



Final CPA Application
Rejuvenation of Sherman Gardens

Belmont Housing Authority

December 5, 2022

Prepared by: 

Community Preservation Committee Town of Belmont

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DATE: December 2, 2022
TIME: 4:32 PM

CPA Funding - Final Application

Ten copies of the completed Final Application must be submitted to the following address by no later than 7:00 pm on Monday, December 5, 2022:

Community Preservation Committee
Matthew Haskell, CPA Administrator
Office of the Select Board
Belmont Town Hall
455 Concord Avenue
Belmont, MA 02478

Unless an applicant can demonstrate that a significant opportunity would otherwise be lost, final applications will not be accepted after the submission deadline. In order for the CPC to consider a project proposal that cannot adhere to the deadlines as outlined in the **Standard Application Process**, the project must meet the additional selection criteria as outlined in the **Special Application Process**.

Project Title: Rejuvenation of Sherman Gardens

Project Location: 131-135 Sycamore Street, Belmont, MA 02478 (Parcel ID: 28-101)

Applicant/Contact Person: Allison MacMartin, District Manager

Organization: Belmont Housing Authority

Mailing Address: 59 Pearson Road, Belmont, MA 02478

Telephone: 617-484- 2160 **E-mail:** amacmartin@cambridge-housing.org

Signature: Allison MacMartin **Date:** 12/2/22

CPA Category (check only one, in consultation with the CPC):

- | | |
|---|-------------------------|
| <input checked="" type="checkbox"/> Community Housing | D Historic Preservation |
| D Open Space | D Recreation |

Amount Requested: \$400,000

Total Project Cost: approximately \$70,167,000

The CPC will review the Final Applications. Applicants will be contacted if additional information or an interview is required. The CPC may also request to visit the site of the proposed project. Applicants will be notified by mid-January whether the CPC plans to recommend their project at the next Annual Town Meeting.

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Project Description

Goals: What are the goals of the proposed project?

Sherman Gardens is a state public housing development currently composed of eighty (80) one-bedroom rental units for the elderly and persons with disabilities (Chapter 667). The property is owned by Belmont Housing Authority (BHA), and it is located at 131-135 Sycamore Street, Belmont, MA 02478 (Parcel ID: 28-101). Sherman Gardens was constructed in 1971. The community consists of six, two-story brick masonry buildings.

As demonstrated by the attached photographs and overview of existing conditions (Exhibit #1), Sherman Gardens has significant capital needs. In addition to building systems and interiors that are original to the 1970s, the buildings are functionally ill-suited for their intended population of elderly and disabled residents. Specifically, half of the units in the garden apartment complex are accessed via stairs, posing a major architectural access barrier to residents and their ability to age in place.

This Community Preservation Act (CPA) application seeks development funding to support the redevelopment of Sherman Gardens. A funding award would build upon prior CPA allocations for this purpose made in fiscal year 2018 (\$173,200) and 2022 (\$400,000). These awards provided funding for consulting, feasibility analysis, architectural, and engineering work at Sherman Gardens. Predevelopment efforts are proceeding well, with a feasibility report prepared by Cambridge Housing Authority (CHA) scheduled for delivery to BHA in December 2022. This report will include architectural and site design concepts for consideration by BHA, including a mix of renovation and new construction to both preserve and expand Belmont's affordable housing stock.

BHA has developed the following goals for the redevelopment of Sherman Gardens:

- Replace the 80 current units for elderly/disabled individuals with at least the same number in a high-quality and accessible mid-rise building.
- Create new, additional affordable housing units on site.
- Optimize the site to include sufficient community space, residential amenities, and outdoor spaces.
- Streamline resident traffic to and from the new mid-rise building, while providing adequate parking for the resident population.
- Ensure that Sherman Gardens has sustainable rental subsidy sources in order to create long-term operational stability.

The \$400,000 in CPA funding requested in this application will further support design activities required for zoning approval, which will make the project shovel-ready. Both a zoning approval and the Town's ongoing financial commitment will enhance BHA's ability to leverage funding from other entities, such as Community Economic Development Assistance Corporation (CEDAC), Local Initiatives Support Corporation (LISC), Massachusetts Housing Partnership (MHP) and the Massachusetts Department of Housing and Community Development (DHCD)

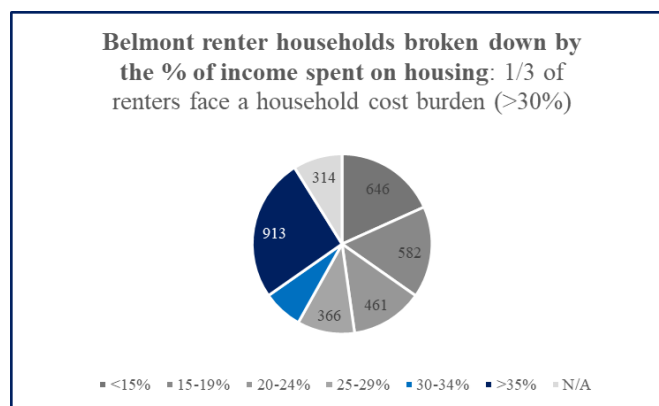
From time to time, DHCD issues Notices of Funding Availability (NOFA) for housing authorities for specific grants to enable housing authorities to redevelop or modernize a property. Potential grants include the Public Housing Innovations (PHI) Grant, Modernizing Public Housing and Serving Elders (ModPHASE), and

High Leverage Asset Preservation Program (HILAPP) among others. DHCD has been allocated a significant amount of American Recovery Plan Act (ARPA) funding. There is a DHCD Notice of Funding Availability (NOFA) to fund the federalization of state public housing which the development team is evaluating for Sherman Gardens. Moving forward expeditiously with Sherman Gardens’ design work in 2023 will position BHA to submit a compelling, fundable application to DHCD.

