

City of Worcester



Inclusionary Zoning Determination Form

Housing Development Division

City Hall, 455 Main Street, Room 404, Worcester, MA 01608

Phone: (508) 799-1400 – Fax: (508) 799-1406

PART 1 – PROPERTY AND APPLICANT INFORMATION

1. Describe the parcel(s) to be developed that are subject to Inclusionary Zoning.

- a. _____
Project Name
- b. _____
Address(es) – please list all addresses the subject property is known by
- c. _____
Parcel ID(s) or Map-Block-Lot (MBL) Number(s)
- d. Worcester District Registry of Deeds, Book _____ Page _____
Current Owner(s) Recorded Deed/Title Reference(s)
- e. _____
Number of existing dwelling units on the property:
- f. _____
Number of proposed new dwelling units:
- e. _____
Date and case number of the Planning Board's Definitive Site Plan approval, if any:

2. Applicant Information

- a. _____
Name(s)
- b. _____
Mailing Address(es)
- c. _____
Email and Phone Number(s)
- d. _____
Interest in Property (e.g., Lessee, Purchaser, etc.)

3. Owner of Record Information (if different from Applicant)

- a. _____
Name(s)
- b. _____
Mailing Address(es)
- d. _____
Email and Phone Number

4. Representative Information

- a. _____
Name(s)
- b. _____
Signature(s)
- c. _____
Mailing Address(es)
- d. _____
Email and Phone Number
- e. _____
Relation to Project (*Architect/Attorney/Engineer/Contractor, etc.*)

PART 2 – PROJECT and UNIT INFORMATION

1. Please select which option will be used to comply with Inclusionary Zoning:

- ☐ A minimum of 15% of the dwelling units will be affordable to households with annual earnings no greater than 80% of the Area Median Income (AMI); or
- ☐ A minimum of 10% of the dwelling units will be affordable to households with annual earnings no greater than 60% of the AMI; or
- ☐ A minimum of 5% of the dwelling units will be affordable to households with annual earnings no greater than 60% of the AMI *and* a minimum of 10% of the dwelling units will be affordable to households with annual earnings no greater than 80% of the AMI; or
- ☐ The project will provide a proportional combination of dwelling units that are affordable to households with annual earnings no greater than 60% and 80% AMI; or
- ☐ Make a payment equal to three percent (3%) of the total construction value of all building permits for the development, including trade permits.

2. Do you, or have you recently owned, any adjoining property(ies)?

Yes No

If yes, provide the following details:

Address(es): _____

Number of Units: _____

Date of last renovation: _____

Are you constructing the required affordable housing units?

Proceed to Part 3A.

Are you making a payment in lieu of constructing the required affordable housing units?

Proceed to Part 3B.

PART 3A – DESCRIPTION OF UNITS TO BE CONSTRUCTED

Note: "AMI" = Area Media Income, the median household income for the metropolitan area that includes the city of Worcester, as defined in the annual schedule of low- and moderate-income limits published by the U.S. Department of Housing and Urban Development (HUD), adjusted for household size. (Article VII, Section 3E)

1. Calculation of Required Number of Affordable Units¹

Total number of net new dwelling units _____

- For households earning 80% or less AMI - Multiply by .15 _____ OR
- For households earning 60% or less AMI - Multiply by .10 _____ OR
- If utilizing a proportional combination of 60% and 80% AMI, please provide the proposed percentage of each category below (*check with Planning staff for acceptable proportional combinations*):

60% AMI _____ 80% AMI _____

¹ Where the requirement results in a fraction of a dwelling unit, the fraction shall be rounded to the nearest whole number, such that a development of 12 dwelling units shall include two (2) affordable units at 80% AMI or one (1) affordable unit at 60% AMI, and so on.

2. Description of Proposed Affordable Housing Units

Bedrooms	60% AMI Units	80% AMI Units	Total
Studio			
One			
Two			
Three			
Four			
Four +			
TOTAL			

3. Finishes

- a. Will all units be identical with respect to materials and finishes?

Yes, all units will be identical No, units will vary

If no, please describe how units will be finished, including base finishes and/or finish selection options for renters/buyers. Note that the Affordable Housing Units must be comparable to the market units. (Provide an attachment if necessary.)

