

**TOWN OF LINCOLN  
CONSOLIDATED HOUSING PLAN**

**March 17, 2003**

**Prepared by the Lincoln Housing Task Force**

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## TABLE OF CONTENTS

Introduction-----	Page 2
Persons in Need-----	Page 4
Housing Market-----	Page 9
Impediments to Affordable and Fair Housing-----	Page 12
Strategic Plan-----	Page 14
Action Plan-----	Page 16

## APPENDICES

- A - Citizen Participation Plan
- B - Homeless and Special Needs Populations
- C - Special Needs of the Non-homeless
- D - Priority Needs Summary
- E - Historical Time Line of Affordable Housing in Lincoln
- F - Results of Town Employee Survey
- G - Housing Priority Matrix
- H - Lincoln's Housing Stock
- I - Public Meetings, Public Hearings, and Comments
- J - Certifications

The Consolidated Housing Plan will be submitted to the U.S. Department of Housing and Urban Development (HUD) in order for the Town of Lincoln to be eligible to participate in the MetroWest HOME Consortium. Participation in the HOME Consortium will enable Lincoln to receive an annual allocation of federal HOME funds to be used for affordable housing projects. The attached Plan discusses Lincoln's housing needs and sets forth both strategic long range goals and specific short range plans to be undertaken to address the Town's housing needs.

## INTRODUCTION

Lincoln has flourished as an incorporated Town since 1754. Through thoughtful planning, land acquisition and visionary zoning, Lincoln has maintained its rural character and small town identity. The population of 5,152<sup>1</sup> has remained relatively stable with about a 5% increase since 1989. Since 1996 Lincoln has added 71 new housing units. Despite this relative stability the Town has seen some major changes. The population demographics have shifted dramatically as the average age of the population has increased. During the 1980's the school population dropped, but since the early 1990's it has been climbing rapidly. (The Lincoln K-8 campus experienced a 40% rise in students from 1994 to 2000.)

An essential element in small town identity that Lincoln has worked purposefully to maintain is the diversity in its housing stock. It is hoped this will allow diversity among its residents in terms of age, education, jobs, professions, and racial and ethnic backgrounds. This reflects an economic diversity made possible through the availability of a varied housing stock - both rental and purchase - priced to be affordable for families of many different income levels. Lincoln has worked effectively in the past through public/private partnerships to maintain housing diversity and was a leader in developing affordable options. Until recently the Commonwealth of Massachusetts certified 10% of Lincoln's housing as "affordable".<sup>2</sup>

Nevertheless, such diversity, in terms of both rental and owned units, has become increasingly difficult to maintain. Lincoln's housing stock has been experiencing tremendous pressure from regional growth and prosperity. The desirability of Lincoln is due to proximity to business, cultural and academic centers, a reputation for excellent schools, and the success of Lincoln's plan to preserve open space and its rural character. This desirability, coupled with a limited supply of housing stock and buildable land, has pushed housing costs to extraordinary levels. As the existing population of low to middle income residents move, escalating housing costs prohibit similar individuals and families with low and moderate incomes from entering the Lincoln housing market. Lincoln is threatened by its own success. As a result, Lincoln now finds itself open to development under Comprehensive Permits under Chapter 40B, which allows developers, promising minimal levels of affordable housing, an avenue to avoid local land use standards. This undercuts the regime under which Lincoln has in the past successfully provided exemplary levels of affordable housing in a manner consistent with the Town's character and values. Careful planning will be required to maintain the affordable housing options central to the unique identity that is Lincoln, while preserving other important elements of its character.

In order to address local and regional housing needs that have become evident, in the fall of 2002 the Selectmen appointed a task force to develop a Comprehensive Housing Plan to present to the Town at the March 2003 Town Meeting. The Housing Task Force consisted of representatives of the Town's Housing Commission, Planning Board, Council on Aging, Conservation Commission and

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<sup>1</sup> All census figures are for zip code area 01773 and exclude housing on the Hanscom Air Force Base which is not under the control of the Town. The Commonwealth of Massachusetts does not include the housing on Hanscom Air Force Base in its inventory of Lincoln's housing stock.

<sup>2</sup> If a city's or town's affordable housing stock is less than 10% of its overall housing stock, the community is subject to M.G.L. chapter 40B, Massachusetts Comprehensive Permit Law (Chapter 40B). Lincoln fell below the 10% threshold to 8.43% when the state revised its numbers based on the 2000 census.

Board of Selectmen. Two additional members represented the two non-profit foundations that have helped the Town build affordable housing in the past, the Lincoln Foundation and the Rural Land Foundation. Task force meetings were open and attended by other residents. The Task Force held two open town-wide meetings prior to Town Meeting to obtain citizen input and feedback on the strategies viewed as promising. One set of written comments upon the Draft Plan was filed, and the final Plan reflects changes suggested in these comments. The completed Plan is approved by the Board of Selectman on March 17, 2003 and will be presented at the Town Meeting later in March 2003. The report that follows is the product of their deliberation and the contributions of the numerous Lincoln residents that participated in the meetings that were held.

## PERSONS IN NEED

The Department of Housing and Urban Development (HUD) calculates the median income for U.S. metropolitan and non-metropolitan areas each year. Lincoln is included within the Boston metropolitan area. HUD establishes income groups - extremely low, low, moderate, and middle- as households whose income falls within specific percentages of the area median income. Most state and federal programs are eligible for households who makes up to 80% of the median income, adjusted for household size.

**Extremely Low-income** – According to the 2000 Census, 5% of households in Lincoln (98 out of 1,995) are extremely low-income, making **less than 30% of the area's median income**<sup>3</sup>. Among this income group, there are 31 renter households making less than \$20,000 who pay more than 30% of their income for rent. Not one of the 98 households with extremely low incomes is a member of a minority ethnic or racial group.

It should be noted that minority racial and ethnic groups represent a very small portion of Lincoln households. According to the 2000 census, Lincoln's population is 1.5% Black and African American, 3% Asian, 0.5% Hispanic or Latino, and 0.5% identified themselves as two races. A total of 5.5% or 111 of Lincoln households contain members of a minority group.

**Low-Income** - Five percent of Lincoln's households are low-income, making from **31 to 50% of the area median income**. 2000 census data shows that of the households for which rents were computed, 51% of renter households making between \$20,000 to \$34,999, pay more than 30% of their income for rent. However, this represents only 20 households (7% of all renter households).

According to the census, 100% of Lincoln's Hispanic and Latino households fall within this income group, while only 5% of all of households are low-income. However, this represents only 9 households, since only 0.5% of Lincoln households are Hispanic or Latino. Three percent of the Asian households are low income, accounting for only two households.

**Moderate-Income** - Nine percent of all households (177 of 1995 households) in Lincoln are moderate-income (**50 to 80% of area median income**) according to the 2000 census. Approximately one-third (16 of 49) renter households making between \$35,000 to \$49,999, pay more than 30% of their income for rent. However, again, there are a small number of households in this income category and the number of renter households is even lower.

Thirty-one percent of Black and African American households and 8% of Asian households fall into this category. This represents 9 Black or African American households and 5 Asian households.

**Middle-Income** - Data from the 2000 census indicates that approximately 5% of households are middle-income, **80-95% of the area median income**. Surprisingly, a majority (64%) of the renter households with incomes between \$50,000 to \$74,999 pay over 30% of their income for rent.

Thirty-one percent of Black and African American households fall into this income group. No other minority ethnic and racial groups have middle-income households.

**Race and Income – Lincoln has few minority households, but among these, incomes vary greatly.** Eighty-nine percent of Asian households make over 95% of the median income. In fact, most Asian households reported incomes exceeding \$200,000. All of the 9 households classified as two or more races also reported incomes over \$200,000. Thirty-eight percent of Black and African

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<sup>3</sup> 2000 Census data was collected in 1999. Therefore, the 1999 Boston area median income was used when calculating 2000 census data. The 1999 area median income was \$62,700. The 2002 area median income is \$74,200.

American households have incomes over 95% of the median. All of these households reported incomes between \$75,000-\$100,000.

Hispanic and Latino households have the lowest incomes, as all these households are low income. The incomes of Black and African American households are evenly divided among moderate, middle, and higher income groups. No Black or African American households are very low or low income. The median income of Asian households is above \$200,000. Except for Hispanic and Latino households, very low- and low-income minority households do not reside in Lincoln. Only 10% of white households have very low or low incomes. In general, incomes in Lincoln are high, 76% of all households have incomes greater than 95% of the median income, based on 2000 census data

**Elderly** - Seventeen percent of Lincoln's population is over 65, but 29% of all households (556 of 1995) are over 65. According to 2000 census data, 19% of elderly households are extremely low- or low-income and another 10% are moderate-income. **Therefore, 29% of elderly households in Lincoln, or 158 households, are income eligible for most federal or state housing programs.** Comparatively, 15% of households under 64 years old are extremely low-, low- and moderate-income and 20% of all households fall into these income categories. Nineteen, or 3% of elderly households are below the poverty level. Four percent of elderly households (27) do not have a vehicle available.

