

INCLUSIONARY HOUSING PLAN

39 Herrick Road

by Herrick Road Realty Trust

November 13, 2018

PROJECT OVERVIEW

The 31 Herrick Road project is located on a 12,979 square foot lot in Newton Centre and will consist of a single, 3-story, mixed-use, building containing a multi-family dwelling with nine (9) apartment-style units (the "Project"). The apartments will consist of a mix of unit sizes ranging from 630 to 1,684 square feet with an average size of 1,153 square feet. There will be three one-bedroom units and six two-bedroom units. All of the units will be flats. There will be nine open-air parking spaces at grade for 9 cars. Except for the inclusionary unit which will be assigned one space, the remaining spaces will be "unbundled" and available on an 'as needed' basis to service residents and/or visitors to the building.

I. DESCRIPTION OF INCLUSIONARY UNITS

Section 5.11.4 of the zoning ordinance currently requires that this special permit development must provide 15% of the proposed units as Inclusionary Units, which in this case is 1.35 (9 x .15%). Accordingly there will be one (1) Inclusionary Unit.

Location & Size of Units

The Inclusionary Unit and its location is shown on the Floor Plans attached hereto as: Unit #201 (1st Floor). Unit #201 contains 1,395 square feet. The unit includes a Living-Dining Area, Kitchen, 2 BR, 2 Baths and Laundry closet with a washer/dryer hook-up.

The square footage of the Inclusionary Unit (1,395 sf) is greater than the average square footage of the five market rate units with the same number of bedrooms (1,379 sf), which exceeds the 60% minimum square footage requirement in Section 5.11.7 of the Ordinance. The square footage of the Inclusionary Unit (1,395 sf) is 13.4% of the total for all units (1,395/10,375 sf), which exceeds the 10% minimum in the Habitable Space requirements of Section 5.11.8.

The units are to be individually metered for consumption of water, electric and gas. Therefore the basic monthly rent does not include these services, which are the responsibility of each tenant. The Inclusionary unit will have one (1) parking space assigned to the unit included in the rent. Snow removal and landscape maintenance are included in the rent. Accordingly there are no other monthly fees assessed to any unit.

Rent Levels

The rent levels for the Inclusionary Unit, which is a three-bedroom unit, based on a four-person household with the maximum income of \$67,210 (65% AMI) would have a maximum rent of \$1,680 (including utilities) according HUD Income and Rent Limits, updated 10/02/17.

However, the maximum rents adjusted for NHA utility allowances of \$247 result in a contract rent of \$1,433. The rent level for the market rate unit is to be established at the time the units are ready for marketing sometime in 2020.

2017 Calculation of Maximum Affordable Rent - 65% AMI (all utilities included in rent)				
Unit Type	Household Size (# of BR + 1)	65% of Adjusted Median Family Income *	Monthly Income	Maximum Gross Rent (30% of income)
Studio	1	\$ 47,060.00	\$ 3,921.67	\$ 1,176.50
1 BR Unit	2	\$ 53,820.00	\$ 4,485.00	\$ 1,345.50
2 BR Unit	3	\$ 60,515.00	\$ 5,042.92	\$ 1,512.88
3 BR Unit	4	\$ 67,210.00	\$ 5,600.83	\$ 1,680.25
4 BR Unit	5	\$ 72,605.00	\$ 6,050.42	\$ 1,815.13

II. CONSTRUCTION STANDARDS AND SPECIFICATIONS

All product and material designations are intended to establish uniform design and quality standards for construction of all the units. Accordingly, all units shall conform to the specifications and standards set forth in **Appendix A** attached hereto. All inclusionary units in development shall be fully built-out and finished dwelling units, containing complete living facilities including a stove, kitchen cabinets, plumbing features, a refrigerator, microwaves, and access to laundry facilities. All inclusionary units shall have exteriors and interiors that are indistinguishable in design and of equivalent materials to the exteriors and interiors of market rate units in the development.

