

City of Newton



Ruthanne Fuller  
Mayor

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

**PRE-PROPOSAL**

**PROPOSAL**

(For staff use)  
date rec'd:

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

For full instructions, see [www.newtonma.gov/cpa](http://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](mailto: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.

<b>Project TITLE</b>	<b>Nonantum Village Senior Housing Preservation</b>				
<b>Project LOCATION</b>	Full street address (with zip code), or other precise location. 241 Watertown Street, Newton, MA 02458				
<b>Project CONTACT(S)</b>	Name & title or organization		Email	Phone	Mailing address
<b>Project Manager</b>	Marcia Hannon Cascap Inc		<a href="mailto:mhannon@cascap.org">mhannon@cascap.org</a>	617-492-5559	231 Somerville Ave. Somerville, MA 02143
<b>Project FUNDING</b>	<b>A. CPA funds requested:</b> \$400,000	<b>B. CDBG funds requested:</b> \$100,000	<b>C. HOME funds requested:</b> \$0	<b>D. Other funds to be used:</b> \$160,000	<b>E. Total project cost:</b> \$ 660,000
<b>Project SUMMARY</b>	<p>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> <p>Nonantum Village Place (NVP) is permanent, affordable housing for seniors (62 years or older). The thirty- five (35) units are deed restricted as affordable in perpetuity. While NVP is income restricted to those with an income below 50% of Area Median Income (AMI), the majority of residents have incomes below 30% of AMI. NVP was built in 2004 by Cascap Inc. We are a local non -profit focused on service enriched housing to disabled and elderly residents. While the Dept of Housing and Urban Development (HUD) provided the majority of development funds through the HUD 202 Program for Supportive Housing for the Elderly, Newton provided significant funding through the CPA, CDBG, and NHA IZ funds.</p> <p>NVP is an architecturally detailed wood-frame building, with one-bedroom units and an on-site Resident Manager. Some building amenities include: seven fully accessible units; a twelve-car parking lot; a community kitchen, dining room, and large sitting room; laundry room; and staff offices. NVP provides residents with stable housing and a part time service coordinator for on-site supportive services, as well as plenty of common spaces to foster community and well-being.</p> <p>We are proposing to address the building's significant capital needs and to improve the building's energy efficiency. The building's roof (there are 3 levels of roofing), and air conditioning system will be replaced and upgraded. Prior roof leaks have been repaired, but all three levels are deteriorated and need replacement. To replace the roofs, the 35 condensers on the roof must be removed. The existing roof insulation will be increased to R-50. As well, the building siding and trim has portions (approx. 30% ) that need to be replaced and painted.</p> <p>The current NVP residents will benefit greatly from proposed improvements, and our ability to invest in roof, HVAC system and siding in the near-term will preserve the building for many future residents.</p>				

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<b>USE of CPA and HOME Funds</b>	<b>COMMUNITY HOUSING</b>	<b>Preservation</b>	
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<b>COMMUNITY NEEDS</b>	From each of at least 2 plans linked to the <a href="#">Guidelines &amp; Forms</a> page of <a href="http://www.newtonma.gov/cpa">www.newtonma.gov/cpa</a> , 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.
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The Nonantum Village Senior Housing Preservation project meets the following recognized community needs:

1. **Preserve much-needed affordable housing for a growing elderly population** – As identified in the “Newton Leads 2040” planning process, “While some retirees will be able to afford to age in place, many are forced to leave Newton if they choose to downsize since there are few options available” (Housing Needs Analysis and Strategic Recommendations, June 2016, pg. 38). These critical capital investments in Nonantum Village Place will preserve the longevity of the property and increase the well-being of its residents today. Likewise, the FY16-20 Consolidated Plan [for Housing and Community Development] finds that rehabbing existing affordable housing, particularly housing for elderly populations near amenities is a high priority (pg. 113).
2. **Reduce greenhouse gas emissions** – As identified in the Newton Comprehensive Plan (2007), Newton has an *Energy Action Plan* that aims to reduce greenhouse gas emissions (pg. 8-6). By replacing existing air conditioning units with modern, energy efficient fixtures and adding additional rooftop insulation, the building will reduce its carbon footprint.

