



ARLINGTON AFFORDABLE HOUSING  
ACQUISITION, CREATION & CONVERSION PROGRAM  
**REQUEST FOR PROPOSALS: FUNDING APPLICATIONS**

**RFP Issue Date:** June 18, 2024

**Submission Deadline:** September 30, 2024 at noon, EST or until funds are exhausted<sup>1</sup>.

Applications will be reviewed on a rolling basis and funding is limited. Applicants seeking funding should submit as early as possible to maximize the likelihood of funding.

**Applications to be submitted to:**

ARLINGTON AFFORDABLE HOUSING TRUST  
c/o Department of Planning and Community Development  
Town of Arlington, Massachusetts  
730 Massachusetts Avenue  
Arlington, MA 02476

**For questions, please contact:**

Sarah Suarez, Assistant Director of Planning & Community Development  
[ssuarez@town.arlington.ma.us](mailto:ssuarez@town.arlington.ma.us)  
(781)316-3096

**CONTENTS**

PURPOSE  
PROGRAM DESCRIPTION  
AVAILABLE RESOURCES  
ELIGIBLE PROPOSALS  
EVALUATION CRITERIA  
INSTRUCTIONS  
APPENDICES

---

<sup>1</sup> The Trust shall issue an addendum indicating when funds have been exhausted.



## ARLINGTON AFFORDABLE HOUSING ACQUISITION, CREATION & CONVERSION PROGRAM REQUEST FOR PROPOSALS: FUNDING APPLICATIONS

### PURPOSE

The Arlington Affordable Housing Acquisition, Creation & Conversion Program (“ACC”) is established by the Town of Arlington (the “Town”) and the Arlington Affordable Housing Trust (the “Trust”) to support the creation of new affordable housing units and the preservation of naturally occurring affordable housing for present and future Arlington residents, for the long term.

There are four key goals for the ACC Program:

1. To increase the share of Arlington’s rental and homeownership housing stock that is protected from market forces and is affordable to households that cannot afford market-rate rents or sale prices;
2. To prevent displacement of low-income tenants of “naturally-occurring” affordable housing units by ensuring their units will remain affordable over the long term;
3. To support and retain a diversity of residents in Arlington by capturing moderately priced housing from the speculative market; and
4. To create new, affordable housing opportunities in excess of the requirements of the Town’s Inclusionary Zoning bylaw;

Eligible Proposals must comply with American Rescue Plan Act (ARPA) affordable housing program requirements and may include:

1. Acquisition of one or more existing, unrestricted, vacant housing units to convert to deed-restricted, low-moderate income Affordable Housing units;
2. Acquisition of existing rental housing units currently occupied by low-moderate income residents to convert to deed-restricted, low-moderate income Affordable Housing units to protect tenant(s) from rent increases or displacement;
3. Property Owners Conversion of one or more housing units currently occupied by low-moderate income residents who wish to place a long-term deed restriction on certain units to protect current tenants from rent increases or displacement; or
4. Property Owners Conversion of one or more vacant housing units seeking to convert to deed-restricted, low-moderate income Affordable Housing units; or
5. Property Owners or Purchasers seeking to create new construction, deed-restricted, low-moderate income Affordable Housing Units.



