

**Sturbridge Affordable Housing Trust
Meeting Minutes
Tuesday, August 22, 2023
Town Hall**

Present:

Diane Trapasso
Margaret Darling
Wally Hersee
Ed Goodwin
Kathy Neal
Maura O'Connor
Jean Bubon, Town Planner
Robin Grimm, Town Administrator
Jeneé Lacy, Administrative Assistant
Will Downie, Barrett Planning Group



APPROVED

Absent:

Jamie Goodwin

K. Neal called the meeting to order at 4:30pm and read the agenda.

Approval of Minutes

June 20, 2023

Motion: To approve the minutes of June 20, 2023 as written.

By: E. Goodwin

2nd: W. Hersee

Vote: 5-0-1 (M. O'Connor abstained)

Discuss the Draft Mission, Vision & Values

W. Downie discussed the draft statements for the Trust's Mission, Vision & Values based on input from the Trust at the last meeting.

- Draft Mission Statement: 'The Sturbridge Affordable Housing Trust works to create low-and moderate-income housing that supports current and future residents of Sturbridge, and which empowers and strengthens the entire community. The Trust achieves this goal by:
 - Embracing creative and innovative ways to create and preserve affordable housing in Sturbridge;
 - Partnering with local and regional actors to amplify the Trust's impacts and coordinate responses to regional housing programs;

- Supports current residents to stay in Sturbridge, and ensure there is housing available for residents of all incomes and ages;
- Educating the public and local leaders on housing policy and the state of housing in Sturbridge; and
- Serving as an advocate for programs and policies that support the creation of affordable and lower cost housing in Sturbridge.'
- Draft Vision Statement: 'The Sturbridge Affordable Housing Trust is helping to create a barn-raising mentality of neighbors helping neighbors to empower creative, collaborative, and effective ways to create and preserve low- and moderate-income housing. The Trust is working to help stabilize the Sturbridge housing market and ensure that Sturbridge meets its affordable housing obligations by creating safe, supportive and mixed-income housing, thereby making all residents feel welcome and allowing everyone in Sturbridge to live how and where they choose, regardless of age, race, creed, disability, gender or income.'
- Draft Values Statement: 'The Sturbridge Affordable Housing Trust bases all of its decisions, plans, processes on a set of core values that serve to guide the Trust and its members:
 - Treat everyone with respect and dignity;
 - Protect the town and its interests;
 - Serve all residents of Sturbridge equally, regardless of income, race, ethnicity, religion, disability, gender, or class;
 - Remain connected and representative of the community; and
 - Collaborate and build community partnerships.

Review of If/Then Statement Results

W. Downie discussed the results of the If/Then Statements submitted and discussed by the Trust.

- Inputs: What the Trust Needs
 - Funds: The financial resources to operate grants, assistance programs and other activities.
 - Land: Trust owned land that can be used to lower development costs.
 - Partnerships: Building stronger ties with local actors to make collaboration possible.
 - Community Ties: Public awareness of the Trust, and what it does.
- How do we gain these inputs?
 - Funds
 - Identifying current and potential new sources of funding

- Applying for grants and greater allocations
- Developing frameworks for new funding streams
- Land
 - Identifying parcels that could be acquired for affordable housing
 - Building up the funds to acquire these properties
 - Development of plans and partners for each property
- Partnerships and Community Ties
 - Raising awareness of the Trust and the assets it possesses
 - Identifying what organizations are active in Sturbridge and the surrounding areas, and working to connect with them
 - Identifying other Town actors who also work on matters of housing, and establishing stronger connections with them

W. Downie asked if the Trust had any other input they wanted to add.

- K. Neal asked how the Trust could build strong ties and partnerships.
 - W. Downie discussed inviting people to meetings and joint meetings with other boards/committees, etc.
- K. Neal asked how to reach out to the community not just the Municipal Government.
 - J. Bubon discussed the Regional Housing Coordinator.
- R. Grimm discussed a lack of resources.
- J. Bubon suggested networking with other Housing Trusts.
- R. Grimm stated that resources for the Trust will be needed from the State.
- M. O'Connor asked what the currently percentage of affordable housing was in Town.
 - J. Bubon stated that the Town was at 5.63% affordable housing.
 - R. Grimm added that the Town should be 10%.
- M. O'Connor asked about tax taking foreclosures being an option.
 - J. Bubon discussed Habitat for Humanity and in regards to tax taking foreclosures, it is mostly land (property) and not homes.
 - E. Goodwin stated that he would like to see a list of property that is up for tax taking.
 - J. Bubon discussed acquiring land.

Discuss Action Plan

W. Downing discussed Financial Services:

- Financial Services – Provide direct financial assistance to homeowners and renters, or to developers to help support affordable housing.
 - Rehabilitation assistance in return for affordability deed restrictions
 - Home repair grants for low- and moderate-income homeowners
 - First-time homebuyer down payment assistance

- Financial and land grants to developers in exchange for a set aside of resulting units for low- and moderate-income households

J. Bubon asked about using a lottery system, stating that there are too many applications and not enough money in many cases. W. Downie stated that he has seen that done before in other communities.

E. Goodwin suggested home repair grants for existing as well as new homes.

The Trust discussed deed restriction, financial eligibility and repair grants.

