



2021
Housing Institute for
**Gateway
Cities**

October 28, November 4 & 9



**Massachusetts
Housing Partnership**

Moving affordable housing forward

Housing Institute for Gateway Cities

October 28, November 4 & 9

10:00 am to 12:00 pm

Day 1 - Thursday, October 28th

Housing Production Tools for Gateway Cities

[Click Here to Register for Day 1](#)

10:00 am **Welcome!**

Clark Ziegler, Executive Director, MHP

10:05 am **Session 1: Addressing Distressed Properties in Holyoke**

Francis Jhoan Goyes Flor, Policy Innovation Associate, MassHousing

Don Bianchi, Senior Policy Advocate, MACDC

Aaron Vega, Planning and Development Director, City of Holyoke

Michael Moriarty, Executive Director, OneHolyoke CDC

Lynne D. Sweet, Principal, LDS Consulting

South Holyoke, a diverse and culturally rich neighborhood in the City of Holyoke, suffers from property disinvestment, as the real estate market too often does not provide the necessary economic incentives for maintaining and improving properties. The Neighborhood Hub, administered by MassHousing in collaboration with other public agencies and nonprofit organizations, has entered into a partnership with the Holyoke Office of Planning and Economic Development and OneHolyoke CDC to address property disinvestment.

In this session, hear from each of these three partners, who are bringing their energy and expertise to confront the challenges the market has created. Hear how OneHolyoke CDC is working with the City to assess the capital needs of the properties it owns and serve as a voice for neighborhood residents. Discover how City government is identifying vacant buildings and developing a toolkit so that private owners have access to the information, the resources, and the connectivity they need to address the rehabilitation needs of properties. Learn about the Neighborhood Hub's experience in bringing these parties together in an "all hands on deck" approach.

10:55 am Transition Break

11:00 am **Session 2: Leveraging State Programs and Tools for Housing**

Bill Reyelt, Principal Planner, Smart Growth Programs, MA DHCD

Stephen Pantalone, Housing Program Specialist, MA DHCD

Greg Watson, Senior Relationship Manager & Originator, MassHousing

Dave Traggorth, Principal, Traggorth Companies

Gateway Cities have the advantage of tapping into State programs and tools specifically created to boost housing production in their communities, such as HDIP, Commonwealth Builder, and Neighborhood Hub. However, implementation and outcomes of these resources may differ under different market conditions. Hear from representatives who oversee or have utilized these programs on the most effective strategies to drive desired outcomes.

11:55 am **Wrap Up Day 1 : See you next week, November 4th 10 am – 12 pm**

Topics: Investment without displacement; Leveraging public land for affordable housing

[Click here to register for Day 2](#)

About Our Speakers:

Francis Jhoan Goyes Flor

Policy Innovation Associate, MassHousing

Francis Goyes Flor is the manager for the Neighborhood Hub, the Commonwealth's technical assistance program for neighborhood revitalization. Prior to joining MassHousing, Francis worked at the Metropolitan Area Planning Council and the World Bank. She recently became a first time homeowner of a condo in a historic brownstone in East Boston.

Don Bianchi

Senior Policy Advocate, MACDC

Don Bianchi is the Senior Policy Advocate at the Massachusetts Association of CDCs. Much of his work is focused on supporting MACDC's Members in their affordable housing and real estate development work. Don has over 30 years' experience in affordable housing development, lending, and policy.

Aaron Vega

Planning and Development Director, City of Holyoke

Aaron Vega is the current director at the Office of Planning & Economic Development for the city of Holyoke. Aaron served 8 years as the State Representative for the city of Holyoke and prior to that served as an at Large Member of the Holyoke City Council. He lives in Holyoke with his wife Debra, son Odin and their cat Colleen in a historic row house.

Michael Moriarty

Executive Director, OneHolyoke CDC

Michael Moriarty has served as Executive Director of OneHolyoke CDC since 2013, dedicated to the organization's mission of transforming distressed neighborhoods and improving lives for residents of the City of Holyoke.

Lynne D. Sweet

Principal, LDS Consulting

Lynne D. Sweet has over 35 years of experience in the real estate industry and is the founder and principal of LDS Consulting Group, LLC. Ms. Sweet has played a vital role as consultant to both private and public sector clients by providing a range of services, including planning, market research, feasibility analysis, financial structuring, grant writing, land use and permitting, team building and project management. Most of the Ms. Sweet's work currently serves affordable, senior and market housing industries as well as smart growth and mixed-use developments. Lynne holds an MBA from Babson College.

Stephen Pantalone

Housing Program Specialist, MA DHCD

Stephen Pantalone, Program Coordinator with DHCD. He works on DHCD's affordable programs, as well as the HDIP program. Has been the primary contact and reviewer for HDIP programs since 2017, and assisted in the transition to the competitive funding round format.

Bill Reyelt

Principal Planner, Smart Growth Programs, MA DHCD

In addition to working with Gateway Cities to establish and amend Housing Development Zones & Plans and reviewing associated Tax Increment Exemption (TIE) agreements under the Housing Development Incentive Program (HDIP), Bill's other primary responsibility at DHCD is administering the c. 40R Smart Growth and Starter Home Zoning Programs. Prior to this current role at DHCD and since joining the Department in 1997, Bill held several different positions involving a number of housing, planning, and economic development programs and initiatives.

Greg Watson

Senior Relationship Manager & Originator, MassHousing

Greg joined MassHousing in June 2008 to lead a new Department that is responsible for coordinating all Comprehensive Permit programs, municipal engagement and planning issues for the agency. Recently he transitioned to the Rental Business Development Division at MassHousing serving as a Senior Relationship Manager and Originator. He has over 25 years of municipal planning, community development and affordable housing experience. Greg graduated from Clemson University with a BS in History & Political Science & obtained a MPA degree from Clemson University & the University of South Carolina jointly.

Mr. Watson is certified as a planner by the American Institute of Certified Planners (AICP) and is a member of the American Planning Association (APA) and the Massachusetts Chapter of the APA.

Dave Traggorth

Principal, Traggorth Companies

Dave Traggorth is a real estate consultant and developer focused on developing projects that require a combination of public and private investment to be successful. He's developed several transformative projects in Gateway Cities – Chelsea, Haverhill, and Worcester for example, and he's used nearly every federal, state, and local funding resource available to advance projects, including HDIP, Historic Tax Credits, Community Preservation Act Funding, to name a few.



Healthy and Affordable Homes Holyoke HUB Grant Presentation



Aaron Vega, City of Holyoke

Lynne D. Sweet, LDS Consulting Group, LLC

Michael Moriarty, OneHolyoke

Nels Nelson, Stantec





Goal and Scope



*** Goal: To identify locations for housing development in the South Holyoke and Flats Neighborhoods of Holyoke**

- **Kick off Meeting**
- **On the Ground Inventory and Parking Analysis with GIS interface**
- **Creation of Base maps**
- **Identify 5 sites for housing development**
- **Provide attributes and obstacles for 5 sites**
- **Stakeholder interviews**
- **Provide housing development tool kit**

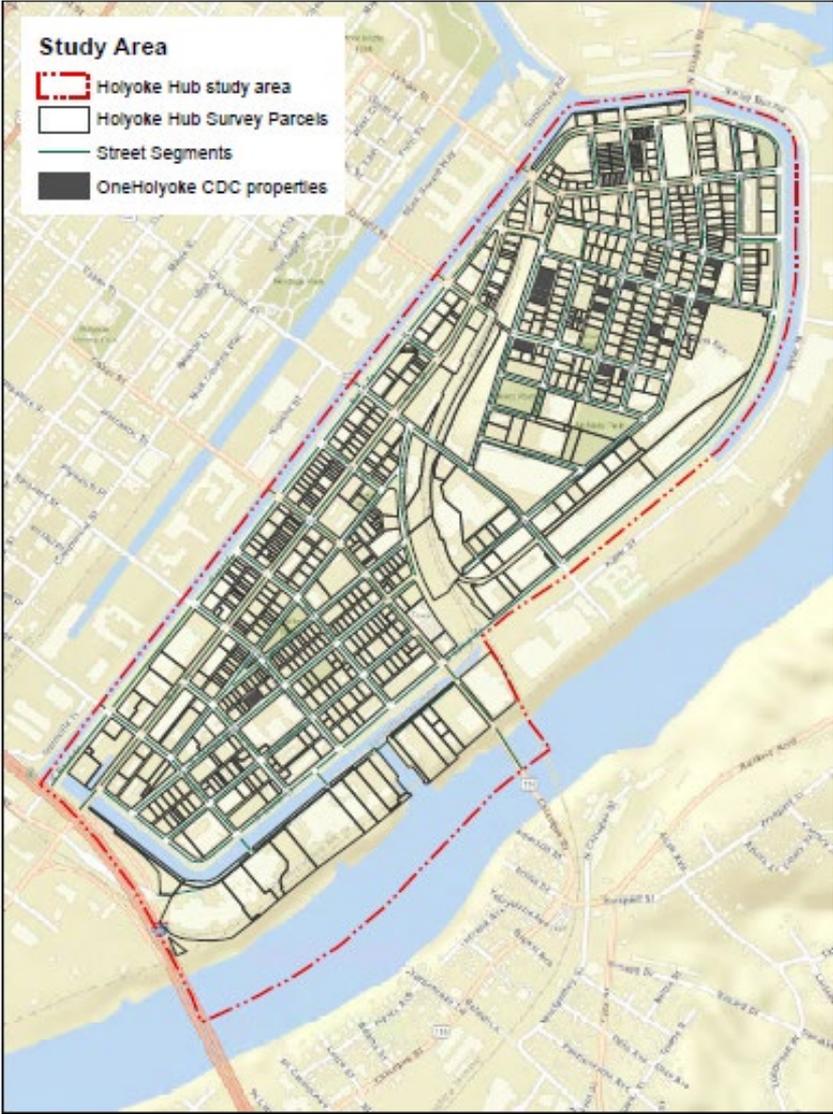


Supplemental Services



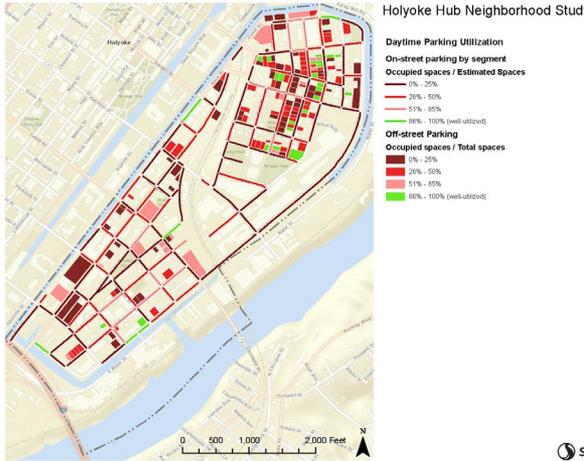
- Map capital needs Holyoke Homes
- Provide development plans for 5 sites
- Research on upper floor residential High/Main Street locations

Study Area

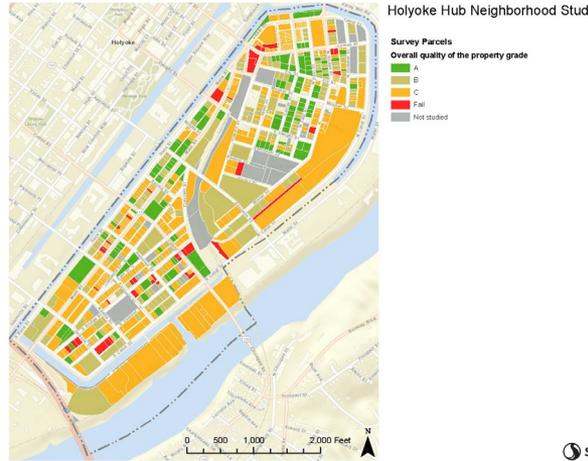


In-depth survey

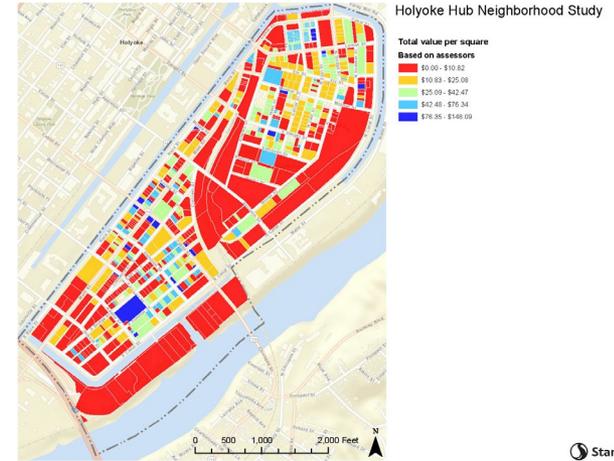
Parking inventory



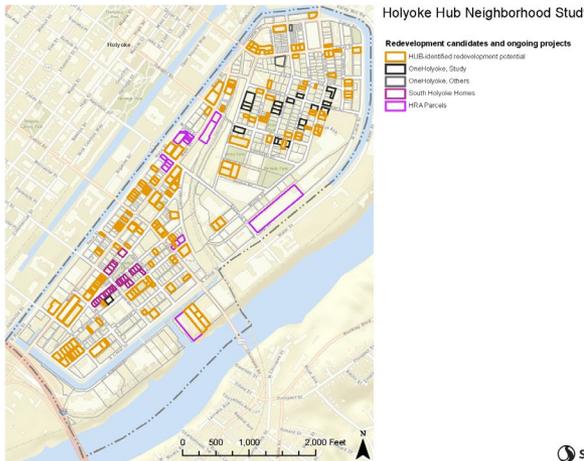
Overall condition



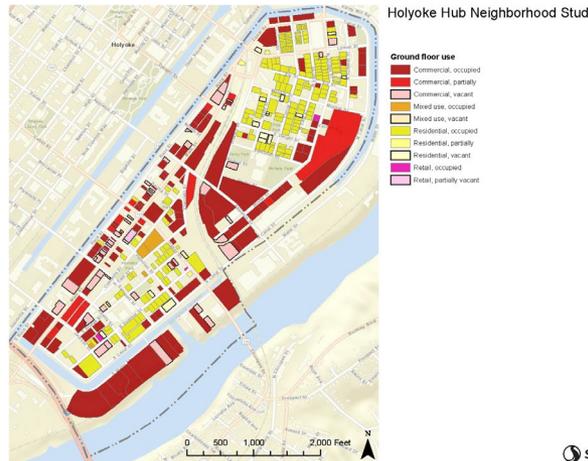
Total value per area



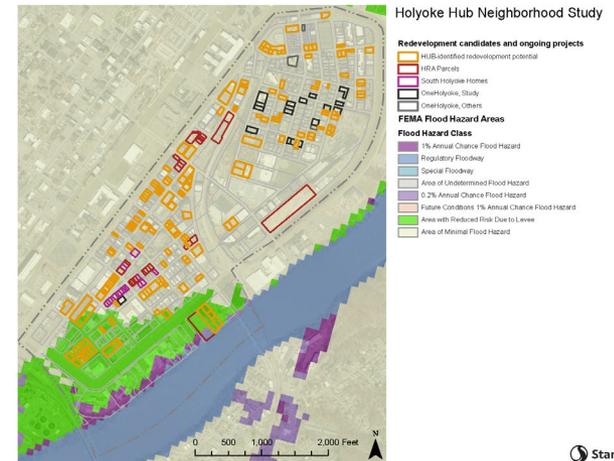
Other redev. sites



Ground floor use



Flood risk



Redevelopment candidates



-  OneHolyoke, Study
-  OneHolyoke, Others
-  South Holyoke Homes
-  HRA Parcels

Redevelopment Candidate Categories

-  1: Other potential candidates
-  2: Ground floor retail, upper story residential
-  3: Rowhouses
-  4: Multifamily infill
-  5: Residential renovation
-  6: Adaptive reuse

before

One Holyoke Building Inspections

✳ Step 1: Building inspection for 22 Properties in South Holyoke/Flats by The Building Inspector of America, Michael McDowell

- ◆ Roof
- ◆ Structure
- ◆ Windows & Doors
- ◆ Insulation & Ventilation
- ◆ Interior
- ◆ Electrical
- ◆ Plumbing
- ◆ HVAC
- ◆ Exterior

One Holyoke Capital Needs

✳ Step Two:

- ◆ Create maps of property locations and physical needs

✳ Step Three:

- ◆ One Holyoke prepares budgets

✳ Step Four:

- ◆ One Holyoke obtains bids using maps etc.

✳ Step Four:

- ◆ One Holyoke works on recapitalization funds (aided by developers tool kit)



Questions? Next Steps?