## ARLINGTON AFFORDABLE HOUSING ACQUISITION, CREATION & CONVERSION PROGRAM REQUEST FOR PROPOSALS: FUNDING APPLICATIONS

### PROGRAM DESCRIPTION

1. Application. Qualified applicants seeking funding under the ACC Program to create new or convert existing housing units to deed-restricted Affordable Housing units in Arlington will submit an application in conformance with ACC Program. Applicants must identify one or more units of housing in Arlington they propose to acquire, create, and/or convert to deed-restricted Affordable Housing, as defined in Section 4.
2. Eligible Proposals. Eligible housing units must meet Housing Quality Standards (“HQS”) as defined by the U.S. Department of Housing and Urban Development. Requested funding may be used to support a portion of acquisition costs, to create an affordable housing unit, to repair the property to ensure compliance with HQS, and/or to subsidize the associated costs of deed-restricting an Affordable Housing unit for the required length of time. Applicants must demonstrate that the acquisition, creation, and/or conversion of the subject unit(s) of housing and its long-term operation will be financially feasible, and that the Applicant’s team has the experience and financial capacity to acquire, renovate, lease and operate the units proposed for conversion. Applicants must also demonstrate they have the ability to obtain all financing needed to acquire, create, and/or convert the unit(s), including any renovations or reserves necessary to ensure the property meets HQS and can reasonably be expected to meet HQS for the term of the deed restriction required by the program. Funding requests must be limited to the amount required to ensure financial feasibility, as demonstrated by a development Sources and Uses schedule and long-term operating pro forma projecting income, operating expenses and capital improvements.
3. Funding Agreement. Upon receiving funding approval, Funding Recipients will enter into a Funding Agreement (“Agreement”) with the Town of Arlington/Affordable Housing Trust no later than November 1, 2024. This Agreement will specify the maximum award amount per unit as proposed by the Applicant to acquire, create, and/or convert to a deed-restricted Affordable housing unit. The Agreement will also provide the specific terms and conditions under which the Town of Arlington/Affordable Housing Trust will provide funding and the specific circumstances for the release of the funds. The Funding Agreement will require the Applicant to satisfy HQS, subject each funded unit to a deed restriction, lease all restricted Affordable Housing Units to eligible tenants, or have homeownership units Sold no later than December 31, 2026. The Funding Agreement will also subject the



## ARLINGTON AFFORDABLE HOUSING ACQUISITION, CREATION & CONVERSION PROGRAM **REQUEST FOR PROPOSALS: FUNDING APPLICATIONS**

Funding Recipient and the subject property (or properties) to any requirements imposed by the source of funding, which may vary, but is anticipated to be federal funds provided under the American Rescue Program ACT (ARPA). Selected funding recipients shall be considered sub-recipients of any state or federal funds, including ARPA funds, as applicable. Selected funding recipients must comply with all local, state and federal laws regarding the use of public funds.

ACC Program funding may be made available to draw at acquisition and/or closing of financing to support acquisition cost, creation and/or any planned repairs or reserves, to the extent needed. The amount of funding made available prior to the execution and recording of the required deed restriction and income qualification of existing residents may be limited.

The Funding Agreement requires the Funding Recipients to notify the Trust promptly of any changes in the proposed development sources and uses or long-term operating pro forma, financing or timeline, including changes in the anticipated purchase price, the cost of repairs, and the eligibility of existing tenants to occupy the units when subjected to the use restriction. The Trust will review such changes to ensure continued eligibility for funding under the program. Time is of the essence with respect to such changes, since any funding not committed and/or expended in a timely manner may be unable to be deployed for intended purposes. The Funding Recipient's failure to provide timely notice of material changes may result in termination of the Funding Agreement and recapture of expended funds.

4. Acquisition Program Funds Closing. Any Purchase & Sale or Option Agreement entered into by a Funding Recipient should provide sufficient time to allow the Funding Recipient, its Lender(s) and the Trust to conduct due diligence. During this period, the Trust and the Funding Recipient will inspect the property to establish any necessary renovation scope and associated budget, clarify the current tenancies, and establish a Final Development and Operating Budget. Any Lender-required actions (e.g. appraisals, environmental review) will be done at this time. If all Trust and Lender requirements are met, the Funding Recipient may proceed with the acquisition.

At the time of closing on the Acquisition Program funding, the Funding Recipient will execute a note and mortgage, providing its share of the purchase price or project costs as specified in the approved Development and Operating Budgets. The



## ARLINGTON AFFORDABLE HOUSING ACQUISITION, CREATION & CONVERSION PROGRAM **REQUEST FOR PROPOSALS: FUNDING APPLICATIONS**

Funding Recipient shall be required to execute an Affordable Housing deed restriction in a form required by the Trust which will be recorded at the Middlesex Registry of Deeds as part of the closing. The restriction for rental units must have a term of no less than twenty (20) years. The restriction for a homeownership unit shall be in perpetuity.

