



TOWN OF EDGARTOWN
Community Preservation Committee
70 Main Street, P.O. Box 5158
Edgartown, MA 02539
508-627-6180

Date: 9/25/24

APPLICATION AND APPLICANT INFORMATION FORM

AMOUNT REQUESTED \$ \$326,600

Purpose (please check each that apply):

Open Space/ Recreation ☐ Affordable Housing ☒ Historic Preservation ☐

Sponsor Name: Island Housing Trust Corporation (IHT)

Mailing Address: POB 779 West Tisbury, MA 02575

Physical Address: 459 State Road #20 Vineyard Haven, MA 02568

Telephone: 508 693 1117 E-Mail: info@ihtmv.org

Summary of Proposal:

Brief Description of Project: (You will be attaching a more detailed description as required in #1 on page 3) Bellevue Veterans Community

Approved CPC funding in FY25, this is a partnership project with the Town of Oak Bluffs and the Cape and Islands Veteran's Outreach Center (CIVOC.) Island Housing Trust (IHT) is requesting additional funds to offset increased project costs.

List Sponsors (including, if applicable, governing Boards, Trustees, Directors, Management, etc...

Supporting Town Committee(s) ("NA" if none) Affordable Housing Committee

Submitter or Project Director:

Name Teri Bernert, Project Director Telephone# (508) 264-2648

E-Mail tbernert@ihtmv.org

****This form is required with your application packet****

Project Narrative

1. Detailed project description, specific objectives for the project and Sponsor's experience in similar projects.

Project Update: *Island Housing Trust (IHT) is requesting additional funding for this CPC recommended and awarded project. This application contains similar information included in last year's application but with an updated project schedule, budget and relevant information.*

IHT applied and was awarded a total of \$546,400 in 2024 CPA funding from all six island towns. IHT is requesting the final balance of \$1,000,000 from all six island towns in 2025 using the 50/50 formula (see attached exhibit) towards the estimated \$6M in project costs. IHT has raised \$900K in private donations and will leverage town CPA funding to secure \$1.9M in competitive state funding in the winter of 2024/2025 in order to start construction in the spring of 2025.

IHT and CIVOC (Cape and Island Veterans Outreach Center) have secured all necessary permits from the MVC and Oak Bluffs ZBA in 2024 and must now raise necessary funding to start construction in 2025

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Project Description:

IHT and Cape and Island Veteran's Outreach Center (CIVOC) are proposing to build 12 rental apartments, approximately 700 square foot each, located within three 2-story buildings for island veterans on land ground-leased by the Town of Oak Bluffs. IHT and CIVOC are currently in the planning and design process with an architectural and engineering team to build a neighborhood of 12 one-bedroom apartments and a shared community room. This neighborhood will provide livable, energy efficient, and accessible rental housing for island veterans earning 30%, 50%, 60%, and 80% or less of the area median income. Once constructed, CIVOC will provide rental and property management services and wraparound support services to the veterans.

The 3.4-acre project site is located at 50 Bellevue Avenue in Oak Bluffs off of County Road with year-round Vineyard Transit Authority (VTA) bus service. The site will be served by town water and sewer. A 50-foot forested buffer will be retained around the building site providing privacy for residents and abutters to the east, west and south with setback relief being sought for the north side facing the capped town landfill.

Buildings will be designed to be energy efficient, sustainable, all-electric and oriented to maximize solar generation. All building entries and ground floor apartments will be located along visitable paths. The buildings face towards a small common green with a centrally located patio space. One of the 6 ground floor homes will be fully accessible, and the other 5 will be constructed as adaptable units. All apartments will include universal design features to best accommodate the ages and abilities of the residents. Each unit will have laundry and storage. One building proposes a walkout basement, utilizing the existing site grading along the eastern side for a shared indoor common space.