THANK YOU FOR YOUR TIME

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Nels Nelson, Stantec

nels.nelson@stantec.com 617 320-4068

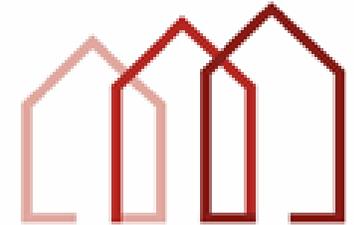
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Aaron Vega, City of Holyoke EDC

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MassHousing's Commonwealth Builder & Workforce Housing Programs



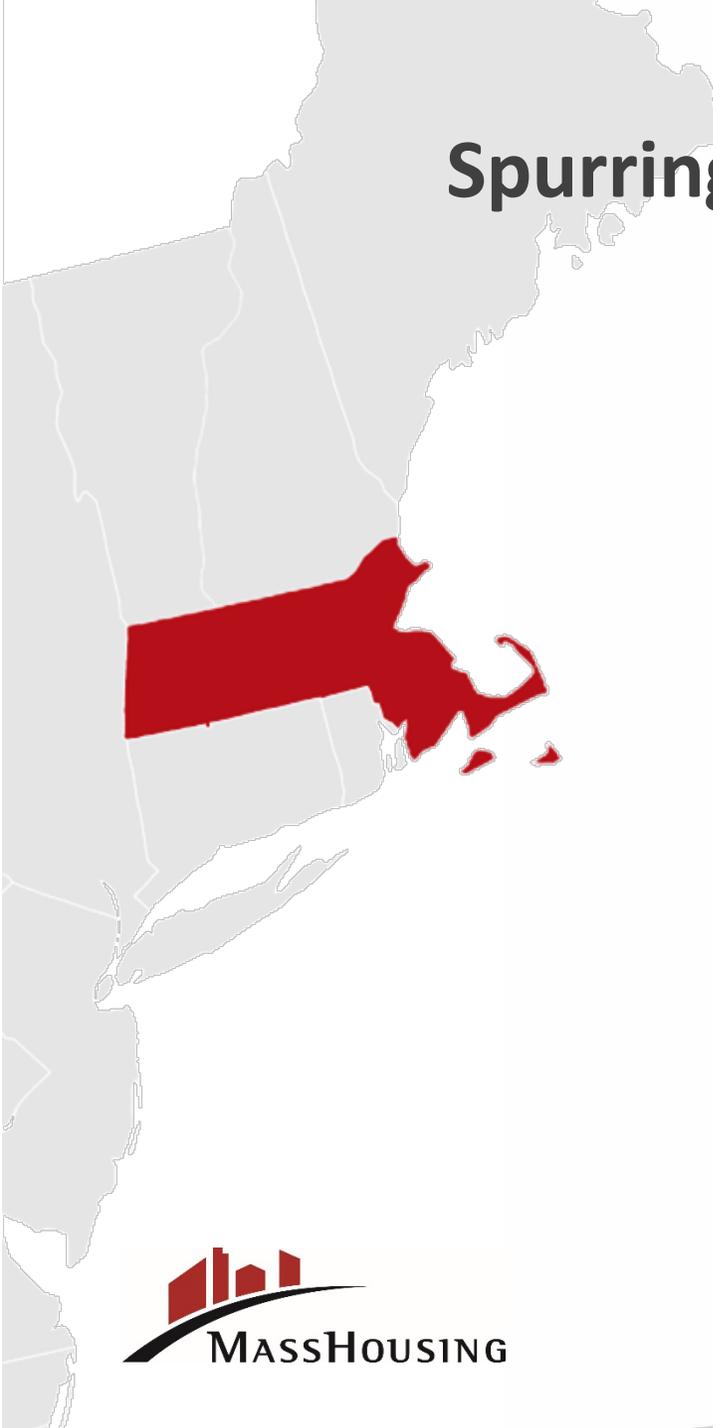
COMMONWEALTH BUILDER PROGRAM

A MassHousing Initiative

Greg Watson, AICP, Senior Relationship Manager and Originator

The Challenge | **Moderate Income Homeownership**

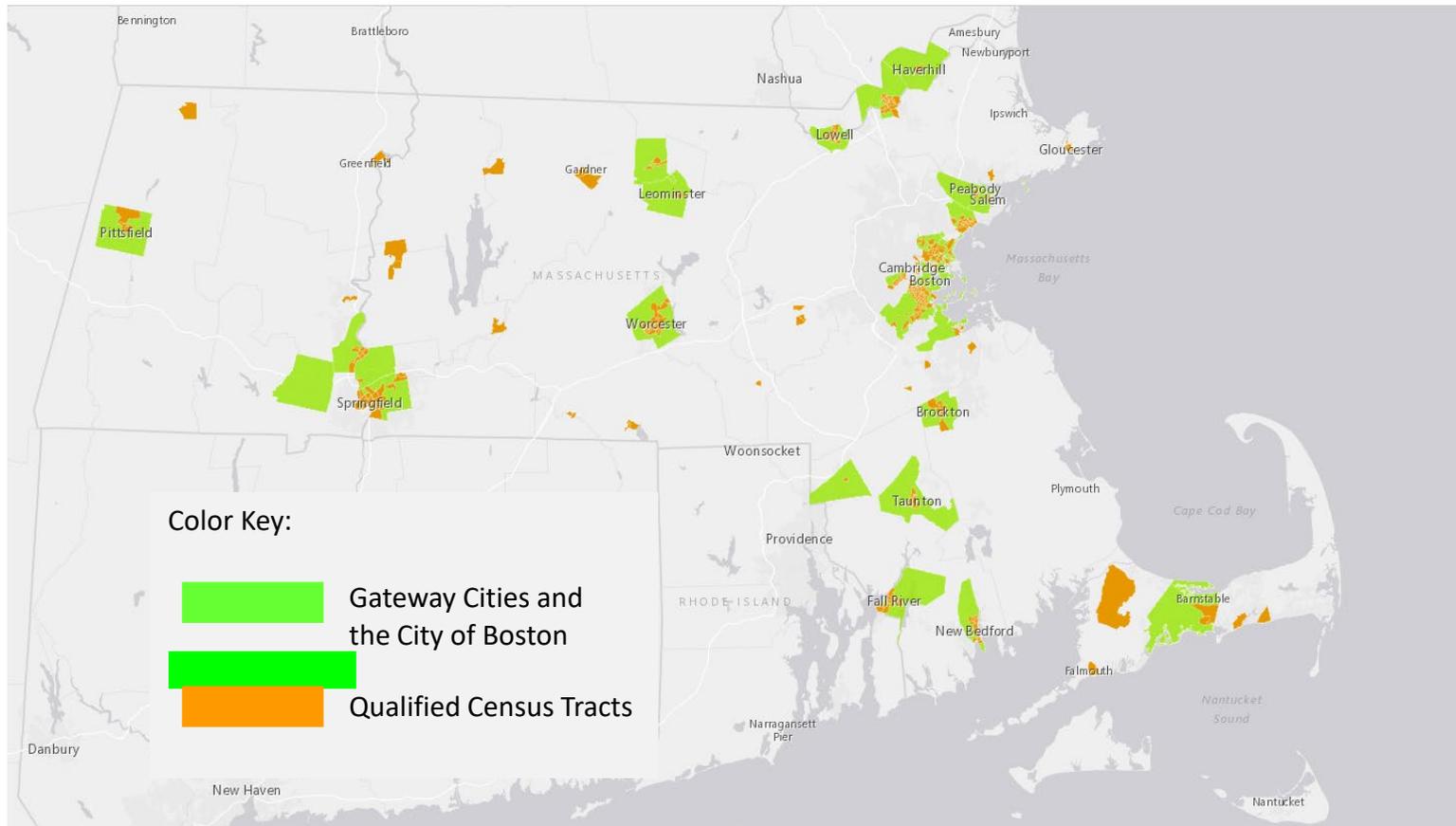
- While Massachusetts is a national leader in supporting the production of affordable and workforce rental housing, it has lacked a substantial program for expanding affordable homeownership.
- The market is not producing new for-sale homes that are attainable for moderate- and middle-income households.
- The disparity in homeownership rates between white householders and householders of color in Massachusetts is among the nation's largest.
- There is strong demand in communities of color for high-quality homes to purchase, but market forces have failed to produce these opportunities, and this market failure reinforces the state's racial homeownership gap.



Spurring the Solution | **CommonWealth Builder**

- The Commonwealth Builder Program is a \$60 million fund which seeks to incentivize investment in urban areas and areas that have historically lacked high-quality new development, particularly in communities of color.
- By engaging the market to create homeownership opportunities in communities of color, this program aims to:
 - Address the state's racial homeownership gap,
 - Promote community investment, and
 - Build intergenerational wealth.

CommonWealth Builder Program | **Goals**



MassHousing's new program seeks to spur the market to deliver up to **500 new homeownership opportunities** for moderate-income households in Boston, Gateway Cities, and Qualified Census Tracts (QCTs) throughout the Commonwealth.

CommonWealth Builder Program | Guidelines

- Target Affordability is 70% - 120% of AMI
- Twenty-unit minimum, with at least ten CWB units. New construction or adaptive reuse; no scattered sites.
- Generally anticipate no more than \$5 million per project, and \$150,000 per unit in subsidy.
- The Agency will prioritize mixed-income developments, those containing units restricted at 70% of AMI, and those requesting less than \$150,000 per unit.
- The units will be designated for first-time homebuyers. There will be no age restrictions.
- Affordability restriction is 15 years.
- Municipal Commitment Required – may be subsidy, land, or infrastructure
- Subsidy may be disbursed through DND for Boston projects; elsewhere, at unit sales.

CommonWealth Builder Program | **Process**

- Upfront structuring involves MassHousing **origination** and **homeownership** teams.
- Provide **letters of interest** to support developers' efforts to assemble team, land, and soft resources.
- When budgets are firm, typically provide **term sheets** to support developers' conversations with construction lenders.
- Applications are submitted when all other resources are secured.
- Review and approval are done at the staff level; proposals do not go to the MassHousing board.
- After commitment, MassHousing will issue a commitment letter, then either
 - Disburse funds to DND to be administered, or
 - Enter into a grant agreement.

CommonWealth Builder Program | Progress

- Internal and external collaboration to build a new program
- Engagement with local leaders and developers across the Commonwealth
- Building a pipeline
 - Over **30** projects in **eight** municipalities;
 - Over **1,200** units – nearly **750** of which would be restricted to moderate-income households;
 - Nearly **\$103 million** in grant subsidies.
 - **Two** projects have sold or are in the process of selling;
 - **Two** more are committed; and
 - Several are currently under review.

Workforce Housing Program Parameters

Per Project Funding Cap

\$3 million



Affordability: 15 year minimum with MassHousing option to “buy” longer term affordability and tenant protection.

Expected return on the funds at 0 – 3% and/or some return of the funds during the term of the loan with flexible combinations of fixed payments and cash flow sharing.

60% - 120% of AMI income targets.

Allow flexibility to set WFH rents at market levels where appropriate within current AMI guidelines.

Workforce Housing Initiative



The Kennedy Building
Hanover



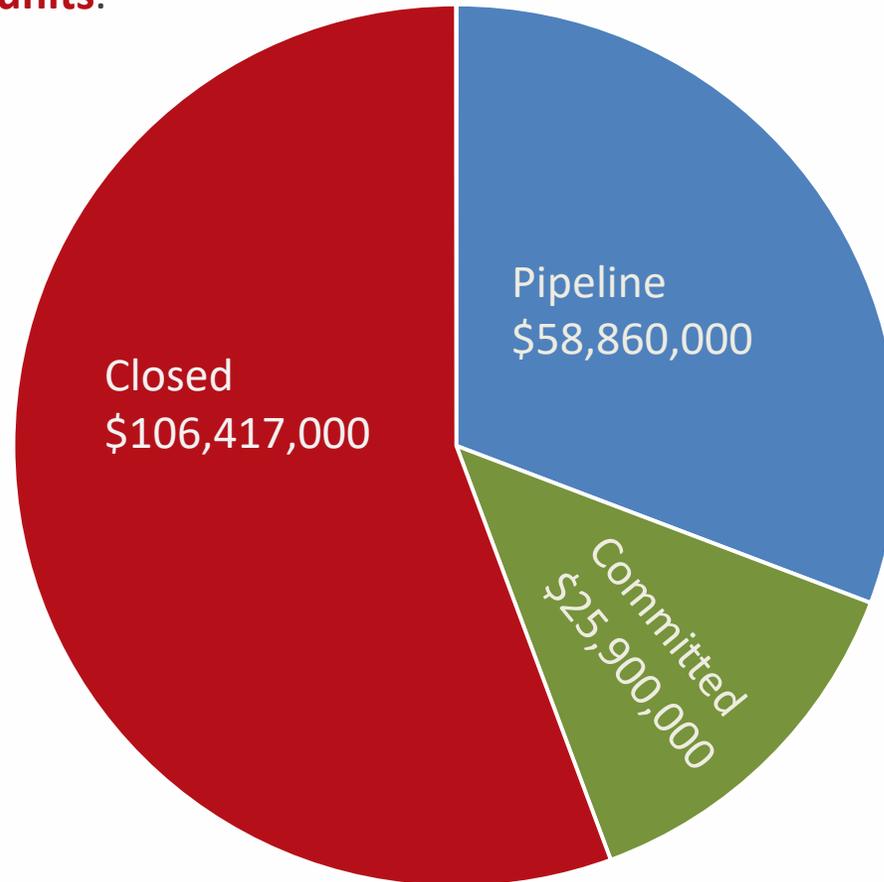
The Residences at Fairmount Station
Boston – Hyde Park

Investment of **\$100 million** from MassHousing's balance sheet to create rental housing affordable to households with incomes up to 120% of AMI.

Funding provided to owners in the form of subordinate debt with an affordability restriction in place for a minimum of **15-40 years** (depending on other programs).

Status | Commitment of Funding

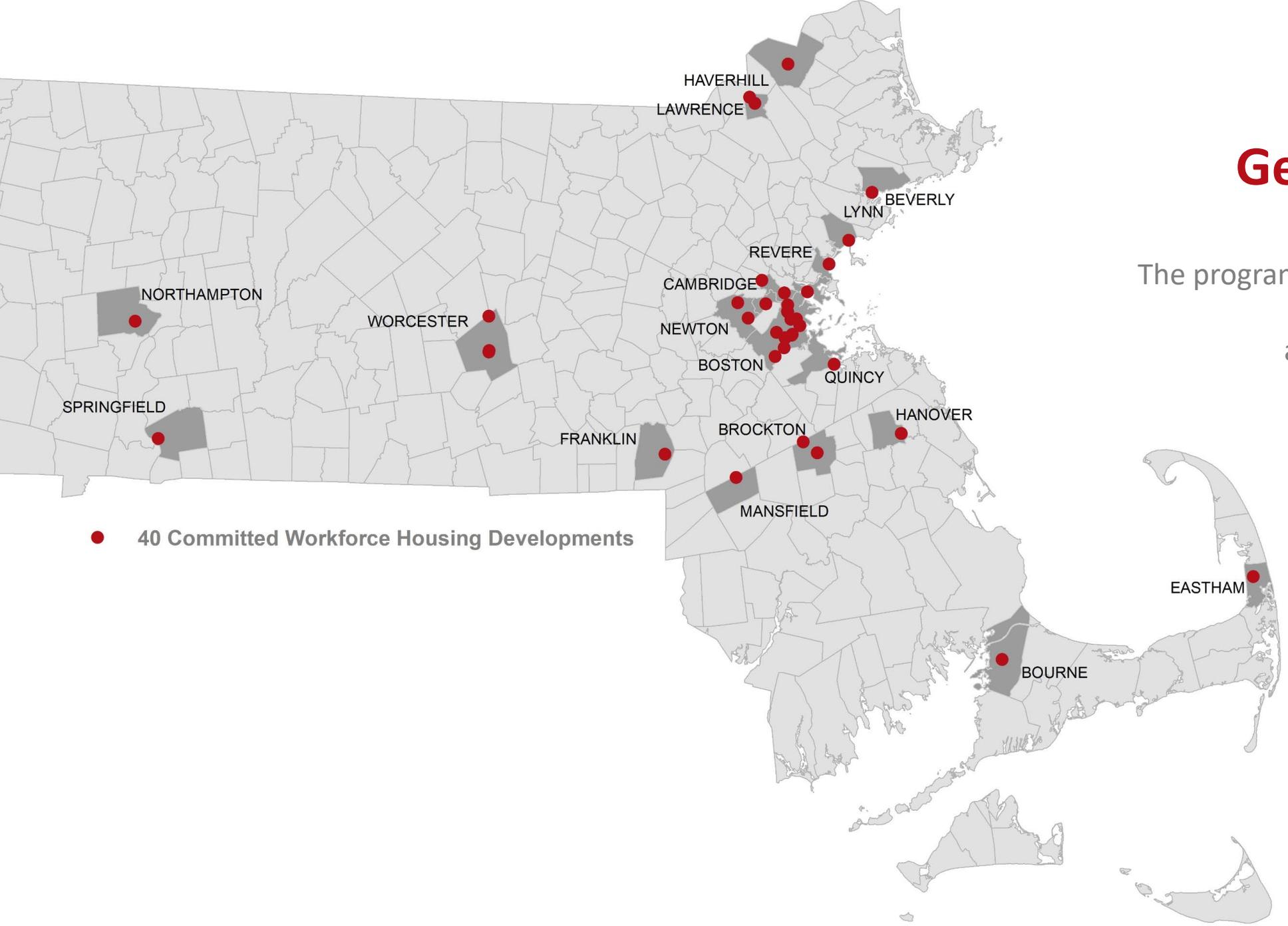
Since the inception of the initiative in 2016, MassHousing has committed or closed workforce housing financing totaling **\$132.3 million** to advance the development of **5,198 housing units** across a range of incomes, including **1,484 workforce housing units**.