5. Repairs. To the degree that the property needs rehabilitation as approved in the Final Development and Operating Budget, the Applicant will undertake the work, drawing down any ACC Program funds budgeted for construction costs as construction progresses. If no acquisition or construction work is required, the Applicant may draw down all of the ACC Program funds upon the Trust's confirmation (following inspection and certification) that the building meets Housing Quality Standards. The Trust funds must be fully drawn down no later than December 22, 2026.
6. Homeownership Requirements. Applicant must agree to submit an Affirmative Fair Housing Marketing and Resident Selection Plan (AFHMP) that meets the standards set forth by the Executive Office of Housing and Livable Communities (EOHLC), as may be amended from time to time, before the marketing and application process commences. Homeownership units shall be reserved for and occupied by income-eligible households whose income (adjusted for household size) at the time of purchase shall not exceed 100% AMI as published by HUD for the Boston, Cambridge, Quincy Metropolitan Area and generally comply with the criteria established by the Comprehensive Permit Project Guidelines established by EOHLC. Sale prices shall be established at the time of the initial marketing of the affordable units in accordance with the maximum sales price as published by HUD for the Boston, Cambridge, Quincy Metropolitan Area.
7. Rental Requirements. Funding Recipients must agree to submit an Affirmative Fair Housing Marketing and Resident Selection Plan (AFHMP) that meets the standards set forth by the Executive Office of Housing and Livable Communities (EOHLC), as may be amended from time to time, before the marketing and application process commences. Units funded utilizing AHTF funds must be leased to tenants earning not more than 100% AMI (average Median Income) limits as provided by HUD. Rent must meet the published HUD Fair Market Rent subtracting any utility allowance for utilities paid by tenant using utility allowance standards published by HUD for the Boston,



## ARLINGTON AFFORDABLE HOUSING ACQUISITION, CREATION & CONVERSION PROGRAM REQUEST FOR PROPOSALS: FUNDING APPLICATIONS

Cambridge, Quincy Metropolitan Area. All units must meet habitability standards as set forth in the Massachusetts Sanitary and Building codes.

8. Occupancy Stabilization. Over a period of up to 24 months, ending no later than December 31, 2026, the developer will execute their occupancy plan as specified in the Final Development and Operating Budget. At the end of this 24-month period, the occupancy of the Affordable Housing Unit(s) shall comply with the terms of the deed restriction. In the event of a conversion of an occupied unit, the Applicant may request a written waiver from the Trust in order to prevent involuntary displacement.

### AVAILABLE RESOURCES

Pursuant to the revised ARPA Framework plan approved by the Arlington Select Board on April 20, 2022, the Town of Arlington has allocated approximately \$3,000,000 of American Rescue Plan Act (ARPA) funding to support the creation, production and preservation of affordable housing in Arlington. Applicants may also access future additional resources, time permitting, from the Community Development Block Grant (CDBG) Program and the Community Preservation Act (CPA) committee or other sources as needed. Applicants are strongly encouraged to make affordable housing units available to mobile voucher holders or to seek project-based vouchers to increase financial feasibility and reduce reliance on ACC Program funding, where possible. Applicants may not request more than is reasonably determined to be necessary for financial feasibility, subject to a maximum award of **\$250,000** per deed-restricted unit. Subsidy funds will be available at acquisition and to assist with approved renovations. At the end of the two-year Occupancy Stabilization Period, tenancies of the property must be compliant with the affordability and occupancy targets agreed upon at the time of closing and secured by the Affordable Housing Deed Restriction. Preference will be given, to the extent consistent with the rolling application process, to projects that provide the most leverage of ARPA funding. The Trust reserves the right to award less than the requested amount of funding and to increase the per-unit funding cap, if necessary, to facilitate the success of the ACC Program and/or any funded project.

### ELIGIBLE PROPOSALS

Eligible projects may include new-construction rental or homeownership units; occupied or partially occupied buildings with one or more rental or homeownership units; and



## ARLINGTON AFFORDABLE HOUSING ACQUISITION, CREATION & CONVERSION PROGRAM **REQUEST FOR PROPOSALS: FUNDING APPLICATIONS**

vacant housing units. Properties shall not be subject to any existing Affordable Housing deed restrictions or covenants, without prior approval from the Trust.

The ACC Program is designed to take advantage of opportunities that currently exist in the market in order to protect existing housing units, and to provide decent housing at reasonable costs. The ACC Program will also consider opportunities to construct new units or subsidize the inclusion of additional Affordable Housing units in development projects currently under construction or those in the process of applying for a building permit through the Inspectional Services Department.