AGE BY HOUSEHOLD INCOME			
	25-64	65+	All
Below 30% of median income	4%	9%	6%
30-50% of median income	4%	10%	6%
50-80% of median income	7%	10%	8%
80-95% of median income	4%	9%	6%
Over	81%	62%	75%
TOTAL	100%	100%	100%
Source: 2000 U.S. Census			

INCOME OF HOUSEHOLDS 65 AND ABOVE		
	Number	Percent
Below 30% of median income	43	9%
30-50% of median income	44	10%
50-80% of median income	71	10%
80-95% of median income	51	9%
Over 95% of area median income	347	62%
TOTAL	556	100%
Source: 2000 U.S. Census		

**Only a small percentage (5%, or 34) of the households over the age of 65 are renters.**

Twenty-nine percent of these elderly renters (10 households) pay more than 30% of their income for rent. Comparatively, 45% of renters under 65 years old pay over 30% of their income for rent, while 18% of all households below 65 are renters.

Elderly homeowners pay a smaller percentage of their income on housing costs than do younger homeowners. Seventeen percent of homeowners over 65 and 24% of owners under 65 pay over 30% of their incomes for housing costs. Since most elderly have owned their homes for many

years, they no longer carry a mortgage on their property, which is reflected in these lower monthly housing costs. (Forty percent of the elderly in Lincoln have owned their homes since 1969 compared to 1% of the 15-64 year old age group.)

Elderly homeowners have accumulated enormous equity in their homes. With median housing prices of over \$800,000 and most elderly without a mortgage, many elderly homeowners have considerable wealth in their real estate assets.

Another source of information on housing need for elderly homeowners is the number of property tax exemptions given by the Assessor. During the fiscal year 2002, the Assessors' office reports that three exemptions were granted to homeowners 70 years and over whose incomes (excluding social security) were less than \$13,000 for a single person and \$15,000 for a married couple. In addition, their assets (excluding the value of their home) were less than \$28,000 for a single person and \$30,000 for a married couple. Two other homeowners over 65 were granted exemptions under the requirement that their incomes be under \$40,000. Another four exemptions were granted to surviving spouses over 70, but this exemption has an asset limit but no income limit. Thus, few exemptions were granted by the Assessors Office based on income.

In 2000, Town Meeting rejected, in a very close vote, the construction of a market rate assisted living facility. Town Meeting concerns included: (1) the site, which was on the grounds of Minuteman Science and Technology High School; (2) the distance from town activities such as the library, churches and Council on Aging; and (3) the development of such a facility by a for-profit developer. Shortly after this vote, the Town appointed the Lincoln Elder Care and Housing Committee (LECHC). [The Committee issued a report in March of 2001. They undertook a process that included substantial input from the community. The report discusses both the desire of most elderly residents to remain in their own homes for as long as possible and the need for services to be brought to the home. Transportation to services is a key issue. The Committee also noted an issue with regard to those needing care that is not readily brought into the home. To address long term needs, the LECHC Report recommends phased development of a multi-site continuing care community. The Report also makes further recommendations including a tax abatement program, transportation, contracting for in-home services with homemakers and part-time nurses.

**Comment:** I will check but I believe the developer was willing to charge lower rates for some units. These were rental not sale units.

**Renters** - Based on the Boston area median income, the maximum affordable monthly rent (30% of income), including utilities, for a very low income household is \$556; for low-income families it is \$928; for moderate-income families \$1,484; and for middle-income families it is \$1,855. It should also be noted that 86% of renters in the 2000 census did pay for one or more utilities in addition to their rent.

According to the National Low Income Housing Coalition in order to afford (paying no more than 30% of gross income) the Boston area's 2002 Fair Market Rent (FMR) for a one bedroom apartment, a family would need an income of \$42,960. Similarly, to afford the FMR for a two-bedroom apartment requires an income of \$53,720. These rents are affordable for middle and moderate-income households, but not for low and very low-income households in the area who, in 2002, earn up to \$37,100 and \$22,250 respectively.

**Owners** - Based on the 2000 census, 21% of all owners (229 of 1417 households) are paying more than 30% of their incomes on housing costs. All of the very low-income owners (54 households) pay over 30% of their incomes on housing costs. However, only 20% (8 households) of the low-income owners and 34% (20 owners) of the moderate-income owners pay over 30% of their income on housing. Seventeen percent of households making greater than moderate income pay over 30% of their income for housing.

According to Citizens Housing and Planning Association (CHAPA), the median single-family home price in Lincoln is \$842,500. The maximum home that a median income Lincoln family can afford is

\$317,138. That leaves an affordability gap \$525,362 between sales prices and the amount a local family can afford to buy. This again emphasizes the difficulty in maintaining diversity in the Town as properties inevitably turn over.

**Size of Households (Single, Two-person, and Large Families) -** Twenty-two percent of households in Lincoln consist of a single person according to the 2000 census. Thirty-seven percent are two-person households. Eleven percent of Lincoln's households are made up of five or more people. Seven percent of family households are headed by a single female. Fifteen percent or 137 of persons over 65 live alone, and all of these individuals are single females.

**Town Employee Survey -** One hundred and forty eight town employees (Fire, police, school, town offices personnel) responded to a Task Force housing survey to assess the interest of town employees to locate in Lincoln. Ten percent of those responding lived in Lincoln. Forty percent would like to live in town. Of those who would like to live in town, seventy-seven percent would buy and the rest would look for rental units.

Most renters need a two-bedroom apartment with rent in the moderate-income range of \$1,000-1,600 per month. There is a smaller group looking for one bedroom in the low-income range of under \$1,000 per month.

Over half of those who would like to buy a house in Lincoln need three or more bedrooms. Most could not afford a house priced higher than \$210,000. A few couldn't afford more than \$130,000 and a few could afford about \$300,000. See Appendix F.

## **HOMELESS AND SPECIAL NEEDS POPULATIONS AND SERVICES**

Lincoln is part of the Metro West suburban service area for State supported social services. Residents with a variety of special needs receive services from agencies located in surrounding communities. Because Lincoln has very few residents who utilize services these agencies do not separate out Lincoln in their statistical reports.

**Homelessness--**The Lincoln Police Department refers any residents in need of temporary housing to the Bristol Lodge Shelters in Waltham. There are no reported in homeless from Lincoln.

**Mentally Ill--** The Massachusetts Department of Mental Health-East Suburban Site in Arlington reports two registered DMH clients residing in Lincoln. The Crisis Intervention Center in Lexington reports less than two contacts with Lincoln residents per year. Additional services are provided by Eliot Community Human Services in Concord.

**Domestic Violence--** Victims of domestic violence receive services from the Concord Network for Women's Lives in Concord, emergency shelters in Waltham, and the Victim Assistance Services of Central Middlesex at the Concord District Court. The victim assistance program reports 5 referrals of Lincoln residents in the past year.

**Mental Retardation/Developmental Delay--** This population receives services through the Massachusetts Department of Mental Retardation.

**Veterans--** Veterans in need of services can obtain assistance from the Lincoln Veteran Service officer. The Assessors office has granted nineteen tax exemptions to veterans during fiscal year 2002. Exemptions to veterans are not income based. They are based on disabilities and medals awarded for service.

**Persons with HIV/AIDS –** There is no available information on the number of persons with HIV/AIDS in Lincoln.



**Elderly**--As has been noted above, seventeen percent of Lincoln's population is over 65. This group of residents is served by a very active Council on Aging (COA). The COA provides transportation to shopping, social activities and medical appointments. It makes referrals for Meals on Wheels, the Emerson Hospital Home Care Department, and Minuteman Senior Services.

**Disabilities** -- The Lincoln Disabilities Commission conducted a limited survey in December 2002 on the status of accessible housing in Lincoln, that is housing that would be suitable for physically disabled citizens. The survey focused on mobility impairments, particularly wheel chair accessibility.

The Commission notes that some physically disabled residents have the means to modify their existing residence, but there are others who cannot find or afford an accessible unit in town. The waiting list at Lincoln Woods demonstrates the need. Currently 14 people with disabilities (both physical and/or mental) are on the waiting list at Lincoln Woods. All are waiting for low or moderate-income units. Half of them are waiting for a one bedroom, low-income unit. At this time Lincoln Woods has only one fully accessible unit. Renovation plans required by Mass Housing call for one fully accessible unit to be added per year until there are a total of 6 fully accessible units.

The Assessors office has granted two tax exemptions in 2002 to blind persons.

## **SUMMARY OF NEEDS**

Lincoln's population is largely higher income with few minorities. Nineteen percent of the households fit the income eligibility guidelines for state or federal housing programs targeted to those making less than 80% of the median income. Most of Lincoln's housing stock is owner-occupied (86%). With low vacancy rates, long waiting lists, and few available apartments, there is a need for additional rental housing. There is a critical need for stabilization of the existing single-family housing stock and the need for additional affordable units available for purchase.