Status

Geographic Reach

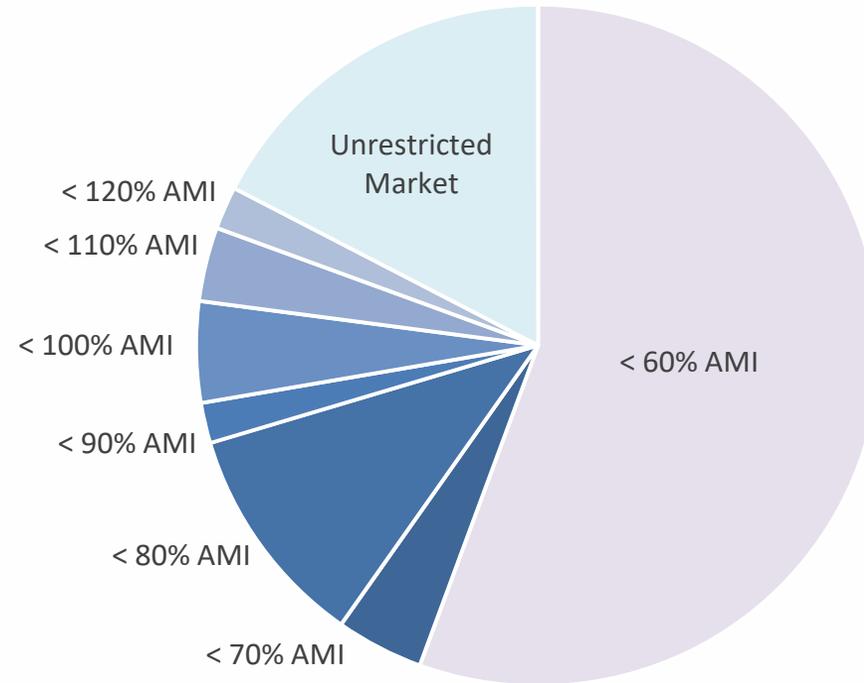
The program has funded 64 projects in **25 cities and towns** across the Commonwealth.



● 40 Committed Workforce Housing Developments

Progress to Date | Providing Income Diversity

Developments funded through the Workforce Housing initiative will help address the need for housing at **all income levels**.



Developments in Focus | Gateway North



Gateway North was the **first development approved** for the Workforce Housing Initiative. Located in Lynn's Central Square across from the North Shore Community College, the Gateway North is **transit-oriented**, a short walk away from the commuter rail station.

Location	Lynn
Developer	Hub Holdings/LHAND
Approved WFH Funds	\$1,600,000
Total Units	71 <i>53 Affordable, 10 Workforce, 8 Market</i>
WFH Unit Types	1-, 2-, and 3-bedrooms
WFH Rents	\$1,358 - \$1,882 a month (70% AMI)
Market Rents	\$1,700 - \$2,950 a month
Estimated Maximum Workforce Income	\$60,450 for a family of two

Workforce residents include:

- A woman working as a hospital operating room facilitator
- A mother of one child working in hotel guest services

Developments in Focus | **Holmes Beverly**



The **transit-oriented mixed-use** development is located adjacent to the Beverly Depot commuter rail station. This transaction had equity from the **Healthy Neighborhood Fund** and was **built on MBTA land**.



Location	Beverly
Developer	Barnat Development LLC
Approved WFH Funds	\$1,600,000
Total Units	67 <i>16 Workforce, 51 Market</i>
WFH Unit Types	Studio, 1-, and 2-bedrooms
WFH Rents	\$1,375, \$1,434, \$1,693 a month (80% AMI) \$2,040, \$2,421 a month (110% AMI)
Market Rents	\$1,700, \$2,300, \$3,150 a month
Estimated Maximum Workforce Income	\$69,050 for a family of 2 (80% AMI) \$94,950 for a family of 2 (110% AMI)

Workforce residents include:

- A teacher in the Salem Public Schools district
- A clinical assistant at the Lynn Community Health Center

Developments in Focus | **Watson Quincy**



The **transit-oriented mixed-income** development is located near the Quincy Shipyard. This transaction had additional equity from the **City of Quincy** through HDIP and other local funds.



Location	Quincy
Developer	WinnDevelopment in Partnerhsip with Neighborhood Housing Services of the South Shore
Approved WFH Funds	\$7,000,000
Total Units	140 <i>86 Workforce, 26 Market, 28 LIHTC</i>
WFH Unit Types	Studio, 1-, and 2-bedrooms
WFH Rents	\$1,750, \$1,870, \$2,375 a month (110% AMI)
Market Rents	\$2,015, \$2,565 a month
Estimated Maximum Workforce Income	\$62,800 for a family of 2 (80% AMI) \$86,350 for a family of 2 (110% AMI)

Workforce residents include:

- A teacher in the Boston Public Schools district
- A single mom who just moved from Florida

Harbor Place, Haverhill

Housing Development Incentive Program (HDIP)



Massachusetts Department of Housing & Community Development

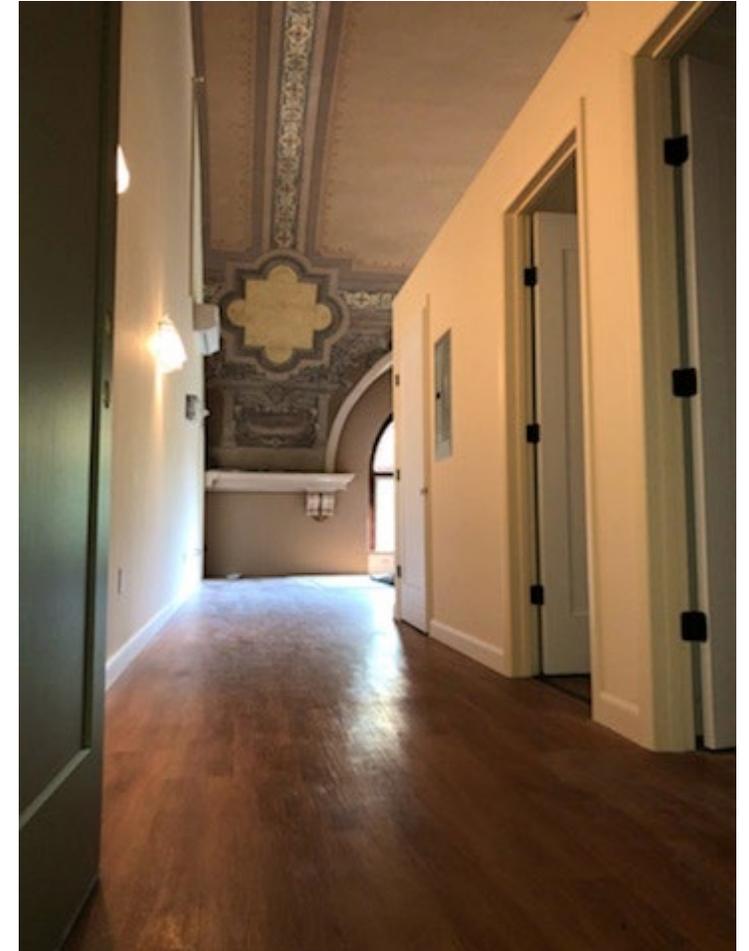
MHP Housing Institute for Gateway Cities

Day 1: Housing Production Tools for Gateway Cities, October 28, 2021

Leveraging State Programs and Tools for Housing

History

- **2010** – Chapter 40V passed in response to municipal requests to support development of market rate housing
- **2011** – Law takes effect. Focused on rehab projects with no more than 50 market rate units in Gateway Cities. Pairs local property tax exemption and a state credit. Value of credit capped at lessor of 10% Qualified Substantial Rehab Expenditures or \$2M.
- **2012** – Initial regulations & guidelines published.
- **2014** – Statute, regulations and program guidelines amended to accommodate larger adaptive reuse projects, but no change in value of credit cap, constraining # of financially feasible projects.
- **2016** – Statute amended, adds new construction and raises credit cap, resulting in dramatic increase in program interest.
- **2017** – Corresponding updates to regulations & guidelines.
- **2018** – HDIP Credit to allocate remains at \$10M per year.
- **2021** – DHCD transitions to competitive funding round program model to address funding availability.



Powerhouse Lofts, Pittsfield



Program Overview

Partnerships:

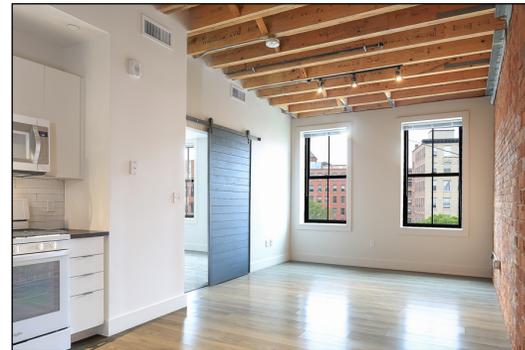
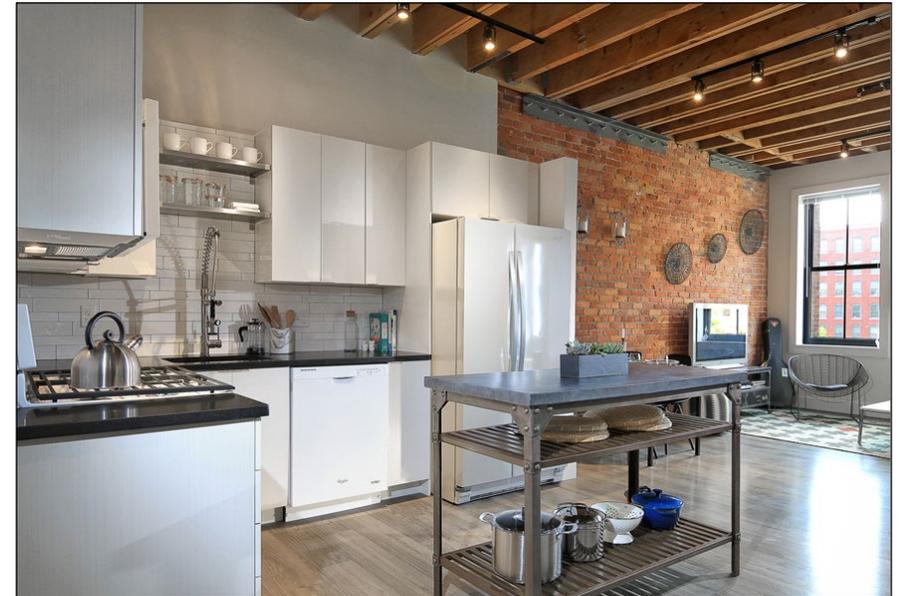
- Gateway Cities
- The Commonwealth
- Developers

Components:

- Approved Housing Development Zone
- Approved Tax Increment Exemption (TIE) Agreement
- Approved Housing Development Project - with or without HD Credit

Project Certification – 3 Stage Process:

- Pre-application
- Preliminary/Conditional
- Final



Key Program Criteria

- At least 80% of Residential Units *Must Be* Market Rate
- Rental or Ownership
- Mixed-Use Projects allowed
- TIE Only with Approved HD Project or TIE + HD Credit
- Credit Max allowed = Lesser of 25% of QPEs or \$2M
- Project Owners Receive Final Certification Once:
 - 80% of the market rate units leased
 - DHCD approves project cost certification
 - Project receives final sign-off from municipality



Onota Building, Pittsfield



Gateway Cities with an Approved HD Zone (22 of 26)

Gateway Cities w/ no HD Zone

Attleboro

Holyoke

Pittsfield

Everett

Barnstable

Lawrence

Quincy

Methuen

Brockton

Leominster

Salem

Revere

Chelsea

Lowell

Springfield

Westfield

Chicopee

Lynn

Taunton

Fall River

Malden

Worcester

Fitchburg

New Bedford

Haverhill

Peabody

Tax Increment Exemption (TIE) Agreements

- Templates for rental, ownership & mixed-tenure
- Obtain DHCD approval of draft TIE prior to execution
- Exemption % may vary year to year over duration of agreement but cannot be less than 10% or more than %100 of incremental value of the market-rate units.
- Duration of exemption cannot be less than 5 years or more than 20 years.
- Base Value is assessed value at time of execution, prior to demolition or construction, minus value attributable to any portion assessed as non-residential that will remain non-residential
- Upon completion, submit Exhibit 4, to confirm or amend effective date, % of market rate units, and assessed value of residential portion.
- Exemption becomes effective July 1 of 1st fiscal year following DHCD Final Certification



Is My Project Eligible for the HDIP Program?

- Site Within an HD Zone
- Project Has City Support (Mayoral and City Council Levels)
- Project Will Result In:
 - Two Or More Units For Sale Or Lease As Market Rate Housing
 - Minimum of 80% Total Units As Market Rate
- Without the Tax Incentive & Potential HD Credit, the Project Likely Would Not Proceed At This Time



Commonwealth Landing, Fall River



Funding Rounds for HDIP Credit

- Change from application intake on rolling basis to competitive funding round
- All HDIP applications for credit will now come through competitive funding rounds
- HDIP credit is an extremely stressed resource
- Next funding round will be in 2022, application date is TBD
- Contact Steve Pantalone to received updates and if a developer/municipality is interested in a "TIE only project"



HDIP to Date...

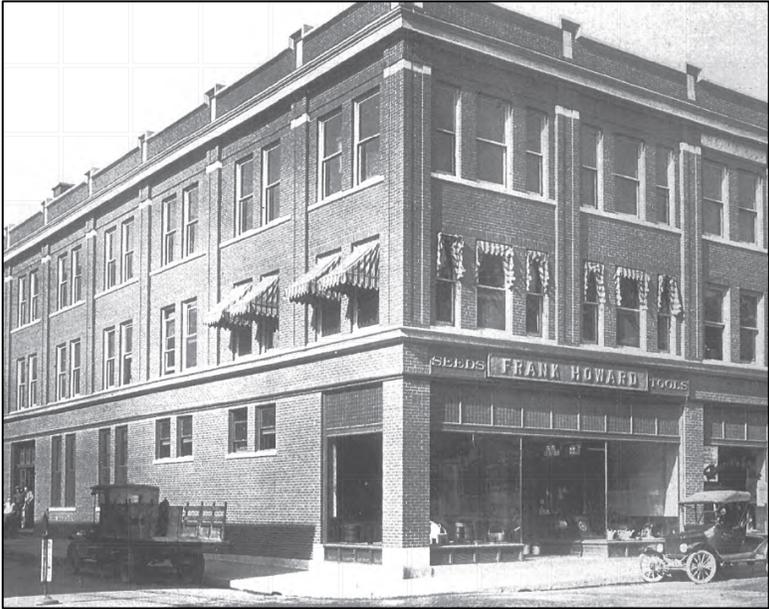
- 32 Projects with Final Certification (over 2,000 units)
- 21 Additional Projects with Conditional Certification / under construction or pending Final Certification
- 3 Projects with Conditional Certification pending
- 14 Projects submitted for 2021 competitive round



23 Central, Lynn



Completed HDIP Projects



The Howard Building, Pittsfield



Completed HDIP Projects



The Flats at 44, Chelsea



Completed HDIP Projects



The Edge, Lowell



Completed HDIP Projects



The Heights, Haverhill



Completed HDIP Projects



Waterhead, Lowell



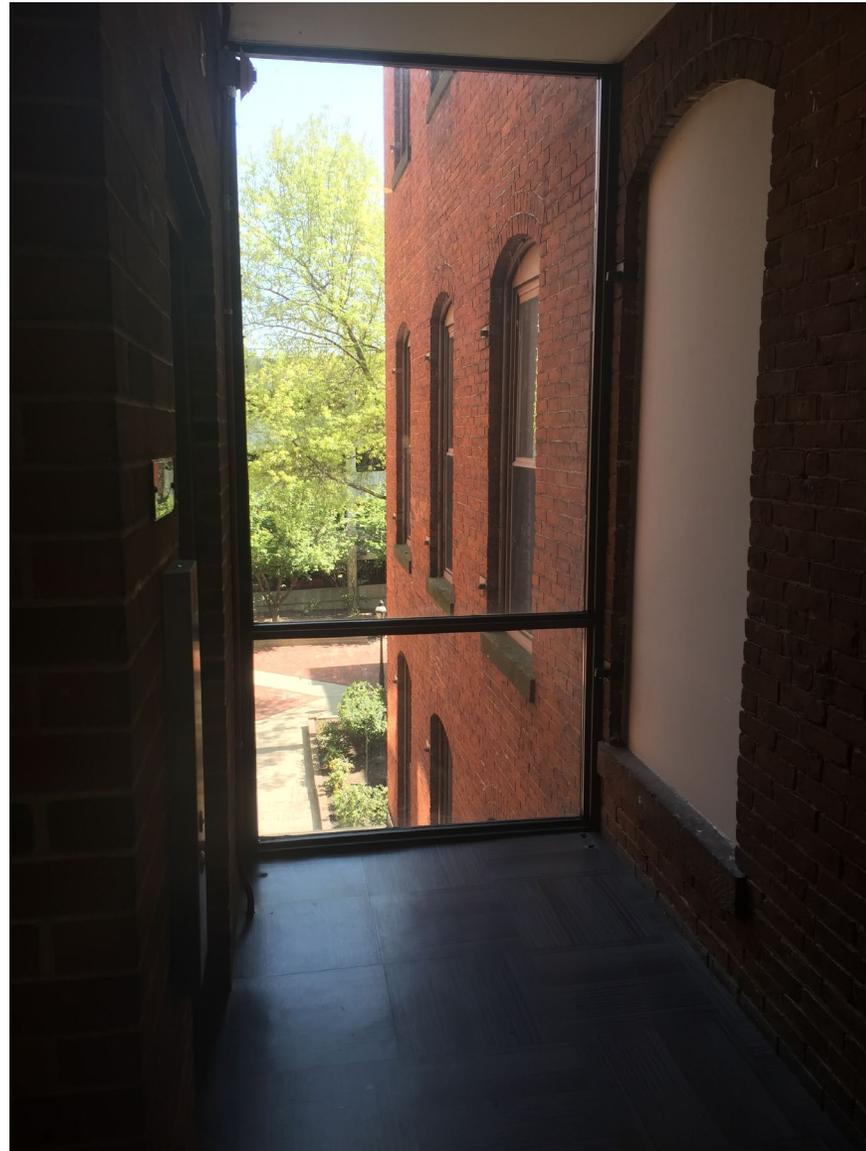
Questions?