It is expected that most of the existing properties/units eligible for the ACC Program will be in substantially good operating condition, providing safe, stable housing that currently meets the Housing Quality Standards (HQS). The Trust will consider vacant properties as well as properties that may need a more significant level of rehabilitation, on a case-by-case basis, as long as the acquisition and/or renovation of the building may be achieved within the financial and time parameters of the ACC Program.

For the acquisition of existing occupied units, there shall be no displacement of tenants in good standing at the time of acquisition. Applicants may propose to provide rental units to a mix of incomes, but ACC Program funds are available only for units that are deed-restricted for a minimum of 20 years to occupants with incomes not exceeding 100% of Area Median Income ("AMI"), preferably with a focus on meeting the needs of occupants with incomes 60% or below the AMI. With respect to properties that have existing tenancies, upon turnover, rents, tenancies, and tenant selection procedures must be adjusted to reflect the proposed occupancy restriction and the requirements of Federal and State fair housing.

### **EVALUATION CRITERIA**

Applicants must meet the Minimum Eligibility Criteria to be considered.

#### Minimum Eligibility Criteria:

1. Complete Application Submission. Applications must be submitted prior to the deadline and contain all necessary forms, documents, and signatures as required in this Request for Proposals ("RFP"). Applications must provide sufficient detail



**ARLINGTON AFFORDABLE HOUSING  
ACQUISITION, CREATION & CONVERSION PROGRAM  
REQUEST FOR PROPOSALS: FUNDING APPLICATIONS**

and completeness so the Trust can fairly evaluate the proposal using the Comparative Evaluation Criteria specified below. Applications that fail to provide sufficient information for this review will be rejected.

2. Good Standing. Applicants must be in good standing with all departments of the Town of Arlington, including for taxes and building code violations, and for all properties it owns in the Town of Arlington. Applicants must also not be debarred or suspended from participation in Federal funding programs.
3. Submission of required standard forms: the Certifications of Tax Compliance, Non-collusion, and Authority (see Appendices).
4. Funds must be spent, construction and/or rehabilitation complete, and Occupancy Plan MUST be completed by December 31, 2026.
5. All units must be deed restricted for a minimum of 20 years to individual households earning up to a maximum of 100% of the Area Median Income (AMI).

**Comparative Evaluation Criteria**

Applications meeting the minimum criteria will be judged on the following evaluation criteria, with assignment of a rating either not advantageous, advantageous or highly advantageous.

1. Overall quality of proposal

**Not Advantageous:** proposal complete and responsive to some, but not all items in RFP.  
**Advantageous:** proposal well written with a clear visual and graphic format and responsive to all items in RFP.

**Highly Advantageous:** proposal is of outstanding visual and written quality, responsive to all items in RFP and introduces innovative and creative concepts with evidence demonstrating that they will result in affordable homes in Arlington in a timely manner.

2. Experience

Experience of Proposer’s principal person and any primary development team members in successfully rehabilitating homes and/or developing affordable housing.

**Not Advantageous:** The proposer has never produced an affordable home.  
**Advantageous:** The proposer has produced an affordable home in the last 5 years.





**ARLINGTON AFFORDABLE HOUSING  
ACQUISITION, CREATION & CONVERSION PROGRAM  
REQUEST FOR PROPOSALS: FUNDING APPLICATIONS**

**Highly Advantageous:** The proposer has produced multiple affordable homes in the Boston area in the last 5 years.

3. Financial feasibility

Financial feasibility of development proposal based on projected funding sources for predevelopment, development, operating costs and financial strength of developer.

**Not Advantageous:** The project budget has significant gaps.

**Advantageous:** The project budget meets industry standards for financial feasibility.

**Highly Advantageous:** Financial feasibility is more than adequate to address the projected funding needs.

4. Affordability

The Affordable Housing Trust has a strong interest in creating or preserving housing restricted to households making at or below 60% AMI but may approve proposals up to 100% AMI to qualify for affordable units:

**Not Advantageous:** This project will not yield any deed-restricted affordable housing units.

**Advantageous:** At least one affordable unit will be preserved or created for households with incomes at or below 100% AMI.