III. AFFIRMATIVE FAIR HOUSING MARKETING & RESIDENTIAL SELECTION PLAN (AFHMP)

The Applicant, Herrick Road Realty Trust, will likely contract with Metro West Collaborative Development Inc. to administer the Affirmative Fair Housing Marketing Plan, Lottery and Tenant Selection process under Metro West’s Regional Ready Renter Program as set forth in **Appendix B** (Scope of Services Contract) and **Appendix C** (Ready Renter Program) attached hereto.

IV. COMPLIANCE WITH AFHMP

The Applicant hereby agrees that at all times, initial rental and all subsequent rentals, resident selection shall be conducted and implemented in accordance with the approved Affirmative Fair Housing Marketing and Resident Selection Plan and DHCD guidelines.

V. RESTRICTIVE COVENANT

All inclusionary units shall comply with the Use Restrictions requirements set out in in the Comprehensive Permit Guidelines of the DHCD, Sec. II.A.1.e. "Use Restriction," and Sec. VI.B.9. "Regulatory Agreement and Use Restrictions" and shall be subject to a Regulatory Agreement and Declaration of Restrictive Covenants executed by and between the Applicant, the City of Newton and DHCD, which the Applicant shall record with the Middlesex South Registry of Deeds as the senior interest in title for each Inclusionary Unit and enduring for the life of the residential development. The Regulatory Agreement and Declaration of Restrictive Covenants shall be filed prior to grant of an occupancy permit and running in favor of the City of Newton, in a form approved by the City Solicitor, which shall limit rental of inclusionary units to eligible households in accordance with provisions reviewed and approved by the Director of the Planning and Development Department which incorporate the provisions of Newton's Inclusionary Zoning Ordinance, Sec. 5.11.

VI. ANNUAL COMPLIANCE

Applicant hereby agrees to submit an annual compliance report to the Director of Planning and Development, in a form approved by the City Solicitor, certifying compliance with the provisions of Newton's Inclusionary Zoning Ordinance, Section 5.11.

Signed this ___ day of November 2018

Herrick Road Realty Trust

By: _____
Stuart Rothman, Trustee

Appendix A

CONSTRUCTION STANDARDS AND SPECIFICATIONS

All product and material designations below are intended to establish minimum design and quality standards for construction of all units. All units, both market rate and inclusionary, shall conform to the following standards:

I. BUILDING

1. Exterior facade on the new building shall be hardi-plank or stucco and/or masonry veneer.

II. FOUNDATIONS

1. All foundation/slab walls shall be cast-in-place concrete.

III. WATERPROOFING

1. Project shall have catch basin drains for run-off from hard surface areas and car park.

IV. FIRE SEPARATION

1. Fire separation to meet or exceed state building code.
- 2.

V. INSULATION

1. Insulation to meet or exceed state building code.

VI. ROOFING

1. EPDM rubber roofs and simulated slates on the mansard roof areas

VII. WINDOWS

1. double-hung insulating glass with screens plus curtain wall.

VIII. INTERIOR WALLS AND CEILINGS

1. Wall and ceiling material shall be gypsum wall board.
2. Paint - One primer coat, two coats color latex finish on walls.
3. Moisture resistant, fiber reinforced 1/2 "cement board at all tubs and showers.

IX. FINISH CARPENTRY- (Paint Grade - 1 coat primer, 2 coats semi-gloss)

1. All window & doors shall have a minimum of 3 1/2" casings.
2. Wood base shall be a minimum of 3 1/2" one piece.

X. BUILDING AMENITY PACKAGE

1. Washer/Dryer connection in laundry closet.

XI. FLOORS

1. Floors in kitchen shall have Vinyl plank flooring
2. Floors in LR, BRs, dining area and foyer shall be carpet.
3. Floors in all baths shall be Ceramic Tile.

