

# PARKSIDE APARTMENTS

## Affordable Rental Unit



### Affirmative Fair Marketing and Resident Selection Plan

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EQUAL HOUSING  
OPPORTUNITY

# PARKSIDE APARTMENTS – MARKETING PLAN

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## I. MARKETING & OUTREACH

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Affirmative fair marketing and tenant selection of all the affordable units shall be conducted to provide maximum opportunity for low income households, including minority households to apply for the lottery.

Marketing and resident selection shall be in accordance with and adhere to all state fair housing laws. The developer and its representatives do not discriminate based on race, color, disability, religion, sex, sexual orientation, gender identify, veteran/military status, familial status, sexual orientation, national origin, age, genetic information, ancestry, children, familial status, or public assistance recipiency or any other basis prohibited by law. Persons with disabilities are entitled to request a reasonable accommodation of rules, policies, practices, or services, or to request a reasonable modification of the housing, when such accommodations or modifications are necessary to afford the persons with disabilities equal opportunity to use and enjoy the housing.

Once the Affirmative Fair Marketing and Resident Selection Plan has been approved by MassHousing and/or their Monitoring Agent, Holland Development will begin placing ads online on the websites noted herein.

**The 60 day market and outreach and marketing period for Parkside Apartments will begin on \_\_\_\_\_ with an application deadline of \_\_\_\_\_. Print Ads announcing the 60-day marketing period will run at least twice within the 60-day marketing period in the newspapers listed below approximately three to four weeks apart.**

### **Print Advertisements:**

1. Patriot Ledger and its Affiliates under the Gatehouse Media New England
2. El Mundo, Jamaica Plain
3. Sampan Newspaper, Boston
4. The Bay State Banner

In addition, notices will appear on the following websites:

1. Citizens' Housing & Planning Assoc. (CHAPA): Mass Access Registry: [massaccesshousingregistry.org](http://massaccesshousingregistry.org)
2. Massachusetts Affordable Housing Alliance (MAHA)
3. City of Boston's Metropolitan Housing Opportunity Clearing Center (Metrolist):  
Boston City Hall, P.O. Box 5996, Boston, MA 02114-5996 (617-635-3321)

Notices will also be sent to the following:

1. **Fair Housing Commissions:**
  - a. MA Commission Against Discrimination
  - b. Boston Fair Housing Commission, City of Boston Office of Civil Rights
  - c. Cambridge Human Rights Commission
  - d. Town of Braintree Commission on Disabilities
2. **Braintree**
  - a. Town of Braintree Mayor's Office

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- b. Town of Braintree Planning and Community Development Department
- c. Town of Braintree Planning Department of Elder Affairs
- d. Town of Braintree Planning Public Schools
- e. South Shore Chamber of Commerce
- f. Braintree Housing Authority
- g. Thayer Public Library
- h. Braintree Community Television

### 3. Area Housing/Social Service Organizations

- a. Baystate Community Services
- b. South Shore Child and Family
- c. South Shore Elder Services
- d. South Shore Housing
- e. Habitation Assistance Corporation
- f. HOLA: Haitian Organization Living Abroad
- g. METCO
- h. Massachusetts Association of Community Development Corporations
- i. Boston Center of Independent Living
- j. Viet Aid
- k. Boston Tenant Coalition
- l. United Way of Mass Bay

### 4. Faith Based Organizations:

- a. Great Boston Interfaith Organization
- b. Black Ministerial Alliance of Greater Boston
- c. Family Promise of Metrowest

### 5. Civic Groups:/ Other

- a. American Legion
- b. Braintree Rotary
- c. Elks Lodge
- d. St. Francis Assisi
- e. East Braintree Civic Association
- f. North Braintree Civic Association
- g. Craig's List

Applications will also available at the Braintree Town Hall and Thayer Public Library, as they have evening hours and ADA access.

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## II. PROJECT INFORMATION PACKAGE

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The following sections contain information on the affordable housing program as well as the background, eligibility requirements, selection priority categories, and application process for the affordable rental units being offered through this lottery for Parkside Apartments in the Town of Braintree.

Parkside Apartments invite you to read this information and submit an application if you think you meet the eligibility requirements. This lottery is the first step in the application process and does not assure you a unit.

The first rental units will be ready for occupancy on: \_\_\_\_\_, 201\_\_.

The application deadline is \_\_\_\_\_, 201\_\_.