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Silverbrick Lofts, Springfield



JM Lofts Case Study Haverhill, Massachusetts

By: Traggorth Companies LLC





History & Acquisition

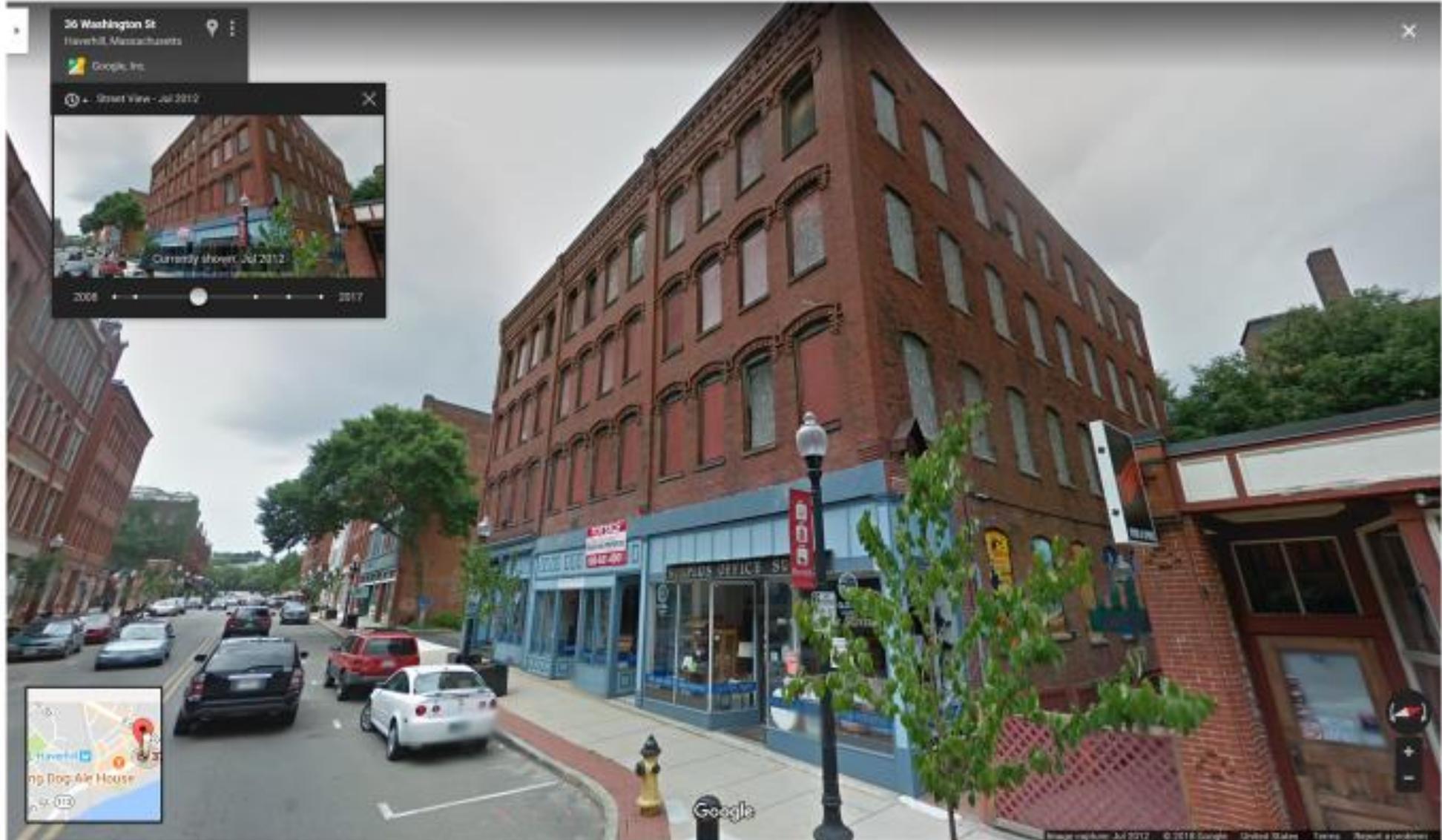
- Originally built in the late 1800's as a shoe factory and retail storefront
- **Centrally located** on Haverhill's main shopping district, steps from commuter rail, very visible
- Discovered the Merrimac Valley on a **MassDevelopment bus tour**
- **Purchased with minimal contingencies in 2014 for \$350,000** from retiree operating Surplus Office Supply Store (still selling typewriters)
- Complete gut rehab in 2015 and opened in 2016

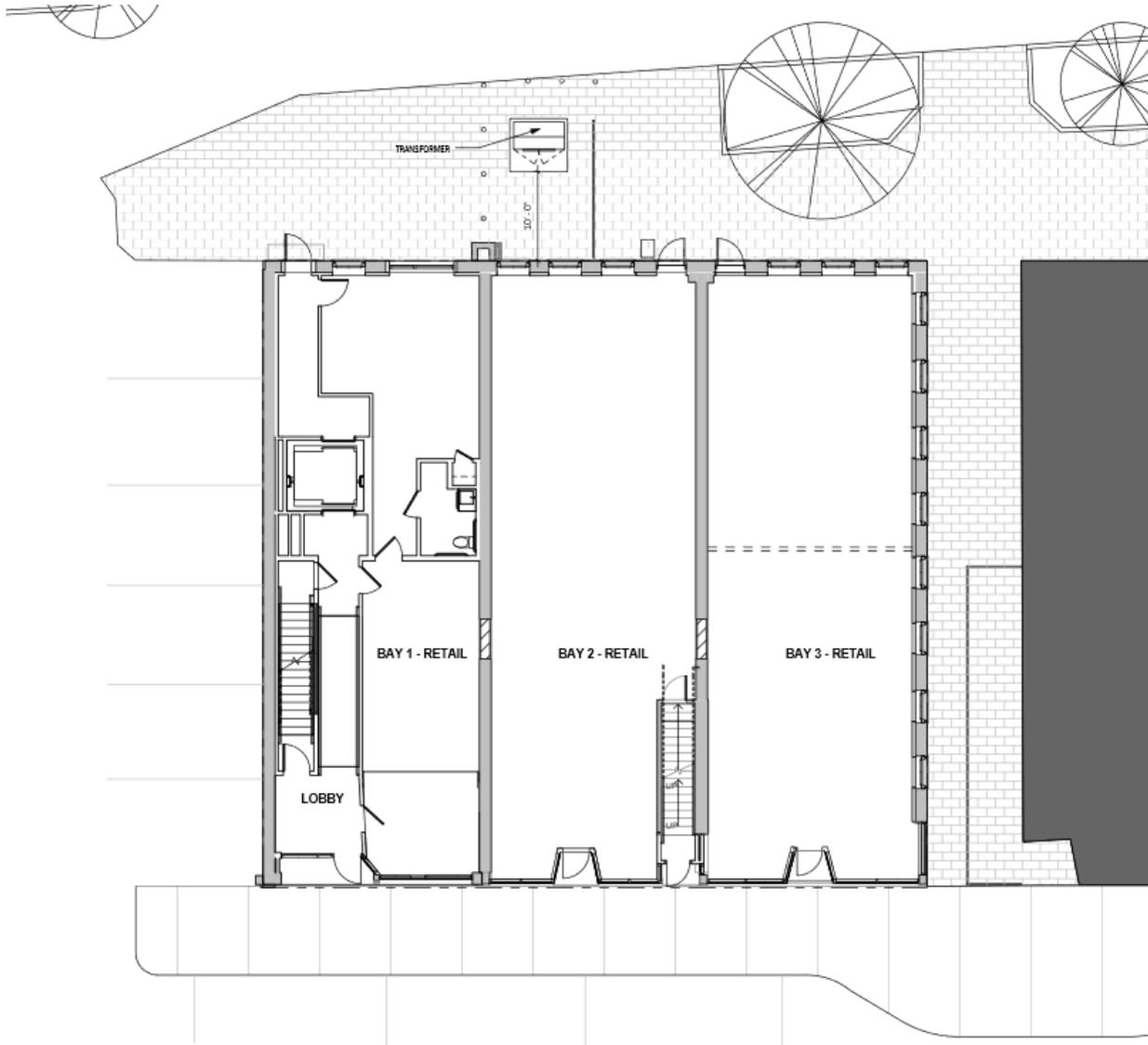
Team

- RODE Architects
- Landmark Structures
- Local broker for marketing and Peabody for property management

Permitting

- Pro development municipal government and support from the public to continue downtown revitalization
- Within a 40R district but used conventional variance process
- **Off-site parking** in a the MVRTA garage







JM Lofts: Capital Stack

SOURCES

Permanent Loan	2,400,000
Federal HTC Equity	986,794
State HTC Loan	880,000
HDIP Loan	402,932
Managing Member Equity	1,054,741
Deferred Developer Overhead/Fee	697,492
Total Sources:	<u>6,421,959</u>

JM Lofts: Revenue Projections

RENTAL INCOME

Type of Unit	No. of Units	Avg Rentable Sq Footage Per Unit	Total Square Footage	Gross Rent per Month per Unit	Total Rent per Month	Total Annual Rent
Residential						
1 BR + Den	3	764	2,292	1,475	4,425	53,100
1 Bedroom	9	601	5,406	1,450	13,050	156,600
2 Bedroom	6	814	4,884	1,540	9,240	110,880
Total Residential	18	2,179	12,582	4,465	26,715	320,580

Type of Unit	No. of Units	Avg Rentable Sq Footage Per Unit	Rent per Square Foot	Gross Rent per Annum per Unit	Total Annual Rent
Commercial					
Bay 2	1	1,500	15	22,500	22,500
Bay 3	1	1,500	15	22,500	22,500
Live/Work	1	1,050	16	16,800	16,800
Total Commercial	3	4,050	46	61,800	61,800

JM Lofts: Lessons Learned

Results

- Fully leased within 2 months
- Retail leased – Battlegrounds Coffee, K Modern, Switchboard, Quinns, and what's next?

Changes Along the Way

- Live/work unit incorporation
- Old infrastructure issues
- Mural

Critical Ingredients

- Supportive municipal and state government and process
- Pre-packaged parking solution
- Efficient, high quality design needing zero amenities

Lessons Learned

- Retail is incredibly hard, and takes multiple players
- Main street can be the amenity (and should be)
- Using federal historic tax credits among the development team is critical to feasibility



switchboard_haverhill • Following
The Switchboard

switchboard_haverhill @alexandru_sabau accompanied by Andrew Ryan playing now!
@fatmaouledsaalem up next!



37 likes

5 DAYS AGO

Add a comment...



battlegroundcoffee • Following
Battle Grounds Coffee Company

battlegroundcoffee #Yoga #wine
@battlegroundcoffee #perfect
m_meletis @kanuscg @sam_meletis I see you
❤️

roque_bluffs @baxpags

kate.dimvaloo Looks like a ton of fun!

baxpags @roque_bluffs I will get to one of these. The last one was sold out when I went to sign up. 🙌🏻🙌🏻🙌🏻

nfw.watch.company Cool photo, BattleFolk...
😊😊😊

tayladavid @stephrob hi, us 🙌🏻

battlegroundcoffee @nfw.watch.company
#battlefolk. Yes!!! 🙌🏻

martykovlundjr Awesome!



248 likes

APRIL 4

Add a comment...



switchboard_haverhill • Following



31 likes

APRIL 5

Add a comment...



quinnsk9cafe • Follow
Quinn's Canine Cafe

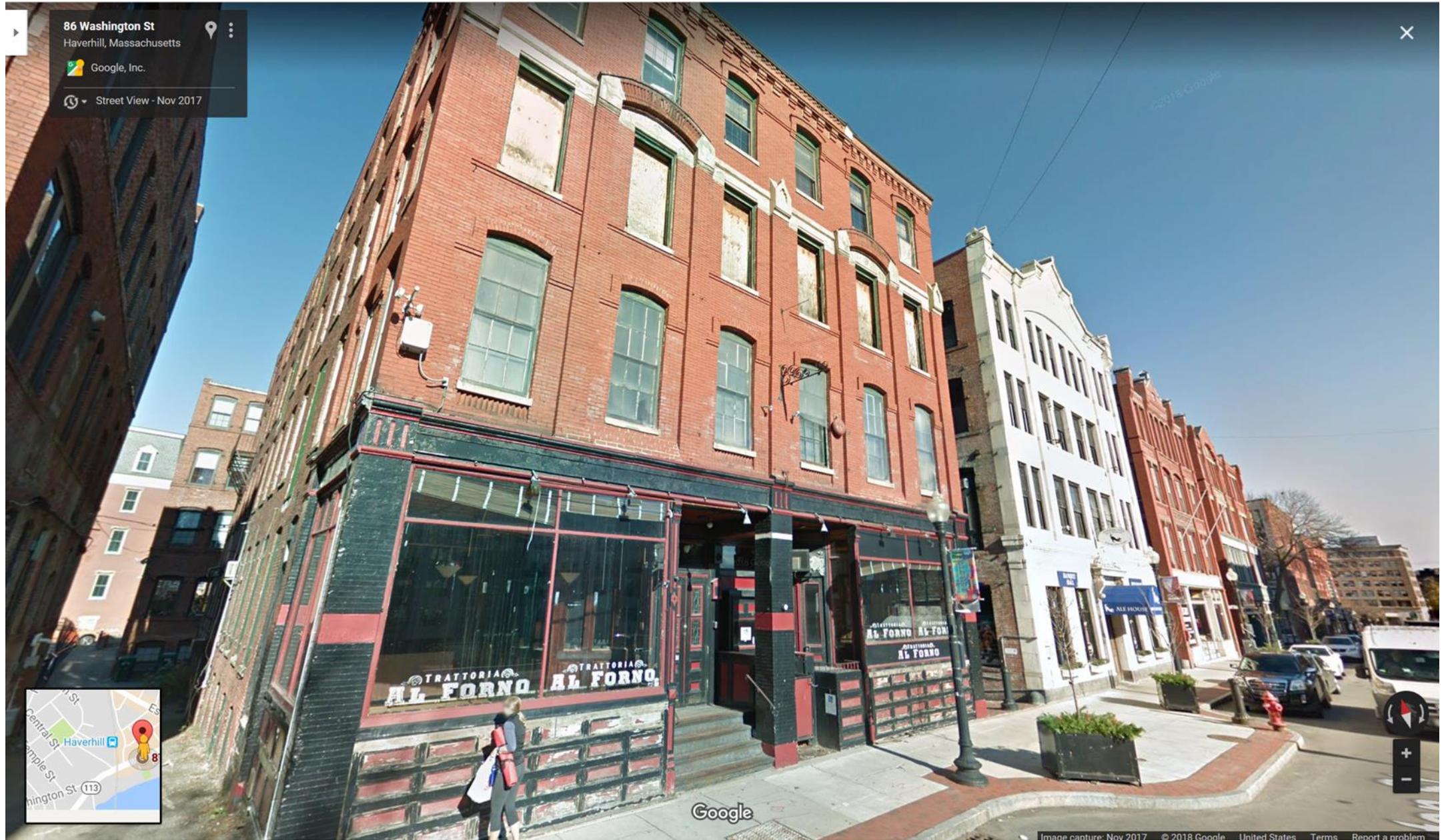
quinnsk9cafe Dog treat tasting today! 11-1pm That's for our four-legged friends, silly! Bring them in to try our wide variety of flavors!
#quinnscaninecafe#homemadedogtreats#luckydog#gourmetdogtreats#tannerymarketplace



17 likes









Housing Institute for Gateway Cities

October 28, November 4 & 9

10:00 am to 12:00 pm

Day 2 - Thursday, November 4th

Create Opportunity with Local Assets

[Click Here to Register for Day 2](#)

10:00 am **Welcome!**

Christine Madore, Senior Development Manager, MHP

10:05 am **Session 1: Investment Without Displacement**

Etel Haxhiaj, Director of Public Education & Advocacy, Central MA Housing Alliance

Emily Innes, Principal, Innes Associates

Public and private investments in Gateway Cities can energize local economies, drive job growth, and increase desirability. Neighborhood change can drive unintended displacement when prosperity only benefits some residents. How can Gateway Cities center equitable development and anti-displacement as they plan for new investments?