Lincoln's most pressing housing problem is simply the very high cost of housing in town. There is a wide gap between the cost of a single family home and the amount a moderate-income family can afford. Many existing homeowners could not afford to purchase their homes at current market prices. Housing prices have exceeded income growth. In addition, it is difficult, if not impossible, for middle or moderate-income families, including town employees, to move into Lincoln. Alternatives for senior citizens other than large, expensive single family homes, are in very short supply. Finally, there is an insufficient number of units in the Town that are accessible to those with disabilities.

## HOUSING MARKET

**Home Sales** - Housing prices in Lincoln are out of reach for moderate and middle-income families. According to the Boston Globe's web site (Boston.com), Lincoln has the second highest real estate value in Massachusetts. In the ten-year period 1991-2001 the median sales price for single-family homes rose 163% from \$328,000 to \$861,805. The price of a single-family home rose 21% from 2000 to 2001 alone (Source: The Warren Group (Banker and Tradesman)). The area median income rose only 7% during that year. Between 1989-1999 the median income in Lincoln only rose 37%. Housing prices are rising much faster than incomes and it is becoming increasingly difficult to afford to purchase a home in Lincoln.

The number of home sales declined somewhat beginning in 2001. There was a 22% drop in the number of sales from 2000 to 2001. However, prices continued to rise. Vacancy rates have lessened by 1.1, which is a decline of over 61%, over the past ten years. The market in Lincoln remains strong. The waiting list for condominium units at Battle Road Farm numbers 61 with about one-third with Lincoln connections.

Lincoln's stock of smaller, more affordable, homes is diminishing. Many homeowners are putting substantial additions onto their existing homes. In 2001 there were building permits approved for 16 additions of over \$100,000 and another 9 approved for an addition valued at \$40,000 to \$99,000. Through November 2002, 22 building permits for additions over \$100,000 have been approved. Another 4 are valued from \$40,000 to \$99,000. Smaller homes are being demolished and replaced by much larger and expensive homes. Four demolition permits are currently pending for approval. In 2000, building permits for 20 new homes were approved. According to the Board of Assessors, during the first half of 2000 the construction cost for each of these homes exceeded \$515,000 excluding the cost of the land. In 2001 permits for 10 new homes were issued. However, in 2002, through November only one permit for construction of a new house was issued. This slow down in new home construction may reflect a slowing down in the economy. However, the pace of home renovations and additions has not slowed down and housing prices have not decreased.

**Rents** - The 2000 Census reported an area median rent of \$888. However, a more realistic picture of the rental situation in Lincoln is evidenced by rental listings in December 2002. Five properties were listed for rent: a one bedroom for \$1700/month, a two bedroom for \$1650, two four bedrooms – one for \$5000 and the other for \$8,000/month, and a five bedroom for \$12,000. Lincoln's housing stock consists of large homes, about 78% of the housing units have 3 bedroom or more. The prices of one and two bedrooms are barely affordable to moderate income households. Larger rentals are out of the range of all but high-income households. The vacancy rate for rental units is less than 1%. They have declined by 0.4, which is a decline of over 38%, over the past ten years. Such low vacancy rates will tend to push rents higher.

There are 65 families on the waiting list for the following unit sizes and types:

NUMBER OF BEDROOMS	LOW INCOME	MODERATE INCOME	MARKET RATE	HANDICAPPED ACCESSIBLE	TOTAL
1	21	3	7		31
2	10	3	4	3	20
3	11	1	2		14
TOTAL	42	7	13	3	65

Lincoln Woods Waiting List – December, 2002

**Town-owned Property** - As part of its exploration of all options for housing in town, the Housing Task Force considered the suggestion of retrofitting some town owned buildings as well as whether there was "open" town land suitable for development for affordable housing.

All of the existing Town-owned buildings (Town Offices, Bemis Public Safety building, Library, Pierce House, DPW barns, Smith, Hartwell and Brooks Schools, the "pods" on the school campus) are all used at the present time for important, if not vital town functions. Although it is conceivable that one or two might be retrofitted to accommodate housing units - it would only be at prohibitive costs and would necessitate the relocation of whatever functions were presently situated in the building. A specific request came to us to look at the Hartwell pods. The Chair of the School Committee indicated that due to present uses that would have to be relocated and concerns about physical layout that would be highly inappropriate for privacy, traffic concerns and overall safety, that the Committee would not see this as a workable option for those spaces.

In 1988, the Town hired (with a \$5,000 grant from the state) a consultant, Kay Alexander, to survey five town-owned sites that the Planning Board had identified as suitable for affordable elderly and family housing. Small sections of land on Mill Street, alongside the schools, on Codman Farm and near the Pierce House were evaluated, along with the Town Barn (DPW) site. All of the sites had certain limitations, but all held some potential as well. Although the report did not recommend one site over any other, the DPW property was considered "ideal for housing" as it was near shopping and the commuter rail.

A re-examination of the five town-owned sites shows that Codman Farm no longer remains viable as a housing site because the 1999 town meeting voted to place the land in permanent conservation. The Schools and the Pierce House properties remain impractical due to site constraints and competing uses, while the Mill Street property and DPW sites remain the most suitable for affordable elderly or family housing. The location of the DPW site, near transportation and retail, continue to make it the most attractive for affordable housing. A more extensive feasibility analysis of the DPW site is warranted.

There are three other smaller (less than 2.5 acres) town-owned properties which the Task Force identified. A preliminary review of these sites indicates that there are significant site constraints which would make them difficult, if not impossible, for the development of affordable housing.

**Private, Institutional and State-Owned Lands** - The Task Force conducted a preliminary analysis of over 20 private, institutional and state-owned properties in town. Both larger properties (greater than 10 acres) and smaller (as little as one acre) were evaluated.

Currently, there are several larger properties that are either undergoing a land use change, on the market, or may be on the market within the next five years. The new owner of the former Boston Institute for Intercultural Communication (BIIC) property has informally expressed some interest to the members of the Task Force in exploring a multi-unit housing project on a portion of the 31-acre site off of Route 2. The biggest obstacle to affordable housing on all of the large properties that were evaluated is the cost of the land. With a 2-acre developable lot priced as much as \$900,000 in today's Lincoln market, significant affordable housing stock is precluded unless there is a considerable subsidy provided by the buyer or seller. Environmental constraints, such as sewage treatment, are another significant issue for most of the properties that were evaluated.

Smaller properties, even in the one-acre range, provide another opportunity for affordable housing in town. The owners of several properties have undertaken preliminary discussions with the Town regarding potential 40B development on these sites. In addition, the Housing Commission has been offered a surplus property located on Sunnyside Lane in north Lincoln and three adjacent state-owned lots may also become available. Several small, privately owned sites in the South Lincoln Business District provide the best opportunity to provide affordable housing near public

transportation and a retail center. Land costs, availability, site planning issues and neighborhood impacts remain the biggest constraints on these smaller properties in town.

**Condition and Lead Paint Hazards-** Lincoln's housing stock is relatively old. Seventy-nine percent of all units were built prior to 1979, and 25% built prior to 1940. However, there are no reported building code violations over the last year. Lincoln's housing stock is continuously maintained and upgraded by owners.

A recent report to Congress estimated that 74% of housing units built prior to 1980 contain lead paint. This translates into approximately 1200 housing units in Lincoln potentially with lead paint.

**Public Housing** -The Town of Lincoln does not have a Housing Authority. As discussed in the following section, it has a Housing Commission instead. There is one Section 8 house in the town which is managed by the Concord Housing Authority, the housing authority of a neighboring town.

## IMPEDIMENTS TO AFFORDABLE AND FAIR HOUSING

The factors that constrain low-cost housing development in Lincoln fall into four related categories: high cost of land and construction, local environmental factors, financial and administrative realities, and attitudes. To create either rental or purchase opportunities in Lincoln that are truly affordable, that is, for people who meet the official definitions for low or moderate income, is not easy.

First, land and housing in Lincoln are extremely expensive because prices over the last twenty years have vastly out paced inflation. The median price for a house and lot in 1985 was \$300,000. In 1996, it was \$600,000, an increase of 100%. Currently, a buildable two-acre (conforming) lot in Lincoln can be sold for as high as \$900,000 in certain locations. These prices are due to a number of factors. A desire to preserve Lincoln's rural and historic character for future generations has led to a long history of purchasing land for conservation; greater than 40% of the town is now protected. Lincoln is located virtually at the intersection of Routes 2 and 128, minutes from Cambridge, and with direct Commuter Rail service to Cambridge and Boston, it has unparalleled access to regional academic, commercial and cultural resources. This has produced a very beautiful and highly desirable community, but has also reduced the number of acres available for development. Consequently, land costs remain some of the highest in the state.

A limiting factor related to prices is the Town's zoning. The vast majority of the developable land in Lincoln is zoned single family residential with a two-acre lot size minimum. In part this zoning is driven by the need to protect limited water resources, as noted below, but it nonetheless contributes to the high prices for developable real estate and obviously limits the development of higher density housing options

Second, the land in Lincoln constrains low-cost development. Since there are no municipal sewers, on-site septic systems are necessary. Lincoln, although small, maintains its own water resources and delivery system. Thus, both regional and local water supplies must be carefully protected with restrictions throughout the recharge areas. Poor drainage of local soils and many acres of wetlands sometimes requires more than two acres per housing unit to protect the valuable water supply. This raises site development and construction costs considerably and particularly limits larger scale housing developments.