**Highly Advantageous:** At least one affordable unit will be preserved or created for households with incomes at or below 60% of AMI; or three or more units will be restricted to those with incomes at or below 100% of AMI.

5. Quality of Housing

**Not Advantageous:** Meets minimum code and sanitation standards. Limited useable square foot area.

**Advantageous:** Exceeds minimum standards and provides useable square foot area consistent with Comprehensive Permit Project Guidelines published by EOHLA. May include a full kitchen, full bath, washer/dryer, and high-speed internet. Rented on a month-to-month basis.



## ARLINGTON AFFORDABLE HOUSING ACQUISITION, CREATION & CONVERSION PROGRAM **REQUEST FOR PROPOSALS: FUNDING APPLICATIONS**

**Highly Advantageous:** Provides spacious living areas, strong natural light, full kitchen, washer/dryer, and high-speed internet. Homeownership opportunity or rented on a long-term lease.

### 6. Interview

The Trust may require an interview with Applicant, and any interview presentations will be considered as part of the overall evaluation process to determine the successful proposer.

**Not Advantageous:** interview does not show a full understanding of the concerns of the Trust and the Town as described in the RFP.

**Advantageous:** responsive to the concerns of the Trust and the Town as described in the RFP.

**Highly Advantageous:** very responsive to the concerns of the Trust and the Town as described in the RFP.

### **APPLICATION SUBMISSION INSTRUCTIONS**

A complete application will include the following documents:

- a. Application Cover Sheet and Letter of Interest
- b. Arlington Affordable Housing Trust Full Application
- c. Description of Proposed Project, including Stabilization Plan and timeline consistent with the requirements of the RFP
- d. Developer Qualification Statement
- e. Development Sources and Uses & Long-term Operating Proforma
- f. Certification of Tax Compliance per state law
- g. Certificate of Non-collusion
- h. Certificate of Authority (applies to corporations only)

Applications shall be submitted electronically, in person or mailed to:

Arlington Affordable Housing Trust Fund  
c/o Department of Planning and Community Development  
Arlington Town Hall Annex



ARLINGTON AFFORDABLE HOUSING  
ACQUISITION, CREATION & CONVERSION PROGRAM  
**REQUEST FOR PROPOSALS: FUNDING APPLICATIONS**

730 Massachusetts Avenue  
Arlington, MA 02476  
Attn: Sarah Suarez  
email: [ssuarez@town.arlington.ma.us](mailto:ssuarez@town.arlington.ma.us)

The Trust will accept applications on a rolling basis but no later than September 30, 2024 at noon, or until funding is fully obligated, whichever comes first. Late submissions will not be accepted.

Rule Of Award

The Trust will select those applicants who best demonstrate the ability to fulfill the goals and objectives of this initiative in accordance with the Trust's evaluation of their responses in accordance with the stated evaluation criteria. The Trust expects this program will provide the selected applicants with sufficient resources to acquire, convert, and/or construct appropriate properties to sustain affordable housing opportunities in Arlington. Funding amounts may be raised to make projects viable, if funding allows, at the discretion of the Trust. Once approved, Applicants will be required to enter into a Funding Agreement with the Town of Arlington.

**APPENDICES**

Arlington Affordable Housing Trust Full Application  
Funding Agreement and ARPA Rider  
Certification of Tax Compliance per state law  
Certificate of Non-collusion  
Certificate of Authority (applies to corporations only)

---

END OF ARLINGTON AFFORDABLE HOUSING ACQUISITION & CONVERSION  
PROGRAM REQUEST FOR PROPOSALS

THE TRUST THANKS YOU FOR YOUR INTEREST

**CERTIFICATE OF NON-COLLUSION**

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

\_\_\_\_\_  
Signature of individual submitting bid or proposal

\_\_\_\_\_  
Name of business

**TAX COMPLIANCE CERTIFICATION**

Pursuant to M.G.L. c. 62C, §49A, the undersigned, acting on behalf of the Contractor, certifies under the penalties of perjury that the Contractor is in compliance with all laws of the Commonwealth of Massachusetts relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

