



# The City of **WORCESTER**

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**Affordable Housing Trust Fund  
Board of Trustees**

**Meeting Minutes  
Wednesday, December 14, 2022, 5:30 PM  
Levi Lincoln Chamber, City Hall**

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**Virtual/remote participation via Webex:**

**To join by phone:** 1-415-655-0001    **Access Code:** 2312 417 6350 #

**To join the meeting virtually:**

<https://cow.webex.com/cow/j.php?MTID=m79dbd2d7e93d8916004992ad5d11f3d6>

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**Present:**

*Affordable Housing Trust Fund Board of Trustees*

James Brooks  
Lucelia DeJesus  
Johanna Hampton Dance  
Keith Krikorian  
Benetta Kuffour (remote participation)  
Jackson Restrepo  
Xaulanda Thorpe

*Staff*

Jeanette Tozer, Affordable Housing Trust Fund Manager

**1. Call to Order**

Mr. Brooks called the meeting to order with a roll call at 5:31 PM.

**2. Approval of Minutes from November 16, 2022, Meeting**

Mr. Brooks made a motion to approve the minutes. Mr. Krikorian seconded the motion. The minutes were unanimously approved 7-0 on a roll call.

### **3. AHTF Application Review and Approval – Worcester Boys Club – Request for \$1,750,000 for Affordable Rental Housing Development Project**

Mr. Brooks introduced the application review and approval of the request for \$1,750,000 for the Worcester Boys Club affordable rental housing development project. Ms. Tozer provided an overview of the application to support the rehabilitation of the former Boys Club building and the construction of a new building to create 80 new affordable units for senior households (55+) earning 60% or less of the area median income (AMI). She then reviewed the summary of the scores that the Board of Trustees gave to the application, noting that there is no minimum score for a proposal to receive funding. The overall score average was 129.6 out of 150 possible points, or about 86%. Bonus points were awarded to the project because the proposal includes units restricted to households earning 30% or less of AMI and ADA units above the 10% threshold. However, the applicant was not seeking bonus funding.

Miguel Rivera, a member of the public, inquired about locating the presentation online, and Mr. Brooks directed him to the November 16, 2022, AHTF Board of Trustees meeting video on the City of Worcester website.

Ms. DeJesus sought clarity that the rent would be prorated to a household's income, and Mr. Brooks confirmed that it would be prorated. He thanked the applicant for attending and presenting the project and exceeding the minimum criteria the AHTF established for the funding. Michael O'Brien, Executive Vice President for WinnCompanies, thanked the City and Board for their assistance.

Mr. Restrepo motioned that the Affordable Housing Trust Fund authorizes its chair to execute a letter of conditional commitment to B&G Club OZ LLC for funding in the amount of \$1,750,000 for the Worcester Boys Club affordable rental housing development project. The conditional commitment shall be valid for nine months and subject to the approved Affordable Housing Trust Fund requirements. Mr. Krikorian seconded the motion. The motion was unanimously approved 7-0 on a roll call.

### **4. Applicant Presentation – Curtis Apartments Phase 1**

Mr. Brooks introduced representatives from Trinity Financial and the Worcester Housing Authority attending the meeting to present the proposed Curtis Apartments Phase 1 project. Ms. Tozer provided an overview of the application, stating that Trinity Financial, in partnership with the Worcester Housing Authority (WHA), is seeking \$2,000,000 from the Trust Fund for Phase 1 of the overall redevelopment of the WHA's Curtis Apartments. The proposed project consists of 129 units in two buildings, of which 90 units are replacement public housing units and 39 are additional affordable units at 60% and 80% of AMI. Ms. Tozer noted that Housing Development Division staff completed a review of the application and determined that it meets the seven minimum threshold criteria as described in the AHTF Application Review Guidance:

1. Eligible Property: The applicant is seeking Trust Fund support for constructing 39 new affordable rental units, which is considered an eligible property.
2. Evidence of Site Control: Applicant has provided proof of site control in the form of an MOU between the WHA (through its affiliate nonprofit corporation Building Futures) and Trinity Financial.

3. Targeted Affordability:
  - 14 units will be occupied by households at or below 60% of area median income
  - 25 units will be occupied by households at or below 80% of area median income
4. Term of Affordability: The project meets the required term of affordability, which is set at a minimum of 30 years.
5. Accessibility: With at least 13 of the units being made accessible, the applicant meets the minimum requirement that 10% of project units are accessible.
6. Financial Feasibility: The underwriting forms indicate that the project is financially feasible, and all sources of funding have been identified including State funding that is being applied for in parallel with their application to the AHTF. Should Housing Trust Fund dollars be awarded to the applicant, a letter of conditional commitment will be issued subject to the applicant obtaining the other funding.
7. Readiness to Proceed: The applicant has provided a project timeline and is aware that they must complete the project by the end of September 2026.