Rents of the few apartments available in town have increased for many of the same reasons: higher carrying costs for the landlords and a demand that outweighs supply ten-fold. Accessory apartments provide some rental units that are in very high demand for people who cannot or do not choose to purchase. They also have the indirect effect of providing additional income to people who need it to be able to afford to remain in their homes. Rents for accessory apartments range from \$500 to \$1,700.

Third, serious financial and administrative constraints exist. Taxes have increased substantially due to increases in town expenditures caused, in part, by the shift in public funding from the state and federal governments to the local level. Many people in town are finding it hard to meet the financial demands of living in Lincoln. This is particularly true of older citizens who have watched their property taxes outstrip their incomes as real estate values have escalated. Increased development affects school population, fire and police functions, as well as water usage. It also puts extreme pressure on volunteer boards and commissions.

Recent trends show particular pressure on middle-income housing (\$200,000 to \$300,000). These homes offer an avenue for high priced development with a tear down/rebuild or a purchase/up-grade scenario. Currently 120 units are assessed under \$317,000, including condominiums. The disappearance of this housing stock will severely affect the diversity of Lincoln's population.

Fourth, as noted earlier, Lincoln does not have a Housing Authority. The Housing Commission, unlike the work of a number of other boards whose activities are mandated by law, operates at the

will of the Town. Although this approach requires a higher degree of consensus, it has proven to be successful in Lincoln because the Town has actively supported and, in fact, has itself (with the cooperation of private foundations) undertaken the development of opportunities for moderately priced housing. There are 184 affordable units available today. It will take continued creative and concerted efforts on the part of the Town and its private partners to further increase the number of units available to low and moderate-income people.

## STRATEGIC PLAN

Because of high housing costs and the general lack of housing other than single-family homes, Lincoln's affordability problem affects virtually all of the potential target populations found in the town or who might locate in town. As indicated in the foregoing assessment, there is a considerable elderly population that is aging in place and is particularly in need of housing alternatives. While the population of ethnic minorities is small, there is a very active METCO program in the Lincoln schools, and more parents of these students would find living in Lincoln attractive if affordable options existed. Similarly, the small but growing number of citizens with disabilities cannot readily find affordable units suitable for their situations. Town employees comprise another target population for affordable housing. The Town would benefit from their living locally and many desire to do so, but housing prices are simply beyond the reach of those in local public service. Finally, the tremendous barrier created by today's housing costs means that young, often first-time homebuyers, have virtually disappeared from Lincoln's landscape.

The Task Force assessed a range of housing options in terms of benefits to target populations, detrimental community impacts and challenges in terms of cost and other obstacles. Three particular dimensions soon became paramount in this assessment: **flexibility** in meeting targeted needs; **cost**; and **speed** of implementation. A summary of the assessment of the merits of the various options considered is set out in matrix form in Appendix G. As a result of Task Force deliberations, the following strategies were identified as being the most important in meeting Lincoln's housing needs.

### **A. Increase affordable and accessible rental opportunities through new development.**

Rental apartments for low and moderate income residents offer the most flexible and cost effective approach for addressing Lincoln's housing needs. The housing stock in town consists overwhelmingly of single family, owner occupied residences. Thus rental units provide an option that is not readily available now. Rental units provide a high degree of flexibility in that they can readily be targeted for many of Lincoln's housing needs including the elderly, METCO parents and Town employees. Multiple unit complexes also allow and even facilitate the design of units to maximize accessibility for handicapped persons. Ongoing management and turnover in rental units also allow targeting to be adjusted over time as Lincoln's affordable housing needs change. Finally, multiple unit developments of at least moderate scale make efficient use of very high cost real estate.

On the other hand, larger scale projects are comparatively time consuming and complex to implement. Community impact issues are significant, so location becomes a critical concern. Lincoln's current zoning leaves little room for such developments, so bylaw changes or reliance upon development under the state's Comprehensive Permit statute, Chapter 40B, will be required. Fortunately, Lincoln appears to have location options that should minimize impacts and facilitate permitting.

Limited opportunities exist for the development of small-scale rental developments on state owned parcels. These parcels are located in an area of national historical significance adjacent to Minuteman National Historical Park and thus are not appropriate for large-scale development. They nonetheless provide housing opportunities if they can be obtained at nominal prices from the state as part of a plan to meet the housing objectives of the Commonwealth. Existing conditions placed by statute upon the transfer of such surplus properties require that they remain in "direct public use" and thus that they be developed as affordable rental properties.

### **B. Increase affordable rental opportunities in the existing housing stock.**

Lincoln has over sixty permitted accessory apartments and many (estimated at over forty) that are not permitted. These, along with changes in state regulations, provide an opportunity to supply additional affordable rental housing. Lincoln has a bylaw that allows a special permit with greater flexibility and a longer term for accessory apartments committed to affordability for a period and under eligibility terms established by the Lincoln Housing Commission. Because many units are already in existence, they offer an opportunity to expand the affordable housing stock without expenditure of public funds and with minimal impact upon the community. As an added incentive for owners of non-permitted units, the Board of Selectmen is exploring the option of an amnesty tied to commitment an amnesty tied to commitment of units under the bylaw to the affordable housing program for a period of fifteen years. Additional incentives can be developed in terms of permit flexibility (e.g. allowing larger apartments) and favorable property tax treatments to spur commitment of new and/or existing units to the affordable housing program. Although these units cannot be targeted as effectively as units constructed to meet specific housing needs, they can nevertheless supply needed affordable housing.

### **C. Increase affordable home ownership opportunities in the existing housing stock.**

One available low-impact option for increasing the affordable housing stock is to buy modestly priced, existing units down to affordable levels. This also benefits Lincoln by protecting existing stock and thus avoiding unnecessary development. By relying upon units in place, this also minimizes neighborhood impacts. Buy downs can be flexibly targeted to priority populations and are particularly suitable for providing ownership opportunities for first time homebuyers. In Lincoln this approach would permit rapid addition to the affordable inventory because there are a significant number of condominium units and normal turnover presents regular purchase opportunities. Battle Road Farm, a townhouse style complex of 120 units with 48 of these affordable, is especially attractive. This Town-sponsored development was originally targeted at 72 affordable units, and the infrastructure for management and maintenance of affordability of the units is already in place. Continued affordability of units is enforced through deed restrictions running in favor of The Lincoln Foundation, a local nonprofit dedicated to developing and preserving affordable housing. Several buy-down possibilities are available in the form of modest condo units and small homes throughout the Town.

In conjunction with this strategy, the Town will pursue opportunities to access assistance for first time homebuyers through programs such as the Soft Second Program. This program provides favorable financing to eligible first time homebuyers.



## ACTION PLAN

HOUSING ACTION PLAN	FUNDING SOURCE	TARGET COMPLETION DATE	HOUSEHOLDS SERVED
Development of rental apartments for low and moderate income tenants	Mass Housing Partnership (MHP) Massachusetts Affordable Housing Trust	First project 2004 Second project 2006	15-20 15-20
Buy down of modest homes and condominiums to affordability	HOME Consortium Community Preservation Act (CPA) Funds	1-2 units per year over five years	5-10
Accessory apartment amnesty and incentive programs	Private	1-2 units per year over five years	5-10
Small scale rental projects	CPA State HOME	1 unit in 2003, 2 units in 2004	1 2

### A. Near Term

In the next twelve months Lincoln would undertake the following activities to meet its housing goals.

1. **Commencement of a medium scale apartment development of 15 to 20 units:** This project would be located on one of several possible parcels where owners have expressed a willingness to work with the Town toward housing goals. Ideally the project would be cited near the town's commercial and transportation center. Such locations are among those identified, but other options exist as well that have attractive features. Three of the units would be designed for handicap accessibility, and priority would be given to target populations of low and moderate means: Elderly, town employees and METCO parents. Feasibility and design studies would be undertaken in 2003 with plans presented for approval along with necessary zoning changes at Town Meeting in 2004. Alternatively, the development process could be expedited through the use of a "friendly" Comprehensive Permit application under Chapter 40B.
2. **Accessory Apartment Affordability Program:** Working closing with the Zoning Board of Appeals and the Housing Commission, the Selectmen will encourage affordable accessory apartments through special permit incentives tied to a commitment on the part of the unit owner to rental upon affordability terms established by the Housing Commission as reflected in the current Accessory Apartment Bylaw. Initially an incentive would be provided for enrollment in the affordability programs through a notice and amnesty program to permit currently unpermitted accessory apartments. Over a longer period, other incentives would be developed as discussed below.
3. **Buy-down of existing housing units:** In addition to CPA and private funds, **the approximate \$30,000 anticipated to be received in FY 2003 through the HOME Consortium will be used to buy modestly priced homes or condominiums and resell them at "affordable" prices with deed restrictions** that will ensure continued affordability of the unit in the future. This sort of affordable home ownership program is already in place at Battle Road Farm, but it could be applied elsewhere in Lincoln. Deed restrictions would be held and enforced by the Lincoln Foundation, a local non-profit foundation established to promote affordable housing. One or two units per year could be purchased and resold under the program using funds that are now available to the Town. Lincoln will enroll in the State's program to provide "soft" second mortgages to first time homebuyers. Affordable units would be offered on a priority basis to target populations established by the Housing Commission such as Town employees and METCO parents. This would require no changes in Lincoln bylaws.