Applications will be available from \_\_\_\_\_, and must be returned to \_\_\_\_\_, the Lottery Agent: *insert name and address*

An information session will be held on \_\_\_\_\_, 201\_\_, to answer questions about the eligibility requirements, preferences for selections, and the lottery process. It will be held in **Thayer Public Library**, which is a public place and has evening hours and ADA access, at **798 Washington Street, Braintree, MA** at **6:00 pm**. *It is not mandatory, but recommended that interested applicants attend.*

Applicants will be notified in writing that their application has been received and if they are eligible for the lottery.

Eligible applicants will be assigned a registration number, which will be placed in the lottery.

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## III. PROJECT DESCRIPTION

Parkside Apartments is providing this affordable rental opportunity in accordance M.G.L. Chapter 40B. Twenty percent of the units are offered under the M.G.L. Chapter 40B.

The property is located at the intersection of Washington Street and Storrs Avenue Braintree, MA. Parkside Apartments will be new construction of 70 rental apartments. The affordable units will be located throughout the building, with no distinguishing marks on the outside of the units.

A total of 20% of the units will meet the criteria of M.G.L. Chapter 40B including 18 units offered for households earning up to 80% of AMI. AMI stands for Area Median income and Braintree and is based in the Boston-Cambridge- Quincy, MA market area (the "Boston MSA"). Therefore, income limits change on a yearly basis as prescribed by HUD.

The affordable rental units will be a mixture of studio, one, two and three bedroom units. The chart below shows the average square footage of units offered as well as number of bathrooms, and number of units by unit type for each level of affordability and estimated 2016 rent. :

Unit Type	# Units	Square Feet	Baths	Net Rent	Utility Allowance	Gross Rent
Studio	1	692	1	\$1,211	\$67	\$1,278
One Bedroom	8	867	1	\$1,287	\$83	\$1,370
Two Bedroom	7	1,159	1 or 2	\$1,529	\$114	\$1,643
Three Bedroom	2	1,413	2	\$1,899	\$156	\$2,055

Affordable units will have one assigned parking space and use of common areas open to residents. Kitchens in affordable units will include a refrigerator, microwave, dishwasher, disposal and an in unit washer and dryer.

**Tenants are responsible for paying the full amount of rent each month. Rents are not based on each applicant's income (unless they already have a Section 8 voucher or similar type voucher).** Tenants will also be responsible for paying gas heat and hot water and electricity for the units. The rents are set annually using a calculation that determines the "affordable" rent, which is based on the Area Median Income for the Boston MSA.

All units will have high end apartment grade finishes including steel front appliances.

Since it is possible that there will be more interested and eligible applicants than available units, Parkside Apartments will be sponsoring an application process and lottery to rank the eligible applicants. The application and lottery process, as well as the eligibility requirements, are described in this plan.

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## IV. INCOME ELIGIBILITY REQUIREMENT

### Income:

The lottery agent will project a household's income over the next 12 months based on their current income and assets. In an effort to provide as accurate an income estimation as possible, the Lottery Agent will also review historical income data to provide a basis for future income estimates.

All sources of income are counted. This includes but is not limited to, Social Security, alimony, child support, overtime pay, bonuses, unemployment, severance pay, part-time employment, matured bonds, monies to be received in court settlements, and actual or imputed interest and dividends on bank accounts and other assets. All sources of income are counted with the exception of income from employment for household members under the age of 18 and any income over \$480/year for full time students who are dependents (but not that all such income must still be documented even if it is exempt from the household income calculation).

There is no asset limit for households applying for this rental development. However, the higher of the actual income earned from assets, or the imputed income of 0.06% of all assets, will be counted as income. Household Assets are calculated at the time of the application. Assets may include cash, net cash value of stocks, checking and savings accounts, investment accounts, CD's, net cash value of retirement accounts, bonds and capital investments etc.

You cannot have a co-signer for an IZ unit, but you may have one for a middle-income unit.

Financial documentation is required to participate in the lottery. A list of these documents is included in the application.

There is no difference in the appearance of the Affordable and Market Rate Units. The difference is in the eligibility criteria as households must earn under 80% of AMI to move into an affordable unit. The income criteria for 2016 is below:

2016 Boston-Cambridge-Quincy HUD Income Limits			
AMI	50%	80%	120%
1 Person	\$34,350	\$51,150	\$82,440
2 Person	\$39,250	\$58,450	\$94,200
3 Person	\$44,150	\$65,750	\$105,960
4 Person	\$49,050	\$73,050	\$117,720
5 Person	\$53,000	\$78,900	\$127,200
6 Person	\$56,900	\$84,750	\$136,560

### Screening:

In order to qualify for an affordable unit:

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1. Households must have income and assets that qualify within the parameters as highlighted above.
2. Applicants will be subject to a screening by the project owner, including credit check. The affordable unit must be your principal, full-time residence; applicants may not own another home and may not own a home in trust.
3. Households cannot own a home, including in a trust, upon move-in. All homes must be sold before leasing a unit.
4. Households, or their families, cannot have a financial interest in the development and a household member cannot be considered a related party.