Community Need: Why is the project needed? Does it address needs identified in existing Town plans?

The redevelopment of Sherman Gardens -will both preserve and expand the stock of affordable rental housing in Belmont. Therefore, the project achieves multiple of the preferences for funding articulated in the Town of Belmont’s *Community Preservation Plan* (2017; pages 7-8):

- **Demonstrate consistency with other current and widely scrutinized planning documents that have been adopted by the Town of Belmont.** Belmont has adopted multiple planning documents that emphasize the importance of producing and preserving affordable housing. Notably, the *Town of Belmont Comprehensive Plan: 2010-2020* (2010; page 50) includes providing “affordable housing options for young families and the aging” as a goal. *Belmont’s Housing Future: Housing Production Plan* (2018; pages 34, 41) recommends creating affordable housing options for seniors and highlights Sherman Gardens as an important site for development.
- **Benefit a currently under-served population** – There is currently an acute need for housing that serves low-income and elderly households in Belmont. According to the American Community Survey (2020 5-Year Estimates) median monthly housing cost (\$2,272) in the Town has risen 34% over the past decade. This median housing cost is a burden (greater than 30% of income) to households earning less than \$90,880. Over 2,900 households in Belmont (29.7% of all households) experience such a housing cost burden, yet little new affordable housing is being built. In 2018, the *Housing Production Plan* assumed that the Town’s Subsidized Housing Inventory (SHI) was effectively 675 units (6.67% of all housing). As of December 21, 2020 the SHI stands at 661 units (6.5% of all housing), indicating that there may have been a small net loss of affordable units in 2019-2020.



- **Leverage additional public and/or private funds** – Investment in Sherman Gardens’ redevelopment planning makes the project more competitive for DHCD’s open NOFA for state public housing federalization. DHCD financial support is critical for project feasibility. For example, a state public housing project in Medford that is similar to Sherman Gardens received predevelopment funding through the CPA process, in a comparable fashion to this proposal. That

project was recently awarded \$15 million in DHCD capital grant funding through the Public Housing Innovations Demonstration Program. As evidenced by the development proforma, the BHA could leverage over \$17 of private and state funding for every projected CPA dollar awarded to the project.

Within the Community Housing category of the Community Preservation Plan (2017; pages 18-19), Sherman Gardens directly addresses specific criteria. A recommend area of focus for Community Housing investment is working “with the Belmont Housing Trust and Belmont Housing Authority to assist with the creation of affordable and/or community housing.” Additionally, a selection criterion is that the project should “assist in the financing or construction of new affordable housing, especially on multi-family rental sites.” The rejuvenation of Sherman Gardens is a priority project for the Belmont Housing Authority, as well as the Town of Belmont. It has the potential to guarantee continued affordable housing for 80 extremely low-income households and to create new units of deeply affordable housing, which will benefit the Town for decades to come.

Community Support: What is the nature and level of support for this project? Include any letters of support and petitions.

The Community Preservation Commission’s (CPC) latest annual plan indicates an intent to work with BHA to create affordable and/or community housing.

Prior CPA awards of \$173,200 in 2018 and \$400,000 in 2022 have been extremely useful in establishing the potential for redevelopment and new construction at Sherman Gardens. The CPC’s continued support for this project will go a long way in ensuring that the Sherman Gardens redevelopment can make credible funding applications to DHCD in 2023.

Additionally, the Belmont Housing Trust is expected to issue an updated letter of support for the project at either its 12/15/22 meeting or its 12/22/22 meeting. This letter will be sent as a supplement to this application.

Project Documentation: Attach any applicable engineering plans, architectural drawings, site plans, photographs, any other renderings, relevant studies or material.

Predevelopment of Sherman Gardens will involve the study of site and building conditions, as well as the creation of architectural and engineering drawings. Representative of such ongoing efforts, attached please find an environmental site assessment (Exhibit #2). This 2019 report found no Recognized Environmental Conditions on site.

Timeline: What is the schedule for project implementation, including a timeline for all critical milestones?

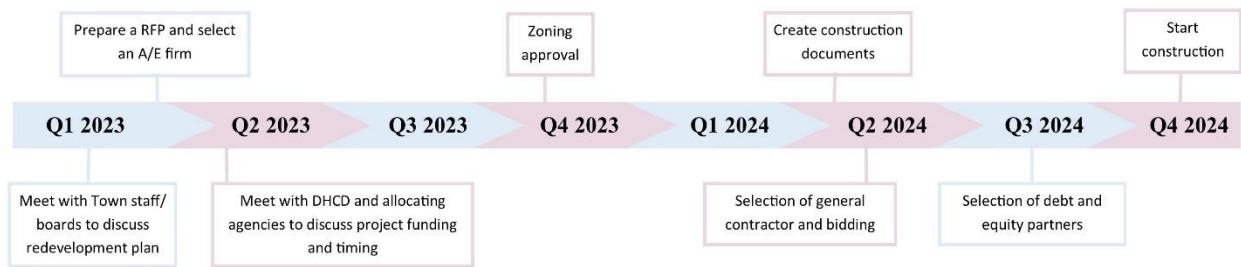
In order to advance the redevelopment of Sherman Gardens and take advantage of current DHCD funding opportunities, BHA intends to take the following steps during 2023 and 2024:

1. Meet with Town of Belmont staff and boards, as well as Sherman Gardens residents and neighbors, to review the forthcoming feasibility report. Preliminary comments from the Town, Sherman Gardens residents, and neighbors should be identified and incorporated into the project as it moves forward.