In this session hear from local housing practitioners on how to proactively plan to reduce displacement and strategies to protect vulnerable residents while promoting economic mobility.

10:55 am Transition Break

11:00 am **Session 2: Leveraging Public Land for Affordable Housing**

Laura Shufelt, Director of Community Assistance, MHP

By making publicly-owned land and buildings available for the development of affordable housing, cities and towns can help to ensure that there is an adequate supply of lower-cost homes in areas with high land costs and limited development opportunities. In strong markets with little or no undeveloped land capable of supporting residential development, local governments or institutions may own properties that include buildings that are vacant, underutilized, or no longer useful for their original purpose.

MHP's own Laura Shufelt will outline effective permitting pathways and potential obstacles when redeveloping public land for affordable housing.

11:55 am **Wrap Up Day 3 : See you next week, November 9th 10 am – 12 pm**

Topics: Getting to yes on local tools for housing: Inclusionary Zoning, ADU, Housing Trust, and more

[Click Here to Register for Day 3](#)

About Our Speakers:

Etel Haxhij

Director of Public Education & Advocacy, Central MA Housing Alliance

Etel is City Councilor-Elect from the City of Worcester. As a climate and housing advocate, she has served in several local boards and committees, including the Community Development Block grant advisory committee, Citizens Advisory Council, and Advisory Committee on the Status of Women. Etel current serves as Director of Public Education and Advocacy at the Central Massachusetts Housing Alliance.

Emily Innes

Principal, Innes Associates

Emily Innes has over ten years of experience in planning and urban design. She was a planner with The Cecil Group when it was acquired by Harriman Associates in 2015 and became Harriman's Director of Planning in 2019, leading their Urban Design and Planning Studio. In 2020, Emily founded Innes Associates to continue her work with communities of all sizes throughout New England. Her primary focus is land use and regulatory planning, including downtowns, urban renewal areas, waterfronts, and industrial areas.

Laura Shufelt

Director of Community Assistance, MHP

Laura Shufelt is one of the most experienced housing professionals in Massachusetts, knowledgeable on a wide range of issues and practices, including proper and effective use of public funds and land, housing lotteries, fair housing, housing authority development and the state comprehensive land use permit law (Ch. 40B). At MHP, Laura's responsibilities include providing pre-development, development, and strategic planning technical assistance to municipalities, housing authorities and other appropriate organizations; building relationships and providing training on affordable housing to town officials, volunteer boards, non-profits, and housing professionals; managing MHP's 40B technical assistance program; and representing MHP and its policy agenda on relevant state and regional affordable housing committees.

Contemporary Redevelopment Authorities

Gateway Cities Housing Institute
November 4, 2021

ia Innes Associates Ltd.
Innes Associates Ltd.



M.G.L. CHAPTER 121B: SECTION 4

REDEVELOPMENT AUTHORITIES; CREATION; DISSOLUTION

There is hereby created, in each city and town in the commonwealth, a public body politic and corporate to be known as the "Redevelopment authority" of such city or town; provided, that no such authority shall transact any business or exercise any powers until the need for such an authority has been determined and a certificate of organization has been issued to it by the state secretary, both as hereinafter provided.

The housing authority in a city/town without a redevelopment authority can act as a redevelopment authority if the municipal officers or a special town meeting has determined need (Section 9).

Area must be blighted open area or decadent area, meeting specific standards defined in 121B.



Four members
appointed by the Mayor
One member
appointed by DHCD



Four members
elected by the Town
One member
appointed by DHCD

**DIFFERENCES IN STRUCTURE MAY LEAD TO
DIFFERENCES IN OUTCOMES:
POLITICAL RISK AND TIME RISK.**

ACTIONS



Receive grants, loans, and other funds from any source.

Borrow funds and secure mortgages or bonds.



Acquisition by purchase, lease, grant, eminent domain.

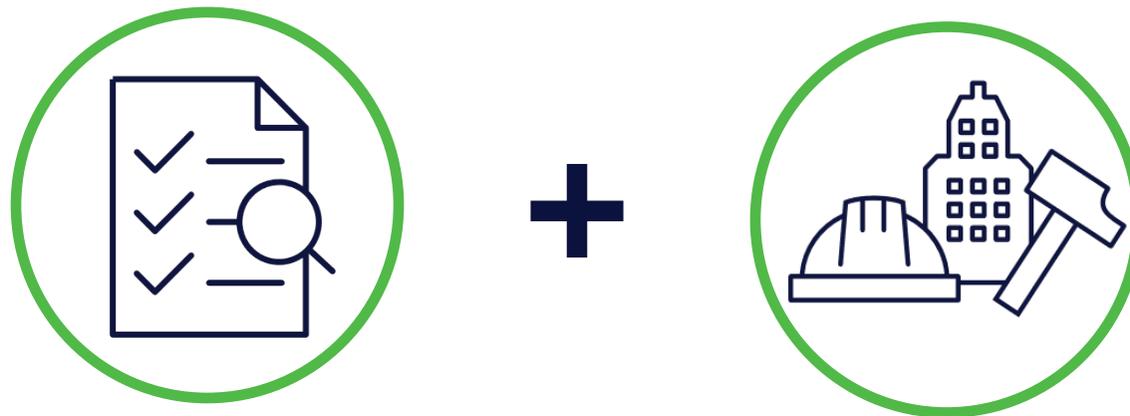


Clear and improve property.



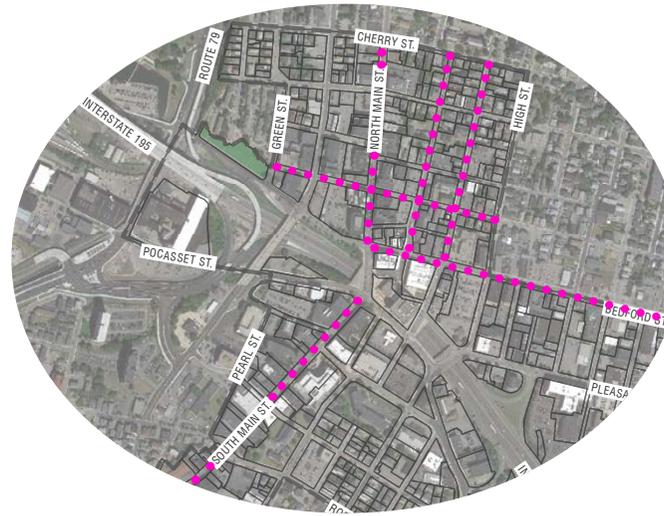
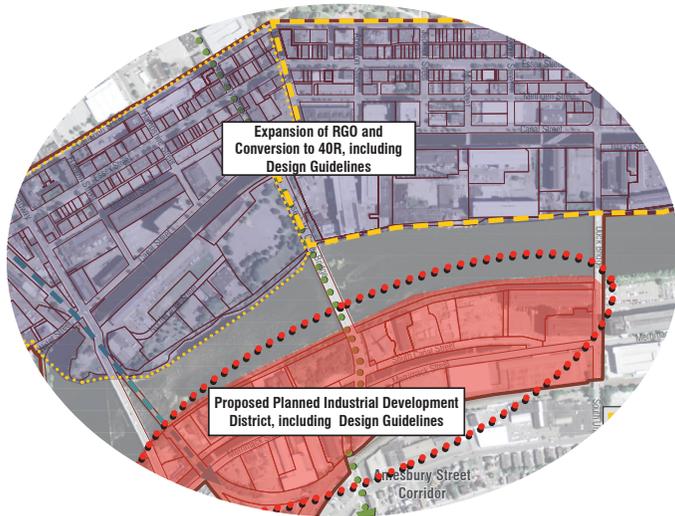
Construct, reconstruct, alter, remodel, or repair.

Redevelopment Authorities have the power to **plan** and **build**.



The primary focus of my past work in urban renewal in Massachusetts has been to create conditions for the **private market** to act.

	Regulatory Controls	Acquisitions	Dispositions	Public Infrastructure	Public Open Space
Salem Downtown Renewal Plan	Y	N	N	N	N
LawrenceTBD Urban Renewal Plan	Y	Y	Y	Y	Y
Fall River Waterfront Redevelopment Plan	Y	Y	Y	Y	Y
Fall River Downtown Redevelopment Plan	Y	Y	Y	Y	Y
Downtown/Trout Brook Urban Renewal Plan (Brockton)	Y	Y	Y	Y	Y
Lovett Brook Urban Renewal Plan (Brockton - in progress)	Y	Y	Y	Y	Y
New Bedford Waterfront Redevelopment Plans (North and South - in progress)	Y	Y	Y	Y	Y



LawrenceTBD

Property acquisition, permitting, and development

Regulatory framework and incentives

Financial and technical assistance for property owners

Transportation and infrastructure improvements

Fall River Downtown

Organizational activities

Regulatory activities

Acquisition activities

Development and disposition activities

Public infrastructure activities

Planning activities

Fall River Waterfront

Organizational activities

Regulatory activities

Acquisition activities

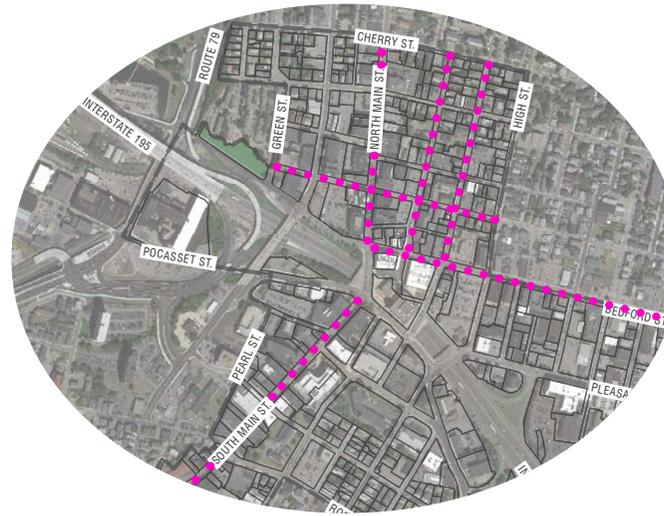
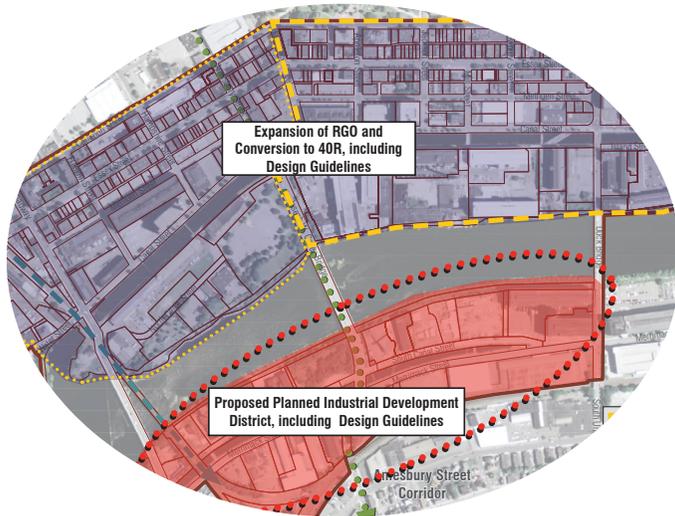
Development and disposition activities

Public infrastructure activities

Planning activities

Other activities

Underlying images from respective plans, courtesy of City of Lawrence, City of Fall River and Harriman Associates



LawrenceTBD

Downtown Smart Growth Overlay District under 40R; use 40R payments for homeownership assistance programs.

Design guidelines.

Study and application for historic district on Essex Street.

Bilingual permitting guide.

One-stop pre-permitting meeting.

Fall River Downtown

Add staffing to Planning Department.

Change zoning boundaries to place more of the downtown into a district that allows higher residential density.

Fall River Waterfront

Acquisition of new land created by reconstruction of Route 79 at grade.

Dispose of land for mixed-use development.

Reconnect existing neighborhoods to waterfront via new streets.

Change zoning boundaries to place more of the waterfront into districts that allow higher residential density.

Underlying images from respective plans, courtesy of City of Lawrence, City of Fall River and Harriman Associates

Brockton (Downtown/Trout Brook)

Integration of multifamily and smaller single-family housing along with adapting to impacts of climate change – but still the focus is public improvements to spur private investment in development.



Underlying image from *Downtown/Trout Brook Redevelopment Plan*, courtesy City of Brockton and Harriman Associates

Brockton (Lovett Brook)

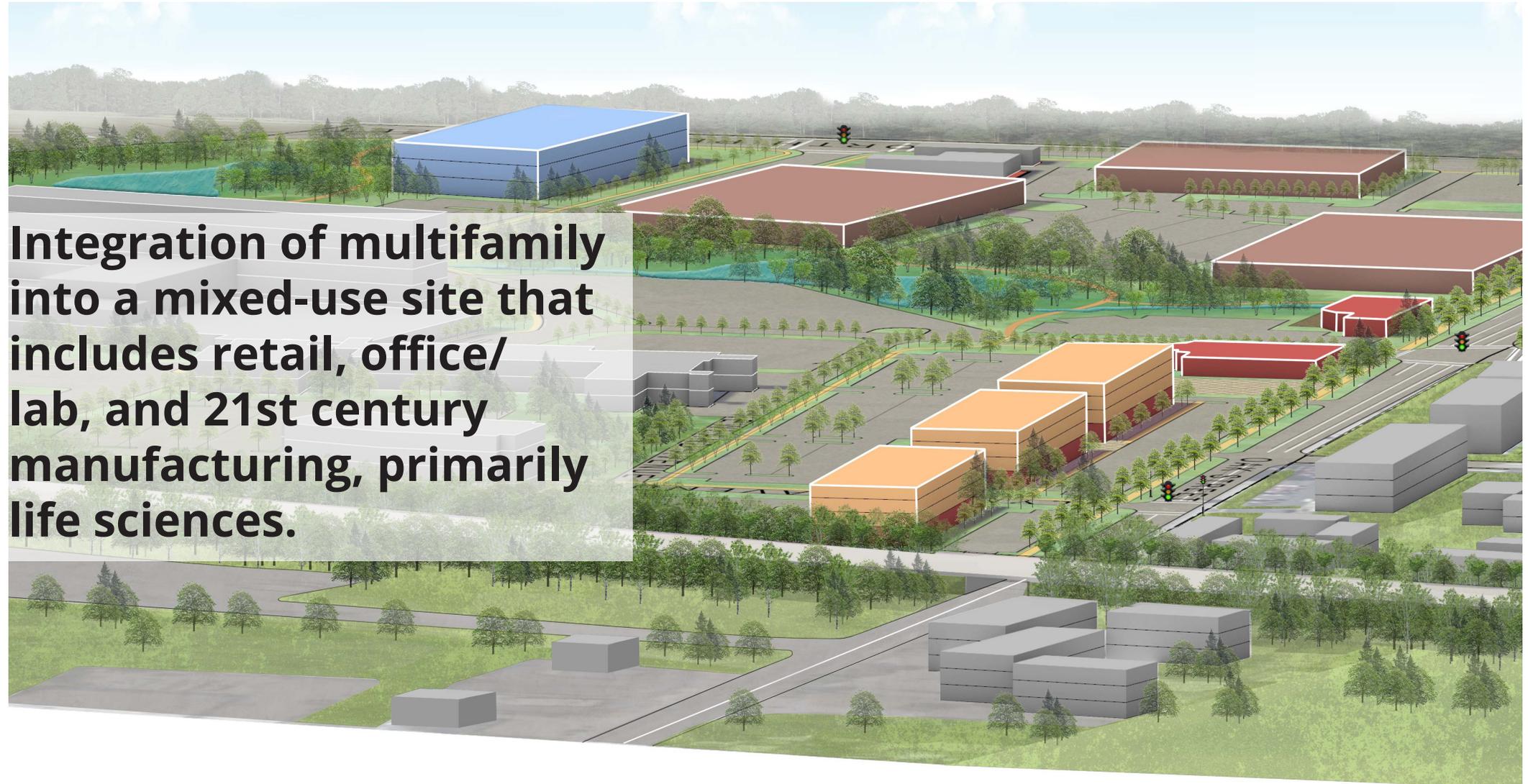


Image: Innes Associates + Halvorson | Tighe & Bond Studio

**Redevelopment
Authorities can
have a direct
role in housing
development.**

Disposition agreements with developers

Expectations for development: uses, design, timeline, affordability.