*Five of the units will be Group 2A Accessible, all remaining units are Group 1 Accessible.* All households may apply for the disabled-accessible units but households in need on an accessible unit will get top priority regardless if the unit is designated as local preference or not.

### **Recertification:**

Tenants will be recertified annually for eligibility. If your household exceeds 140% of the maximum allowable income adjusted for household size, then at the end of the lease, you will have the option of staying in your unit and paying market rent or not renewing your lease.

The Lottery Agent, \_\_\_\_\_, will handle the annual recertification. Having the required successful prior experience in each component of the AFHMP, and the capacity to address matters related to limited English language proficiency, \_\_\_\_\_ is deemed qualified by the state as an affordable housing consultant.

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## **V. LOTTERY PROCESS**

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The lottery will be held on \_\_\_\_\_ at 6:00 pm at **Thayer Public Library** which has evening hours and ADA access, at **798 Washington Street, Braintree, MA**

### **Lottery Process:**

1. All applications submitted prior to the application deadline will be reviewed for completeness and processed to confirm eligibility. Qualified households will be included in the lottery.
2. Eligible applicants will be notified in writing of their inclusion in the lottery. They will be assigned a lottery registration number, and given any further information.
3. The objective of these State subsidy programs is to provide housing to appropriate sized families:

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- There is at least one occupant and not more than two occupants per bedroom.
- A married couple, 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.
- A person described in the first sentence of (2) shall not be required to share a bedroom if a consequence of sharing would be a severe adverse impact on his or her mental or physical health and the lottery agent receives reliable medical documentation as to such impact of sharing.
- A household may count an unborn child as a household member.

To this end, there will be a preference given in the lottery to households that need all of the bedrooms, in this case 3 bedrooms.

4. Regarding households in the process of divorce or separation, appropriate documentation must be provided.
5. Applicants do not need to attend the lottery to be eligible to rent an affordable unit. All applicants will be notified in writing of the outcome of the lottery. Lottery winners will be notified immediately following the lottery and will receive clear instructions regarding the Lease Agreement and terms of occupancy.
6. **There will be two lotteries, a Local Preference Lottery and an Open Lottery.** All local preference households are places in both lotteries. All others are place only in the Open Lottery. When applicable disabled-accessible apartments will be added in with other applicants for both lotteries.
7. **Local Preference shall be given for qualified applicants in the following order:**  
Preference shall be given to any other qualified applicants who fall within any of the following equally weighted categories:
  - a. Individuals or families who live in the Town of Braintree;
  - b. Households with a family member who works in the Town of Braintree, has been hired to work in the Town of Braintree, or has a bona fide offer of employment in the Town of Braintree; and
  - c. Households with a family member who attends public school in the Town of Braintree.
8. A non-interested third party will draw the lottery numbers. **Note that the order of the numbers drawn does not necessarily reflect the order of households that will be selected as it may be adjusted due to household size.**
9. The top-ranking applicants will be offered to lease a unit. All applicants are subject to official income verification by the lottery agent and credit screening by the project owner.
10. A list of the remaining applicants will be maintained should a unit become available.
11. Applicants that have an opportunity to lease a unit are expected to occupy in a reasonable timeframe.

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## VI. RENTAL APPLICATION

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### AFFORDABLE HOUSING APPLICATION

Application Deadline: \_\_\_\_\_

Applicant Legal Name \_\_\_\_\_ Phone Number \_\_\_\_\_ E-mail \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State/Zip \_\_\_\_\_

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

Website: \_\_\_\_\_ Letter: \_\_\_\_\_

Advertisement: \_\_\_\_\_ Other: \_\_\_\_\_

This application is not complete if not filled out completely, signed and submitted with ONE COPY of the following documentation. Failure to provide a complete application package can delay the approval process and your ability to participate in the lottery.