\_\_\_\_\_  
Signature of Individual submitting bid or proposal

\_\_\_\_\_  
Name of business



## Town of Arlington

730 Mass Ave  
Arlington, MA 02476  
[www.ArlingtonMA.gov](http://www.ArlingtonMA.gov)



**ARLINGTON  
AFFORDABLE  
HOUSING TRUST**

### **Town of Arlington/Affordable Housing Trust Acquisition, Creation, and Conversion Program Grant Agreement**

This GRANT AGREEMENT (the “Agreement”), effective on date of the last signature, shall be by and between the Town of Arlington through its Affordable Housing Trust (“Trust” or “Grantor”), established by a Special Town Meeting on November 18, 2020 pursuant to Chapter 44, Section 55C of the Massachusetts General Laws, and having its usual place of business at 730 Mass Ave Arlington, Massachusetts 02476, and [RECIPIENT NAME], [designation] [ADDRESS] (“ Recipient” or “Grantee”) (each is a “Party” and collectively, the “Parties”).

**WHEREAS**, the purpose of the Affordable Housing Trust shall be to provide for the preservation and creation of affordable housing units in the Town of Arlington for the benefit of low- and moderate-income households; and

**WHEREAS**, the Trust established the Acquisition, Creation, and Conversion Program for the benefit of low- and moderate-income households by providing financial assistance to create new affordable housing units and preserve existing housing units occupied by income eligible households for health and safety purposes, providing public benefit commensurate with the funding provided; and

**WHEREAS**, the Trust invited, pursuant to its statutory authority, the Request for Proposals for grants of funds for purposes consistent with the Acquisition, Creation, and Conversion Program; and

**WHEREAS**, in response thereto, the Recipient submitted a proposal for funding for purposes consistent with the Acquisition, Creation, and Conversion Program hereinafter referred to as the “Project”; and

**WHEREAS**, the Trust determined the Recipient’s project will assist low- and moderate-income households, and approved the Project as noted in the Grant Letter dated [DATE] or as amended; and

**WHEREAS**, Recipient is receiving financial assistance from the Town of Arlington through its Affordable Housing Trust to provide funding to create, rehabilitate, or convert a home located at [ADDRESS] in compliance with and the Grant Letter; and

**NOW THEREFORE**, the Trust and Recipient agree as follows:

1. **Term of Agreement.** The term of this Agreement (the “Term”) shall commence on the date of the last signature (the “Commencement Date”) and shall terminate on December 31, 2027 (the “Termination Date”).
2. **Use of Funds and Status as Subrecipient.** The Recipient acknowledges that any monies paid to it (the “Project Funds”) may be funded in whole or in part with federal Coronavirus State and Local Fiscal Recovery Funds established under the American Rescue Plan Act (“ARPA



## Town of Arlington

730 Mass Ave  
Arlington, MA 02476  
[www.ArlingtonMA.gov](http://www.ArlingtonMA.gov)



**ARLINGTON  
AFFORDABLE  
HOUSING TRUST**

Funds”). Recipient acknowledges that ARPA Funds must be obligated by December 31, 2024 and spent by December 31, 2026. Recipient further acknowledges that it is a Recipient for purposes of this Agreement, as well as a subrecipient of ARPA Funds, as applicable. Recipient is responsible for complying with any and all requirements for the use of ARPA Funds. The Town reserves all rights at law or in equity if Recipient fails to expend any ARPA Funds awarded under this Agreement, or fails to expend ARPA funds in a manner consistent with any applicable laws. This provision shall survive the termination of this Agreement.

