

## Full Application to Request CPA Funds

Hebrew SeniorLife

October 23, 2023

### 1. PURPOSE AND SCOPE OF PROJECT

Hebrew SeniorLife (HSL) is pleased to submit a Full Application for consideration of Community Preservation Act (CPA) funds to the Town of Stoughton's Community Preservation Committee (CPC). HSL owns several parcels of land in the area of Canton Street and Simpson Street, on a portion of which HSL is proposing the new construction of approximately 200 units of affordable senior housing, community space and other ancillary spaces (the "HSL Development"). While this will be an independent living community for eligible seniors aged 62+, we are in the very preliminary stage of exploring the possibility of creating a few units for young adults aging out of foster care – perhaps in partnership with the Stoughton Housing Authority – as there is tremendous need for housing for this population and we think there could be some positive synergies between the needs of our senior population and these young adults. It is anticipated that construction would proceed in two phases, with the building(s) in each phase being designed such that they present as one seamless community upon final completion. This full application for \$2,300,000 of CPA funds is to support both phases of the project.

The development will be 100% affordable and target seniors earning less than or equal to 60% of AMI (or less than or equal to \$62,340). All units will be one bedroom and average 625 square feet. HSL envisions providing programming and services that nurture residents' wellness, improve health outcomes, and cultivate independence. Thoughtful and vibrant community space will be included in the design in order to facilitate these services and programming. The building scope and design will also employ Passive House standards to support green initiatives, resident comfort and healthy homes. The Passive House benefits include optimized thermal control and air circulation, reduced energy consumption and a low carbon footprint building. To achieve appropriate zoning for this design, HSL will work closely with the Town of Stoughton and community stakeholders to navigate the comprehensive permit process.

### 2. ENHANCE/PRESERVE STOUGHTON'S COMMUNITY CHARACTER

HSL's proposed development will benefit the community through providing resources and programming that support the well-being of senior residents both those that live in this community and other seniors throughout Stoughton. To better understand the programs and services already offered and those needed, HSL met with Janiece Bruce from the Council on Aging and convened three meetings with residents and staff from the Stoughton Housing Authority. Residents expressed that they would like to see programming that includes: arts and crafts, potentially with their grandchildren; a library; computer access; green space with outdoor seating; a food pantry; and a game room with scheduled game nights. HSL will try to align its programs and service offerings with the feedback from the residents. Additionally, HSL will work in concert with Stoughton's Council on Aging to ensure we are complimenting programs already offered.

### 3. DEMONSTRATED COMMUNITY NEED

The need for senior housing in Stoughton continues to increase, resulting in more than 3,600 seniors on the Stoughton Housing Authority's federal and state public housing waitlists, with an additional 1,700

seniors waiting for a mobile MRVP or Section 8 voucher from the Housing Authority. The Town's housing production plan estimates that the age 65+ senior population of Stoughton will increase by 2,174 through 2030. Census data suggests that approximately 30% of existing seniors in Stoughton are cost burdened (i.e. paying more than 30% of their income for housing-related expenses).

With this demonstrated need for more affordable senior housing to serve the Stoughton community, HSL intends to request a preference for up to 70% (approximately 147) of the units at the HSL Development to be leased to local residents at initial occupancy. At the completion of the zoning and permitting processes, all units in the HSL Development would be included on Stoughton's subsidized housing inventory (SHI).

### 4. PROJECT ALIGNMENT WITH TOWN GOALS

The Town of Stoughton's 2022 Community Preservation Plan emphasizes the need to spur affordable housing units that "assist low income elderly renters and homeowners" (Page 2 of the Plan). The Plan encourages the principle of community housing that maintains and influences positive "community character" while catering to the "quality of life for residents" (Page 17 of the Plan). The proposed HSL Development would support this goal through the creation of housing that promotes a sense of community through onsite programming and amenities.

Beyond community need for the housing created, the proposed HSL Development would also benefit the Town of Stoughton in the following ways:

Job Creation: In addition to creating affordable, sustainable senior housing within the Stoughton community, the proposed HSL Development would also contribute to local economic growth. While in construction, it is anticipated that over 300 jobs will be created. Once in operation, there will also be ongoing employment opportunities available through HSL's robust property management and resident service resources.

Fees: While the HSL Development is still in the preliminary planning phase, based on current estimates, we anticipate a building permit fee payable to the town of approximately \$600,000 per phase. In addition to the building permit fee, there will also be ancillary permit fees related to various utilities.

Tax Revenue: The proposed new development of approximately 200 residential units will result in annual property tax revenue that will be paid to the Town. To ensure that we can provide a comprehensive service package to the residents of this new community, we have reached out to the acting Town Assessor to explore the possibility of obtaining some measure of tax relief in line with arrangements that the Town has supported on other affordable housing communities in Stoughton.



