

City of Newton



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Newton Community Preservation Program

Supplemental Attachments for AFFORDABLE HOUSING DEVELOPMENT PROPOSALS

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All projects requesting CPA funds must follow the funding guidelines in Newton's current [Community Preservation Plan](#) and the process, instructions & sample forms in the CPC's current [Proposal & Project Handbook](#). Housing proposals must also provide the additional information listed on the Affordable Housing project Supplemental Sample Form and Attachment Checklist. Sample forms and instructions on how to complete them are included in the following pages.

Before submitting either a pre-proposal or a full proposal for community housing projects, applicants should meet with staff to review program requirements and go over the specific elements of the project. Housing Development projects will often require additional City review processes including the City's interdepartmental Development Review Team, the Newton Planning and Development Board, and others. Staff will consolidate meetings as much as they can.

STAFF CONTACT

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INSTRUCTIONS

The following instructions refer to both the main proposal form and attachments checklist in the [Proposal & Project Handbook](#) and the supplemental affordable housing development form and checklist below. The supplemental form and attachments are intended to supply the additional information which is most often needed to address project questions raised during affordable housing proposal reviews.

The CPC recognizes that each project is unique. Not all of the following questions will apply to every project. For this reason, it is important that all applicants contact the Community Preservation Program Manager as soon as possible to review the project and what to submit. This allows for pre- and full proposal forms to be customized to the individual project. Staff is also available to review draft forms or potential attachment materials at any time during the project development process

GENERAL (PRE)PROPOSAL FORM

(in [Proposal & Project Handbook](#))

PROJECT SUMMARY (Page 1)

For housing projects, please describe the location including amenities within walking distance and access to transit, target population, unit composition, basic project features (rental or ownership, rehabilitation or new construction), and any special project features (accessibility, supportive services, very low or extremely low affordability, historic preservation, etc.).

USE of CPA FUNDS (Page 2)

Staff will complete this section after reviewing the project and CPA requirements with new applicants.

COMMUNITY NEEDS (Page 2)

Community housing proposals provide brief citations (section & page) showing how the project meets the needs identified in at least 2 of the following community-wide plans listed below. Links to these plans can also be found on the [CPA Funding Process and Materials](#) page of Newton's Community Preservation Program website.

- [Newton Comprehensive Plan](#)
- [FY16-20 Consolidated Plan for the City of Newton Housing and Community Development Program](#)
- [Newton Leads 2040: A Blueprint to Promote Affordable, Diverse Housing & Economic Growth](#)

Optional: You may also identify needs the project will address from other community-wide plans linked to the [CPA Funding Process and Materials](#) page.

COMMUNITY CONTACTS (Page 2)

Please list at least two community contacts *within* the project's neighborhood for all housing development projects.

SUPPLEMENTAL FORM & ATTACHMENTS

B. SUPPLEMENTS TO PROJECT FINANCES

All affordable housing development proposals are required to include:

- **A market analysis** for the project's primary geographic area and target population which includes: the typical household's income, age, and household type; the area's prevailing rents and/or sales prices and recent trends; vacancy rates; and current housing demand. This analysis may be based on primary sources (e.g. waitlists, surveys of comparable properties, community meetings) and/or secondary sources (e.g. census data, market study, industry research).
- **A 10-year operating budget** based on conservative assumptions (revenue from rents or fees increasing no more than 2% per year; expenses increasing at least 3% per year).
- **For home ownership projects, a cost of ownership analysis** which include proposed sales prices, estimated total annual housing costs, the range of affordability, the proposed condominium association annual budget, and the percentage of interest assigned to the affordable units in any mixed-income developments.

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C. DEVELOPER CAPACITY & QUALIFICATIONS

Include information on or resumes for the **qualifications for key members of the development team** (e.g. developer, architect, consultant and property manager, depending on the type and size of project).

To help City staff identify potential conflicts of interest under City policies, state law or federal regulations, any **affiliations with City of Newton bodies** (boards, commissions, depts.) **or with potential project beneficiaries** should also be noted in this section. **Nonprofit organizations** must also provide this affiliation information for their boards of directors.

Rental projects should also include a summary of the proposed owner's current rental portfolio which includes occupancy status, cash flow schedules, and compliance status.

D. COMMUNITY OUTREACH

Newton encourages active community outreach that goes beyond the public hearings and meetings already required by the funding process. Affordable housing developers are encouraged to exceed the notice requirements of City policies, state and federal laws and fair housing regulations to gain support from the surrounding community and local City Councilors prior to submitting a CPA funding proposal. Please provide a detailed summary for any outreach to date and any plans for additional outreach efforts in the future.

E. FAIR HOUSING, ACCESSIBILITY, RELOCATION

- **Affirmative Fair Housing Marketing and Resident Selection:** While Newton has a local preference policy, it also requires that all housing projects requesting public funds follow the Massachusetts Dept. of Housing and Community Development's "[Guidelines for MGL c.40B Comprehensive Permit Projects and the Subsidized Housing Inventory](#)" and "[Guidelines for Uniform Local Resident Selection Preferences in Affordable Housing](#)":
- **Anti-Displacement and Relocation:** All housing projects requesting public funds are required to minimize the displacement of existing tenants. If existing tenants must be relocated temporarily (for construction, deleading, etc.) or permanently because they do not meet the project's income requirements, applicants must provide a relocation plan including relocation costs in the development pro forma, as well as copies of any written notifications to residents to date. Housing developers should refer to the Anti-Displacement and Relocation Plan found on the final page of the [2015 Citizen Participation Plan](#).