Direct partnerships.

Ability to hire a developer directly while retaining control of the property; can be used when keeping the property for an income stream. Needs a sophisticated developer.

Regulatory controls within and in conjunction with the urban renewal plan.

40R (Lawrence)
Zoning changes (Fall River, New Bedford, Brockton)

Design guidelines

Can be general principles or more specific development standards.

Financing stacks in partnership with the City

DIF: District Improvement Financing captures tax revenue for public improvements (**Quincy, Brockton**)

HDIP: Market rate housing in Gateway Cities (**Lawrence**)

UCH-TIF: Housing, including affordable housing, and commercial development in commercial centers (**Lowell**)

Using Public Property for Affordable Housing



Gateway Cities Housing Institute
November 4, 2021
Presented by Laura Shufelt



Goals

- Provide overview of the steps necessary to:
 - Find, assess, build support for and prepare to dispose of public real property for affordable housing
- Explain some red flags in disposing of public real property
- Showcase some developments that are or are going to be developed on public real property



Blanchard School, Uxbridge Before & After, 25 family units

Why use public property?

- Proactive way to address affordable housing to meet the needs of the municipality
- Reuse vacant municipal buildings, ex. schools
- Rehab and/or redevelop tax title properties
- Redevelop blighted areas

McElwain School, Bridgewater
Will be 57 units with 51
affordable to 30-60% AMI



What's available?

- The Assessing, GIS, Planning, or Community Development Dept of the municipality may have a list of all municipality-owned property
- Housing Authorities often have surplus land
- Redevelopment Authorities also may have property
- The state also has surplus land that may be attainable

Lyman Terrace, Holyoke
Public Housing Redevelopment
Total 166 units in 2 phases



We have a list, now what?

- If staff driven, prioritize list based on suitability and initial feasibility assessment
- If not administration/staff driven, talk with staff to get support to evaluate parcels to prioritize

Wm Barton School
The Pryde, Hyde Park
74 units from 30% of AMI
to 100% AMI
Senior LGBTQ+ friendly



Choose a property to pursue

- Designate the property for disposition or transfer to redevelopment authority or Municipal Affordable Housing Trust
- Determine the municipal process for Disposition or Transfer
 - Disposition: Typically administrative branch (Selectboard or Mayor or Town Manager) votes to recommend the disposition to Legislative branch (Town Meeting or City/Town Council)
 - Transfer to Redevelopment authority or Housing Trust according to Town or City Charter

Why Dispose?

Why dispose of the property vs public development?

- Complexity of financing and public construction costs
- Public Management of “private housing”
- Financial risk, liability
- Lack of staff capacity
- Political implications

Wells School, Southbridge
49 Senior units
All below 60% AMI



Real Property Disposition

- Develop solicitation: Request For Proposals (RFP) or Invitation For Bids (IFB) if value is \$35,000 or more
- IFB: property is sold to the highest bid
- RFP: Document detailing the requirements and preferences for the property's development

The Chapter 30B Manual: Procuring Supplies, Services and Real Property

- Legal Requirements
- Recommended Practices
- Sources of Assistance



Commonwealth of Massachusetts
Office of the Inspector General

Glenn A. Cunha
Inspector General

November 2016

Site Feasibility and Due Diligence

- The goal of a disposition is to get the best development that meets the needs and preferences of the City
- To meet that goal, the City must gather enough information about the property to attract developers
- At a minimum, the City should provide:
 - Title information
 - Site survey
 - Building plans, if existing building and if available
 - Utility access and availability
 - Identification of any development constraints

Build Community Support

- Begin early, preferably before you have a site chosen
- Message the need for housing, lead with people: Who is affected? Who would have to move?
- Hold community engagement sessions during the process
- Consider using a web-based platform to survey opinions



RFP Red Flags

- Recent bid protest decisions by the Attorney General have raised red flags around the requirements and control of the development when disposing of public property.
- The decisions identify a number of factors that can contribute to requiring compliance with Ch. 149 even when disposing to a private entity.
- These decisions contradict guidance and opinions that have been historically relied upon.

I will note some of the factors in the next few slides.

RFP Red Flags

- Leasehold vs. Sale
 - Leasehold could be a factor in requiring compliance with Ch. 149, public construction
- Property description: Site information and corresponding documents as attachments. Locus map, deed, survey, any site due diligence, for example
- Use Restrictions: affordability requirements

RFP Red Flags

- Detailed Requirements and Preferences
 - Design or design standards cannot be too prescriptive
 - Management: cannot be required to be a public entity
 - Public entity cannot approve or have oversight of construction (beyond standard practice), management, tenant selection, or funding

RFP Red Flags



- Contract terms and requirements:
 - Lease term must be more than 50 years
 - Lease payments cannot total value of land
 - Lease or Land Disposition Agreement terms cannot be too “controlling” (ex. Additional inspections/oversight above standard practice)
 - No Reverter back to public entity
 - Property cannot transfer back to public entity at no or reduced cost at the end of the lease term

Moving Forward

- Currently, there are no clear regulations or direction to avoid a bid protest when disposing of public property
- But, MHP and others are working on defining a clear path or safe harbor to follow.
- For now, we will keep projects moving forward, avoiding as many red flags as possible.

Community Assistance Team

Contact Information:

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857 317-8514

Shelly Goehring

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857 317-8525

Christine Madore

cmadore@mhp.net

Emma McGurren

emcgurren@mhp.net

857 317-8517

The Clarion, Boston



39 family units plus 5,990 sq. ft.
of ground floor commercial space
27 affordable below 60%, 5 @ 100%AMI
7 market

Carter School, Leominster

39 units, all below 60% AMI

After



Before



2 Hardy St., Beverly • 12 Rental Units

To satisfy an inclusionary zoning requirement, a developer transferred the property, (a former parking lot), fully permitted to a local non-profit, Harborlight Community Partners. The result is a 6 unit deeply affordable (30-50% AMI) family development.



Little Pond Place, Falmouth

40 affordable rental apartments
and community space



Housing Institute for Gateway Cities

October 28, November 4 & 9

10:00 am to 12:00 pm

Day 3 - Tuesday, November 9th

Unlocking Local Potential for Housing

[Click Here to Register for Day 3](#)

10:00 am **Welcome!**

Katy Lacy, Senior Planner, MHP

10:05 am **Unlocking Potential with Local Tools for Housing**

Austin Hodge, Senior Advocacy Specialist, AARP Massachusetts

Derek Thomas, Founder, Incremental Developers

Hannah Carrillo, Legislative Liaison, Somerville Mayor's Office

The scale of our housing crisis spans the Commonwealth and the country, but advocates and practitioners have responded by proposing tools and policies to address issues from the bottom up. Hear from an ADU developer and representatives from AARP Massachusetts on why the use of Accessory Dwelling Units is one way to meet our unique housing needs. Hannah Carrillo from Somerville Mayor's Office will share some effective tools to curb displacement and protect lower-income households in the City.

10:55 am Transition Break

11:00 am **Panel Discussion: Getting to Yes on Local Tools**

Evan Spetrini, Senior Planner & Policy Manager, City of Malden

Lor Holmes, Community Lead, Revere Housing Coalition

Whitney Demetrius, Director of Fair Housing Engagement, CHAPA

Jesse Kanson-Benanav, Executive Director, Abundant Housing MA

The panel will share their stories in facilitating the often challenging road of adopting of local housing policies, including Inclusionary Zoning and creating a local housing trust. Discussion will be open to both attendees and panelists for an interactive session.

11:55 am **Wrap Up Day 3 : Thank You**

About Our Panelists:

Austin Hodge

Senior Advocacy Specialist, AARP Massachusetts

Austin Hodge is responsible for both state and federal level advocacy and government relations for AARP's Massachusetts state office. He engages elected officials on a wide variety of issues including healthcare, consumer protection, caregiving, financial security, and food insecurity. Additionally, Austin works with legislators to draft legislation that advances AARP's mission.

Derek Thomas

Founder, Incremental Developers

Derek is the founder and managing director of Incremental Developers, a full-service design-build firm that specializes in the development of Accessory Dwelling Units. He is an advocate for middle-market and affordable housing options with a focus on incrementally developing existing properties. Derek has designed and built dozens of ADUs in the greater Boston area. His credentials include an unrestricted Massachusetts CSL, and is a licensed General Contractor, also holding an HIC and OSHA-30 certification.

Hannah Carrillo

Legislative Liaison, Somerville Mayor's Office

Hannah Carrillo is originally from New York City, but has been living in Massachusetts for 10 years now, specifically East Somerville for the last 6. She spent 4 years working in the City of Somerville Housing Division before making the move to the Mayor's Office as the Legislative Liaison this past June. Hannah remains very active in housing policy advocacy in her new role and is excited to share knowledge and lessons-learned from her various experiences.

Evan Spetrini

Senior Planner & Policy Manager, City of Malden

Evan Spetrini is the Senior Planner & Policy Manager for the City of Malden's Office of Strategic Planning and Community Development, where his work encompasses everything from land use and economic development to housing and climate resilience. Evan serves as staff to Malden's Affordable Housing Trust Fund and project manager for the Mystic Valley Development Commission, a partnership created by the cities of Malden, Everett, and Medford to remediate and redevelop historically contaminated properties along the Malden River.

Lor Holmes

Community Lead, Revere Housing Coalition

Lor Holmes is General Manager and leads business development for CERO Cooperative, an award-winning commercial composting company based out of Dorchester, Massachusetts. Lor worked as a Boston school bus driver and community organizer before earning a Master's Degree in Community Economic Development. Lor started Roxbury's first microenterprise program and, as founding director at HarborCOV, worked with immigrant communities to develop the country's first permanent housing and economic development center for families affected by violence.



Whitney Demetrius

Director of Fair Housing Engagement, CHAPA

Whitney Demetrius is the Director of Fair Housing Engagement at Citizens’ Housing and Planning Association (CHAPA) in the Municipal Engagement Initiative program. In addition to her local Coalition building work she is responsible for directing the CHAPA Fair Housing Committee and works to strategically identify areas of policy and practice that promote equal and fair access to housing opportunities.

Jesse Kanson-Benanav

Executive Director, Abundant Housing MA

Jesse Kanson-Benanav is the Executive Director of Abundant Housing MA, a statewide pro-housing coalition advocating for housing for all in communities across Massachusetts. Jesse is a trained urban planner who brings nearly 20 years’ experience in affordable housing development, public housing management, policy advocacy, and organizing to this role.



ADUs in the Bay State

Creating Housing Options for Massachusetts

Austin Hodge
Senior Advocacy Specialist
AARP Massachusetts

AARP[®]

November 9th, 2021

What is an Accessory Dwelling Unit? (ADU)

“Also known as granny flats, in-law units, guest houses, pool homes or caretaker quarters, ADUs are, by definition, second, smaller homes on the same property as a main house. They can be separate from the house or attached, but they will have a kitchen, bathroom and an outside entrance.”



▲ Accessory dwelling units (or ADUs) come in many shapes and styles.

Who should consider an ADU?

- **Empty nesters** can build one and rent out main house.
- **Families with kids** can build one for grandparents.
- **Caregivers** can live in one.
- **Those with disabilities** can live independently in them.
- **Homeowners** can use ADUs for supplemental income.
- **Workers** can use ADUs for office or workshop.
- **College students** can live in ADUs.



46%

Believe they will **stay**
in their home and
never move



17%

Not sure



24%

Move to a
different community



13%

Move into a different
residence within their
current community

What People 50+ Think About Where They Will Live



Source: 2018 AARP Home and Community Preferences Survey: A National Survey of Adults Age 18+

Sharing a Home



As you grow older would you consider sharing your home with another person? Would sharing your home with another person be something you would consider if...?



Already share or would consider sharing their homes as they age; **a majority would consider it** if they needed help with everyday activities.

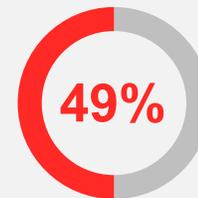
Reasons **would** support sharing a home



You needed help with everyday activities such as household chores or transportation to places like the grocery store or doctor's office



You found yourself not wanting to live alone and wanting companionship



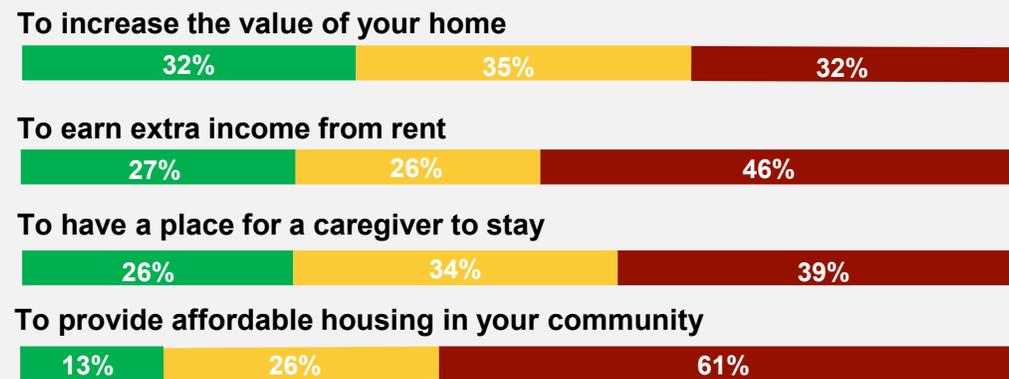
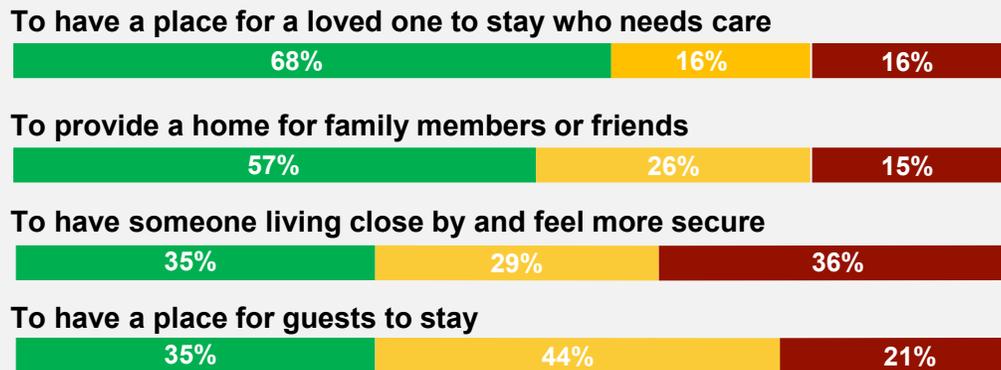
You needed extra income



Respondents are most willing to build an ADU to provide space for those they care about.



For each of the following reasons choose whether each one is a major reason, a minor reason, or not a reason for building an ADU on your property.



Accessory Dwelling Unit



Do you currently have an ADU on your property?

If you had the space to create an ADU within your home or on your property, would you consider doing that?

An Accessory Dwelling Unit, or ADU, is a residential unit built on the same lot as an existing single family home and may be attached or detached to the home.

ADUs provide complete separate living quarters, including a kitchen and bathroom, that can allow older adults to age in their existing home with live-in care, make it possible for adults to assist their aging parents, other relatives and loved ones, or use for rental income.



Have an Accessory Dwelling Unit



Do not have an Accessory Dwelling Unit



Would consider building one on their property



Changes from the “Housing Choice” Legislation

A new law in Massachusetts has made it easier to amend local ordinances to allow ADU construction.

Changes that allow ADU’s to be built by-right or by special permit now require a simple majority, instead of a 2/3rds supermajority.

Local restrictions still apply, and ADU’s must be 900 sq ft or half the size of the principal residence (whichever is smaller) in order to qualify.