XII. KITCHENS

1. Cabinets - factory painted or wood finish.
2. Counters - Granite.
3. Sink - with integral spray nozzle.

XIII. BATH ROOMS

Units will have 2 bathrooms:

1. Toilet – two piece white, American Standard or equal.
2. Faucets - American Standard or equal.
3. Lavatory - American Standard or equal.
4. Tub /Shower - single piece fiberglass unit or similar.

XIV. DOORS

1. Stained, fiberglass entry doors.
2. Solid core, raised panel, Masonite interior door.

XV. HARDWARE

1. Unit entry doors shall have a mortised interlock.
2. All interior doors shall have passage, privacy set.

XVI. PLUMBING, HEATING AND COOLING

1. Ventilation or vents for bathrooms.
2. Complete plumbing system exceeding all state and local codes.
3. Heating & cooling by forced hot-air system w/ thermostatic control in unit.

XVII. ELECTRICAL

1. One telephone jack in LR or kitchen; one cable jack in each room.
2. Individual electric meters for each unit.
3. Lighting - Typical lighting package for each unit.
4. Kitchen - Surface mounted or recessed on separate switch.
5. A minimum of 100 amp service to unit.
6. Wi-Fi ready access for each unit.

XVIII. SECURITY & SAFETY

1. Hard-wired smoke and carbon monoxide detector system.

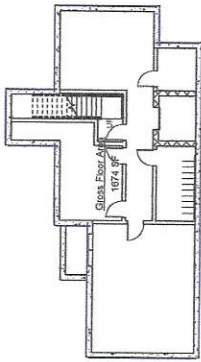
XIX. APPLIANCES

1. Gas cook top and oven, 30" minimum.
2. Frost-free Refrigerator/freezer.
3. Microwave/exhaust combo over cook top.
4. All appliances shall be Energy Star certified.

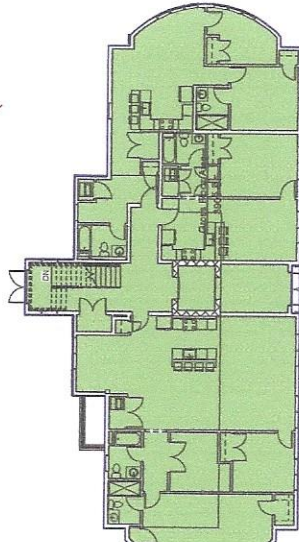
XX. SPRINKLER SYSTEM

1. Sprinklers to meet or exceed state building code.

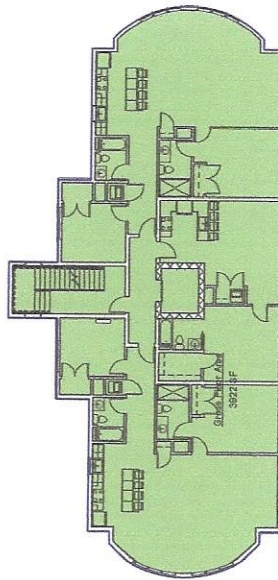
GROSS FLOOR AREA



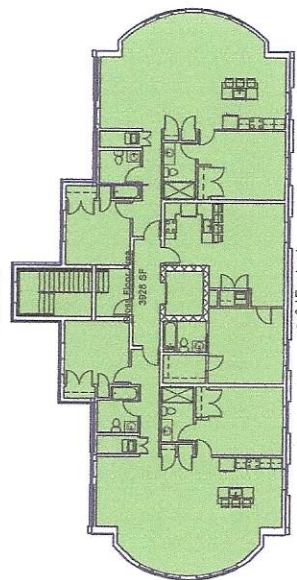
① 1st Floor Level
332' x 110'



② 2nd Floor Level
332' x 110'

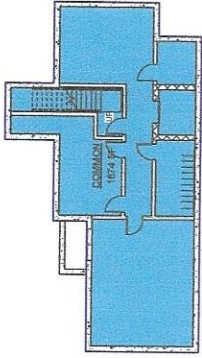


③ 3rd Floor Level
332' x 110'