CIVOC will provide wraparound supportive services to the veterans based upon each individual's needs and personal plan. The services may include referrals to educational programs,

employment assistance, financial literacy training and savings plans, transportation service to doctors' appointments (for example), or meeting with CIVOC's in-house counselors for personal needs. Residents will be referred to off-site regional providers, as no group service programming will occur on-site

Sponsor's experience in similar projects:

Owner/Developer: Island Housing Trust

IHT is a non-profit Community Development Corporation that supports a diverse and vital community on the island of Martha's Vineyard by creating and sustaining permanently affordable housing. Over the past 18 years, IHT has developed 157 homes including 74 ownership homes and 83 rentals to year-round low-, moderate- and middle-income families throughout the six towns on the Island of Martha's Vineyard. IHT currently has an additional 147 homes under development, including 18 ownership and 137 rentals totaling \$92 million in total development costs

Owner/Program/Property Manager: Cape and Islands Veterans Outreach Center (CIVOC)

Founded in 1983 by a group of Vietnam veterans who were without the services and programs they needed to transition back into society, CIVOC has grown into the largest non-profit veteran service provider on the Cape and Islands. For 40 years CIVOC has delivered service-enriched housing and supportive programs that empower veterans to achieve independence with dignity and respect. CIVOC currently owns and manages 5 units of supportive transitional housing for veterans in the Town of Dennis.

2. How does this project accomplish the goals of the CPA?

The Community Preservation Act is intended to address Open Space/ Recreation, Historic Preservation, and Affordable Housing. The new supportive rental housing for veterans in Oak Bluffs will provide stable, quality, affordable year-round housing to those who have served our country and are in need.

3. How does this project impact Edgartown's citizens and address current need?

What is the estimated or target number of people this project will benefit/effect?

How will you measure the success of this project.

Today, veterans comprise nearly 10%, or over 19,000, of the total population on the Cape and Islands. This is nearly twice the State average of 5.8%. 4.4% of this population, over 850 individuals, live below the poverty line, and over 70% of Cape veterans are above age 65. In addition, over 470 suffer from a traumatic brain injury (TBI) and post-traumatic stress disorder (PTSD), and at any given point in time, there are at least 39 to 45 homeless veterans in the area. When you count those near homelessness the number approaches nearly 150 on any given night.

Over 1,000 year-round residents and their families are waiting for affordable rental housing on Martha's Vineyard, including 310 children. Rents on the island are 30% above the state-wide median while wages are 27% below the state-wide median. Only 38% of the housing stock on the entire island is available for year-round occupancy and 21% of year-round residents pay more than half of their income on housing costs.

This proposed project will provide permanent affordable homes to between 12 and 24 individuals who have so generously and bravely served our nation, veterans of our armed services. The development creates 12 one-bedroom apartments for veterans with rents set commensurate with incomes at or below 30%, 50%, 60% and 80% or less of area median income for Dukes County.

4. Projected Action Plan and Timeline including major steps needed to complete the project.

This project was issued its comprehensive permit from the ZBA through the 40B process on June 12, 2024. IHT anticipates applying for a building permit by February of 2025 with construction starting in the Spring of 2025 and completion by the Spring of 2026.

5. Provide detailed financial information including the following, as applicable:

- **Initial Capital budget and proposed schedule of CPC disbursement of funds, should application be accepted**

IHT and CIVOC intend to finance the project with a combination of state and local affordable housing funding as well as commercial mortgage financing.

Competitive grant funding from the Executive Office of Housing and Livable Communities (EOHLC) is currently in the application process along with grant and subsidized mortgage financing from the Federal Home Loan Bank. A total of \$1 million is being requested from all the six island CPCs. In addition, CIVOC and IHT will conduct private philanthropic fundraising for the project.

We will be seeking 9 project-based rental support vouchers. The vouchers will ensure stable tenancy, particularly for those veterans with lower incomes as well as provide sufficient rental income to support the required mortgage.