Michael Lozano, Vice President with Trinity Financial, Aaron Horne, Project Manager with Trinity Financial, and Peter Proulx, Chief Operating Officer with the Worcester Housing Authority, presented the Curtis Phase 1 project.

Ms. Kuffour inquired if the new design of access points would impact transportation access into and through the area. Mr. Lozano responded that the intent is to make it easier for residents and visitors to access the area and address issues in the existing design. He further elaborated that they will coordinate with the WRTA to improve public transportation access in addition to improving pedestrian and vehicular connections through the area.

Ms. DeJesus inquired about prior improvements to the Curtis Apartments. Mr. Proulx responded that the upgrades to the stair towers along Tacoma Street were funded by DHCD about twenty years ago. Ms. DeJesus further inquired about the number of families that would be relocated, and Mr. Lozano responded that 72 families would be accommodated through the relocation process. Ms. DeJesus asked if the rents would be prorated, and Mr. Lozano confirmed that residents would continue to pay just a portion of their income, and the units will be made affordable to a range of incomes, including 30%, 60%, and 80% AMI.

Ms. Thorpe inquired if current residents would see an increase in their rents, and Mr. Lozano responded that they would not unless their incomes changed. Ms. Thorpe also sought confirmation that the 129 units are in Phase 1 and that the 156 proposed parking spaces would be sufficient; Mr. Lozano responded affirmatively.

Mr. Restrepo asked if there were concerns about relocating 72 families given the WHA's backlog and current housing crisis. Mr. Lozano responded that they are confident they will be able to successfully relocate the 72 families given their previous experience with similar relocation efforts and the extensive planning that has been undertaken with the WHA. Mr. Restrepo also inquired about the potential market rate housing mentioned in the application; Mr. Lozano clarified that market rate housing may be included in future phases but not in Phase 1.

Mr. Brooks asked about what thought has been given to modernizing the new units to meet needs that have emerged, including accommodating remote schooling and remote work. Mr. Lozano responded that the buildings would be fully wired and prepared for broadband. He further clarified that the Economic Opportunity Center is being constructed across the street and will be fully accessible to residents of Curtis Apartments. Mr. Brooks also inquired about the inclusion of universal design into the project, such as wider doorframes, rewiring for electric door openers, etc. Mr. Lozano responded that the buildings would have elevators and be fully accessible, and all units will be fully adaptable. Finally, Mr. Brooks inquired about green infrastructure and energy efficiency efforts to reduce electricity costs. Mr. Lozano responded that the buildings' green and sustainable features include all-electric HVAC, meet or exceed the stretch energy code, and high-performance building envelope systems. The site will also have improved stormwater management and decreased impervious surface.

Ms. DeJesus inquired about the design of the new buildings. Mr. Proulx noted that the four floors represent an additional floor over the existing buildings, allowing increased density within similar footprints.

Mr. Brooks opened the meeting up to public comment. Two members of the public provided input. Robert Bilotta, disability housing advocate, stated that the advocacy community is excited about the once-in-a-generation opportunity this project presents to increase accessible units and sought clarification about the number and distribution of accessible units. Mr. Lozano responded that 13 out of the 129 units in Phase 1 would be accessible and distributed throughout the unit types. Mr. Bilotta further noted that 13 seems too low and noted that more accessible units would be beneficial to a larger swath of the residents than just residents with disabilities. He shared his hope that the number of accessible units will increase. Miguel Rivera, current Worcester resident and former Curtis Apartments resident, voiced his support for the project. However, he shared his concerns about the need for more accessible units, improved connections to Roberto Clemente Field, replacement reserves, and the provision of employment opportunities to residents through the proposed project.

Mr. Restrepo motioned to place the Curtis Phase 1 project application on the January 18, 2023, Affordable Housing Trust Fund agenda. Mr. Krikorian seconded the motion. The motion was approved 7-0 on a roll call.

##### **5. Potential future agenda items**

Ms. DeJesus put forth outreach to developers as well standardized questions for applicants as items for a future AHTF Board of Trustees meeting agenda. Ms. Kuffour inquired about the amount of funding remaining in the AHTF. Ms. Tozer responded that once the Department of Administration and Finance establishes the AHTF account, the Board will receive monthly financial updates. Mr. Brooks summarized the three potential agenda items – outreach to developers, a list of standardized questions for applicants, and monthly financial reports – and motioned to approve the future agenda items. The motion was approved 7-0 on a roll call.

## **6. Adjournment**

There being no further business, Mr. Brooks motioned to adjourn the December 14, 2022, AHTF Board of Trustees meeting. The motion passed on a voice vote, and the meeting adjourned at 6:48 PM.