4. **Small-scale rental developments:** Lincoln has the opportunity to acquire certain state owned lots at reasonable prices for the development of affordable housing to meet state and local objectives. These lots, adjacent to Minuteman National Historical Park, may offer an opportunity for small-scale rental development if done carefully to respect historic preservation and neighborhood interests. State restrictions upon transfer of surplus properties to local governments for “direct public use” require that Lincoln retain title to such properties and thus that housing upon the properties provide rental rather than ownership units. Lincoln should continue to pursue acquisition of these properties for housing purposes if they can be obtained at nominal prices with the objective of creating up to three additional units in addition to the one unit of affordable housing that already exists on one of the state owned lots.

## **B. Long Term**

Over the next two to four years Lincoln would pursue the following activities to increase the stock of affordable housing.

1. **Additional incentives for affordable accessory apartments:** The Housing Commission and ZBA in conjunction with the Board of Assessors and the Board of Selectmen should investigate providing additional incentives for development of affordable accessory apartments. These might include favorable property valuation procedures, property tax abatements or refunds and so forth. If such incentives appear feasible and practical, changes in the Accessory Apartment Bylaw and other necessary bylaws to provide such incentives should be developed and proposed for consideration by Town Meeting in March 2004.
2. **Continued buy downs:** The buy down program described as a short-term option may be continued. Available funding provides an option to buy down 1-2 units per year for five years.
3. **Task Force on assisted living options:** The Selectmen should appoint a Task Force to study and pursue the development of reasonably scaled assisted living options for Lincoln residents. One of Lincoln’s most significant unmet needs is for “one move” alternatives to senior citizens remaining in single-family homes that are too large and too financially burdensome. Presently residents must leave Lincoln to find these alternatives. The Task Force should provide preliminary findings to TM in 2004 with a detailed proposal targeted for presentation to TM 2005.
4. **Additional apartment developments:** If sufficient affordable housing units to meet Lincoln’s housing needs are not obtained as a result of the short and long term options described above, a second rental apartment development should be considered. Pursuit of a second apartment development at a later date would permit assessment of the feasibility of sites such as the DPW garage that present more complex development issues but are otherwise very attractive for the development of affordable housing.
5. **Inclusionary zoning bylaw:** The Lincoln Housing Commission with the concurrence of the Planning Board should propose to Town Meeting in March 2003 a new Inclusionary Zoning Bylaw. This bylaw would require that developers applying for subdivisions of property in Lincoln above a minimum number of lots provide affordable housing as a component of the proposed subdivision or alternatively to make a payment to the Town for the purpose of funding affordable housing. This bylaw, similar to those enacted in several other towns, would both promote affordable housing in Lincoln and discourage wholesale subdivision of remaining undeveloped large parcels in the Town.

## INSTITUTIONAL STRUCTURE AND COORDINATION

The Lincoln Housing Commission is the primary housing group in the Town. The mission of the Commission is to preserve and increase the supply of affordable housing in Lincoln. Five residents serve on the Housing Commission. The Town elects three members, the Selectmen appoint one member, and the state appoints one member. The Housing Commission is subject to control by the Town Meeting as it is not a corporate entity. The Housing Commission is not eligible to apply for or receive State or Federal housing grants. It may, however, cooperate with non-profit organizations or Housing Authorities in neighboring towns to apply for grants on behalf of its projects.

Lincoln does not have a Housing Authority. As mentioned, the Concord Housing Authority manages the Town's one Section 8 unit.

As previously mentioned, the Selectmen appointed a Housing Task Force for the purposes of developing a comprehensive housing plan. The Task Force includes representatives of the town's Housing Commission, Planning Board, Council on Aging, Conservation Commission, Board of Selectmen, the Lincoln Foundation, and the Rural Land Foundation.

The Lincoln Foundation is a private non-profit organization founded in 1968 for the purposes of promoting affordable housing in Lincoln. The Foundation's present statement of purpose is as follows: "To contribute to the preservation of a diverse stock of housing in the Town of Lincoln, to protect and develop affordable housing opportunities in the town, to cooperate with government agencies and private charitable organizations to preserve open space and protect the environment, while increasing the availability of housing opportunities in the town for persons of limited financial means, to enhance the quality of life and community in the town, to preserve the essential values and characteristics of the Town's rural heritage and to carry on any other activity that may be lawfully carried on by a corporation formed under Chapter 180 of the Massachusetts General Laws and exempt from taxation under Section 501(c)(3) of the internal Revenue Code of 1986, as amended, or any other provision thereto." An eight-member Board of Directors governs the Foundation.

The Rural Land Foundation is one of three major land conservation organizations in Lincoln. It is dedicated to maintaining Lincoln's rural heritage. Established in 1965 as a charitable trust, the RLF works to protect lands identified by the town to be of conservation interest. In addition to its land conservation efforts, the RLF works with the Town to identify and secure property for creative development, including low and moderate-income housing. In the mid 1970s the RLF purchased the land for the first major affordable housing project in town known as Lincoln Woods.

## **APPENDIX A CITIZEN PARTICIPATION PLAN**

The Town of Lincoln is required to have a Citizen Participation Plan which contains the town's policies and procedures for public involvement in the Consolidated Strategy and Plan (Consolidated Housing Plan) process and the use of HOME money.

This Citizen Participation Plan must be available to the public.

The Citizen Participation Plan outlines the process through which the public will have an opportunity to participate in an advisory role in developing, amending, and assessing the Town of Lincoln's Consolidated Housing Plan and Annual Action Plans. These plans are required for the Town to receive funds through the Department of Housing and Urban Development's (HUD's) HOME program.

### **Participation**

The participation of citizens, agencies and other interested parties in the process of developing the *Citizen Participation Plan, Consolidated Strategy and Plan, and Annual Action Plans* will be encouraged. All meetings and draft public documents will receive the broadest possible circulation and notice to encourage participation especially by residents in the lowest income brackets, and by minorities and non- English speaking persons, as well as persons with mobility, visual or hearing impairments. The Concord Housing Authority, as the housing authority with jurisdiction in Lincoln, will be notified of all meetings in order to encourage the participation of public and assisted housing residents. Upon request, accommodations will be made for persons with disabilities to ensure their participation in the process including holding hearings in accessible sites, providing signing and/or assistive listening devices, and providing assistance in reading documents.

#### Access to Meetings

The public will be informed of the date, time, place, and accommodations for people with disabilities of meetings through advertisements placed in the Lincoln Journal at least ten (10) days before each meeting. Notice of the meeting will be mailed to appropriate committee members and interested citizen groups and agencies. Public housing authorities and other groups providing housing to low-income persons should be encouraged to post notices in their housing. Any citizen who indicates an interest should be placed on the mailing list. The notice will be posted at Lincoln Town Offices.

#### Access to Information

Any citizen, agency or other interested party may request information and review and submit comments regarding the Consolidated Housing Plan and/or Annual Action Plans, including the proposed use of funds and the benefit to low and moderate income residents. Documents will be available at Lincoln Town Offices, the Lincoln Public Library, and through mailings as requested.

Plans to minimize and assist those displaced as a result of activities will also be available. Citizens will have access to records for at least five years.

#### Technical Assistance

Technical assistance will be provided to groups representative of low and moderate-income groups that request assistance in developing proposals under the consolidated submission.

### Public Hearings

At least two (2) public hearings will be held to obtain input from citizens, agencies, and other interested parties. At least one of the public hearings will be held to obtain comments regarding the Consolidated Housing Plan and/or Annual Action Plan. The second public hearing will be on the Annual Performance Report. Hearings will be held in the evening to enable most working people to attend. They will be held in a location that is accessible for people with disabilities.

### Publishing the Plan

A summary of the proposed Lincoln Consolidated Housing Plan and Annual Action Plans will be published in the Lincoln Journal at least ten (10) days prior to the Public Hearing for the proposed plan. Copies of the plan will be available in Town Offices and the Lincoln Public Library. The summary public notice will describe the content and purpose of the plan and will include a list of locations where copies of the entire plan may be examined.

### Comments

Citizens will have at least a two-week period for comments after the public hearing for the action plan. A comment of 30 days will be provided after the proposed Consolidated Housing Plan public hearing. The Town will consider the comments of all citizen, agencies, and other interested parties in preparing its final plan. A summary of any comments made during the planning process will be attached to the final submission. The summary will include an explanation of any comments not accepted and the reasons these comments were not accepted.

Answers to written complaints and grievances will be provided within 15 days, where practical.

### Amendments

Prior to submission of any *substantial change* in the proposed use of funds, citizens will have reasonable notice of, and opportunity to comment on, the proposed amendment. The procedures will be the same as those described above.

