	X	Rental subsidy, if any: sources, commitment letters or application/decision schedules				
ownership only	N/A	Cost of ownership analysis: including proposed sales prices, owners' estimated total housing costs, % interest of affordable units & proposed condominium association budget				

C. Supplements to SPONSOR FINANCES & QUALIFICATIONS						
sponsor: check all that apply		X Non-profit	Certified CHDO	Public Agency	Project LLC	Private for- profit
always	X	Organization mission & current housing portfolio , including how this project fits both; summary of previous similar projects completed, with photographs				
nonprofits	X	Board of Directors: including skills, experience, tenure & City board/commission affiliations				
D. Supplement to COMMUNITY OUTREACH						
always	X	Community outreach plan & efforts to date				
E. FAIR HOUSING, ACCESSIBILITY, RELOCATION						
	X	Affirmative marketing & resident selection plan				
always	X	Fair housing: training completed, summary of any past complaints & their resolution				
	X	Reasonable accommodation/reasonable modification policy				
as needed	X	Relocation plans/ budget/ notices				