

Town of Sudbury

Sudbury Housing Trust

Flynn Building
278 Old Sudbury Rd
Sudbury, MA 01776
978-639-3387

Housing@Sudbury.Ma.US

**Brookside Square
70 Beharrell Street
Concord, MA 01742**

Information and Application for Affordable Housing Waiting List One-Bedroom Rental Units - \$1,267 per month Two-Bedroom Rental Units - \$1,507 per month

This packet contains specific information about the application process for the waiting list for the for eight affordable rental units at the Brookside Square development in Concord, MA, including eligibility requirements, the selection process, and the application.

This application is a first step in the process and does not assure you an apartment at Brookside Square. Applications to be added to the Brookside Square waiting list will be accepted as of **Wednesday, May 30th, 2018**. A lottery to determine placement on the waiting list will be held on **Tuesday, 6/19/18 at 10am** at the offices of the Regional Housing Services Office located at 37 Knox Trail in Acton, MA. To be included in the lottery, your application must be received by **Friday, 6/15/18 at 10am**. Applications received subsequent to 6/15/18 at 10am will be added to the bottom of the waiting list.

Please contact the agent below for any questions or to submit your application.

Lara Plaskon
Sudbury Housing Trust
278 Old Sudbury Road
Sudbury, MA 01776
(978) 287-1092; lara@rhsousing.org

Project description

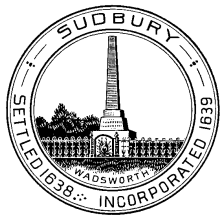
The Brookside Square development is located in the village of West Concord on a 5 acre parcel on Beharrell Street, adjoining the main commercial district of the village. This five acre parcel provides a multi-family mixed-use building with 74 luxury rental units and 36,000 square feet of non-retail commercial space in a three story modern structure with elevators. The apartments are located on the second and third floors with elevator access. Eight rental units, 4 one-bedroom and 4 two-bedroom apartments, are affordable. The affordable rental units offered in this project are Local Action Units within the Commonwealth's Local Initiative Program (LIP), with DHCD and the Town of Concord as Monitoring Agents

In accordance with the program guidelines, the initial monthly rent is established so that a household is not required to spend more than thirty percent (30%) of the monthly adjusted income, whose gross income equals eighty percent (80%) of the Boston Area Median Income (AMI) for a family for housing costs, including rent and utilities. The tenant will be responsible for payment of all utilities. Taking into consideration a utility allowance of \$114, the rent for a 1 bedroom unit as of June 2018 is \$1,267. Taking into consideration a utility allowance of \$148, the rent for a 2 bedroom unit is \$1,507. Tenants pay all utilities except water and sewer. These rents are based on 2018 income limit figures, and are subject to update when/if HUD issues new limits.

The one-bedroom units feature one bath, living room, dining room and kitchen in an open floor plan with livable square footage ranging from 675 to 750 square feet. The two-bedroom units feature two bathrooms, living room, dining room and kitchen in an open floor plan with livable square footage ranging from 1015 to 1047 square feet. Two units – a one-bedroom apartment and a two-bedroom apartment – are ADA compliant. Surface parking is provided.

The finishes are "high end" – granite counters, energy-efficient stainless appliances, wood floors in living areas, tiled master bath, ample storage (including walk-in closets, extra storage rooms), 9 ft ceilings, lots of natural light from generous windows,





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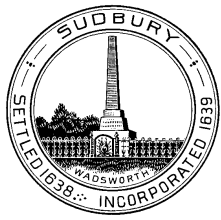
energy-efficient, individually controlled heating, ventilating and air conditioning; overall healthy, 'green' building materials and furnishings. The ADA units include wider kitchen, larger bathrooms, lower cabinets and ADA appliances.

This parcel is located near shopping and services, Nashoba Brook and recreational trails, and is a short walk to the MBTA Boston/Fitchburg commuter rail line station in West Concord.

Application process description:

1. The applications for this housing opportunity will be generally available on-line and in hardcopy at the Sudbury Department of Planning and Community Development, or will be sent to anyone interested.
2. Applications must be received in hardcopy. Email or fax submission of applications are not accepted.
3. An applicant's household size will be determined from the application, and required number of bedrooms as indicated on the application. Priority shall be given to households requiring at least the number of bedrooms for that unit. Smaller households are encouraged to apply.
4. The applicant's income will be compared to the income limits published by HUD for the Boston Metropolitan Statistical Area. Income includes all income prior to any deductions from all adult household members, and are determined using the method as in the HUD Section 8 program defined at 24 CFR 5.609. An imputed income amount of 0.06% of assets will be added to income for assets over \$5,000. The income limits for this offering are subject to change upon HUD release of updated income limits. The current **2018** limits are:
1 person household - \$56,800, 2 person household- \$64,900,
3 person household- \$73,000, 4 person household - \$81,100
5. If any household member owns a residential property, the property must be sold before the household enters into a lease.
6. It is the policy of the leasing office that the applicant have sufficient income for the rent. No more than 35% of an applicant's gross income can be spent on rent. This translates to minimum incomes of \$43,440 for the 1BR units, and \$51,669 for the 2BR units. Applicants may make less than the minimum incomes if they have sufficient savings to contribute to their rent so as to meet the required ratio for twelve months. Applicants who receive a housing subsidy (like Section 8) are not subject to the minimum income requirements. Applicants will be considered ineligible if they make less than the required income.
7. All applicants will be screened for eligibility. Applicants who have been deemed ineligible will be notified by email of the decision and given time to contact the lottery agent in writing to disagree with the determination.
8. A final lottery eligibility letter will be emailed to each applicant who submits their application by Friday, 6/15/18 at 10am indicating their final eligibility determination, lottery number, and the lottery specifics (date/time).
9. The lottery numbers will be pulled randomly in a public setting. Letters will be emailed within three business days to inform applicants of their placement on the waiting list.
10. Household Size Preference: There will be a preference for larger households for the two-bedroom units. The applicant's household size will be determined from the application, and required number of bedrooms as indicated on the application. The household size preference is based on the following criteria.
 - There is at least one occupant and no more than two occupants per bedroom.
 - A husband and wife, or those in a similar living arrangement, shall be required to share a bedroom.
 - Other household members may share but shall not be required to share a bedroom.
11. ADA Preferences: Households requiring an ADA compliant unit will be given preference for those units, irrespective of household and unit size.
12. Existing Tenant Preference: Existing tenants that qualify for a change in household size, either increase or decrease, will be given preference.





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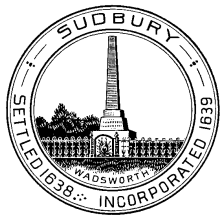
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13. Local Preference: There will be no local preference for the waiting list.
14. When affordable units become available, the first household on the waiting list (needing the available bedroom size or accessibility features, as applicable) will be contacted and required to submit additional documentation to verify the income and assets listed on their initial application. Based on this documentation, final eligibility will be determined.
15. If an eligible household declines the opportunity to rent an available affordable unit, that household may remain on the waitlist for future opportunities, but will be moved to the bottom of the list.
16. Eligible households who want to pursue the opportunity to rent an affordable unit will attend an interview with the owner/manager and complete a Rental Application in the order that they were determined to be eligible. If an eligible household does not sign a lease or is otherwise disqualified, the next qualified applicant will be selected. All eligible applicant households will be subject to landlord screening and final approval. Screening is provided by Core Logic Safe Screening which includes a review of factors such as employment history, credit score/reports, former lease history, and criminal background. Sufficient income is also considered. Note that co-signers and/or guarantors are not allowed.
17. Tenants are required to recertify annually. Annual income must be below 140% of the 80% income limits to remain eligible. Ineligible tenants may be required to pay market rent.
18. The Fair Housing Act and other federal and state laws and regulations prohibit discrimination on the basis of race, creed, color, sex, age, disability, marital status, religion, familial status, veteran status, sexual orientation, and/or national origin, or any other basis prohibited by law and which is specifically prohibited. An applicant who believes that they have been discriminated against in the selection process may contact the Massachusetts Commission Against Discrimination and/or the United States Department of Housing and Urban Development.
19. Qualified persons with disabilities are entitled to request reasonable accommodation of rules, policies, or services, or reasonable modification of housing, when accommodation is necessary to ensure equal access to the building and individual unit, amenities and services.





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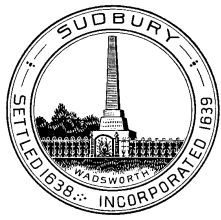
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AFFORDABLE HOUSING APPLICATION

Must Be Completed and Returned to Sudbury Housing Trust Office

Applicant Legal Name: _____ Phone Number: _____ E-mail: _____

Address: _____ City: _____ State/Zip: _____

Co-Applicant Legal Name: _____ Phone Number: _____ E-mail: _____

Address: _____ City: _____ State/Zip: _____

I learned of this Housing Opportunity from (check all that applies):

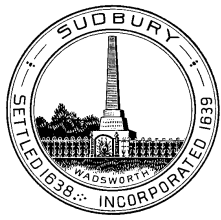
Website: _____ Letter: _____

Advertisement: _____ Other: _____

THIS APPLICATION IS NOT COMPLETE IF NOT SUBMITTED WITH:

- _____ Completed application signed by all individuals over the age of 18
- _____ Copy of 2015, 2016, and 2017 Federal tax returns, as filed, with 1099 and W-2 forms for 2017 tax return, for every current person living in the household over the age of 18.
- _____ Copy of three consecutive months pay stubs (minimum of 5 most recent), for salaried employed household members over 18, longer for seasonal and hourly workers.
- _____ Evidence of full-time matriculation for students age 18 or older with more than \$480/year income, if applicable.
- _____ Current statements and documents that indicate the payment amounts from all other sources of income of all members listed on the application, such as alimony, child support, Social Security benefits, pensions, unemployment compensation, workman's compensation, disability and any other form of income
- _____ Current statements of all assets (all pages), on financial institution letterhead, showing current value including all bank accounts, investment accounts, cash life insurance policies, retirement accounts. Include copy of last three months of each asset statement. Provide explanation for non-income deposits.
- _____ Documentation regarding current interest in real estate, if applicable.
- _____ Documentation regarding Rental Assistance, if applicable.
- _____ Documentation regarding need for Accessible Unit, if applicable.
- _____ No Income Statement, signed and notarized, for any household member over 18 with no source of income, if applicable, containing the language "Under penalties of Perjury"
- _____ No Child Support Statement, signed and notarized, if applicable, containing the language "Under penalties of Perjury"





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Household Information – List all members of your household including yourself _____

Number of Bedrooms Needed: _____

| Names of all Persons to Reside in Dwelling (First Name, Middle Initial, Last Name) | | Relation to Head | Age | Date of Birth | Minority Category * (Optional) |
|---|--|---------------------|-----|---------------|-----------------------------------|
| HEAD | | | | | |
| 2 | | | | | |
| 3 | | | | | |
| 4 | | | | | |

*Minority categories include only Native American or Alaskan Native, Black or African American, Asian, Native Hawaiian or Pacific Islander; or other (non-White); and the ethnic classification Hispanic or Latino. Requires a separate self-declaration document.

Property - Do you own or have an interest in any real estate, land and/or mobile home? Yes () No ()

Address: _____ Current Value: _____

[Provide current assessment information, and current mortgage statement]

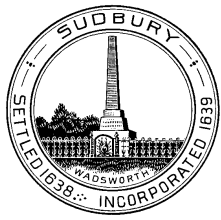
Have you sold real estate or other property in the past three years? Yes () No () If yes, attach settlement statement

When: _____ Address: _____ Sales Price: _____

Do you require Accessible Unit? Yes () No () If yes, attach note from physician

Do you have any rental assistance (ie. Section 8)? Yes () No () If yes, attach benefit statement





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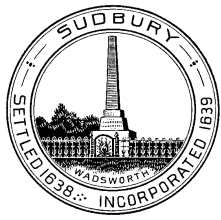
Income - List all income of all members over the age of 18 listed on application to reside in the unit, such as wages, child support, Social Security benefits, all types of pensions, employment, Unemployment Compensation, Workman's Compensation, alimony, disability or death benefits and any other form of income; including rental income from property. Adults with no income are required to submit a notarized statement. If additional space is needed, please attach another sheet.

| # | Source of Income | Address/Phone# of Source | Amount per Year |
|-------|------------------|--------------------------|-----------------|
| 1 | | | |
| 2 | | | |
| 3 | | | |
| 4 | | | |
| 5 | | | |
| TOTAL | | | |

Assets - List all checking, savings accounts, CD's, stocks, bonds, retirement accounts, savings bonds and any other investments below. If additional space is needed, please attach another sheet. Household assets do not include necessary personal property.

| # | Type of Asset | Account No | Value, Balance |
|-------|--------------------|------------|----------------|
| 1 | Checking account | | |
| 2 | Savings account | | |
| 3 | Retirement account | | |
| 4 | Other: _____ | | |
| 5 | Other: _____ | | |
| 6 | Other: _____ | | |
| 7 | Other: _____ | | |
| TOTAL | | | |





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APPLICANT(S) CERTIFICATION

I/We understand that this application is not an offer of housing and does not guarantee housing.

I/We understand that additional information and verifications will be necessary to complete the standard application process.

I/We certify that our household size is _____ persons, as documented herein.

I/We certify that our total household income equals \$_____, as documented herein.

I/We certify that our household has assets totaling \$_____, as documented herein.

I/We certify that no member of the household owns a home, including in Trust.

I/We certify that the information in this application and in support of this application is true and complete to the best of my/our knowledge and belief under full penalty of perjury. I/We understand that false or incomplete information may result in disqualification from further consideration.

I/We certify that I am/we, or our family, are not related to the Developer of the Brookside Square property, the Housing Agent, the Monitoring Agent or any party of this project.

I/We agree to provide additional information on request to verify the accuracy of all statements in this application.

I/We consent to the disclosure of such information for the purpose of income, asset and any other verification related to my/our application. I/We grant permission for all of the above information to be verified by the owner/agent.

No application will be considered complete unless signed and dated by the Applicant/Co-Applicant.

Applicant Signature

Date

Co-Applicant Signature

Date

THIS IS APPLICATIONF IS ONLY FOR THIS SPECIFIC DEVELOPMENT.