<b>COMMUNITY CONTACTS</b>	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.
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Name & title or organization	Email	Phone	Mailing address
Marilyn Brashears			241 Watertown St., Unit 27
Mary Ann Lambert			241 Watertown St., Unit 23

Project TITLE	Nonantum Village Senior Housing Preservation	
SUMMARY CAPITAL/DEVELOPMENT BUDGET		
Uses of Funds		(rounded amounts)
Construction before contingency		545,499
Construction contingency		62,239
Soft costs		52,262
<b>D. TOTAL USES (should equal C. on page 1 and E. below)</b>		<b>\$660,000</b>
Sources of Funds	Status (requested, expected, confirmed)	(rounded amounts)
Newton CPA Funds	Requested	\$ 400,000
Newton CDBG Funds	Requested	\$ 100,000
Newton HOME Funds	Requested	\$0
Foundation Charlesbank	Confirmed	\$50,000
Nonantum Village Place	Confirmed	\$110,000
<b>E. TOTAL SOURCES (should equal C. on page 1 and D. above)</b>		<b>\$ 660,000</b>
SUMMARY ANNUAL OPERATIONS & MAINTENANCE BUDGET (cannot use CPA funds)		
Uses of Funds		(rounded amounts)
NVP annual budget: Administrative and renting expenses		\$81,043
Maintenance		\$87,148
Resident Services		\$25,327
Utilities, taxes and insurance		\$126,047
Replacement reserve -requested (current amount is \$70,000 annually)		\$115,875
<b>F. TOTAL ANNUAL COST (should equal G. below)</b>		<b>\$435,440</b>
Sources of Funds		(rounded amounts)
Residential Effective Annual Gross Income HUD Rental Subsidy and tenant payments		\$436,825
Laundry		\$1,000
		\$
<b>G. TOTAL ANNUAL FUNDING (should equal F. above)</b>		<b>\$437,825</b>
Cashflow		<b>\$2,385</b>

Project TIMELINE	Phase or Task	Season & Year
	Funding application and building permit application	Spring-Summer 2021
	Construction start- Building Siding and Trim	Summer- Fall 2021
	Roof replacement (all three roofs)	Spring 2022
	A/C systems for 35 units and common area	Spring 2022

Project TITLE		Nonantum Village Senior Housing Preservation	
↓ 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.	<b>PROJECT FINANCES</b> printed and as computer spreadsheets, with both uses & sources of funds		
	X	<b>Development pro forma/capital budget:</b> 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)	
		<b>Operating/maintenance budget, projected separately for each of the next 10 years</b> (CPA funds may not be used for operations or maintenance)	
	X	<b>Non-CPA, CDBG, and Newton HOME funding:</b> commitment letters, letters of inquiry to other funders, fundraising plans, etc., including both cash and est. dollar value of in-kind contributions	
		<b>Purchasing of goods &amp; services:</b> briefly summarize sponsor’s understanding of applicable state statutes and City policies	
REQUIRED for full proposal.	<b>SPONSOR FINANCES &amp; QUALIFICATIONS, INSTITUTIONAL SUPPORT</b>		
		<b>For sponsoring organization, most recent annual operating budget</b> (revenue & expenses) & <b>financial statement</b> (assets & liabilities); each must include both public (City) and private resources (“friends” organizations, fundraising, etc.)	
		<b>For project manager:</b> relevant training & track record of managing similar projects	
REQUIRED for all full proposals involving real estate acquisition, construction or other building/ landscape improvements.	<b>SITE CONTROL, VALUE &amp; DEED RESTRICTIONS</b>		
		<b>Owner’s agreement to a permanent deed restriction for affordability</b>	
	<b>ZONING &amp; PERMITTING</b>		
		Short email confirming review by the <b>Development Review Team (DRT)</b>	
		<b>Brief property history:</b> at least the last 30 years of ownership & use (ask CPC staff for assistance with sources)	
		<b>Environmental mitigation plans:</b> incl. lead paint, asbestos, underground tanks	
		<b>Zoning relief and permits required:</b> incl. parking waivers, demolition or building permits, comprehensive permit or special permit	
		<b>Other approvals required:</b> Newton Conservation Commission, Newton Historical Commission, Newton Commission on Disabilities, Massachusetts Historical Commission, Massachusetts Architectural Access Board, etc.	
	<b>DESIGN &amp; CONSTRUCTION</b>		
		<b>Professional design &amp; cost estimates:</b> include site plan, floor plans & elevations	
	<b>Materials &amp; finishes;</b> highlight “green” or sustainable features & materials		
OPTIONAL for all proposals.		<b>LETTERS of SUPPORT</b>	from Newton residents, organizations, or businesses