2. While those meetings are occurring, prepare and issue a Request for Proposal for architectural/engineering services required to obtain zoning approval and procure a contractor. The goal is to have a designer hired by March 2023 or April 2023.
3. Meet with DHCD and state allocating agencies (MassDevelopment and/or MassHousing Finance Agency), to discuss the availability and timing of potential public housing funding, a private activity bond allocation, which is necessary to be eligible 4% LIHTC, and other state soft loans.
4. Aim to have zoning in place by December 2023 or January 2024 so the project can be considered for DHCD 2024 Funding Round.
5. Supervise the design team through the development of the schematic design and construction documents.
6. Supervise the bidding process for selection of a construction manager and the subsequent pricing of the project.
7. Approve the redevelopment budget and selection of equity and lender partners in accordance with development agreement.
8. Close on financing to allow a construction start in later half of 2024.

In addition to these key steps, a thorough process of community engagement with Sherman Gardens residents and abutters will be critical.



Credentials: How will the experience of the applicant contribute to the success of this project? What prior municipal procurement experience does the applicant have? If the applicant has no prior procurement experience, what member of the project's working team or Town of Belmont Department Head mentor will be responsible for ensuring the project adheres to the necessary procurement laws?

BHA professionally manages a portfolio of 262 state public housing rental units. These units provide housing assistance for low-income families, veterans, elderly, and disabled individuals. The BHA portfolio consists of 100 units of two- and three-bedroom family housing, 154 units of elderly and handicapped/disabled housing, and an eight-unit Section 689 property serving individuals with developmentally disabilities in collaboration with the Department of Mental Health. BHA also administers 17 aided Alternative Housing Voucher Program vouchers, and 47 federally aided Section 8 Housing Choice Vouchers. The Housing Authority Board is made up of five members, four of which are elected for overlapping five-year terms. The fifth member is appointed by the state. The Board sets policy and are the fiduciaries of BHA.

Since August 2020, BHA has had a contract with CHA to provide day-to-day management services. During the summer of 2021, CHA's scope of work was expanded to include consulting on the redevelopment of BHA's properties. The Planning and Development staff at CHA have extensive experience with all tasks associated with the redevelopment of existing and construction of new affordable housing, including

project conception and execution, identifying and securing financing, managing relocation needs and construction phasing, overseeing design development and construction, and finalizing project completion. The staff of 25 is comprised of experienced project managers, architects, urban planners, construction supervisors, financial planners, and an energy specialist. CHA is one of only a few housing authorities nationally to do all its redevelopment and new development in-house. CHA has used a variety of public housing repositioning programs, including the federalization of state public housing, RAD, RAD Blend, and the Section 18 Disposition program. Since 2010, CHA has served as the developer of projects totaling over \$1 billion in total costs. CHA's projects have impacted over 2,000 units.

CHA has also been at the forefront of incorporating green and sustainability features into existing and new properties and has experience meeting the requirements of Enterprise Green Communities. To date, portfolio-wide energy efficiency upgrades have reduced CHA's annual utility cost by 32% while improving resident comfort and building performance.

CHA has extensive experience with public procurement and will be responsible for ensuring that the project adheres to laws. CHA's executive and legal teams were instrumental in the recent passage of the State Economic Growth and Relief Act (H. 5374) in November 2022. This legislation includes a long sought-after provision that should assist BHA in reducing the cost of constructing affordable housing. The law exempts redevelopment of state-aided or federally-aided public housing projects from the state's procurement requirements, except for prevailing wages. The land or buildings of a project must have been conveyed or transferred to an affiliated non-profit or private entity for purposes of completing redevelopment, and DHCD must approve the procurement method used to select a developer.

Success Factors: How will the success of this project be measured?

BHA will measure success based on short- and long-term outcomes. Short-term outcomes are the successful accomplishment of milestones in accordance with the schedule included in this application:

- Creation of schematic design documents
- Zoning approval
- Application to DHCD and other private/public partners for project funding

Long-term outcomes are related to the provision of affordable housing to low-income families:

- # of apartments renovated at Sherman Gardens
- # of newly constructed affordable apartments at Sherman Gardens
- # of households taken off of BHA's waiting lists (currently 14,569 applicants)
- Square feet of community and recreational space constructed
- Square feet of open space preserved/enhanced

Budget: What is the total budget for the project and how will CPA funds be spent? All items of expenditure must be clearly identified. Distinguish between hard and soft costs and contingencies.

The redevelopment of Sherman Gardens is anticipated to have a total cost of approximately \$70.2 million. This preliminary budget is subject to change as construction prices and interest rates fluctuate. Furthermore, the budget may be impacted by the design choices made by BHA in consultation with Town staff and Boards as the project moves forward.

Sources and Uses for Phase 2.A Redevelopment Option

Source	Total	Per Unit	Use	Total	Per Unit
4% LIHTC Equity	\$34,056,253	\$252,269	Acquisition	\$2,000,000	\$14,815
Permanent Loan	\$10,829,497	\$80,218	Hard Costs	\$53,227,550	\$394,278
State Low Income Housing Tax Credit	\$4,100,000	\$30,370	Soft Costs	\$6,974,817	\$51,665
DHCD Public Housing	\$10,500,000	\$77,778	Financing Costs	\$2,992,953	\$22,170
DHCD Housing Production	\$4,400,000	\$32,593	Reserves	\$487,506	\$3,611
Belmont CPA (previously awarded)	\$573,200	\$4,246	Developer's Fee	\$4,484,141	\$33,216
Belmont CPA (current request)	\$400,000	\$2,963			
Belmont CPA (future request)	\$3,026,800	\$22,421			
BHA Acquisition Loan	\$2,000,000	\$14,815			
Deferred Developer Fee	\$281,218	\$2,083			
Total	\$70,166,968	\$519,755		\$70,166,968	\$519,755

CPA funding will be utilized on architecture, engineering, and related due diligence that prepare the project to receive zoning approval and make it shovel-ready for construction.