Operating expenses have been estimated based on both CIVOC's and IHT's existing portfolio of rental housing. In addition, CIVOC provides supportive services at its existing properties and those service costs are the basis for projected costs at Bellevue Avenue

- **Other revenue sources including private/public funds or in-kind contributions**

The project will be financed through a combination of grant funding from the State Executive Office of Housing and Livable Communities. The project will request a total of \$1,000,000 in Municipal Affordable Housing Trust and Community Preservation Act grant funding from the Town of Oak Bluffs and the five other municipalities on the Island of Martha's Vineyard. IHT/CIVOC will raise additional funding from private donors and grants.

The estimated project costs of the 12-unit 50 Bellevue Ave project is \$6,048,978

Sources of private and public funds are:

- \$546,400 Island Wide CPC/AHTF, secured at ATM2024
- \$1,000,000 Island Wide CPC/AHTF, unsecured [50/50 formula, see attached exhibit]
 - \$28,200 from the Aquinnah CPC [2.82% of \$1M]
 - \$104,400 from the Chilmark CPC [10.44% of \$1M]
 - \$326,600 from the Edgartown CPC [32.66% of \$1M]
 - \$213,600 from the Oak Bluffs CPC [21.33% of \$1M]
 - \$185,600 from the Tisbury CPC [18.56% of \$1M]
 - \$141,900 from the West Tisbury CPC [14.19% of \$1M]
- \$702,578 in Permanent Debt

- \$900,000 in IHT/CIVOC grant
 - \$1,900,000 in State EOHLC HSF/HIF grants
 - \$800,000 in FHLB Boston grants
 - \$200,000 in CLC Energy Rebates
- CPC disbursement of funds is not anticipated until the construction phase of the project scheduled from May 2025 to May 2026
- **Annual cost to the town, once the project is operational?**

There are no costs to the town once the project is operational.

- **What are the key assumptions in the budget? What are the risks?**

Once the 50 Bellevue Ave. apartments are built CIVOC will own and manage the 12-unit facility to income qualify, lease-up, and provide property management services for the 12 one-bedroom apartments at 30%, 50%, 60% and 80% AMI. The annual income from the rents will pay for the property's annual operating expenses including rental and property management services, maintenance, property insurance and taxes, common utilities, and capital reserves, as well as debt service for the bank loan.

- **Financial sustainability – how will the continuation of the project be secured after the grant?**

Once the Bellevue Avenue apartments are developed by IHT, CIVOC will own and manage the project for veterans supportive housing. CIVOC will income qualify, lease-up, and provide property management services for the 12 one-bedroom apartments for veterans at 50%, 60%, and 80% AMI. The annual income from the rents will pay for the property's annual operating expenses including rental and property management services, maintenance, property insurance and taxes, common utilities, and capital reserves, as well as debt service for the bank loan

6. Are there any legal ramifications and/or impediments to this project?

Under Massachusetts fair housing law, Chapter 151B, military status, which includes veterans, is a protected class. Protected classes are designated groups of people and their families that are covered under fair housing law. The military status protected class covers veterans, those individuals on active duty, and those persons enrolled in the Reserves. Therefore, the project can be developed and designated for veterans supportive housing and rented to veterans under Massachusetts fair housing law.

7. Do you have the authorization of the property owner? What permits/ orders/ licenses will be required from which Town, Regional or Federal Agencies?

IHT/ CIVOC were designated as developers of the property by vote of the Oak Bluffs Select Board on June 29, 2023. This designation allows IHT/ CIVOC to enter into a Land Disposition Agreement for the property that will outline the terms of a 99-year ground lease that will be executed at closing. The ground lease contributes the value of the property to the IHT/ CIVOC development.

See attached designation letter from The Town of Oak Bluffs confirming IHT/ CIVOC's selection as developer of the 50 Bellevue property.

A Development of Regional Impact (DRI) permit has been obtained from the Martha's Vineyard Commission. The 40B process is complete and the ZBA has issued the project its comprehensive permit as of 7/19/2024. Other permits and approvals will include:

- Board of Health, Water Department, Department of Transportation, Fire Department, Building Department approvals and permits.
- Eversource / Comcast / Verizon - Design and approval of utilities service to site.