Growth & Mobility: The provision of alternative, affordable housing options for Stoughton’s senior community will contribute to greater housing opportunities for all demographics. A barrier to the current overall housing market is lack of available supply. Contributing to the lack of available housing are seniors who have been unable to downsize, finding it difficult to find affordable alternatives to aging in place. An influx of senior units through the HSL Development could create opportunity for households looking to move into and within the Stoughton community.

Sustainability: Consistent with Stoughton and HSL’s shared commitment to environmental sustainability, we will endeavor to design and construct this community to Passive House standards. We will aim to minimize our use of fossil fuels to the extent possible and we will likely include solar panels as part of the source energy for the community. We will also explore with the Town the possibility of allowing the Town access to the “undevelopable” green space surrounding the property to be used for community walking paths or other appropriate outdoor uses Please see Attachment #13 for a full description of our intent with respect to sustainability for this project.

HSL has prioritized sustainability throughout the organization. Three of our current projects, which are either ready for occupancy or in construction, have been designed to meet Passive House standards. Several years ago, we convened a Sustainability Committee comprised of HSL residents and staff across all HSL campuses and operational areas who work together to expand HSL’s environmental stewardship. Members of this group boast a wealth of professional sustainability experience: they have served on a regional Public Works Commission, developed, and taught school curriculum on environmental issues, and led culinary services and building management at large residential campuses. In addition, several committee members actively volunteer on their respective Town energy committees and climate action groups. This Committee has championed several initiatives including: recycling and composting initiatives; banning the use of plastic bags; adoption of WegoWise for tracking energy use at all of our communities; refrigeration temperature management; installation of EnergyStar-rated appliances; installation of LED lighting; and, in our new communities, the elimination of fossil fuels (with the exception of domestic hot water). At HSL, we encourage seniors to focus on “what matters most” for them. It’s no surprise that what matters deeply to most of our residents and patients are their grandchildren and their hope for future generations.

## **5. LEVERAGING OF FUNDS**

In addition to the \$2.3 million request for Town of Stoughton funds, the project will require significant funds from other sources including permanent and construction loans, allocations of state and federal Low-Income Housing Tax Credits (and the equity associated with these allocations), soft debt from the Executive Office of Housing and Livable Communities (EOHLC) and funding from MassWorks to support the site infrastructure. We intend to partner with the Town in 2024 to apply for these MassWorks funds. Assuming we receive this allocation of Town of Stoughton funds and the project receives its comprehensive permit, our pre-application to EOHLC will be submitted in the fall of 2024. We have included in this application letters of interest from debt and equity providers that HSL has worked with on other affordable housing projects (see Attachment #11). For every \$1 of Town CPA funds, we anticipate leveraging approximately \$44 of funds from other sources.

## 6. COMMUNITY SUPPORT

The HSL team organized resident meetings with the help of the Stoughton Housing Authority to garner feedback about the most critical services seniors seek in Stoughton. Meetings were held on October 10, 2023 at Memorial Village, La Civita Court and 4 Capen Street. Close to 40 residents and staff attended the meetings along with Janiece Bruce from Stoughton’s Council on Aging (who we met with separately) and Jan Crimmins from the VNA. In addition, HSL worked with the Town Assessor’s office to identify direct abutters for outreach. Abutter letters were mailed on October 6, 2023 to promote a collaborative and informed community process. HSL intends to be transparent about our plans for this parcel and proposal

and we absolutely welcome feedback from all stakeholders throughout the planning process. We have set up a dedicated email address: [stoughton@hsl.harvard.edu](mailto:stoughton@hsl.harvard.edu) for abutters and other stakeholders as a simple way for them to get in touch with us. We have included in this application the letter that was sent to residents from the Stoughton Housing Authority (see Attachment #9), the letter sent to the abutters and the list of abutters (see Attachment #5), and letters of support from the Stoughton Housing Authority, the Council on Aging, the Town Manager from Randolph and the Town Administrator from Canton (see Attachments #4, #6 and #9). We think these letters from Randolph and Canton illustrate the ways in which we seek to become strong assets to our host communities.

## 7. PROJECT PERMITS

As this funding request involves the new construction of affordable housing, all phases of the project will require building permits prior to closing on construction financing, as well as any necessary ancillary construction-related permits. Certificates of occupancy will be issued by the Town of Stoughton prior to closing on the permanent financing for each phase. We anticipate the issuance of a building permit for phase one in CYQ1 2026 with a certificate of occupancy issued for this phase in CYQ3 2027. We anticipate the issuance of a building permit for phase two in CYQ1 2027 with a certificate of occupancy in CY 3Q 2028.