As demonstrated by the below table, the development budget to bring Sherman Gardens to a construction loan closing is approximately \$1.5 million. CPC's prior \$573,200 awards to BHA are utilized for predevelopment costs. BHA is working to secure the balance of predevelopment funding needed through CEDAC, LISC, and/or PCI among others.

Sources and Uses Through Construction Loan Closing

Source	Amount	Use	Amount
Belmont CPA (previously awarded)	\$573,200	Architect & Engineering*	\$1,287,620
Belmont CPA (current request)	\$400,000	Survey & Permits	\$12,500
To-Be-Awarded CEDAC, LISC, MHP, HOME and DHCD	\$562,569	Environmental	\$15,000
		Legal	\$40,000
		Title and Recording	\$1,500
		Appraisal	\$12,000
		Financing Fees	\$17,149
		Staffing/Consultant	\$150,000
Total	\$1,535,769		\$1,535,769

*Reflects A/E firm differing half of their fee until construction loan closing

Other Funding: What additional funding sources are available, committed, or under consideration? Include commitment letters, if available, and describe any other attempts to secure funding for this project.

Predevelopment funding will be sought from CEDAC, LISC, MHP, and DHCD. BHA has previously received \$48,975 in funding from the WestMetro HOME Consortium, which is being utilized for both Sherman Garden and Belmont Village redevelopment planning.

CPA funding lays the groundwork for receipt of many other public and private sources of funding. Potential funding sources include:

- Low Income Housing Tax Credit (LIHTC): The main source of financing for affordable housing development is the LIHTC program. There are two types of LIHTC (4% and 9%), which are named based on the percentages of eligible costs that they use to calculate tax credit availability.
- DHCD Soft Loan/Grant Funding: As noted previously, from time to time DHCD makes available funding to support the modernization of public housing and development of affordable housing. DHCD programs that may be applicable to Sherman Gardens include, but are not limited to:
 - High Leverage Asset Preservation Program (HILAPP): This state funding program supports the comprehensive modernization and preservation of the state's public housing stock. The program provides grants to local housing authorities (LHAs) that are able to secure matching funds from local and/or other non-DHCD sources.
 - Modernizing Public Housing And Serving Elders (ModPHASE): Since 2016, the ModPHASE program has provided expanded access to funding for capital improvements and supportive services to Chapter 667 state public housing communities (elderly/disabled).
 - Public Housing Innovations (PHI): PHI is a state program created in 2015, and it helps LHAs find creative strategies to redevelop their state public housing portfolios. Completed grant rounds have funded such strategies as mixed-income redevelopment, transferring units to federal regulation and subsidy, and mixed-finance redevelopment involving tax credits and the addition of new affordable units.
 - State Federalization NOFA: The MTW Federalization Program at DHCD issued a NOFA in October 2022 for a rolling application program funding work to be conducted prior to federalization of state public housing.
 - State Housing Production Loans: DHCD also provides a variety of funding for new units including funding through Affordable Housing Trust, Housing Stabilization and Investment Funding, Capital Improvement & Preservation Trust, Housing Innovation Funding, Community Based Housing Funding and Facilities Consolidated Funding
- Federal Programs: The federal government is an active funder of affordable housing:
 - American Rescue Plan Act (ARPA): In 2021, ARPA was passed by the federal government to enable American households to remain stably housed during the pandemic. States and local governments can use ARPA funds for affordable housing projects. Belmont was designated to receive \$7.8 million in ARPA money during 2021 and 2022.
 - HOME Investment Partnerships Program (HOME): HOME is a federally funded program that assists in the production and preservation of affordable housing for low- and moderate-income families and individuals. Belmont is part of the WestMetro HOME Consortium.
 - Energy Incentives for Affordable Housing: The federal Inflation Reduction Act directs \$1 billion to grants and loans towards improving energy and water efficiency, as well as climate resilience, in HUD-assisted multi-family housing.
 - Elderly Modernization Notice of Funding Availability (NOFA): HUD's Section 202 Supportive Housing for the Elderly program provides capital funding for the development of supportive rental housing for very low-income persons aged 62 years or older.
- MA State Low Income Housing Tax Credits (SLIHTC): DHCD allocates SLIHTC competitively through annual funding competitions.

Town Properties: All CPA applications filed by a private person or entity for a CPA project either located on, or which involves, public land, structures, personal property or amenities shall be co-sponsored by [...] entities of the Town of Belmont which have control of, or jurisdiction over, said land, structure, personal

Rejuvenation of Sherman Gardens

CPA Final Application

Belmont Housing Authority



property or amenity. The [...] entities of the Town of Belmont which have control of, or jurisdiction over, said land, structure, personal property or amenity may set guidelines, standards and rules for, or make revisions to a CPA project

Sherman Gardens is a project that involves public land and structures. Therefore, it will be sponsored by BHA, a public entity in the town of Belmont founded in 1948.

As a result, the requirements for a private entity acting as a project sponsor (nonprofit 501(c)(3) organization and submission of IRS determination letter) are not applicable.

Maintenance: If ongoing maintenance is required for your project, how will it be funded?