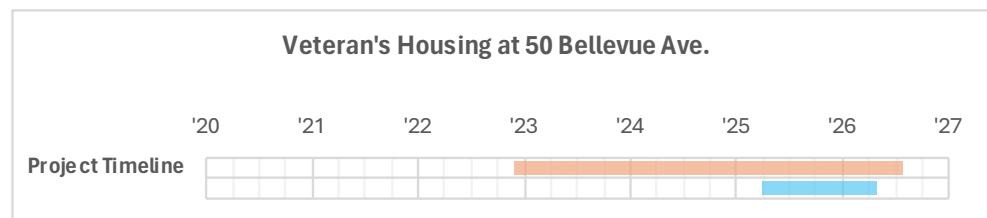
A 21E environmental assessment.



Bellevue Veteran's Community, Oak Bluffs
EXHIBIT TABLE OF CONTENTS

1. Project Cover Sheet
2. 50/50 Formula
3. Support Letters
4. Preliminary Budget
5. Construction Estimate
6. ZBA Decision
7. IHT Green Building Best Practices
8. Union Studio Bio

Summer '26 Occupancy | 12 rental homes



50/50 Formula:

The County of Dukes County created the 50/50 formula when the Dukes County Regional Housing Authority (DCRHA) requested administrative funds from all 6 island towns. This formula is now used by other organizations such as Dukes County Health Care Access Program as a fair and equitable representation of town resources. The 50/50 formula has been successfully utilized for Island-wide CPC requests going back to the Gay Head lighthouse move over 10 years ago and has become the default for all the subsequent island-wide applications since then.

| | Population | Equalized Valuation | 50/50 formula |
|--------------|--------------------------|---------------------|---------------------|
| County Town | 1/1/23 | FY2024 & 2025 | |
| Aquinnah | 2.47% | 3.17% | 2.82% |
| Chilmark | 6.59% | 14.30% | 10.44% |
| Edgartown | 24.49% | 40.84% | 32.66% |
| Oak Bluffs | 26.64% | 16.02% | 21.33% |
| Tisbury | 23.58% | 13.53% | 18.56% |
| West Tisbury | 16.24% | 12.14% | 14.19% |
| | | | |
| | 1 | 100.00% | |
| | | | |
| | Street Census Population | | Equalized Valuation |
| | (per town clerks) | | per DOR |
| | 1-Jan-23 | | FY2024 & 2025 |
| Aq | 502 | 2.47% | 860,784,100 |
| Chilmark | 1339 | 6.59% | 3,878,126,000 |
| Edg | 4978 | 24.49% | 11,072,643,200 |
| OB | 5416 | 26.64% | 4,343,520,600 |
| Tisbury | 4794 | 23.58% | 3,667,871,800 |
| West Tis | 3301 | 16.24% | 3,290,703,900 |
| | | | |
| TOTAL | 20330 | 100.00% | 27,113,649,600 |



September 27, 2024

Edgartown Community Preservation
Committee
Edgartown Town Hall

Re: CPC Funding Request – Veteran's Supportive Housing

Honorable Committee Members:

This letter is to express our strong support of Island Housing Trust's application for Veteran's supportive housing at Bellevue Avenue in Oak Bluffs, in the amount of \$326,600 providing 12 one-bedroom rentals to support the island's Veteran population.

Today, veterans comprise nearly 10%, or over 19,000, of the total population on the Cape and Islands. This is nearly twice the State average of 5.8%. 4.4% of this population, over 850 individuals, live below the poverty line, and over 70% of Cape veterans are above age 65. In addition, over 470 suffer from a traumatic brain injury (TBI) and post-traumatic stress (PST), and at any given point in time, there are at least 39 to 45 homeless veterans in the area. When you count those near homelessness the number approaches nearly 150 on any given night.

Please help us support the veterans of Martha's Vineyard by reserving the CPA funds requested, to leverage the state funding imperative to the successful completion of this project.

Island Housing Trust is committed to expanding affordable housing opportunities and we are excited to join them in making these projects a success.