3. **Terms of Repayment.** The Recipient agrees that if they sell part or all of the property without the Trust’s prior written consent during the term of the Agreement, then the Trust may require payment in full the amount of the grant. The Recipient agrees that the Funds used to pay for the Project are subject to recapture at any time during the term of this Agreement or after the term of this Agreement should any information supplied prove to be deliberately false or misleading, including all application material.
4. **Payment.** Neither the Trust nor the Town is responsible for any monies required to complete the Project in excess of those awarded under this Agreement. Such excess monies shall be at the Recipient’s sole expense and must be available for the Project in advance of any Funds issued under this Agreement. The Trust agrees to pay submitted invoices in accordance with the procedures describes in the Grant Letter within 30 days.
5. **Compliance with Law.** Recipient shall complete the Project in accordance with all local, state and federal laws, including any local or state building code laws and regulations and obtaining any required permits.
6. **Low- and Moderate-Income Tenant Selection.** Recipient agrees to comply with the terms set forth in the Affirmative Fair Housing Marketing Plan as described in the Comprehensive Permit Project Guidelines established by EOHLIC for the entirety of the affordable housing deed restriction.
7. **Notice to Sell.** Recipient agrees to comply with the terms set forth in the Affirmative Fair Housing Marketing Plan as described in the Comprehensive Permit Project Guidelines established by EOHLIC. Recipient agrees to notify the Trust at least 60 days prior to the initial listing of a homeownership unit for sale.
8. **Enforcement.** The Parties agree and acknowledge that this Agreement shall be enforced by the Town and/or the Trust.
9. **Indemnification.** The Recipient shall indemnify, defend, and hold the Town and Trust, and its officers, employees, and agents (the “Indemnified Parties”) harmless from and against any and all claims, demands, liabilities, actions, causes of actions, costs and expenses, including attorneys’ fees, arising out of or directly from the Trust’s performance of the Project that is the subject of this Agreement or the negligence or misconduct of the Indemnified Parties. To the extent permitted by law, the Indemnified Parties shall not be personally liable under this Agreement.
10. **Successors and Assigns.** This Agreement is binding upon the Parties, its successors, assigns, and legal representatives. The Recipient may not assign this Agreement without prior written consent by the Town and/or Trust.



## Town of Arlington

730 Mass Ave  
Arlington, MA 02476  
[www.ArlingtonMA.gov](http://www.ArlingtonMA.gov)



**ARLINGTON  
AFFORDABLE  
HOUSING TRUST**

- 11. Notice.** Any and all notices, or other communications required or permitted under this Agreement, shall be in writing and delivered by hand or mailed postage prepaid, or by other reputable delivery service, or by electronic communication (e-mail).

As to the Trust:

Sarah Suarez, AICP  
Assistant Director of Planning and Community Development  
730 Mass Ave Annex  
Arlington, MA 02476  
[ssuarez@town.arlington.ma.us](mailto:ssuarez@town.arlington.ma.us)

As to the Recipient:

[add notice information for Recipient]

- 12. Severability.** If any term or condition of this Agreement or any application thereof shall to any extent be held invalid, illegal or unenforceable by a court of competent jurisdiction, the validity, legality, and enforceability of the remaining terms and conditions of this Agreement shall not be deemed affected thereby unless one or both parties would be substantially or materially prejudiced.
- 13. Governing Law.** This Agreement shall be governed by, construed, and enforced in accordance with the laws of the Commonwealth of Massachusetts and any of its courts with competent jurisdiction.

[signature page follows]



**Town of Arlington**

730 Mass Ave  
Arlington, MA 02476  
[www.ArlingtonMA.gov](http://www.ArlingtonMA.gov)



**ARLINGTON  
AFFORDABLE  
HOUSING TRUST**

**IN WITNESS WHEREOF**, the parties hereto have signed this Agreement.

Awardee: \_\_\_\_\_

Date: \_\_\_\_\_

Title: \_\_\_\_\_

**TOWN OF ARLINGTON**

Town Manager: \_\_\_\_\_

Date: \_\_\_\_\_

James Feeney

**APPROVED AS TO FORM**

Town Counsel: \_\_\_\_\_

Date: \_\_\_\_\_

Michael Cunningham

**APPROVED AS TO APPROPRIATION**

Comptroller: \_\_\_\_\_

Date: \_\_\_\_\_

Ida Cody





**Town of Arlington**

730 Mass Ave  
Arlington, MA 02476  
[www.ArlingtonMA.gov](http://www.ArlingtonMA.gov)



**ARLINGTON  
AFFORDABLE  
HOUSING TRUST**

**IN WITNESS WHEREOF**, the undersigned Homeowner(s) has/have affixed his/her signature(s) and seal(s) this day of \_\_\_\_\_.

Signed, sealed and delivered on this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_.

\_\_\_\_\_  
Recipient

\_\_\_\_\_  
Co-Recipient (if applicable)

COMMONWEALTH OF MASSACHUSETTS

\_\_\_\_\_ COUNTY, ss \_\_\_\_\_, 20\_\_

On this date the above named personally appeared before me and proved to me through satisfactory evidence of identification, which was [ ] a current driver's license, [ ] a current U.S. passport, [ ] my personal knowledge, to be the person/s whose name is signed on the preceding instrument, and acknowledged the same to be his/her free act and deed.