## 8. PROJECT BUDGET DETAIL

We have included the development pro forma and 10-year operating budget in Attachment #11 (along with letters of interest from debt and equity providers). Simultaneously with the other funding sources committed to this project, we will need access to the CPA funds at construction closing for each phase. The CPA funds will be used to pay for hard and soft costs incurred during the construction period for both phases.

## 9. PROJECT COSTS BASIS

We based the development cost estimate on a per square foot calculation based on a recently-closed project that we have in construction. These costs will need to be updated as we refine this project’s building design. The operating expenses are based on average per unit costs within our existing portfolio.

## 10. PROJECT MAINTENANCE COST AND RESPONSIBILITIES

HSL will be responsible for the development’s project and maintenance costs. Examples of the open space amenities and associated maintenance costs might include: walking paths, sidewalks, trash, landscaping, snow removal and upkeep of accessible green spaces. Funds for these ongoing operating costs will be built into the project’s operating budget. We will engage with the Town to discuss municipal services that will be provided at the property and any costs associated with these services. Additionally, to the extent

The Power to Redefine Aging.



Hebrew  
SeniorLife



HARVARD MEDICAL SCHOOL  
AFFILIATE

HSL and the Town mutually agree to provide some part of the land to be used for community open space, HSL will discuss with the Town how to manage the ongoing maintenance costs associated with these spaces.



**11. PROJECT SCHEDULE**

<b>Date</b>	<b>Event/Milestone</b>
<b>August 8, 2022</b>	Initial HSL meeting with town staff. Introduced HSL and discussed potential development proposed at the site.
<b>August 2022 – February 2023</b>	Follow-up meetings with town staff
<b>May 5, 2023</b>	Met with Janiece Bruce from the Council on Aging
<b>July 28, 2023</b>	Met with representatives from CPC and Select Board to discuss conceptual plans for the proposed development
<b>September 6, 2023</b>	Presented at CPC meeting re: pre-application
<b>October 3, 2023</b>	Met with representatives from municipal departments, including fire, public works, police, board of health. Attendees reviewed conceptual site plan and elevations
<b>October 5, 2023</b>	Mailed letters to abutters
<b>October 10, 2023</b>	Met with residents from three SHA public housing communities –Memorial Village, La Civita Court, 4 Capen
<b>October 25, 2023</b>	Submits full application to CPC for funding
<b>November 2023</b>	Submit Project Eligibility letter (PEL) to Executive Office of Housing & Livable Communities as part of the comprehensive permit process
<b>January 2024</b>	Commence comprehensive permit hears with Zoning Board of Appeals
<b>February 2024</b>	Finalize Town Warrant for CPC funding
<b>Spring 2024</b>	Finalize comprehensive permit process with ZBA
<b>May 2024</b>	CPC funding request approved at Town Meeting
<b>Fall 2024</b>	Submit pre-application to EOHLIC for Phase 1
<b>Winter 2025</b>	Submit full application to EOHLIC for Phase 1
<b>Summer 2025</b>	Receive award from EOHLIC for Phase 1
<b>Fall 2025</b>	Submit pre-application to EOHLIC for Phase II
<b>Winter 2026</b>	Close on construction financing and begin construction of Phase 1
<b>Winter 2026</b>	Submit full application to EOHLIC for Phase II
<b>Summer 2026</b>	Receive award from EOHLIC for Phase II
<b>Winter 2027</b>	Close on construction financing and begin construction of Phase II
<b>Fall 2027</b>	Phase 1 is complete and lease-up begins
<b>Fall 2028</b>	Phase II is complete and lease-up begins

## 12. TEAM QUALIFICATIONS

**Hebrew SeniorLife:** Hebrew SeniorLife (HSL) is a mission driven non-profit that is deeply rooted in Eastern Massachusetts. HSL was founded in 1903 in Dorchester and is the largest provider of senior housing and health care in New England. The organization is focused on providing improved quality of life and health outcomes for seniors. HSL does this through established and distinguished health care and senior living campuses that become senior hubs and safety nets in the communities in which it operates. Throughout our 119-year history, HSL has served as a champion for seniors, taking on the challenges that those in our community face as they age. Driven by our unparalleled combination of experience, optimism, vision and determination, HSL continually strives to promote independence of all seniors and transform every aspect of the aging experience positively.