Please contact me with any questions.

Dr. Robert Tankard
MV Community Services
Veterans Outreach Advocate
111 Edgartown Road
Vineyard Haven, MA 02568
508-693-7900 Ext 272



AQUINNAH HOUSING COMMITTEE

955 STATE ROAD AQUINNAH, MASS 02535 TEL: 508-645-2300

September 26, 2024

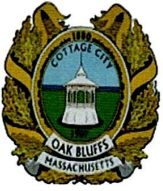
Dear Island Housing Trust friends,

On behalf of the Aquinnah Affordable Housing Committee, we write to you to express our strong support for housing initiatives for both veterans supportive housing and school employee housing. We acknowledge that Island Housing Trust is committed to expanding affordable housing opportunities and we are excited to join in making these projects, which benefit island-wide residents, a success. We are all in this together!

Sincerely,

Aquinnah Affordable Housing Committee

Rudy Sanfilippo
Mitzi Pratt
Vera Dello Russo
Beth Green
Sophia Welch



**TOWN OF OAK BLUFFS
AFFORDABLE HOUSING COMMITTEE**
Email: ahc@oakbluffsma.gov
56 School Street, Oak Bluffs MA 02557

Sep 25th 2024
The Community Preservation Committee
Town of Oak Bluffs
Ms Joan Hughes, Chairperson.

Dear Ms Hughes,

We write in support of 2 IHT All-Island projects, viz:

1. The School Employee Housing Project
2. The Veterans Housing Project

As you well know, both projects strive to meet critical work force and community support housing needs on our Island. IHT has asked for our support, and we are pleased to give you the strongest recommendation we can for funding help for a good cause for the future stability of our Island community.

The difference your Committee can make through the support it provides is inestimable, and AHC tries through our limited means as an advisory committee to do what we can. We cannot do more. Hence this ask on their behalf.

Sincerely,

Ms. Katherine Donahue
Chair, Oak Bluffs Affordable Housing Committee
Town of Oak Bluffs

The listing of matters are those reasonably anticipated by the Chair, which may be discussed at the meeting. Not all items may in fact be discussed and other items not listed may also be brought up for discussion to the extent permitted by law.



TOWN OF EDGARTOWN
Edgartown Affordable Housing Committee
70 Main St. PO BOX 5158
Edgartown, Massachusetts 02539

TELEPHONE:
(508) 627-6178
FAX:
(508) 627-6123
E-MAIL:
affordable@edgartown-ma.us

Chairman: Mark Hess
Vice-Chairman: Jason Mazar-Kelly
Melissa Vincent, Maria Ventura, Casey O'Connor, Justin Kush

September 27, 2024

Edgartown Community Preservation Committee
Edgartown Town Hall
70 Main Street
Edgartown, MA 02539

Reference: CPC Funding Request – Veteran's Supportive Housing, and
School Employee Housing

Honorable Community Preservation Committee Members:

On behalf of the Edgartown Affordable Housing Committee and with our full support, this letter is to express our endorsement of the project concepts proposed by the Island Housing Trust. Specifically, we wish to express our support for the following two Island-wide housing initiatives:

1. **Veterans Supportive Housing** at Bellevue Avenue in Oak Bluffs, providing 12 one-bedroom rental units to support the Island's Veteran population.
2. **School Employee Housing** at 48 Old Courthouse Road in West Tisbury, which will offer eight (8) critical needed rental units for Island School Employees.

While we are fully supportive of these important housing initiatives, we are not endorsing the specific amount requested by Island Housing Trust at this time. Nonetheless, we believe these projects will make a significant contribution to addressing the urgent housing needs on the Island.

Please contact me with any questions.