After redevelopment, affordable housing on the Sherman Gardens site will require ongoing maintenance. BHA has entered into a management agreement with CHA, which will be managing and maintaining the property after construction completion. CHA will fund maintenance by using Sherman Gardens' operating income (project-based operating subsidy and tenant rents). BHA will be positioned to successfully and sustainably operate Sherman Gardens given the introduction of new rental assistance and a more robust operating budget upon completion of the redevelopment. BHA currently manages and operates 262 public housing units across four sites. BHA has been operating and managing public housing units since 1948. BHA's Maintenance Department is responsible for the day-to-day upkeep of properties, including routine and non-routine work orders, grounds maintenance, landscaping, common area cleaning, vacant unit preparation, and snow removal.

Impact on Town Budget: What, if any, potential secondary effects will your proposed project have on the Town's Operating Budget? Are there any capital projects that rely on the successful completion of your project?

The comprehensive redevelopment of the Sherman Gardens property is highly contingent on the receipt of CPA funding to complete both pre-development and development activities. CPA funding will assist the project in securing necessary zoning approvals, as well as additional state and federal funding.

The development budget included within this application includes a \$3.0 million line item for anticipated future CPA funding. Subject to future conversation with the Town and CPC, BHA believes that an effective way for CPC to generate this vital funding would be to pledge a portion of its future annual proceeds to support a bond issuance.

Additional Information

1. Control of Site

The site is owned and controlled by the Belmont Housing Authority.

2. Deed Restrictions

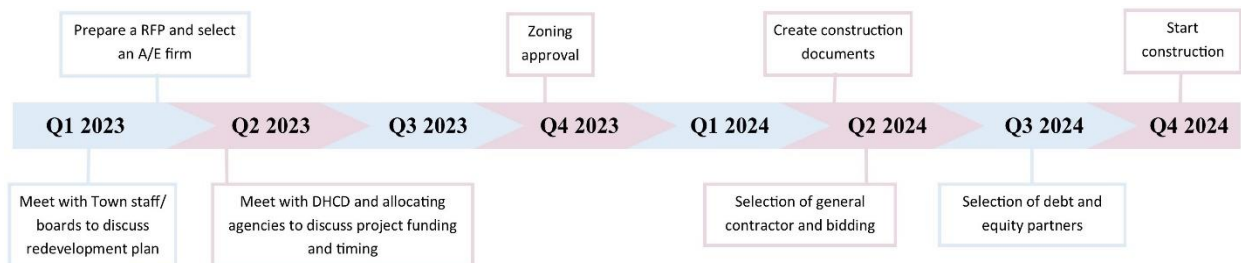
The property is currently state-assisted public housing and is required to serve elders and persons with disabilities with income at or below 80% of area median income. BHA's proposed redevelopment of the site would continue to serve the same population. DHCD will require a use agreement be placed on the property requiring its use for affordable housing.

3. Acquisitions

Not applicable. BHA currently owns the Sherman Gardens property.

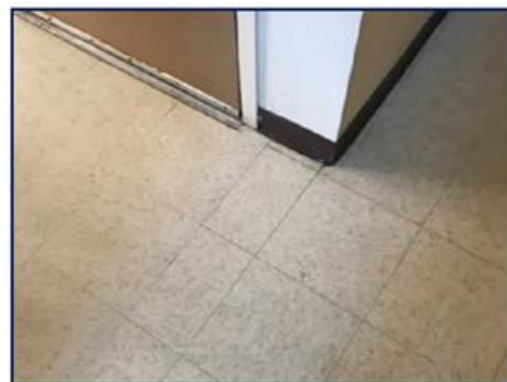
4. Feasibility

Redevelopment of the Sherman Gardens property will require zoning approvals. As discussed in greater depth within the Project Description, BHA anticipates the following timeline for further actions.



5. Hazardous Materials

An Environmental Site Assessment (Exhibit #2) conducted in 2019 did not show any recognized environmental conditions associated with the property. However, some additional testing will be required since the initial assessment did not include testing building components for either asbestos containing materials or lead-based paint.



It is unknown whether asbestos remains under the tile flooring in units

6. Permitting

The Sherman Gardens redevelopment project will likely require zoning approvals, which are expected to be received in Fall/Winter 2023. The project will conform with the appropriate building codes.

7. Environmental Concerns

The prior environmental reports did not identify any wetlands, floodplains, or other natural resource limitations within the boundaries of the project.

8. Professional Standards

Cambridge Housing Authority (CHA), which is serving as BHA's development consultant, has extensive experience with all aspects of the redevelopment of existing and construction of new affordable housing, from project conception to completion. CHA's Planning and Development team includes 25 experienced project managers, architects, urban planners, construction supervisors, financial planners, and an energy specialist. This allows CHA to be one of only a few housing authorities nationally to do all its development work in-house. CHA has used a variety of public housing repositioning programs, including the federalization of state public housing, RAD, RAD Blend, and the Section 18 Disposition program. Since 2010, CHA has served as the developer of projects totaling over \$1 billion in costs. CHA's projects have impacted over 2,000 units.

9. Fundraising

Not applicable.

10. Further Attachments

Exhibit #3 provides the property's assessment map.

Exhibit 1: Existing Conditions Photographs and Description

Sherman Gardens – Existing Conditions and Opportunities

A. Physical Conditions

The Sherman Gardens site is approximately 80,586 square feet. The site includes a stand-alone community center and 80 one-bedroom units of approximately 415 square feet spread across six (6) two-story, walk-up buildings. Located in the Waverly Square section of Belmont, MA, the site has excellent transit access. It is situated just 0.15 miles from the MBTA Commuter Rail Fitchburg line, which provides service to downtown Boston, Porter Square in Cambridge, and employment centers along I-495. Bus routes 73 and 554 also have stops within 0.25 miles of Sherman Gardens. These bus routes offer access to Harvard Square in Cambridge, Waltham, and Newton. Sherman Garden’s immediate, mixed-use neighborhood includes the sprawling Beaver Brook Reservation, active and passive recreational open spaces, a supermarket, a pharmacy, and McLean Hospital, which is an anchor institution that employs over 1,900 individuals.