*Substantial change* is defined, in accordance with 24 CFR §91.505(a), as:

1. A change in allocation priorities (e.g., a change greater than 25% in an individual project budget) or a change in the method and distribution of funds;
2. The addition of an activity (including those funded exclusively with program income) not previously covered by the consolidated plan; or
3. A change in the purpose, scope, location, or beneficiaries of an activity.

**APPENDIX B  
HOMELESS AND SPECIAL NEEDS POPULATION**

		Estimated Need	Current Inventory	Unmet Need/ Gap	Relative Priority
<b>Individuals</b>					
<b>Example</b>	<b>Emergency Shelter</b>				
<b>Beds / Units</b>					
	Women's shelter	0	12	0	L
	Men's shelter	0	45	0	L
<b>Estimated Supportive Services Slots</b>	Job Training	0	0	0	L
	Case Management	0	0	0	L
	Substance Abuse Treatment	0	0	0	L
	Mental Health Care	2	2	0	L
	Housing Placement	0	0	0	L
	Life Skills Training	0	0	0	L
	Other	0	0	0	L
<b>Estimated Sub- populations</b>	Chronic Substance Abusers	0	0	0	L
	Seriously Mentally Ill	2	2	0	M
	Dually - Diagnosed	0	0	0	L
	Veterans	0	0	0	L
	Persons with HIV/AIDS	0	0	0	L
	Youth	0	0	0	L
	Other	0	0	0	L

**Persons in Families with Children**

<b>Example</b>	<b>Emergency Shelter</b>				
<b>Beds / Units</b>	Emergency Shelter	0	56	0	L
	Transitional Housing	0	0	0	L
	Permanent Housing	0	0	0	L
	Total	0	56	0	
<b>Estimated Supportive Services Slots</b>	Job Training	0	0	0	L
	Substance Abuse Treatment	0	0	0	L
	Mental Health Care	0	0	0	L
	Housing Placement	0	0	0	L
	Life Skills Training	0	0	0	L
	Other	0	0	0	L
<b>Estimated Sub- populations</b>	Chronic Substance Abusers	0	0	0	L
	Seriously Mentally Ill	0	0	0	L
	Dually - Diagnosed	0	0	0	L
	Veterans	19	19	0	M
	Persons with HIV/AIDS	0	0	0	L
	Victims of Domestic Violence	5	5	0	M
	Youth	0	0	0	L
	Other	0	0	0	L

**APPENDIX C**  
**SPECIAL NEEDS OF THE NON-HOMELESS**

<b>Sub-Populations</b>	<b>Priority Need High, Medium, Low, No Such Need</b>	<b>Estimated Priority Units</b>	<b>Estimated Dollars to Address</b>
Elderly	H	4	\$720,000
Frail Elderly	M		
Severe Mental Illness	L		
Developmentally Disabled	M		
Physically Disabled	H	3	\$540,000
Persons w/ Alcohol/Other Drug Addictions	L		
Persons w/ HIV/AIDS	L		
Other (Specify)			
<b>Total</b>			

Priority Need Level signifies the relative priority to be given to each group during the period of the strategic plan (2-3 years).

**APPENDIX D  
PRIORITY NEEDS SUMMARY**

<b>PRIORITY HOUSING NEEDS (households)</b>		<b>Priority Need Level</b> High, Medium, Low	<b>Estimated Units</b>	<b>Estimated Dollars to Address</b>
Renter	Small Related	0-30%		
		31-50%	2 <sup>4</sup>	\$180,000
		51-80%	16 <sup>**</sup>	\$2,280,000
	Large Related	0-30%		
		31-50%		
		51-80%	5 <sup>****</sup>	\$820,000
	Elderly	0-30%		
		31-50%		
		51-80%	4 <sup>*****</sup>	\$640,000
	All Other	0-30%		
		31-50%		
		51-80%		
Owner		0-30%		
		31-50%		
		51-80%	3 <sup>*****</sup>	\$450,000

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<sup>4</sup> 1 accessory apartment - \$0  
 1 rental unit in a small scale development - \$180,000  
<sup>\*\*</sup> 12 units in a 20 unit medium scale rental development - \$1,920,000  
 2 accessory apartments - \$0  
<sup>\*\*\*\*</sup> 4 rental units in medium scale rental development - \$640,000  
 1 rental unit in a small scale development - \$180,000  
<sup>\*\*\*\*\*</sup> 4 units of elderly housing in medium scale rental development - \$640,000  
 feasibility study of elderly housing project with services - \$100,000  
<sup>\*\*\*\*\*</sup> 3 buy downs of condominium units - \$450,000



## **APPENDIX E**

### **HISTORICAL TIME LINE OF AFFORDABLE HOUSING IN LINCOLN**

1965 “By 70 Plan” recommends increased use of clustering and higher density developments to achieve better use of land and greater economic and social diversification of the population.

1967 Planning Board and Selectmen establish the Moderate Income Housing Committee to study housing needs and set policy.

1968 The report of the Moderate Income Housing Committee concludes that more “efficient” housing types, such as apartments or row houses, are needed for older families, young families and town employees.

1968 The Lincoln Foundation organizes in November to “produce, maintain, operate, and finance housing in Lincoln.”

1969 The state legislature passes Chapter 774, the “anti-snob zoning law,” which allows a developer to override local zoning in certain cases to provide affordable housing.

1970 The League of Women Voters’ report “Tight Little Island” urges moderate-income housing development.

1970 The Lincoln Foundation leases two houses on Tower Road from the Town, improves them, and makes them available to persons of moderate income.

1971 The Rural Land Foundation, a charitable trust founded in 1965 to combine conservation and development to creatively preserve open spaces, helps to purchase a large portion of the Codman estate for housing purposes.

1972 The Town adds the accessory apartment by-law, Section 14 (Appendix C-5), with the special purpose of encouraging units for people of low and moderate income.

1972 The Town adds a new zoning by-law, R-4 (Appendix C-3), Planned Community Development, and applies it to the Codman land. The Lincoln Foundation develops Lincoln Woods on 70 acres of land bought with the help of the Rural Land Foundation from the Codman estate.

1976 Lincoln Woods opens with 125 units, half subsidized, half market rate.

1977 Land Use Conference. Participants express many concerns about the housing situation which leads to the appointment of a Housing Committee the following year.

1978 The Selectmen appoint a Housing Committee which produces an inventory of housing in Lincoln, develops a list of housing needs, and recommends that Lincoln establish a Housing Commission (instead of a Housing Authority).

1978 Lincoln liberalizes its accessory apartment by-law (see Appendix C-5).

1979 Lincoln creates a Housing Commission (see Appendix A).

1981 The Rural Land Foundation purchases a parcel of land from the Umbrellos and holds it for the Town. The Housing Commission develops a plan for 45 units of mixed market and subsidized housing in cluster zoning. Town Meeting turns down this proposal.

1981 The Housing Commission takes over from the Lincoln Foundation the management of the two moderate-income rental houses on Tower Road.

1982 The Housing Commission's second proposal (30 units instead of 45) for the Umbrello land falls short of the necessary two-thirds majority by only 24 votes after lengthy and difficult debate.

1982 The Governor issues Executive Order 215. Lincoln loses state assistance in its purchase of the Umbrello conservation field because this order denies funds to communities "unduly restrictive of housing growth."

1984 Lincoln Community Homes, a privately sponsored group, makes the third attempt to develop the Umbrello parcel, this time with fewer houses in clusters for the elderly. The March Town Meeting defeats this proposal.

1984 The Housing Commission holds an initial neighborhood meeting concerning a parcel of Sandy Pond Trust land which is not of conservation interest. Strong neighborhood opposition to a partly subsidized housing development causes the Housing Commission to abandon further consideration of this parcel. The land is subsequently sold to a private developer.

1985 The Rural Land Foundation decides to sell the Umbrello land to a developer, leaving some acres in conservation.

1985 The Codman Farmhouse, a congregate housing facility for four elders developed by the Housing Commission, becomes operational.

1985 Lincoln amends its accessory apartment by-law (Section 14)(Appendix C-7) to provide for larger additions and larger apartments if the owner agrees to rent to persons of low or moderate income under the auspices of the Housing Commission for 5 years,

1985 League of Women Voters produces a housing needs study for Lincoln.

1986 Special June Town Meeting appropriates \$2,000,000 to purchase 31 acres of McHugh property in North Lincoln for potential development of affordable housing.

1986 Special November Town Meeting approves construction of an affordable housing development in North Lincoln with 60% (72 units) of the total development (120 condominium units) to be constructed under the provisions of the new Massachusetts Homeownership Opportunities Program and sold to first-time buyers of low or moderate income.

1986 Housing Commission appoints a marketing advisory committee to advise the Commission on issues relating to Battle road Farm, specifically (1) the marketing process; (2) eligibility criteria and procedures for the affordable units; (3) first owner agreements for the affordable units; and (4) long term ownership issues for affordable units.