W. Downie discussed educational programing, coordination & partnerships, and development of public resources:

- Educational Programing – Hosting and Co-hosting educational events on housing topics in Sturbridge.
 - First-time homebuyer information sessions
 - Public sessions discussing affordable housing issues like affordability requirements and deed restrictions
 - Listening sessions featuring developers, nonprofits and other groups involved in affordable housing
- Coordination & Partnerships – Programming and events that allow the trust to learn from and interact with other groups in Sturbridge and the region, helping to educate the trust, the public, and building working relationships.
 - Inviting local groups to speak at educational sessions
 - Developing working relationships with local developers to help drive affordable housing production, and create developments that fit Sturbridge's need and character
- Development of Public Resources – Developing informational resources that can help connect residents to services, and developers to programs, financing, and land for affordable developments.
 - Develop a guide to assistance programs available in Sturbridge for low- and moderate-income residents
 - Develop an inventory of buildable plots in Sturbridge that could be potential sites for affordable developments

J. Bubon stated that she would like to veto the development of a buildable plot inventory, and said that she doesn't like to tell people that a lot is buildable because there are too many variables.

The Trust discussed buildable lots, friendly 40B's, and not wanting developers to buy up property to build expensive houses.

E. Goodwin suggested the opening up of hard to access land.

W. Hersee discussed cottage cluster housing and explained. J. Bubon stated that there are examples of cottage communities in the Eastern part of the State.

M. Darling asked about the live/work spaces that have recently been built in Fiskdale. J. Bubon discussed the artist studios and stated that they are not affordable housing options. But did say that, that specific developer has done a lot to clean up some neglected properties in Town and could be an option for a developer partnership.

W. Downie discussed the importance of relationships with builders and developers and went on to present the final aspect of the Action Plan, public advocacy.

- Public Advocacy – Using its position and platform to advocate for policies and programs that create and support affordable housing in Sturbridge.
 - Advocate for an Inclusionary Zoning Bylaw in Sturbridge, which would require developments over a certain size set aside some units for low- and moderate-income households
 - Advocate for changes to the Zoning Bylaw that could allow for more variety in housing types and prices
 - Advocate for increase transit options, and ensure that transit is serving the needs of low- and moderate-income residents

J. Bubon thought that W. Downie captured everyone's feedback in his Action Plan presentation.

W. Downie discussed how to establish the framework of the trust and the process and outcomes.

- Diagramming the Plan
 - Process – Inputs, activities & outputs
 - Outcomes – Short, intermediate & long
- First-Year Activities
 - Planning
 - Public education and outreach
 - Identifying, analyzing second-year opportunities
 - Developing a program budget and garnering support for it
- Road Map for the Plan
 - What activities are short-term goals, and what are longer-term goals?
 - J. Bubon – public resources and programming.
 - K. Neal – collaborating with people and organizations for educational purposes.
 - J. Bubon discussed the current housing state of emergency.
 - R. Grimm discussed people living in hotels.
 - W. Downie stated that it is important to build relationships so that people know to come to the Trust.

- R. Grimm stated that it is also important to make relationships with developers.
- E. Goodwin stated that public advocacy is as important as financial services.
- W. Downie asked what financial services the Trust thought would be good to start with.
 - J. Bubon suggested rehab programs (deed restricted) in tandem with laying a framework for Friendly 40Bs, creating new housing but also a way for people to stay in their homes.
 - The Trust discussed Friendly 40B's.

K. Neal asked if any other Town committees/boards were aware of the creation of the Housing Trust.

J. Bubon stated that CPC, Planning Board, ZBA were all aware but that an action plan was needed and discussed building up the Housing Trust website with links to resources.

R. Grimm discussed publications and press releases.

W. Downie discussed lessons from other Housing Trusts and mistakes to avoid.

- Failing to Establish Connections
 - Trusts require funds to operate their programming, and those funds need to come from somewhere.
 - Building connections between the Trust and other government agencies is vital.
- Focusing Exclusively on One Activity
 - A common mistake among Trusts is focusing on just one large scale project or program.
 - The Trust's entire reputation is bound into one single activity.
 - Focusing on just this one activity slows public awareness of the Trust, and ties the Trust's funds and energy up with one activity to the detriment of other priorities.
 - Building up capacity for several activities might take more time upfront, but it leads to more solid long-term outcomes.

E. Goodwin asked if W. Downie could go into more specifics.

R. Grimm asked if types of failures could be defined.

W. Downie discussed Trusts putting all their funds towards only one project and the project ends up failing, losing all the money available to the Trust.

M. O'Connor asked who would be in control of the finances of the Trust. J. Bubon stated that it would be Barbara Berry (Finance Director) and then the BOS would have to vet and approve the transfer of funds. J. Bubon also added that a part-time administrator may need to be hired.

R. Grimm reiterated the importance of a good relationship between the BOS and the Trust. W. Downie agreed stating that money transfers cannot happen if the Boards do not work together.

The Trust discussed the importance of Board working together, information being widely available and transparency.

K. Neal suggested that the Planning Board be looped in early. D. Trapasso suggested there be an update under the Town Planner Update for Planning Board and ZBA to get information to those Boards.

Old/New Business

Next meeting date: October 17th at 4:30pm.

Adjourn

Motion: To adjourn.

By: D. Trapasso

2nd: E. Goodwin

Vote: All in Favor (6-0)

Minutes prepared by: Jeneé Lacy