ADU Resources: 2020 Model Ordinance



ACCESSORY DWELLING UNITS

Model State Act and
Local Ordinance



CREATED FOR STATE AND LOCAL LEADERS BY:

AARP State Advocacy & Strategy Integration, Government Affairs

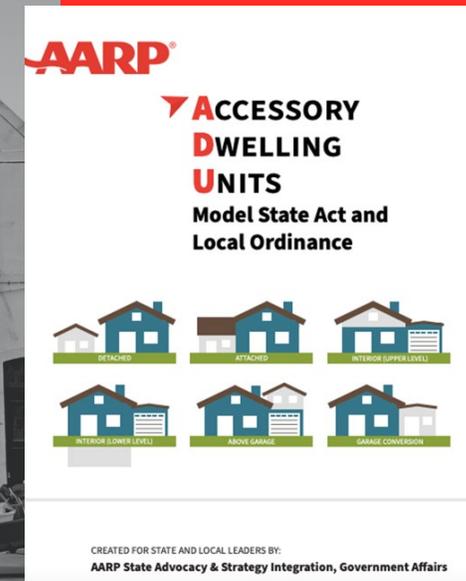
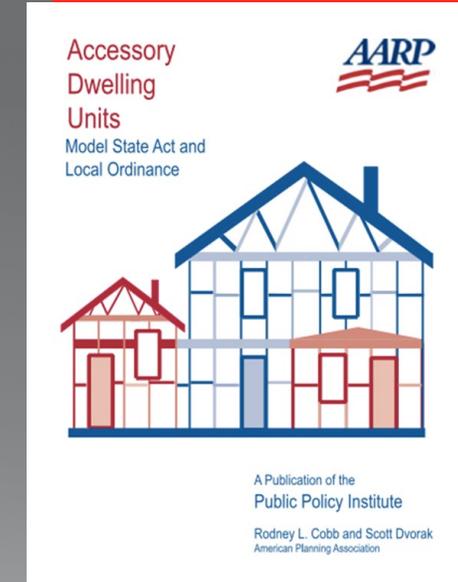


From 2000 to 2020

Model (“optimal”) provisions only.

Substantial revisions to model statute and ordinance language and to the commentary.

Case studies and references and resources eliminated – consult AARP ADU resources and the web now.



Poison Pills: 2020 Model Ordinance

1

**Owner Occupancy
Requirements**

2

**Parking
Requirements**

3

**Conditional Use
Permitting for ADUs**

Additional Topics Covered in the 2020 Model Ordinance

 **Garfield County**
Community Development Department
108 8th Street, Suite 401
Glenwood Springs, CO 81601
(970) 945-8212
www.garfield-county.com

LAND USE CHANGE PERMIT APPLICATION FORM

TYPE OF APPLICATION

<input checked="" type="checkbox"/> Administrative Review	<input type="checkbox"/> Development in 100-Year Floodplain
<input type="checkbox"/> Limited Impact Review	<input type="checkbox"/> Development in 100-Year Floodplain Variance
<input type="checkbox"/> Major Impact Review	<input type="checkbox"/> Code Text Amendment
<input type="checkbox"/> Amendments to an Approved LUCP <input type="checkbox"/> LIR <input type="checkbox"/> MIR <input type="checkbox"/> SUP	<input type="checkbox"/> Rezoning <input type="checkbox"/> Zone District <input type="checkbox"/> PUD <input type="checkbox"/> PUD Amendment
<input type="checkbox"/> Minor Temporary Housing Facility	<input type="checkbox"/> Administrative Interpretation
<input type="checkbox"/> Vacation of a County Road/Public ROW	<input type="checkbox"/> Appeal of Administrative Interpretation
<input type="checkbox"/> Location and Extent Review	<input type="checkbox"/> Areas and Activities of State Interest
<input type="checkbox"/> Comprehensive Plan Amendment	<input type="checkbox"/> Accommodation Pursuant to Fair Housing Act
<input type="checkbox"/> Pipeline Development	<input type="checkbox"/> Variance
<input type="checkbox"/> Time Extension (also check type of original application)	

Application & Review Standards



Short Term Rental Use of ADUs



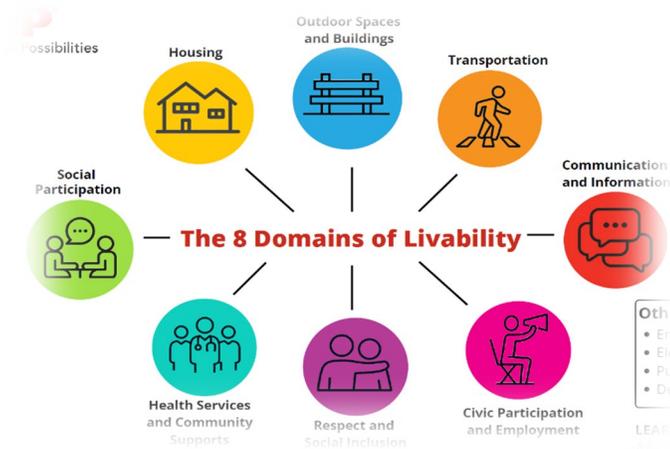
Building Code Reforms



Incentives for Certain types of ADUs

AARP Livable Communities Approach aka our “Age-Friendly” Approach

We support communities and local leaders to think differently about their **housing, transportation and public spaces** to create great places for all people of **all ages**.



Age-friendly framework



Catalytic grants



Nationwide presence

Tools to help local leaders

Current Location: Rochester, Olmsted County, MN
RECENT LOCATIONS: Bismarck, ND | Arlington, VA 22204 | 22204, Arlington, VA

TOTAL INDEX SCORE
64
Livability Score

CATEGORY SCORE

- 56 HOUSING: Affordability and access
- 55 NEIGHBORHOOD: Access to life, work, and play
- 64 TRANSPORTATION: Safe and convenient options

DO MORE WITH THIS SCORE

Livability Index
<https://livabilityindex.aarp.org/>

Free weekly e-newsletter
Text LIVABLE to 50757

View the AARP Network of Age-Friendly States and Communities

Member States and Territories x Member Counties x Member Cities and Towns x

Viewing 476 AARP Age-Friendly Members | 0 AARP Community Challenge Grantees

Filter to narrow results

Year Joined/Awarded

- 2020
- 2019
- 2018
- 2017
- 2016
- 2015
- 2014
- 2013
- 2012

Age-Friendly Network Domains

- States and Territories
- Counties
- Cities and Towns
- Grantees

Searchable map
<https://livablemap.aarp.org>

October 24, 2018 View Online

AARP Real Possibilities
Livable Communities Newsletter

Home Page | About Us | Tool Kits & Resources | A-Z Archives

Why Walkable Communities Are the Best Communities for Older Adults
Urban planner, author and walkability advocate Jeff Speck offers advice for what to look for — and not fall for — when searching for an aging-friendly place to live.
TIP: HAVING A PLACE TO WALK TO IS KEY

Last Conference Call!
The 2018 AARP Livable Communities National Conference is just a few weeks away. We'll be in Charlotte, North Carolina, November 12-14. Check out our updated conference program, breakout session descriptions and field trip offerings.
REGISTRATION CLOSES SOON

Livability News & Notes

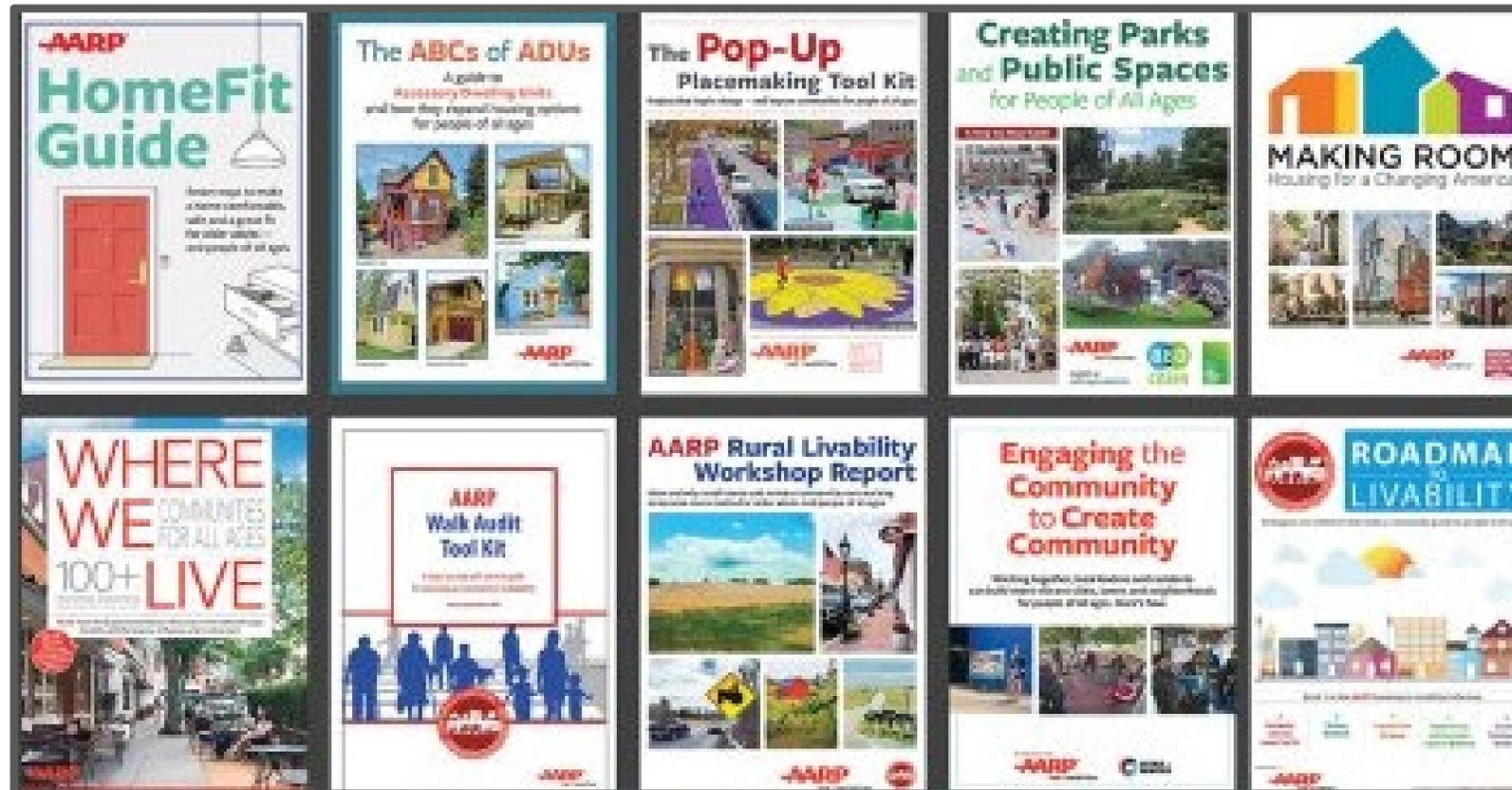
The Mayor Who Banned Cars — By doing so, an historic city center on the decline rebounded to become a safer, healthier, more vibrant and walkable place to live, work and play. Source: [The Guardian >](#)

The Best Type of Car for Older Adults — "Getting into a sports car is a controlled fall into the seat and a climb out," notes an engineer. "A pickup is the reverse." The seat height found in small SUVs provides a perfect fit. Source: [Detroit Free Press >](#)

Livability in the Rural Mountain West — Thanks in part to the LOR Foundation, which supports livability efforts in Idaho, Montana, Wyoming, Colorado and New Mexico, this year's AARP Livable Communities conference will include several sessions about livability needs and successes in rural areas. Source: [LORfoundation.org >](#)

Since the AARP Livable Communities team is busy preparing for our aforementioned conference, this newsletter won't be published on Halloween or the day after Election Day. Look for the next issue on November 14.
You can read past issues by visiting the [AARP Livable Communities e-Newsletter archive](#).

AARP Livable Communities Resources

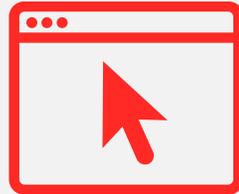


Free practitioner-oriented publications

ADU Resources: The ABCs of ADUs

A guide to Accessory Dwelling Units and How They Expand Housing Options for People of All Ages. You access to the document at:

aarp.org/adu



The ABCs of ADUs

A guide to
Accessory Dwelling Units
and how they expand housing options
for people of all ages



BASEMENT ADU



DETACHED ADU



ATTACHED ADU



SECOND-STORY ADU



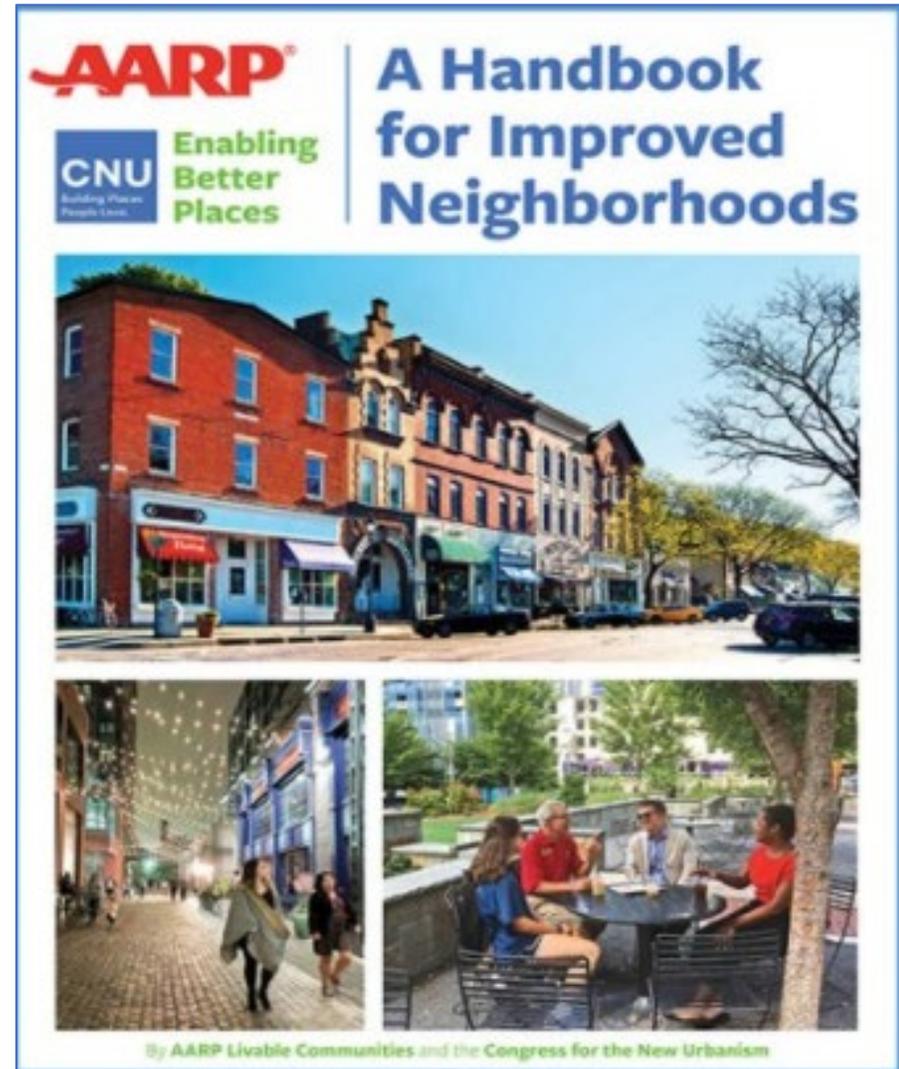
GARAGE-CONVERSION ADU

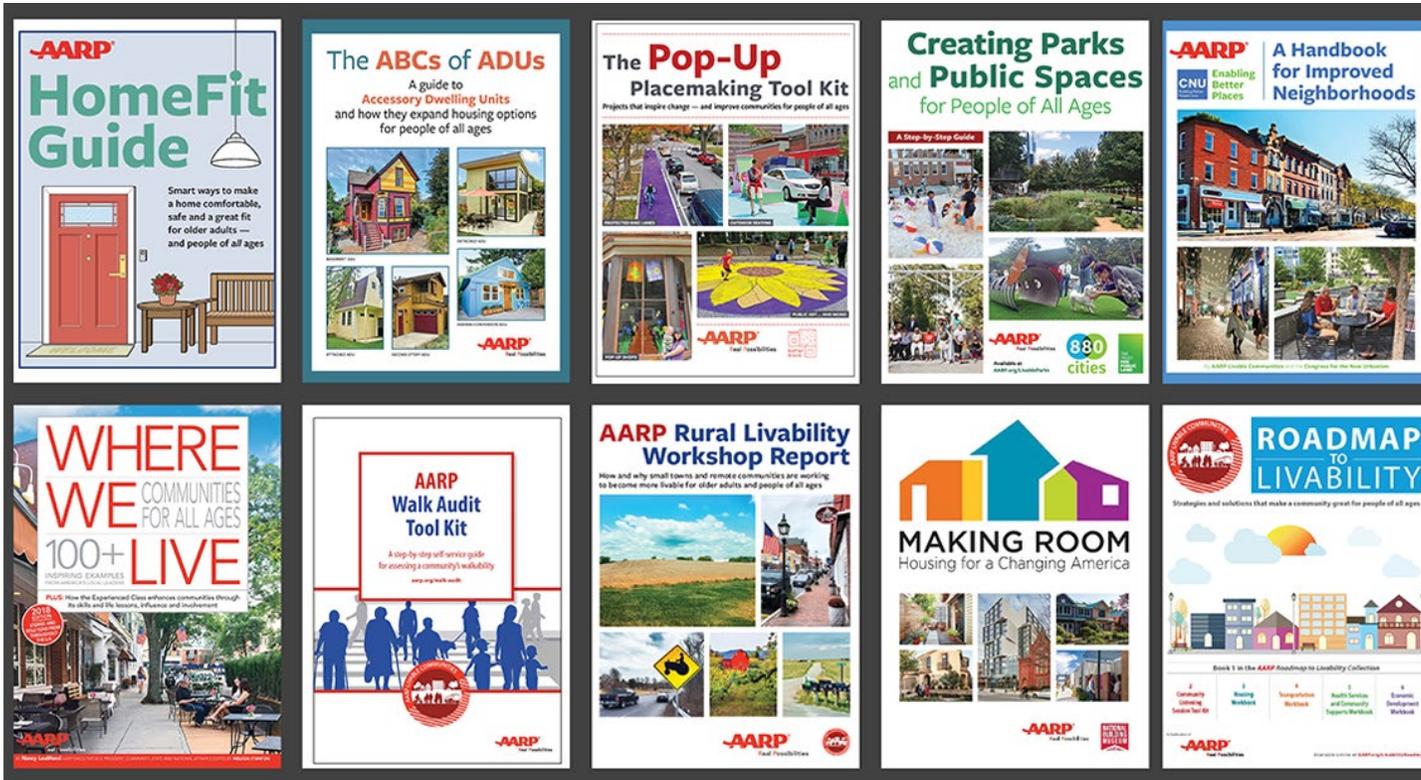
AARP
Real Possibilities

AARP and CNU's *Enabling Better Places*

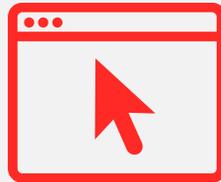
- Addresses how conventional zoning has contributed to inequitable access, amenities, services and more
- Focuses on commercial corridors and adjacent neighborhoods
- Includes 40+ suggestions for *incremental* code changes that can enhance communities through better design of:
 - Streetscapes
 - Buildings forms and uses
 - Facades, frontages and parking