#### REQUIRED INCOME VERIFICATION DOCUMENTS:

- \_\_\_\_\_ Last 3 year's Federal tax returns (NO STATE RETURNS), including 1099's, W-2's and schedules, for every person living in the household over the age of 18
- \_\_\_\_\_ 5 most current, consecutive pay stubs, for all salaried employed household members over 18. Six months of income for hourly and seasonal workers. For unemployment, disability or worker's compensation and/or severance pay, copies of checks or DOR verification stating benefits received.
- \_\_\_\_\_ Child support and alimony: legal court document indicating payment amount.
- \_\_\_\_\_ Self-employed: provide a detailed expense and income statement for the 5 months prior to the lottery, and 3 copies of business checking and savings accounts.
- \_\_\_\_\_ Recent statements received from social security, annuities, insurance policies, retirement funds, pensions, disability or death benefits, etc.
- \_\_\_\_\_ Asset statements showing current value including all bank accounts, investment accounts, retirement accounts, cash value of whole life policies, etc.
- \_\_\_\_\_ Interest, dividends and other income from real or personal property.
- \_\_\_\_\_ Unborn children may be counted as household members with proof of pregnancy.
- \_\_\_\_\_ School registration for any full-time student for any household member over 18.

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\_\_\_\_\_ If in the process of a divorce or separation, provide legal proof that the process has begun or been finalized.

**HOUSEHOLD INFORMATION:** List all members of your household including yourself

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)
1					
2					
3					
4					

\*Minority preference 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.

Do you have a Section 8 voucher? \_\_\_\_\_ Yes \_\_\_\_\_ No

Do you require a handicapped accessible unit? \_\_\_\_\_ Yes \_\_\_\_\_ No

**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			
<b>TOTAL</b>			

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**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	Bank/Credit Union Name	Account No	Value, Balance
1	Checking account			
2	Savings account			
3	Retirement account			
4	Other: _____			
5	Other: _____			
6	Other: _____			
			<b>TOTAL</b>	

### EMPLOYMENT STATUS

**Applicant's Name:** \_\_\_\_\_

Occupation: \_\_\_\_\_

Present Employer: \_\_\_\_\_

Employer Address: \_\_\_\_\_

Name & Title of Supervisor: \_\_\_\_\_

Date of Hire: \_\_\_\_\_ Annual Gross Salary: \_\_\_\_\_

**Co-Applicant's Name:** \_\_\_\_\_

Occupation: \_\_\_\_\_

Present Employer: \_\_\_\_\_

Employer Address: \_\_\_\_\_

Name & Title of Supervisor: \_\_\_\_\_

Date of Hire: \_\_\_\_\_ Annual Gross Salary: \_\_\_\_\_

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### APPLICANT(S) CERTIFICATION

1. I/We certify that our household size is \_\_\_\_\_ persons, as documented herein.
2. I/We certify that our total household income equals \$\_\_\_\_\_, as documented herein.
3. I/We certify that the information in this application and in support of this application is true and correct 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.
4. I/We certify that no member of our family has a financial interest in the project.
5. I/we understand that being selected in the lottery does not guarantee that I/we will be able to lease a unit. I/we understand that all application data will be verified and additional financial information may be required, verified and reviewed prior to leasing a unit. I/We also understand that the project's owner will perform its own screening to determine eligibility.
6. I/We authorize \_\_\_\_\_ to verify all financial and household information and direct any employer, landlord or financial institution to release any information to \_\_\_\_\_ and the project owner to determine eligibility.
7. I/We understand that there may be differences between the market and affordable unit and accept those differences.
8. I/We understand that if my/our total income exceeds 140% of the maximum allowable income and at the time of annual eligibility determination, at the end of my current lease term I will no longer be eligible for the affordable rent.

I/We have completed an application and have reviewed and understand the process that will be utilized to distribute the available units. I/We am/are qualified based on the program guidelines and agree to comply with applicable regulations.

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Applicant Signature

Date

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Co-Applicant Signature

Date

THIS IS APPLICATION IS ONLY FOR THIS SPECIFIC DEVELOPMENT.

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As of xxx day of xxx of 191\_, as authorized representatives of Parkside Apartments and \_\_\_\_\_lottery agent, respectively, each of us has reviewed this plan and agrees to implement this AFHMP, which shall be made effective as of the approval date. Further, by signing this form, [Developer] agrees to review and update its AFHMP as necessary in order to comply with all applicable statutes, regulations, executive orders and other binding DHCD requirements pertaining to affirmative fair housing marketing and resident selection plans reasonably related to such statutes, regulations, executive orders, as same may be amended from time to time. We hereby certify that all the information stated herein, as well as any information provided herewith, is true and accurate.

Parkside Apartments

By: \_\_\_\_\_

Hereunto duly authorize

\_\_\_\_\_lottery agent

By: \_\_\_\_\_

Hereunto duly authorized

DRAFT