HSL is the parent company of six campuses made up of assisted and independent living residential sites as well as a long term care hospital and short term rehabilitation facilities. They include: Orchard Cove in Canton, Hebrew Rehabilitation Center in Roslindale, Center Communities in Brookline, Jack Satter House in Revere, Simon C. Fireman Community in Randolph and New Bridge on the Charles in Dedham. Across our communities, residents benefit from our dedication and purpose to champion seniors' quality of life, social engagement and enjoyment during their aging experience. HSL has operated our supportive housing communities for low income seniors in Greater Boston since 1978 when we opened the Jack Satter House community. This launched HSL into the trajectory of a recognized pioneer in redefining supportive living and services for the elderly. Within our campuses exists a network of long-term services and supports for community-dwelling seniors including outpatient services, home care, private care, community palliative care, home therapy and hospice care.

HSL provides a specialized model of health care and supportive services at our communities called Right Care, Right Place, and Right Time (R3) program. We are eager to extend our proven and documented enhanced R3 resident services model to senior residents in Stoughton. The R3 model integrates health care and housing. It embeds wellness teams comprised of coordinators and nurses in affordable housing and utilizes an "eyes-on" approach, where all housing staff (including maintenance, administrative support, and social work) are trained to share observations and contribute to care coordination efforts. The R3 wellness teams cover resident service coordination and serve as a link between housing and health care to efficiently support residents in their housing communities, where they spend much of their time, helping them achieve improved outcomes and live independently in their homes for as long as possible. Key elements of R3 include ongoing proactive outreach to all residents and a data-driven approach. Coupling the R3 service model, HSL's existing supportive housing communities provide the following services for residents, all of which we intend to explore for this proposed community in Stoughton:

- **Onsite fitness and wellness programs** with fitness staff who provide individualized exercise support and lead a variety of group fitness classes including strength, yoga, and tai-chi. Wellness programs include a balance course, walking group, and healthy eating.
- **Onsite recreational, educational and cultural programming:** Programs are planned based on resident interest and ensure a vibrant, engaging community life.
- **Hebrew SeniorLife health care services** such as skilled home care, personal care, primary care,



and rehabilitative therapy all support resident wellbeing in coordination and collaboration with the housing staff.

HSL is the only senior care organization affiliated with Harvard Medical School and is home to the only long term chronic care teaching hospital in the United States. Our patients and residents benefit from the spirit of curiosity this prestigious academic connection brings to our care delivery and programs. Our Harvard affiliation also connects us to four major teaching hospitals in the Boston area and Harvard Medical School's 18 academic health care centers. Future doctors, researchers, and health care professionals find an enriching learning environment as they learn from and work alongside our skilled professionals. HSL trains over 1,000 medical and nursing students and students from other health care professions each year.

HSL has embarked on a mission to address the growing need for affordable senior housing and increase both its senior housing and services footprint beyond our established six living communities. Three new developments for seniors aged 62 years have been and are in the process of being created: Simon C. Fireman Expansion project in Randolph; Leyland Community in Dorchester; and 108 Centre Street in Brookline. Simon C. Fireman Expansion, a new 45-unit development in Randolph broadens the existing 160-unit Simon Fireman Community. The new construction physically links the existing community and leverages the capacity of supportive services in a thriving independent living setting that affords quality housing for extremely low-income seniors. The project also helped meet the Commonwealth's subsidized housing inventory (SHI) goal by increasing the number of units in Randolph above 10.7%. Construction of this Passive House-designed project is complete with residents moving in and joining the community there.

Hebrew SeniorLife was engaged in a joint venture to develop 43 units of new senior affordable housing, Leyland Community in Dorchester. Together with Dorchester Bay Economic Development Corporation, a Minority Business Enterprise (MBE), HSL pursued the call to support the creation of the first quality, affordable senior development in a minority community to promote housing stability and meet the critical housing demands of the aging population. Located at 9 Leyland Street, Leyland Community, a Passive House-designed building, includes 41 one bedroom and 2 two-bedroom units with space for community events and other programming. Leyland Community is expected to be complete in November 2023 with new residents moving in immediately after construction completion.

The 108 Centre Street project, which is under construction, includes the creation of 54 one-bedroom units with community space and enhanced outdoor space for the recreational enjoyment of residents from our Center Communities of Brookline (CCB) campus and other seniors throughout Brookline. 108 Centre Street abuts the Brookline Senior Center so the community and space programming included in the 108 Centre Street building was coordinated with the Brookline Senior Center to ensure that seniors throughout Brookline can avail themselves of the services and programs that most interest them. Seniors will benefit from enhanced fitness programming, case and transitions management, multigenerational programs, quality meals, health care services and nursing support. The programming at 108 Centre will be complemented by our strong site and management staff who include a Director of Community Life and Resident Services Coordinator, Fitness Specialist, Wellness Nurse and Director of Property Management.