Over the years, BHA has been a strong steward of Sherman Gardens. Although the property is in relatively good condition considering its age, there are signs of deterioration. The property is no longer able to effectively serve its current resident population (seniors aged 60+ and persons with disabilities). The property's obsolescence is due to the following factors:

- Nearly all building exteriors, systems, and interiors are in their original condition from 1971. Property management staff have observed water infiltration, degradation of finishes, and failing building systems (electrical, heating, ventilation, plumbing, etc.).
- Half of the units are located on the second floor and accessed by a staircase, which makes them inaccessible to residents who are disabled or infirm. Virtually none of the common entrances meet required widths or heights for wheelchair accessibility.
- At 415 sq. ft., units are much smaller than DHCD’s target size of 600 sq. ft., for one-bedrooms. The units would benefit from more storage space, natural light, and insulation.

These issues have made Sherman Gardens functionally obsolete to its intended and current population. As residents age, their mobility needs grow, but Sherman Gardens is unable to provide a supportive living environment.

Building Systems Summary

Building System	Type	Condition Notes
Foundation	Slab-on-grade (no basements; 4')	Poor condition
Roof	Asphalt	
Space Heating	Electric baseboard	Outdated
Water Heating	Electric boiler	
Cooling	None	
Electric	Breakers	Outdated; lacks capacity



Kitchens are original to the 1970s, with finishes in worn condition and some kitchens showing signs of water damage. Stoves are not full size and there is inadequate food preparation area



Single-pane, uninsulated windows are not energy efficient. Given their age, replacement parts are not available, making it difficult to maintain them in operable condition



Most bathroom fixtures are original to 1970s, and some bathrooms have water damage



Second-floor units require use of a steep and narrow staircase



Resident storage is located in basement of community building and prone to flooding



All units have at least one step up into their front entrance



Sherman Garden's community building is well-used, but in deteriorating condition



Residents informally maintain flowers and landscaping

B. Environmental

In 2019, Campbell Environmental, Inc. conducted an environmental site assessment of Sherman Gardens. The report found no Recognized Environmental Conditions on the site. However, some additional testing will be required since the initial assessment did not include testing building components for either asbestos containing materials or lead-based paint.

Exhibit 2: Environmental Assessment

**ENVIRONMENTAL SITE ASSESSMENT
SHERMAN GARDEN APARTMENTS
131-135 SYCAMORE STREET
BELMONT, MASSACHUSETTS**

Prepared for:

Belmont Housing Authority
59 Pearson Road
Belmont, MA 02478

July 19, 2019

Prepared by

Campbell Environmental Incorporated
38 Sunset Drive
Northboro, Massachusetts 01532

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LIMITATIONS

EXECUTIVE SUMMARY

Campbell Environmental Incorporated (CEI) was retained by the Belmont Housing Authority to complete a Phase I Environmental Site Assessment (ESA) of the property located at 131-135 Sycamore Street, in Belmont, Massachusetts.

The subject site (site,) the Sherman Gardens Apartments, is residential housing complex, with six residential two-story buildings housing 80 one-bedroom apartments and a central community center/office/maintenance building. The buildings were constructed in 1971. The property is approximately 80,440 square feet and is identified by the Town of Belmont assessors map as property 28-101. Land use in the vicinity of the site is residential.

This ESA was performed in accordance with a proposal approved by the Belmont Housing Authority. Activities included a site visit, interviews with municipal officials, historical research, an interview with a representative of the property owner, and a review of available environmental records.

The Town of Belmont provides public water and sewer to the site building. The site is not located in a Massachusetts Department of Environmental Protection (MassDEP) designated Zone II groundwater recharge area or designated potentially productive aquifer and no potable wells were identified within at least 500 feet of the site.

Based on historical records, the site was developed in 1971. Historical aerial photos and maps indicate the site was undeveloped prior to 1971 although agricultural use is possible.

Based on a review of available records and the site visit, a release of oil or hazardous materials (OHM) was not identified at the subject property.

Several Massachusetts Department of Environmental Protection (MassDEP) listed releases were identified within ½ mile radius of the site. Based on distance from the site and/or elevation and/or status (closure) these releases appear unlikely to substantially impact the subject site.

Based on a site visit, interview with a representative of the property owner and review of available records, no REC's were identified at the site.

Signature of Environmental Professional

This report was prepared and reviewed by an employee of Campbell Environmental Incorporated whose signature appears below. As specified in E 1527-13 to the best of my professional knowledge and belief, I meet the definition of Environmental Professional as defined in 312.10 of 40 CFR 312. I have the specific qualifications based on education, training and experience to assess a property of the nature, history and setting of the subject property. I have developed and performed the all appropriate inquiry in conformance with the standards and practices set forth in 40 CFR Part 312.

George E Campbell

George E. Campbell, PG, LSP

1 INTRODUCTION

1.1 Purpose and Scope

The Belmont Housing Authority retained CEI to perform a Phase I ESA of the property located at 131-135 Sycamore Street, in Belmont, Massachusetts (site).

In order to prepare this report, CEI conducted a reconnaissance of the site and immediately adjacent properties. The site includes the Sherman Garden Apartments, a public housing complex. Six two-story residential apartment buildings housing 80 one-bedroom apartments are located on site. The site latitude and longitude is 42.3858590 and 71.1931650 respectively. See Appendix A for a MassDEP Priority Resources Map and site photographs.