1986 Housing Commission distributes town-wide a draft of a resource manual for constructing accessory apartments.

1986 The Town signs a long-term lease with the State for a house on Sunnyside Lane and begins renovations to make it suitable for rental (the house was previously used as office space). The Concord Housing Authority agrees to apply for a Chapter 707 rent subsidy (available only to housing authorities) and select a low-income tenant so that Lincoln can charge the maximum rent allowed in order to recoup rehabilitation costs in a five-year period.

1988 Occupancy of Sunnyside Lane house begins.

1988 Housing Commission submits its Five-Year Housing Plan for the Town, which includes an account of current housing stock and an assessment of needs for affordable housing, to the Executive Office of Communities and Development (E.O.C.D.).

1988 A consultant, Kay Alexander, completes survey (with \$5,000 grant from the State) of five Town-owned sites that the Planning Board's Long Range Planning Committee identified, for suitability as low and moderate-income housing.

1988 Town Meeting votes to file special legislation to establish a modified Housing Authority. No action taken.

1989 The Housing Commission leases the three-bedroom house at 10 Mill Street from Minutemen Tech (whose students built the house) and rents it.

1989 Upon completion of the renovations (using \$50,000 that the Town appropriated plus a generous gift from Codman Trustees) of the 65 Tower Road house, the Housing Commission chooses a qualified tenant by lottery.

1989 The Town establishes a position for a Housing Commission Clerk

1989 Battle Road Farm completes Phase I with 28 (70%) affordable units and 12 (30%) market rate units.

1990 The Housing Commission reviews all Town-owned housing for each unit's (1) capital needs in order to maximize our ability to plan ahead for capital needs, and (2) the application of income guidelines to each tenant in order to determine the appropriate rent and to achieve a more standardized leasing policy.

1991 Housing Commission leases a second student built home at 16 Mill Street from Minutemen Vocational Tech and rents it.

1991 Housing Commission Clerk cut from the Town budget.

1991 Battle Road Farm completes Phase II which offers an additional 9 (28%) affordable units and 23 (72%) market rate units.

1992 The Town requests legislation permitting the Town to convert the Housing Commission to a Housing Authority. When the Senate fails to vote on it in 1992, Lincoln re-files it for 1993.

1992 St. Joseph's Church initiates the Ryan Estates development, which offers elders 24 luxury condominiums with an assisted living component. Although Ryan Estates offers two "moderate rate" units, these do not officially qualify as affordable housing because their moderate rates are above the affordable moderate rate limitations.

1993 Mid-1993 the Senate counsel rules that Lincoln's legislation needs another approving vote by Town Meeting. The Housing Commission decides, in the absence of available State and Federal funding for housing, to postpone its request for Housing Authority legislation.

1995 Both Mill Street residences revert to Minuteman Vocational Technical Institute for their management, because the rental Minuteman requires from the Town puts these units beyond the state income guidelines for affordable housing.

1996 Battle Road Farm completes Phase III, which provides an additional 11 affordable units and 37 market rate units. The total mix at Battle Road Farms is 48 (40%) affordable and 72 (60%) market rate units.

1997 Codman farmhouse leased to Codman Community Farm for use as housing by their farmers.

2000 Lincoln Housing Commission begins negotiations with the State for the purchase of the house on Sunnyside Lane.

2001 Five town-owned housing units and the Sunnyside Lane house accepted as "affordable" by the State under the Local Initiative Program.

2001 Five town-owned housing units, the Sunnyside Lane house, and 2 homes under in perpetuity deed restrictions are accepted as "affordable" by the State under the Local Initiative Program.

2002 Lincoln Housing Commission negotiates with the State for the purchase of three state-owned undeveloped acres surrounding the Sunnyside Lane house.

**APPENDIX F**  
**LINCOLN COMPREHENSIVE HOUSING PLAN TASK FORCE – RESULTS OF EMPLOYEE SURVEY**

QUESTION			
	YE S	NO	Total
1. Live in Lincoln?	15	133	148
2. Travel Distance			
Less than 5 miles	5	3	
5 to 10 miles	23	8	
10 to 15 miles	22	24	
15 to 20 miles	11	16	
Over 20 miles	14	7	
3. Would like to live in Lincoln			
		No	Yes
		75	58
4. Rent or Buy			
Maximum monthly cost including utilities			
Rent			13
5. Number of bedrooms			
1		0.31	4
2		0.62	8
3			1
4 or more			0
Maximum monthly cost			
Buy			45
5. Number of bedrooms			
1			0
2			10
3			26
4 or more			9
* Approximate Maximum price of \$130,000 ** Approximate Maximum price of \$210,000 *** Approximate Maximum price of \$250,000 **** Approximate Maximum price of \$300,000			

## APPENDIX G HOUSING PRIORITIES MATRIX

<u>Detrimental Impacts</u>					<u>Benefits</u>			<u>Logistics</u>		
Neighbor hood Character	Traffic/ Safety	Schools/ Water/ Services	Administrative Burden		Need Satisfaction	Proximity Convenience	Meets Other Objectives	Degree of Difficulty	Speed	Cost/ Subsidy
<b><u>No Build Options</u></b>										
Accessory Apartments	Low impact	Low impact	1-for-1, low	Low annual	Owner control Could try targeting	Unit specific		Zoning change	Relatively slow, could get early bump	Owner bears
House Subdivision	Low impact	Some, but dispersed	Depends upon approach What will qualify?	Depends upon approach Rental? Ownership? Owner occupied?	Depends upon approach	Unit specific		Zoning change, medium	Slow	Depends upon approach (Rehab?)
Buy-Downs	Low impact	none	None	Some up-front in place capability	Could set priorities	Unit specific	Possible historic, conservation	Low	Fast start, slow overall	\$80-200k (Rehab?)
Voluntary Covenants	Low impact	none	None	None	Owner controlled (no help w/ 40B)	Unit specific	Possible historic, conservation	High	slow	0
<b><u>Build Options</u></b>										
1-3 Units	Low impact	Some, but dispersed	Low	High if rentals, otherwise low	Could target, but could raise costs	Unit specific	Possible conservation	Zoning change, medium	Fast start, slow overall	High, small-scale State subsidy possible
4-8 Units	Medium impact	High under 40B, but dispersed	High, 1/4 under 40B	Up-front if 40B, afterward low, in place High if rental	Developer controlled under 40B, could target otherwise	Unit specific	Possible conservation	Easy under 40B, zoning otherwise, except R-4	Slow under 40B	Could beat break-even on cheap land
<i>Large Scale</i>										
Town Homes (ownership)	High w/ exceptions	High, but location dependant	High, 1/4 under 40B	Up-front if 40B, afterward low, in place	Developer controlled, but might negotiate	High near town center, low otherwise	Possible conservation	Easy under 40B, zoning otherwise, except R-4	Fast if in control	None under 40B State and federal funds
Apartments (stand-alone or multi-use over commercial)	High w/ exceptions	High, but location dependant	Medium, 1/1 under 40B	High, with exceptions	Could target, new option	Could be high near center, low otherwise	Possible conservation	Easy under 40B, zoning otherwise, except R-4	Fast if in control	None under 40B, otherwise depends on financing

	<u>Detrimental Impacts</u>				<u>Benefits</u>			<u>Logistics</u>		
	<u>Neighborhood Character</u>	<u>Traffic/Safety</u>	<u>Schools/Water/Services</u>	<u>Administrative Burden</u>	<u>Need Satisfaction</u>	<u>Proximity Convenience</u>	<u>Meets Other Objectives</u>	<u>Degree of Difficulty</u>	<u>Speed</u>	<u>Cost/Subsidy</u>
Assisted Living	High w/ exceptions	High, but location dependant	Low on schools, high on water	High, by owner	Covers recognized need	Location dependent	Not likely, driven by economics	Possible under 40B but economics difficult, zoning change otherwise	Medium	None under outside ownership
Continuing Care (dispersed)	High	High	Low on schools, high on water	High	Covers recognized need	Location dependent	Not likely, driven by economics	Possible under 40B but economics difficult, zoning change otherwise	Slow	None under outside ownership
<u>Zoning/Incentives</u>										
Inclusionary Zoning	none	none	none	Medium	Promotes affordable units	Location dependent		Zoning change required-Town Meeting Vote	Slow	None
Tax incentives to make existing accessory apts. affordable	none	none	none	None	Owner control	Unit specific	Not likely	Zoning change required-Town Meeting Vote	Slow	Slow
Overlay District-South Lincoln	Medium	Medium	Medium	Some	Owner controlled	High	Maybe	Zoning change required-Town Meeting Vote	Slow	None
Multi-family zoning--dividing existing houses	Low	Low	Low	None	Promotes affordable units	Location dependent	Possibly conservation	Zoning change required-Town Meeting Vote	Slow	None
Multi-family zoning--new	Low if dispersed	Low if dispersed	Medium	None	Promotes affordable units	Location dependent	Possibly conservation	Zoning change required-Town Meeting Vote	Slow	None

**APPENDIX H  
LINCOLN'S HOUSING STOCK**

	1996 Total Units	2000 Census Figures	2002 Total Units	State Subsidized Units	Town Subsidized Units
Single Family Houses	1472	1516	1515	3	2
Two Family houses (10) <sup>a</sup> (7) <sup>b</sup>	20	20	14	0	2
Three Family house (1) <sup>a</sup> (2) <sup>b</sup>	3	3	6	0	0
Condominiums	307	307	332	48	0
Co-operatives	125	125	125	125	0
Apartments (Ridge Court)	27	27	27	0	0
Accessory Apartments	63	59	74	0	1
Mixed Use (Residential & Commercial)	10	5	5	0	0
<b>Total</b>	<b>2027</b>	<b>2062</b>	<b>2098</b>	<b>176</b>	<b>5</b>
<sup>a</sup> Number of structures--1996					
<sup>b</sup> Number of Structures--2002					



## **APPENDIX I**

### **PUBLIC MEETINGS, PUBLIC HEARINGS, and COMMENTS**

The Housing Task Force, throughout the process of developing the consolidated housing plan, held weekly public meetings. In addition, two public hearings were held during the consolidated planning process. The first hearing was held on December 19, 2002 to receive public input into the planning process. A draft plan was made available to the public on January 23, 2003. The second hearing was held on February 6, 2003 to present the draft plan and receive comments. A 30-day comment period followed the public hearing. Both public meetings were well attended with over 35 citizens attending each of the meetings. Citizens' comments were incorporated into the plan.