**AVENUE DEVELOPMENT LLC, WBE:** Avenue Development led by Loryn Sheffner is the project consultant. The Boston-based firm has expertise in real estate and community development. Loryn has over 20 years' experience working on aspects of planning, policy, financial analysis, management of mixed-use housing and construction. Sheffner is joined by Carolyn Shiel of Shiel Consulting LLC. Carolyn is a real estate development professional and consultant who specializes in complex housing developments and financing transactions. Together, they bring in-depth experience and expertise in driving the proposed project forward in areas involving: project feasibility, permitting and zoning procedures, pre-development, construction and tax credit financing, deal underwriting and structuring informing funder and equity investor requirements. Avenue Development's contribution on past projects include, the Soldiers Home in Chelsea, Hamilton Canal Crossing in Lowell, Madison Tropical Parcel 10 in Roxbury and The Western MA Food Bank in Chicopee.

**ARCHITECT: DIMELLA SHAEFFER**

DiMella Shaffer Architecture is located in Boston. The company is dedicated to creating spaces and designing housing that is influenced by the principles of balance between social, environmental and aesthetic expressions. They have an established senior living design team with wide experience in designing affordable, resilient, sensible, welcoming and livable spaces for seniors. Their design team is well equipped to guide HSL through the design concepts, master planning and coordination with local residents, and community stakeholders to promote positive outcomes throughout the design process.

Some of DiMella Shaffer's senior housing projects are The Baldwin in Londonderry New Hampshire, The Pryde in Hyde Park and Mary D Stone Apartments in Auburn. DiMella Shaffer previously worked with HSL on the interior renovations of the Orchard Cove senior housing community in Canton.

**CIVIL ENGINEERING: BEAL AND THOMAS**

Beal and Thomas is a leading engineering firm in Massachusetts with specialties in civil engineering, land survey design and environmental analysis. Beal and Thomas aims to collaborate and support the client's vision of the physical and surrounding built environment. The firm is recognized as a problem solver and known for their solution-oriented focus in both civil and environmental planning. Beal and Thomas served in this role for several recent projects such as: Tihonet Development in Wareham, Cambridge Crossing in Somerville, Ames Shovel Apartments in Easton and Arlington 360 apartment, and townhomes in Arlington.

**LANDSCAPE ARCHITECT: CROWLEY COTTRELL, WBE**

Crowley Cottrell is a Boston based Landscape Architect. The firm is adept and versatile in providing advice and guidance on issues related to site permitting, preservation, grading and drainage, planning and sustainable design. Their differentiating niche involves understanding how to best leverage what already exists while adding unparalleled design that encourages and delivers functional, inviting and relaxing spaces with the surrounding environment. Crowley Cottrell worked with HSL on the landscape design of the Orchard Cove community and Jack Satter House in Revere.

**LEGAL: LAW OFFICES OF BARRY R. CRIMMINS, P.C.**

Barry R. Crimmins, P.C. is a Stoughton based law firm with a multifaceted practice area representing clients on issues regarding municipal permitting, the development, acquisition and sale of real estate and land use permitting. Barry R Crimmins also supports developers and municipalities in the creation of affordable housing. He offers responsive and appropriate advice to clients in all areas of their practice.



Attorney Barry Crimmins is very familiar with the Town of Stoughton. He serves as the Chair of the Stoughton Housing Authority and has worked on several local Comprehensive Permit applications.

### **13. URGENT REVIEW**

We do not anticipate a request for Urgent Review.

### **14. REPORTING TO COMMUNITY PRESERVATION COMMITTEE**

HSL intends to comply and provide timely updates about the project, milestones and related construction efforts as requested by the CPC.

**ATTACHMENTS:** We have included all required attachments per the following sections of the application: Required for All Proposals; Priority Proposals; Required for Community Housing Proposals; Required for Proposals Involving Real Property; and Required for Proposals Involving Design & Construction

Attachment 1: Site Photographs

Attachment 2: Site Map, Major Roads & Intersections

Attachment 3: Draft Warrant Article for Town Meeting

Attachment 4: Letters of Support from Town departments

Attachment 5: Notices to Direct Abutters.

Attachment 6: Letters of support from neighborhood groups

Attachment 7: Letters of support from project abutters or why support not demonstrated

Attachment 8: Accommodation for people with disabilities

Attachment 9: Statement of support from the Stoughton Housing Authority

Attachment 10: Deed

Attachment 11: Development Pro Forma and 10-year operating budget

Attachment 12: Site plans, floor plans, elevations

Attachment 13: Sustainability

Attachment 14: Compliance with building codes, etc.