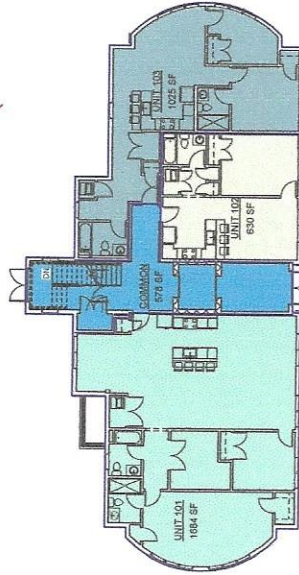


④ 4th Floor Level
332' x 110'

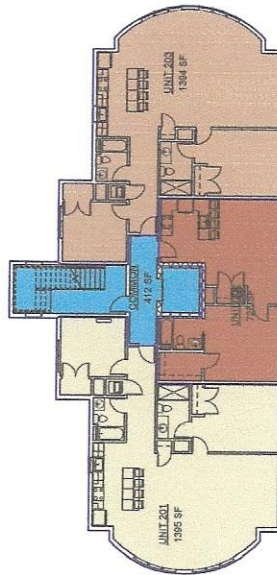
UNIT AREAS



① 1st Floor Level
332' x 110'



② 2nd Floor Level
332' x 110'



③ 3rd Floor Level
332' x 110'



④ 4th Floor Level
332' x 110'

Area	Name	Level
1674 SF	COMMON	Basement
1674 SF	COMMON	1st Floor Level
3609 SF	COMMON	2nd Floor Level
3622 SF	COMMON	3rd Floor Level
3620 SF	COMMON	4th Floor Level
13433 SF		

Area	Name	Level	Comments
1674 SF	COMMON	Basement	
1674 SF	COMMON	1st Floor Level	
3609 SF	COMMON	2nd Floor Level	
3622 SF	COMMON	3rd Floor Level	
3620 SF	COMMON	4th Floor Level	
1684 SF	UNIT 101	1st Floor Level	2 Bedrooms + Study / 2 Bathrooms
630 SF	UNIT 102	1st Floor Level	1 Bedroom / 1 Bathroom
630 SF	UNIT 103	1st Floor Level	2 Bedrooms / 2 Bathrooms
1028 SF	UNIT 201	2nd Floor Level	2 Bedrooms / 2 Bathrooms
1368 SF	UNIT 202	2nd Floor Level	1 Bedroom / 1 Bathroom
728 SF	UNIT 203	2nd Floor Level	2 Bedrooms / 2 Bathrooms
1368 SF	UNIT 301	3rd Floor Level	2 Bedrooms / 2 Bathrooms
1397 SF	UNIT 302	3rd Floor Level	1 Bedroom / 1 Bathroom
728 SF	UNIT 303	3rd Floor Level	2 Bedrooms / 2 Bathrooms
1368 SF	UNIT 401	4th Floor Level	2 Bedrooms / 2 Bathrooms
1343 SF	UNIT 402	4th Floor Level	1 Bedroom / 1 Bathroom
1343 SF	UNIT 403	4th Floor Level	2 Bedrooms / 2 Bathrooms

PROJECT NAME
Herrick Road
Residences

PROJECT ADDRESS
39 HERRICK ROAD
NEWTON, MA

CLIENT
HERRICK ROAD
REALTY TRUST

ARCHITECT
E S I G N
KHALSA

17 WALDO STREET SUITE 400
CAMBRIDGE, MA 02142
TELEPHONE 617.552.6674 FAX 617.552.6688

CONSULTANTS:

CONTRACT NO. 08-1018
DATE: 08/20/2018
SCALE: 3/32" = 1'-0"

REVISIONS

No.	Description	Date



BUILDING AREAS
A-021
Herrick Road Residences