Download or request a copy at
aarp.org/zoning





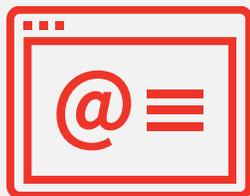
AARP Livable Communities Resources



Available at
<https://www.aarp.org/livable-communities/>

**Thank you!
Questions?**

November 9th, 2021



Austin Hodge
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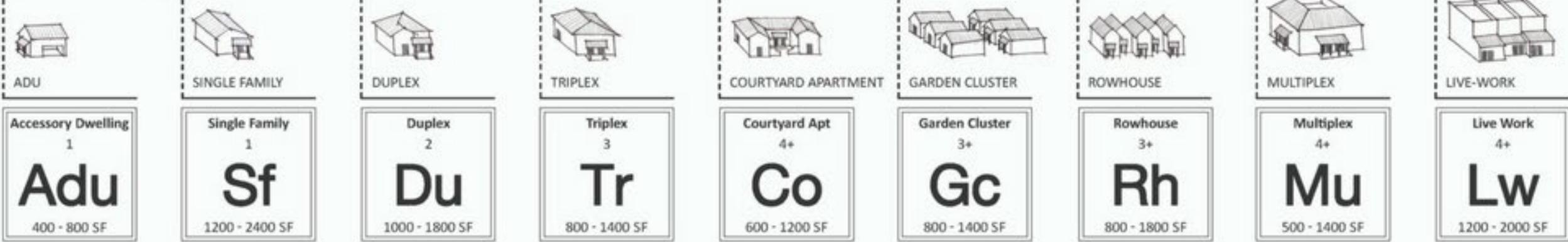
AARP[®]

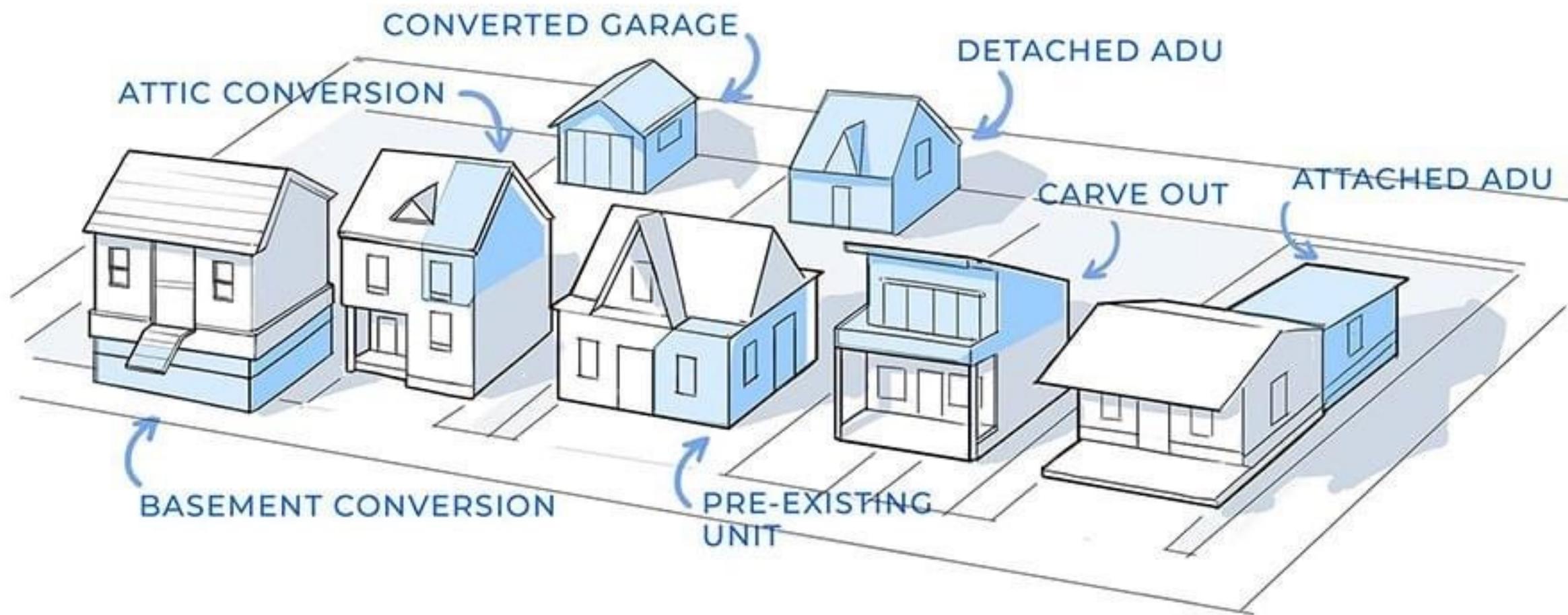
INCREMENTAL DEVELOPERS

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PROVIDED BY
OPTICOS







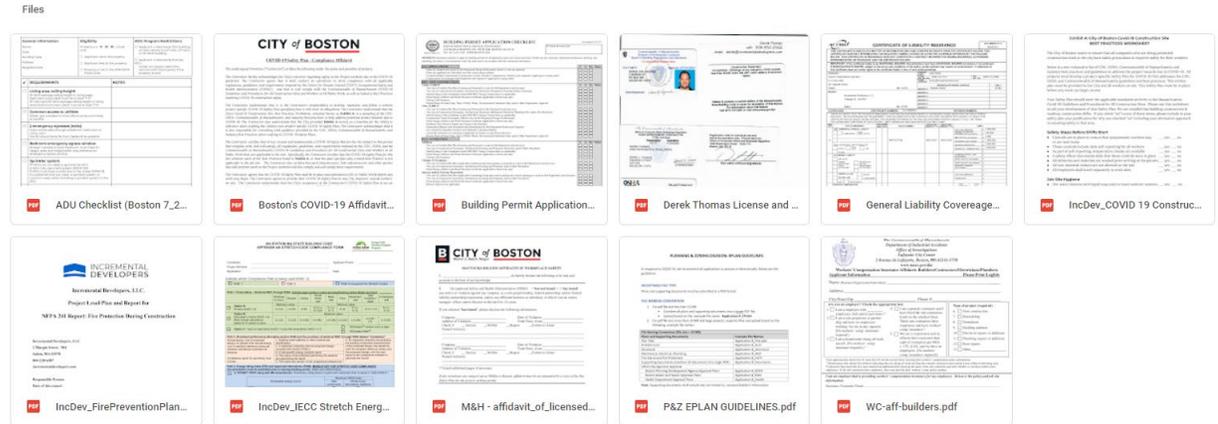
Building Small

1. “We” still create hundreds of sheets and documents. It doesn’t need to be easy, but it should be identified. (homestead document?)

2. Special Permit, By-Right, Other? Who are all the decision makers and stakeholders involved?

(City Assessors on the card)

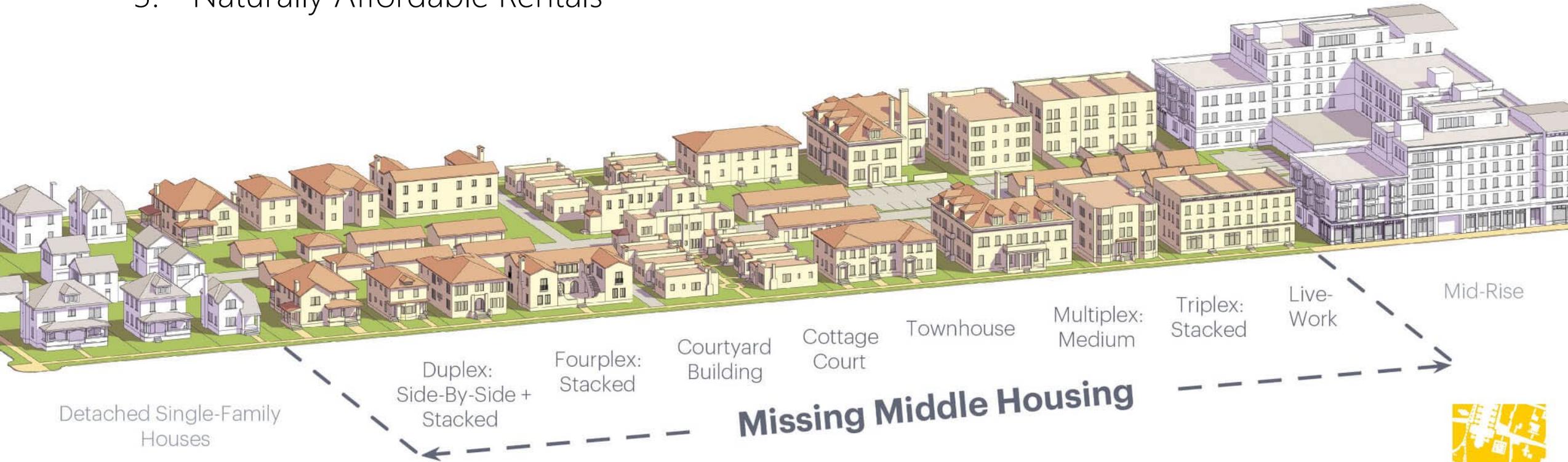
Feasibility Assessment; Contract Documents, Construction Plans and Specs; etc... Then:



ADU Checklist

General Information	Eligibility	ADU Program Restrictions
Name Date Building Type Address Neighborhood	Property is a 1F 2F 3F (circle one) <input type="checkbox"/> Applicant owns the property <input type="checkbox"/> Applicant lives at the property <input type="checkbox"/> Property is not in the 2016 FEMA Flood Zone	<input type="checkbox"/> Applicant understands that building an ADU results in a 1F+ADU, 2F+ADU or 3F+ADU building. <input type="checkbox"/> Applicant understands that the ADU owner-occupancy restriction remains with the property if the property is sold
REQUIREMENTS		NOTES
<input type="checkbox"/> Living area ceiling height 1F+ADU average ceiling height in living areas (bathrooms excluded) must be at least 7'0" 2F+ADU and 3F+ADU average ceiling height in living areas (bathrooms excluded) must be at least 7'6"		
<input type="checkbox"/> Common access to utilities Water, gas and electric shut-offs must be commonly accessible		
<input type="checkbox"/> 2 emergency egress (exits) Exits cannot pass through a bedroom, bathroom or utility room Exit #2 should be as far from Egress #1 as possible		
<input type="checkbox"/> Bedroom emergency egress window At least 1 window in each bedroom must meet all height, area, and height/width requirements for emergency egress window		
<input type="checkbox"/> Sprinkler system 1F+ADUs do not need to sprinkle the ADU 2+ADU may use a tank system (NFPA 13C) 3+ADU must have a water line to the street (NFPA 13) It is preferred that you install a sprinkler system in common areas when installing a sprinkler system in the ADU		
<input type="checkbox"/> Heat Detection 2F+ADU and 3F+ADU must install heat detectors in each non-ADU unit		
<input type="checkbox"/> Hard-wired smoke and CO2 alarm 1F+ADU, 2F+ADU, and 3F+ADU must have hard-wired smoke alarms and CO2 detectors in all units		
<input type="checkbox"/> Emergency response lighting/wayfinding The existence of the ADU and access to the ADU must be obvious to emergency response personnel. This can be through lighting and wayfinding.		
<input type="checkbox"/> Other items to consider <ul style="list-style-type: none"> Light - Ensure ADU has adequate natural light Circulation Venting Heating source 		

1. Aging in Place (AARP data)
2. Family and Generational
3. Naturally Affordable Rentals



derek@incrementaldevelopers.com

Tools to Curb Displacement and Protect Lower- Income Households

Hannah Carrillo, Legislative Liaison
City of Somerville

Tools to curb
displacement
and protect
lower-income
households

Condominium Conversion

- Local Regulation

Community Land Trust

- Nonprofit Partners

Policy Advocacy

- State Permission

Condominium Conversion Regulation

Under state law in Massachusetts, [Chapter 527](#), municipalities can regulate condominium conversions in properties that have 4+ units

- Somerville obtained state permission in 1985 to go beyond the State enabling legislation and may regulate any sized properties
 - A Home Rule Petition would be required to regulate 2 and 3 family properties for other municipalities
- More information on condo conversion across the state can be found here (from 2017 and does not reflect updated changes in Somerville)-
<https://www.masslegalhelp.org/housing/lt1-chapter-17-protections-tenants-condo-conversion>

Key Components of the Somerville Condo Conversion Ordinance

Tenant protections

- Strongest tenant protections available
- Notice period of 1 or 5 years if entitled to enhanced protections (elderly, disabled, low income)
 - Assistance finding a new comparable unit
- Relocation payment of \$6-10K

Waiting Period

- All vacant rental units are subject to 1 year waiting period during which time the unit cannot be sold as a condo
 - Units can be renovated or rented so long as any prospective tenants are properly notified- if not they will become entitled to full protections
 - Properties can still be sold during this time, but only as a whole and the prospective buyer would be required to complete the condo conversion process prior to sale

Condominium Conversion Right to Purchase

- Tenants have the right to purchase their units, and the City/Affordable Housing Designee has the right to purchase if a tenant waives that right
- City/Designee also has right to purchase any vacant units- rental or formerly owner occupied- submitted for conversion (Owner-occupied units are exempt)
 - Units purchased by City/Designee must be made **affordable in perpetuity**
 - Applies to all rental units unless a unit is going to be sold to a family member of the owner
 - These units are NOT required to be sold at affordable prices- these are market rate units being offered in 'as is' condition
 - Consistent pipeline of units for purchase

Could be utilized to **actively prevent displacement** if funds were available

Key Components Community Land Trusts

Nonprofit focused on acquiring units and removing them from the regular market

- Can actively prevent displacement by purchasing occupied properties
 - 100 Homes Program expansion
 - Trust can become Designee and purchase units through Condo Conversion

Importance of working with community and municipality

- Engaged residents and advocates are essential, no organization without them
- City has provided crucial resources and support
 - Funds for TA that enabled Land Trust to develop a [Strategic Business Plan](#)
 - Start-up funds for first staff member to be hired in the coming months

Policy Advocacy

Key Housing Policies

- Real Estate Transfer Fee
 - [H.1377/S.868](#)
- Right of First Refusal
 - [H. 1426/S.890](#)
- Right to Counsel
 - [H. 1436/S.874](#)

Crucial that these tools fit together in order to enable one another

- No one policy can solve this crisis
 - We considered the land trust when drafting the condo conversion update for example, and transfer fees will provide much needed funding for the Land Trust and Right to Purchase opportunities

Questions?

Contact- hcarrillo@somervillema.gov

617-366-6518 (work cell)