\_\_\_\_\_  
Notary Public  
My Commission Expires:



**Town of Arlington**

730 Mass Ave  
Arlington, MA 02476  
[www.ArlingtonMA.gov](http://www.ArlingtonMA.gov)



**ARLINGTON  
AFFORDABLE  
HOUSING TRUST**

**IN WITNESS WHEREOF**, the undersigned Trust Designee has affixed his/her signature and seal this day of \_\_\_\_\_.

Signed, sealed and delivered on this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Trust Designee



**ARLINGTON  
AFFORDABLE  
HOUSING TRUST**

**APPLICATION FOR  
ACQUISITION, CREATION, AND CONVERSION PROGRAM**

It is highly recommended you have a pre-application meeting with the staff prior to submitting your application. Applicants should submit a copy of the completed application, along with any supporting documents to the Trust via email at [ssuarez@town.arlington.ma.us](mailto:ssuarez@town.arlington.ma.us). If you have already provided the requested information in a funding request to another entity (e.g. EOHLC, CPAC, FHLB, etc.), please feel free to note that in the space provided below and attach a copy of the other application.

**APPLICANT/ORGANIZATION NAME:** \_\_\_\_\_

Primary Contact Person: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

**PROJECT NAME:** \_\_\_\_\_

**PROJECT LOCATION/ADDRESS:** \_\_\_\_\_

**PROJECT SUMMARY:** Provide a brief description of the proposed project.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**TYPE OF PROJECT:** Circle or underline the type of project being developed.

Acquisition                      New Construction – Multifamily                      New Construction – ADU  
 Rehabilitation /Renovation                      Conversion                      Other: \_\_\_\_\_

**TYPE OF HOUSING:** Circle or underline the type of housing being developed.

Rental                      Homeownership                      SRO/Group Residence  
 Permanent Supportive Housing                      Shelter                      Other: \_\_\_\_\_

**TARGET POPULATION:** Circle or underline the target population.

Individual/Family                      Age-Restricted                      Homeless/At Risk of Homelessness  
 Special Needs/Disabilities                      Other: \_\_\_\_\_

**UNIT MIX:** Please indicate the anticipated number of units at each target income level for the proposed deed restricted units.

	<b>0-30% AMI</b>	<b>30-50% AMI</b>	<b>50-60% AMI</b>	<b>60-80% AMI</b>	<b>80-100% AMI</b>	<b>100-120% AMI</b>
<b>SRO</b>						
<b>1 Bedroom</b>						
<b>2 Bedroom</b>						
<b>3 Bedroom</b>						
<b>4+ Bedroom</b>						
<b>Total</b>						

**AFFORDABILITY PERIOD:** How long will the units remain affordable? The minimum requirement is 20 years; however, the Affordable Housing Trust favors a term of 30 years or longer.

**DEVELOPMENT TEAM:** List all engaged development team members for the project, including but not limited to the Applicant, development consultant, architect, attorney, and general contractor. For the Applicant, include information on experience developing affordable housing, including number of units, location of units, and over what time period.

Applicant:

---

---

Other member of the development team:

---

---

**PROJECT STATUS:** What level of planning has already been undertaken to evaluate the potential development opportunity?

---

---

---

---

---

---

---

---

**SITE INFORMATION:** Provide a brief description of the current site. Note status of site control as well as any zoning relief or permitting needed.

---

---

---

---

---

---

---

---

**COMMUNITY OUTREACH/SUPPORT:** If new construction is anticipated, provide a description of any current or planned efforts to engage the community or other tenants in the building through outreach, neighborhood meetings, etc.

---

---

---

---

---

---

---

---

**DEVELOPMENT SCHEDULE:** Describe the anticipated timeline for your proposed project keeping in mind that any ARPA funds MUST be spent by December 31, 2026.

---

---

---

---

**FUNDING REQUEST:** Provide a description of how Trust funds will be used, and any other funds anticipated

---

---

---

---

**BUDGET:** Please attach a development budget. Note the status of any funding requests.

Signature \_\_\_\_\_  
Name:

Date \_\_\_\_\_