Sincerely,

Mark Hess
Chairman
Edgartown Affordable Housing Committee

Bellevue Ave. Veterans Supportive Housing 9 Units at 30% & 50% & 60% Rents w/ Vouchers & 3 Units at 80%

| Project Summary | | Unit Break Down | | | | Rent | |
|--------------------------------------|-------|-----------------|------------------|-----------|-----|-----------|--------------|
| Total Units | 12 | No. Units | Unit Type | No of BRs | GSF | Monthly** | Annual Total |
| | | 3 | 1BR 30% Vouchers | 3 | 629 | \$ 2,075 | \$ 74,700 |
| | | 3 | 1BR 50% Vouchers | 3 | 629 | \$ 2,075 | \$ 74,700 |
| | | 3 | 1BR 60% Vouchers | 3 | 629 | \$ 2,075 | \$ 74,700 |
| Total Gross SF of new const | 7,547 | 3 | 1BR 80% AMI | 3 | 629 | \$ 1,885 | \$ 67,860 |
| No. Parking spots | 15 | 12 | | | | | \$ - |
| \$(GSF building only) | 335 | 1 | Common Space | | 700 | | \$ - |
| Construction time line, months | 9 | | | 12 | | | \$ 291,960 |
| **Rents assume no utilities included | | | | | | | |

SOURCES

Permanent Sources

| | |
|---------------------------------|---------|
| IHT & CIVOC Equity | |
| Cape Light Compact Rebates | |
| Municipal CPA (6 towns) | awarded |
| CPA 6 towns | applied |
| Permanent Debt (25 yr @ 6.2%) | |
| FHLB Affordable Housing Program | |
| DHCD (HSF/HIF) | |

Total

| |
|-----------|
| 900,000 |
| 200,000 |
| 546,400 |
| 1,000,000 |
| 702,578 |
| 800,000 |
| 1,900,000 |

6,048,978

USES

Acquisition Cost

-

\$

-

\$

-

Hard Costs

| | |
|--------------------------------------|--------|
| New Construction | |
| Site work (grading, parking, septic) | |
| Hard Cost Contingency | 10.00% |
| Subtotal | |
| Architectural & Engineering | 6.0% |
| Survey & Permit | 1.0% |
| Subtotal | |
| Total Hard Costs | |

| |
|-----------|
| 4,006,447 |
| 730,000 |
| 400,645 |

| |
|----|
| \$ |
| \$ |
| \$ |

| |
|---------|
| 333,871 |
| 60,833 |
| 33,387 |

| |
|----|
| \$ |
| \$ |
| \$ |

| |
|-----|
| 500 |
| 75 |
| 53 |

5,137,092

\$

426,091

\$

628

300,000

\$

25,000

51,371

\$

4,281

351,371

\$

29,281

\$

47

5,488,463

\$

457,372

\$

727

Soft Costs

| | |
|----------------------------------|-------|
| Owner's clerk of the works | |
| Acquisition Interest | |
| Construction Interest | 5.50% |
| Environmental Engineering | |
| Taxes & Insurance | |
| Legal & Title | |
| Lender's legal | |
| Accounting Cert | |
| Appraisal | |
| Marketing & Lease-Up | |
| Financing Fees | 1% |
| Inspecting Engineer | |
| Development Consultant | |
| Total Soft Costs | |
| Subtotal Development Cost | |
| Soft Cost Contingency | 5% |
| Capital & Operating Reserve | |
| Developer Overhead | 2.25% |
| Developer Fee | 2.25% |
| Total Development Cost | |

| |
|--------|
| 30,000 |
| - |
| 30,000 |
| 11,022 |
| 10,693 |
| 35,000 |
| 5,000 |
| 5,000 |
| 6,400 |
| 14,000 |
| 7,026 |
| 20,000 |
| 30,000 |

| |
|----|
| \$ |
| \$ |
| \$ |
| \$ |
| \$ |
| \$ |
| \$ |
| \$ |
| \$ |
| \$ |
| \$ |
| \$ |

| |
|-------|
| 2,500 |
| - |
| 2,500 |
| 919 |
| 891 |
| 2,917 |
| 417 |
| 417 |
| 533 |
| 1,167 |
| 585 |
| 1,667 |
| 2,500 |