F. ARCHITECTURAL ACCESS

All affordable housing projects are encouraged to exceed the state & federal architectural access requirements for persons with disabilities. Please address the following questions when completing this section:

- Which requirements apply to the project - Section 504, Title II of the Americans with Disabilities Act (ADA), the Fair Housing Act (FHA), and/or Massachusetts's Architectural Access Board (MAAB)?
- Why does that requirement apply – is it based on sources of funding and/or project size?
- If a Section 504 Compliance Plan is required, what progress has been made and are there any outstanding deficiencies?
- Is the project anticipated to require any variances from the Massachusetts's Architectural Access Board (MAAB) requirements? If so, what is the status of the variance process?

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- For rehabilitation/preservation work on existing projects or buildings, calculate the cost of the proposed work relative to the value of the building per MAAB's CMR 521 3.3 and, if Section 504 is applicable, relative to the replacement cost of the facility per Section 504 8.23(a).

Technical assistance and additional information on Architectural Access questions is available at:

Fair Housing Accessibility First:

FIRST Design and Construction Resource Center
(888) 341 – 7781 (Voice/TTY)
<https://www.fairhousingfirst.org/>

New England ADA Center:

(800) 949-4232 (voice/tty)
<https://www.newenglandada.org/>

Massachusetts Architectural Access Board:

(617) 727-0660
<https://www.mass.gov/orgs/architectural-access-board>

Newton, Massachusetts Community Preservation Program
AFFORDABLE HOUSING PROPOSAL - Supplemental Information

(for staff use
only)

Last updated May 2017.

This form is required with both pre- & full proposals. **Submit it electronically as an editable file.**
 In printed copies, insert this form after page 1 of the main (pre)proposal form.

PRE-PROPOSAL

FULL PROPOSAL

Project TITLE & ADDRESS

Project SPONSOR & CONTACT

USES OF FUNDS *Check all that apply.*

Acquisition	Rehabilitation	New construction	Mortgage buydown/ refinance	Site preparation/ remediation
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TARGET POPULATION, TYPE OF HOUSING, SPECIAL FEATURES – *Check & describe all that apply.*

Individuals	Families	Seniors	Homeless/At Risk of Homelessness	
Rental	Ownership	Condominium	Cooperative	Group/congregate

Combination or other (identify):

Special needs/disabilities (identify population & provider of support services, if any):

Special features (historic preservation, sustainability, etc.):

UNIT COMPOSITION *List number of units in each category.*

UNIT TYPE	≤ 30% AMI	≤ 50% AMI	≤ 80% AMI	80-100% AMI	Market-rate	TOTAL
SRO						
Studio						
1 BR						
2 BR						
3 BR						
4 BR/+						

THIS FORM IS A READ-ONLY SAMPLE.
 Staff will provide a customized form for your project.

You may adjust fields on this form as needed, but please fit all requested information on one page.

**Newton Community Preservation Program
Affordable Housing Proposal – Supplemental Attachments Checklist**

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.

{PROJECT TITLE.

REQUIRED	Check if attached.	ATTACHMENT SUMMARY
A. Supplement to PHOTOS & MAPS		
rehab only		Home inspection report by a licensed professional, for rehabilitation projects
B. Supplements to PROJECT FINANCES		
always		Market analysis: including prevailing/trending rents or prices & target population
rental only		Rental subsidy, if any: sources, commitment letters or application/decision schedules
ownership only		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	Non-profit	Certified CHDO
		Public Agency
		Project LLC
		Private for-profit
always		Organization mission & current housing portfolio, including how this project fits both; summary of previous similar projects completed, with photographs
nonprofits		Board of Directors: including skills, experience, tenure & City board/commission affiliations
D. Supplement to COMMUNITY OUTREACH		
always		Community outreach plan & efforts to date
E. FAIR HOUSING, ACCESSIBILITY, RELATIONSHIP		
always		Affirmative marketing & resident selection plan
always		Fair housing: training completed, summary of any past complaints & their resolution
		Reasonable accommodation/reasonable modification policy
as needed		Relocation plans/ budget/ notices

**THIS FORM IS A READ-ONLY SAMPLE.
Staff will provide a customized form for your project.**

F. Supplement to DESIGN & CONSTRUCTION: ARCHITECTURAL ACCESS WORKSHEET	
This worksheet may be expanded onto additional pages as needed.	
REQUIRED	PROPOSED
1. Site access – accessible route	
2. Accessible parking (identify proposed total # of spaces)	
3. Building entrances & accessible routes within buildings	
4. Common areas & facilities (offices, laundry rooms, community rooms, etc.)	
5. Group 1 Units (MAAB) (include units covered by the FHA)	
6. Group 2 Units (MAAB)	