This ESA was performed generally in accordance with a proposed scope of work (SOW) approved by the Belmont Housing Authority and ASTM Standard E 1527-13. The investigation included the following:

- ∞ Assessment of current site conditions for the identification of Recognized Environmental Conditions (RECs).
- ∞ Inspection of the site grounds for evidence of releases of oil or hazardous materials (OHM) as defined by the Massachusetts Contingency Plan (MCP).
- ∞ Visual assessment of abutting properties from the subject site.

In accordance with the proposal, the following activities were completed:

- ∞ A site walkover and visual site inspection.
- ∞ Visual inspection of abutting properties from the subject site.
- ∞ Research at municipal offices including the Fire Department, Assessors Office, Building Department, and Public Library.
- ∞ Review of MassDEP, Bureau of Waste Site Cleanup disposal site list.
- ∞ Review of MassDEP, Bureau of Waste Site Cleanup underground storage tank list.

- ∞ A computer search of State and Federal Government Environmental databases by EDR.
- ∞ Review of historical maps and records.
- ∞ Interview with a representative of the property owner.

2 SITE DESCRIPTION

2.1 Property Location and Description

The subject property is located at 131-135 Sycamore Street in Belmont, Massachusetts. The site includes six two-story apartment buildings and a centrally located recreation/office/maintenance building. The property is approximately 80,440 square feet in size.

The site is located in a residential neighborhood in the Town of Belmont. Abutting properties are residential. The site elevation is approximately 69 feet above mean sea level. Site topography is level. The site is not identified within a 100-year floodplain. See Appendix A for a MassDEP Priority Resource Map, a Town of Belmont Assessors Map and site photographs. See Appendix B for local records.

2.2 Sensitive Receptors

The Town of Belmont provides public water and sewer to the site buildings. No drinking water wells are located on the subject property. No records identified potable wells within at least 500 feet of the property boundary. A MassDEP Priority Resource Map (see Appendix A) was reviewed and the site is not located in a MassDEP designated Zone II or potentially productive aquifer. MCP GW-1 standards, protective of drinking water use, do not apply to the site. A building exists on-site, and depth to ground water is assumed to be less than 15 feet below grade. MCP GW-2 standards, protective of indoor air quality, therefore apply within 30 feet of an occupied building. MCP GW-3 standards, protective of surface water, also apply to site groundwater.

Storm water runoff is controlled by catch basins installed in adjacent streets. The nearest surface water body, Beaver Brook, is located approximately 600 feet northwest of the site.

2.3 Site Reconnaissance/Interview

See Appendix C for the interview checklist completed by Mr. Joe Whalen (representative for the property owner). Mr. Whalen had no knowledge of environmental incidents or releases of oil or hazardous material at the subject site.

On July 8, 2019, a visual reconnaissance of exterior and interior portions of the site was conducted to identify RECs at the site or immediately adjacent properties by means of a

visual, surficial inspection. Observations concerning the site visit are summarized as follows:

Six separate apartment buildings and one office/recreational/storage/maintenance building is located on site. The site also includes paved parking and landscaped grounds.

Utilities identified in the site vicinity include electric, natural gas, municipal water and sewer. Storm-drains were observed in streets and parking areas.

The buildings are heated by electricity.

One transformer was observed on site. No markings were observed on the transformer and the transformer may contain PCBs.

Stained soils were not observed on site.

Dry wells, pits, ponds or lagoons were not identified.

No basements are present in the residential buildings on site.

Foul odors or evidence of surface oil or hazardous material spills were not identified.

Areas of stressed vegetation were not observed.

Hazardous substances or petroleum products associated with a REC were not observed.

55-gallon drums associated with the storage of oil or hazardous materials were not identified at the site.

Odors associated with hazardous materials or an REC were not detected.

Containers of hazardous materials (beyond household commercial cleaning products, paint, and pesticides etc.) were not observed.

Pools of liquid were not identified on the site.

No landfilling or disposal of solid or hazardous waste was observed or reportedly occurred at the site.

Historic fill soils were not identified at the site.

Beyond de minimus quantities, stained pavement was not observed.

Active underground or aboveground storage tanks were not observed on site (historical UST's were not identified).

3 SITE HISTORY

3.1 Site History/Records Review

Sanborn Fire Insurance Maps from 1922, 1931 and 1949, and historical aerial photographs from 1938, 1955 and 1969 were reviewed. Development of the property was not apparent from the maps and photos reviewed. See Appendix E for historical maps.

Local records were reviewed at Town of Belmont offices, the public library and the Belmont Historical Society. See Appendix B. Results of this review are briefly summarized below:

- ∞ The Town of Belmont Fire Department did not identify any underground storage tanks or environmental incidents on the site.
- ∞ The Town of Belmont Assessors Office lists the Belmont Housing Authority as the site owner. Town of Belmont assessor records are attached in Appendix B.
- ∞ Town of Belmont Building Department records were reviewed. The permits appear to be predominantly for electrical or minor alterations/repairs to the structure.
- ∞ Historical Town of Belmont Directories from 1922, 1927, 1937 and 1944 were reviewed at the Belmont Historical Society. No listings were identified for 131-135 Sycamore Street.