204,141

\$

17,012

\$

27

5,692,603

\$

474,384

\$

754

10,207

\$

851

90,000

\$

7,500

128,084

\$

10,674

128,084

\$

10,674

6,048,978

\$

504,081

\$

802

OPERATING

Revenue

| | |
|----------------------|----|
| Annual Rental Income | |
| Vacancy Allowance | 5% |
| Total Income | |

| |
|----------|
| \$ |
| 291,960 |
| (14,598) |

\$ 277,362

Expenses

| | | |
|-----------------------------------|-------|------------|
| Property Operating Expenses | 8,000 | unit/annum |
| Supportive Services | 8,500 | unit/annum |
| Reserves | 500 | unit/annum |
| Total Expenses & Taxes | | |

| |
|---------|
| 96,000 |
| 102,000 |
| 6,000 |

\$ 204,000

Net Income

\$ 73,362

Debt Service

\$ 62,358

Surplus Cash Flow

\$ 11,004

Debt Coverage Ratio

0.150

25 yrs, 6.2%

\$ 702,578

| Construction Estimate - Bellevue Ave Veterans Supportive Housing | |
|--|--------------------|
| DESCRIPTION OF WORK | SCHEDULED |
| | VALUE |
| | |
| General Conditions | \$ 90,000 |
| Site Work/Existing conditions | \$ 280,000 |
| Earthwork and Improvements | \$ 320,000 |
| Concrete | \$ 210,000 |
| Carpentry | \$ 680,000 |
| Thermal & Moisture Control | \$ 370,000 |
| Doors, Windows, Glass | \$ 350,000 |
| Finishes | \$ 250,000 |
| Specialties | \$ 60,000 |
| Equipment | \$ 62,000 |
| HVAC | \$ 400,000 |
| Electrical | \$ 450,000 |
| Earthwork and Improvements | \$ 320,000 |
| Plumbing | \$ 444,447 |
| Utilities and Trenching | \$ 90,000 |
| Overhead | \$ 180,000 |
| Profit | \$ 180,000 |
| Construction Contingency | \$ 400,645 |
| | |
| Totals | \$5,137,092 |
| | |

GREEN BUILDING PRACTICES

Goals and Purpose:

IHT (Island Housing Trust) is committed to using best green building practices to decrease maintenance and energy costs in order to ensure ongoing (monthly) affordability for our tenants, as well as in construction. Developing durable, thoughtful, and efficient buildings is critical to our mission, our resident's needs, and making progress towards a sustainable Martha's Vineyard.

Site Design & Landscaping

- Use cluster development strategies to minimize area of impact on the land.
- Preserve prime conservation (and agricultural) land in partnership with conservation organizations where possible
- Create shared systems (wells, septic, etc.) and functions (common land, driveways, etc.)
 - Utilize state-of-the-art denitrification septic systems requiring minimal maintenance, electric usage, and no chemical additives (currently: NitROE technology)
- Design pedestrian friendly neighborhoods that limit vehicular traffic, paving, and maximize permeable surfaces
- Provide resident-access EV charging stations
- Model our designs on local vernacular and neighborhood scale
- Provide enough clear south facing roof to accommodate solar collection
- Site houses utilizing terrain features to increase ease of physical access
- Protect existing trees, plants, and landscaping features on site from construction damage
- Minimize grass lawns and use local drought resistant plant species well-adapted to the climate
- Avoid use of fertilizer, pesticides and chemicals that may leach into groundwater