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<b>Newton, Massachusetts Community Preservation Program, CDBG, and HOME Investment Partnerships Program</b>						
<b>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.</b>						
<b>USES OF FUNDS</b> <i>Check all that apply.</i>						
Acquisition	Rehabilitation/ Preservation	New construction	Mortgage buydown/ refinance	Site preparation/ remediation		
<b>TARGET POPULATION, TYPE OF HOUSING, SPECIAL FEATURES</b> – <i>Check &amp; describe all that apply.</i>						
Individuals		Families		Seniors X		Homeless/At Risk of Homelessness
Rental X	Ownership	Condominium		Cooperative	Group/congregate	
Combination or other (identify):						
Special needs/disabilities (identify population & provider of support services, if any): Residents are elders, aged 62 years or older. Many have disabilities or are frail. Support services are provided by Wingate Companies						
Special features (historic preservation, sustainability, etc.): (expand description) Sustainability: high efficiency heating, reflective roofing, R-50 roof insulation, high efficiency air conditioning systems to be installed as part of the project. Project will also allow for solar thermal or photovoltaic installation at a later date.						
<b>UNIT COMPOSITION</b> <i>List number of units in each category.</i>						
<b>UNIT TYPE</b>	<b>≤ 30% AMI</b>	<b>≤ 50% AMI</b>	<b>≤ 80% AMI</b>	<b>80-100% AMI</b>	<b>Market-rate</b>	<b>TOTAL</b>
<b>SRO</b>						
<b>Studio</b>						
<b>1 BR</b>	<b>14</b>	20			1 rent free RM	<b>35</b>
<b>2 BR</b>						
<b>3 BR</b>						
<b>B. Supplements to PROJECT FINANCES</b>						
always		<b>Market analysis:</b> including prevailing/trending rents or prices & target population				
rental only		<b>Rental subsidy, if any:</b> sources, commitment letters or application/decision schedules				
ownership only	N/A	<b>Cost of ownership analysis:</b> including proposed sales prices, owners' estimated total housing costs, % interest of affordable units & proposed condominium association budget				
<b>C. Supplements to SPONSOR FINANCES &amp; QUALIFICATIONS</b>						
sponsor: check all that apply	Non-profit X	Certified CHDO	Public Agency	Project LLC	Private for-profit	
always		<b>Organization mission &amp; current housing portfolio,</b> including how this project fits both; summary of previous similar projects completed, with photographs				
nonprofits		<b>Board of Directors:</b> including skills, experience, tenure & City board/commission affiliations				
<b>D. Supplement to COMMUNITY OUTREACH</b>						
always		<b>Community outreach plan &amp; efforts to date</b>				
<b>E. FAIR HOUSING, ACCESSIBILITY, RELOCATION</b>						
always		<b>Affirmative marketing &amp; resident selection plan</b>				
		<b>Fair housing:</b> training completed, summary of any past complaints & their resolution				
		<b>Reasonable accommodation/reasonable modification policy</b>				

as needed	N/A	<b>Relocation plans/ budget/ notices</b>
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