- b. Describe amenities for all units. If not all units will have the same amenities (for example, access to shared/common spaces, private outdoor space, in-unit laundry, storage space, dishwasher, fireplace, etc.) identify the units and describe how the amenities will differ for different unit types:

4. Schedule of Units (Attachment)

Describe each of the proposed dwelling units using the Inclusionary Zoning Schedule of Units form (XLS). If there are variations in finishes or amenities among the units, add columns to this chart to identify the variations per unit. Add any other additional columns as necessary. Please provide this chart in Excel.

Proceed to Part 4A.

PART 3B – PAYMENT IN LIEU (ATTACHMENT)

In lieu of constructing the required affordable housing units, an applicant may elect to make a payment equal to three percent (3%) of the total construction value of all building permits for the development, including trade permits. Applicants electing this option shall submit a detailed construction cost budget certified by a licensed architect using the Inclusionary Zoning Construction Budget Form (attachment) as part of the building permit submission to the City of Worcester. No building permit will be issued without the completed Inclusionary Zoning Construction Budget Form.

Proceed to Part 4B.

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PART 4A – APPLICATION REQUIREMENTS FOR CONSTRUCTING REQUIRED AFFORDABLE HOUSING UNITS

1. Submission Checklist

I have attached the following items to this submission (if available):

Floor plans and elevations for all proposed structures.

Please provide approved building permit set of plans, if available; the Housing Development Division will need a copy of the final building permit set to finalize the IZ documents. Include architectural drawings, including floor plans indicating residential unit numbers, site plans, elevations, and individual unit type plans.

Schedule of Dwelling Units with certification by the architect of the number of dwelling units - Use the Schedule of Units form.

Please also submit the Schedule of Units form in Excel.

Affirmative Fair Housing Marketing Plan

Condominium documents (for homeownership units)

2. Representations Regarding Marketing and Resident Selection

I agree to use the approved Affirmative Fair Housing Marketing Plan marketing and tenant selection procedures that comply with federal and state fair housing laws at the time units are marketed.

I will not enter into any agreements to sell or lease Affordable Housing Units, unless the units are marketed, and residents selected according to the guidelines of the Plan.

I hereby agree that the City or its agent will certify the eligibility of prospective buyers or renters of my Affordable Housing Units prior to a sales contract(s) or lease agreement(s) being executed.

I agree to comply with the City's Inclusionary Zoning regulations and procedures.

PART 4B – APPLICATION REQUIREMENTS FOR PAYMENTS IN LIEU

Floor plans and elevations for all proposed structures.

Please provide approved building permit set of plans, if available; the Housing Development Division will need a copy of the final building permit set to finalize the IZ documents. Include architectural drawings, including floor plans indicating residential unit numbers, site plans, elevations, and individual unit type plans.

A detailed construction cost budget with certification by licensed architect (must be submitted as part of the building permit submission to the City of Worcester) – Use the attached Inclusionary Zoning Construction Budget form.

Please also submit the Construction Budget in Excel.

PART 5 – SIGNATURE AND CERTIFICATIONS

I hereby certify (check off):

I am the Applicant or authorized to make this submission for the Applicant(s);

All statements of fact herein are true and correct to the best of my knowledge;

All descriptions herein of proposed activities reflect the intent of the Applicant(s);

The Applicant(s) agrees to the following:

The Applicant(s) understand that they will read, understand, execute and record an Inclusionary Zoning Affordable Housing Restriction, if producing affordable housing units.

The Applicant(s) understand that they will comply with the approved affirmative marketing plan and residential selection procedures prior to entering into any agreements to sell or lease the affordable housing units, if producing affordable housing units.

The Applicant(s) understand that, for ownership housing, condominium documents will be reviewed and approved by the City prior to recording, if producing affordable housing units.

The Applicant(s) understand the long-term price restrictions, monitoring requirements, and reporting requirements regarding Affordable Housing Units, if producing affordable housing units.

The Applicant will comply with all regulations and procedures established by the City for the Inclusionary Zoning Program.

For: _____
Name(s) of Applicant(s)

Signature

By: _____
Signature

Relationship of Signer to Applicant

Date: _____