Finally, Katharine Preston attended a meeting of the Board of Trustees of Battle Road Farm (BRF) in late January. They expressed general support for the town's approach, but some concern that Battle Road Farm is specifically targeted for some of the proposed "buy-downs". Unanticipated assessments and capital costs have been hard on the lower income folks at BRF, which in turn have made financial decisions by the Trustees relating to the BRF community as a whole particularly challenging. They just wanted the town to be sensitive to this when planning any changes in the market/affordable mix, suggesting that there be a cap on the number of units bought down. They felt that the financial burden for mixed housing should be shared with more of the town. Preston assured them that BRF was not the only place that was being considered and that their concerns would indeed be a top priority when considering how many units would be brought into the affordable mix.

## APPENDIX J

### CERTIFICATIONS

In accordance with the applicable statutes and the regulations governing the consolidated plan regulations, the jurisdiction certifies that:

**Affirmatively Further Fair Housing --** The jurisdiction will affirmatively further fair housing, which means it will conduct an analysis of impediments to fair housing choice within the jurisdiction, take appropriate actions to overcome the effects of any impediments identified through that analysis, and maintain records reflecting that analysis and actions in this regard.

**Anti-displacement and Relocation Plan --** It will comply with the acquisition and relocation requirements of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, as amended, and implementing regulations at 49 CFR 24; and it has in effect and is following a residential antidisplacement and relocation assistance plan required under section 104(d) of the Housing and Community Development Act of 1974, as amended, in connection with any activity assisted with funding under the CDBG or HOME programs.

**Drug Free Workplace --** It will or will continue to provide a drug-free workplace by:

1. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the grantee's workplace and specifying the actions that will be taken against employees for violation of such prohibition;
2. Establishing an ongoing drug-free awareness program to inform employees about -
  - (a) The dangers of drug abuse in the workplace;
  - (b) The grantee's policy of maintaining a drug-free workplace;
  - (c) Any available drug counseling, rehabilitation, and employee assistance programs; and
  - (d) The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace;
3. Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph 1;
4. Notifying the employee in the statement required by paragraph 1 that, as a condition of employment under the grant, the employee will -
  - (a) Abide by the terms of the statement; and
  - (b) Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction;
5. Notifying the agency in writing, within ten calendar days after receiving notice under subparagraph 4(b) from an employee or otherwise receiving actual notice of such conviction. Employers of convicted employees must provide notice, including position title, to every grant officer or other designee on whose grant activity the convicted employee was working, unless the Federal agency has designated a central point for the receipt of such notices. Notice shall include the identification number(s) of each affected grant;
6. Taking one of the following actions, within 30 calendar days of receiving notice under subparagraph 4(b), with respect to any employee who is so convicted -
  - (a) Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973, as amended; or
  - (b) Requiring such employee to participate satisfactorily in a drug abuse assistance or

rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency;

7. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs 1, 2, 3, 4, 5 and 6.

**Anti-Lobbying --** To the best of the jurisdiction's knowledge and belief:

1. No Federal appropriated funds have been paid or will be paid, by or on behalf of it, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement;
2. If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract, grant, loan, or cooperative agreement, it will complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions; and
3. It will require that the language of paragraph 1 and 2 of this anti-lobbying certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

**Authority of Jurisdiction --** The consolidated plan is authorized under State and local law (as applicable) and the jurisdiction possesses the legal authority to carry out the programs for which it is seeking funding, in accordance with applicable HUD regulations.

**Consistency with plan --** The housing activities to be undertaken with CDBG, HOME, ESG, and HOPWA funds are consistent with the strategic plan.

**Section 3 --** It will comply with section 3 of the Housing and Urban Development Act of 1968, and implementing regulations at 24 CFR Part 135.

\_\_\_\_\_  
Signature/Authorized Official

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title

### Specific HOME Certifications

The HOME participating jurisdiction certifies that:

**Tenant Based Rental Assistance** -- If the participating jurisdiction intends to provide tenant-based rental assistance:

The use of HOME funds for tenant-based rental assistance is an essential element of the participating jurisdiction's consolidated plan for expanding the supply, affordability, and availability of decent, safe, sanitary, and affordable housing.

**Eligible Activities and Costs** -- it is using and will use HOME funds for eligible activities and costs, as described in 24 CFR § 92.205 through 92.209 and that it is not using and will not use HOME funds for prohibited activities, as described in § 92.214.

**Appropriate Financial Assistance** -- before committing any funds to a project, it will evaluate the project in accordance with the guidelines that it adopts for this purpose and will not invest any more HOME funds in combination with other Federal assistance than is necessary to provide affordable housing;

\_\_\_\_\_  
Signature/Authorized Official

\_\_\_\_\_  
Date

\_\_\_\_\_  
Title

## APPENDIX TO CERTIFICATIONS

### INSTRUCTIONS CONCERNING LOBBYING AND DRUG-FREE WORKPLACE REQUIREMENTS:

#### A. Lobbying Certification

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by section 1352, title 31, U.S. Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

#### B. Drug-Free Workplace Certification

1. By signing and/or submitting this application or grant agreement, the grantee is providing the certification.
2. The certification is a material representation of fact upon which reliance is placed when the agency awards the grant. If it is later determined that the grantee knowingly rendered a false certification, or otherwise violates the requirements of the Drug-Free Workplace Act, HUD, in addition to any other remedies available to the Federal Government, may take action authorized under the Drug-Free Workplace Act.
3. Workplaces under grants, for grantees other than individuals, need not be identified on the certification. If known, they may be identified in the grant application. If the grantee does not identify the workplaces at the time of application, or upon award, if there is no application, the grantee must keep the identity of the workplace(s) on file in its office and make the information available for Federal inspection. Failure to identify all known workplaces constitutes a violation of the grantee's drug-free workplace requirements.
4. Workplace identifications must include the actual address of buildings (or parts of buildings) or other sites where work under the grant takes place. Categorical descriptions may be used (e.g., all vehicles of a mass transit authority or State highway department while in operation, State employees in each local unemployment office, performers in concert halls or radio stations).
5. If the workplace identified to the agency changes during the performance of the grant, the grantee shall inform the agency of the change(s), if it previously identified the workplaces in question (see paragraph three).
6. The grantee may insert in the space provided below the site(s) for the performance of work done in connection with the specific grant:

Place of Performance (Street address, city, county, state, zip code)

Town of Lincoln, 16 Lincoln Road, Lincoln, MA 01773

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Check \_\_\_\_\_ if there are workplaces on file that are not identified here.

The certification with regard to the drug-free workplace is required by 24 CFR part 24, subpart F.

7. Definitions of terms in the Nonprocurement Suspension and Debarment common rule and Drug-Free Workplace common rule apply to this certification. Grantees' attention is called, in particular, to the following definitions from these rules:

"Controlled substance" means a controlled substance in Schedules I through V of the Controlled Substances Act (21 U.S.C. 812) and as further defined by regulation (21 CFR 1308.11 through 1308.15);

"Conviction" means a finding of guilt (including a plea of nolo contendere) or imposition of sentence, or both, by any judicial body charged with the responsibility to determine violations of the Federal or State criminal drug statutes;

"Criminal drug statute" means a Federal or non-Federal criminal statute involving the manufacture, distribution, dispensing, use, or possession of any controlled substance;

"Employee" means the employee of a grantee directly engaged in the performance of work under a grant, including: (i) All "direct charge" employees; (ii) all "indirect charge" employees unless their impact or involvement is insignificant to the performance of the grant; and (iii) temporary personnel and consultants who are directly engaged in the performance of work under the grant and who are on the grantee's payroll. This definition does not include workers not on the payroll of the grantee (e.g., volunteers, even if used to meet a matching requirement; consultants or independent contractors not on the grantee's payroll; or employees of subrecipients or subcontractors in covered workplaces).