EDR Corporation conducted a search of environmental records. See Appendix F for the environmental record search and complete listing of results. Relevant search results (within 0.25 mile of the site) are briefly summarized below:

- ∞ Review of the Massachusetts Hazardous waste Generators Lists indicates that there are five generators within approximately 0.25 miles of the subject site.
- ∞ Review of the State Hazardous Waste Site (SHWS) list reveals five sites within approximately 0.25 miles of the site. These sites are identified below:

Site Address	Distance	RTN	Status
Near 21 Dwight Street	0.082 mile	3-25095	RAO
32 Chandler Street	0.085 mile	3-33328	PSNC
27 Lexington Street	0.129 mile	3-25391	RAO
563 Trapelo Road	0.204 mile	3-22478	RAO
Trapelo Road	0.227	3-3417	RAO

RAO = Site Closure, PSNC = Site Closure, RTN = Release Tracking Number

- ∞ Review of the Leaking UST database reveals five sites within approximately 0.5 miles of the site. The UST sites closest to the subject site are included in the SHWS list (see above).
- ∞ Review of the Leaking Aboveground Storage Tank database reveals three sites within approximately 0.25 miles of the site. Note that these properties are listed in the state hazardous waste site list, see above.

Based on a review of the MassDEP waste site list, multiple state listed sites are located within a half-mile of the subject property. Based on the site status (closure) and/or elevation and/or location, substantial impacts to the subject site appear unlikely.

EDR also identified several 'orphan' sites where the sites could not be mapped due to an inadequate description. Based on the descriptions (e.g. intersection), these sites appear unlikely to substantially impact the subject site.

The MassDEP underground storage tank (UST) list was also reviewed for the site and immediately adjacent properties. No UST listings were identified in the MassDEP database for the site or immediately adjacent properties.

3.2 User Required Information

The ASTM Standard requires the user of the ESA to provide certain specific information pertaining to the site. A representative of the user was not aware of any environmental liens or environmental use restrictions at the subject site. In addition, the user is not aware of any reduction in the purchase price vs. the fair market value of the property due to contamination at the site. The user has no specialized knowledge of the site (or adjacent property) or knowledge of chemical storage (beyond deminimus quantities of common paints, pesticides or cleaning products) or current or past environmental releases at the site.

4 IDENTIFICATION OF DATA GAPS

4.1 Data Gaps

Selected data gaps were identified during the ESA. These data gaps are briefly described below:

Historical property use prior to 1971 is unknown. Consistent with development in Belmont, the earliest use likely was agricultural. This data gap is considered unlikely to affect the conclusions of this report.

5 FINDINGS AND CONCLUSIONS

The salient findings of this Environmental Site Assessment (ESA) are summarized as follows:

According to the Belmont Assessors office, the site has been developed since 1971. Based on review of historical maps and aerial photographs property use prior to that time appears vacant although historical agricultural use is likely.

We performed a site visit, interview with a representative of the property owner and review of available records in accordance with the ASTM 1527-13 standard. Based on available records and the site visit, no reportable releases of OHM have occurred at the site and no RECs were identified.

The site is not located in a DEP designated Zone II or potentially productive aquifer and no potable wells were identified on site or within at least 500 feet of the site.

Multiple state listed sites are located within a half-mile of the site. These sites appear unlikely to substantially impact the subject site due to distance, downgradient location and/or site status (closure).

Campbell Environmental Incorporated performed this ESA in conformance with the proposal approved by Belmont Housing Authority and ASTM Practice E 1527-13.

Maps, atlases, records, and officials at government agencies and private parties were consulted during this ESA and report preparation. The information, findings and conclusions expressed within this report are limited to the accuracy of these sources. This project is subject to the attached limitations.

REFERENCES

Local Records

Town of Belmont Assessors Office

Town of Belmont Building Department

Town of Belmont Fire Department

Town of Belmont Public Library

Belmont Historical Society

State and Federal Records

Massachusetts Department of Environmental Protection, Bureau of Waste Site Cleanup Site List, DEP website, 2019

Massachusetts Department of Environmental Protection, Priority Resource Map, 2019

Massachusetts Department of Environmental Protection, Underground Storage Tank List, DEP website, 2019

EDR Corporation, Environmental Records Search, 2019

Other

NETR Historical Aerial Photographs

Directory of Belmont, Union Publishing, Boston, MA 1922

Lothrop's Belmont Directory, 1927, 1937, 1944

Sanborn Fire Insurance Maps

Exhibit 3: Property Assessor's Record and Parcel Map

Quick Zooms

Find Properties

Owner:

Parcel ID:

Address: #

[Clear](#)

Results Summary

Parcels for Identify

Parcel ID	Owner	Address
28-101	BELMONT HOUSING AUTHORITY	131-135 SYCAMORE ST

Detail Information [Zoom To](#)

Parcel ID	28-101
CAMA ID	3823
Owner	BELMONT HOUSING AUTHORITY
Address	131-135 SYCAMORE ST
LINK	28-101
PROP_ID	28-101
MAP_NO	28
LOC_ID	F_739075_2965770
CITY	BELMONT
ZIP	02478
OWN_ADDR	SYCAMORE ST TO THAYER RD
OWN_CITY	BELMONT
OWN_STATE	MA
OWN_ZIP	02478
OWN_ZIP4	
TOTAL_VAL	9908000.0000
FY	2022
LOT_SIZE	80440.0
LOT_UNITS	5
ZONING	7
INTEREST	Residential
LS_DATE	19500101
LS_BOOK	
LS_PAGE	
LS_PRICE	0.0000
LIV_UNITS	8
RES_AREA	5412
BLD_AREA	0
SOURCE	ASSESS
POLY_TYPE	FEE
PLAN_ID	



Find Abutters

SimpliCITY by PeopleGIS

FIND ZOOM FOLLOW

Map Info
State Plane, NAD 83 Ft
741242_2866433

About
Layers
Find

Map navigation controls including zoom in (+), zoom out (-), home, and other utility icons.