Building Construction

- Meet or exceed Energy Star V1.2 for Homes Standards with third party testing that achieves a Home Energy Rating System (HERS) Index of 40 or better, including:
 - Highest quality insulation (cellulose or Demilac foam) with third party inspection to Grade #1 insulation
 - Airtight construction.
 - High performance double-glazed casement windows, fiberglass, or wood
 - High efficiency Air Source Heat Pumps for both HVAC and Hot Water
 - Energy Star certified appliances, with all light fixtures to be LED
- Use high efficiency water conservation fixtures (toilets, showers, faucets)
- No fossil fuels; All electric design
- Efficient use of square footage and volume of our apartments
- Design good daylight and cross ventilation throughout for natural summer cooling
- Use zero-maintenance exterior materials that are durable and require no paint and/or finishes
- Avoid toxic construction materials (i.e., high VOC paints, glues, particle board, etc.)
- Incorporate materials with high recycled content, FSC certification, and/or locally sourced
- Design and construction for moisture, mold, and mildew prevention
- During construction, install all conduit needed for future rooftop solar panels and future radon mitigation (if it becomes needed)
- Actively recycle as much construction and demolition waste as possible



OAK BLUFFS ZONING BOARD OF APPEALS
P.O. BOX 1327, OAK BLUFFS, MA 02557-1327
508 693 – 3554 x 120

Application Filed: March 15, 2024

**DECISION OF THE ZONING BOARD OF APPEALS
ON THE REQUEST FOR COMPREHENSIVE PERMIT
M.G.L. CHAPTER 40B**

Applicant(s): Bellevue Veterans Community LLC
Island Housing Trust
The Cape and Islands Veterans Outreach Center

Map: 29

Parcel: 166

At a meeting held on Wednesday, June 12, 2024, the Oak Bluffs Zoning Board of Appeals ("the Board") voted unanimously (4-0) to grant a Comprehensive Permit for the construction of a 40B development on a 3.4-acre lot located at 50 Bellevue Ave. in the R-3 Residential District (the "Site"). The Site is owned by the Oak Bluffs Resident Homesite Committee.

PROCEDURAL HISTORY:

1. Bellevue Veterans Community LLC, Island Housing Trust ("IHT"), and The Cape and Islands Veterans Outreach Center ("CIVOC") filed an application for a Comprehensive Permit with the Board on March 15, 2024. The Board will refer to Bellevue Veterans Community, IHT, and CIVOC collectively as the "Applicant".
2. An advertisement for the Board's public hearing was published in the Martha's Vineyard Times on March 21, 2024 and March 28, 2024.
3. Notice of the hearing was mailed on March 15, 2024, postage prepaid, to the petitioners; the abutters - owners of land adjacent to the subject property within 300-feet of the property lines - all as they appear on the most recent, applicable tax list; and to all the proper town boards and departments.
4. The Board opened the public hearing and referred the Applicant's proposal to develop the Site to the Martha's Vineyard Commission ("MVC") on April 4, 2024, as a development of regional impact (DRI).
5. On April 5, 2024, the Board informed the Applicant, developer, and DHCD in writing of its intent to invoke Safe Harbor status.

6. The hearing was continued to May 15, 2024 and subsequently to June 16, 2024, pending MVC review.

7. The MVC convened on May 23, 2024 to review the project (C.R. 4-2024), at which time the MVC voted not to concur, remanding the project to the Board. On May 28, 2024, the MVC sent a letter to the Board announcing the non-concurrence.

8. On June 16, 2024 the Board opened the continued hearing, reviewed the application, the plans and exhibits, and all other materials and information submitted. Additionally, the Board discussed open issues and reviewed proposed conditions and requested waivers. The Board voted unanimously to close the public hearing and, after deliberations, voted 4-0 to approve the request for a Comprehensive Permit, with a Special Conditions. The Applicant agreed to confer with abutters to reach an agreement regarding measures to be taken to mitigate the dust, noise, or any disturbances during the construction of the Project, and to submit to the Board a proposal for conditions relating to that agreement, thus extending the time within which a written decision would be filed.

FACTS:

1. Bellevue Veterans Community LLC, IHT, and CIVOC meet the jurisdictional requirements outlined in 760 CMR 31.01 (1) based on a project eligibility letter from the Executive Office of Housing and Livable Communities dated December 4, 2023, which was submitted as part of the package.

2. IHT and CIVOC have site control based on a notice from the Oak Bluffs Select Board, dated June 29, 2023, stating that IHT and CIVOC have been selected as the developer of the Site. IHT and CIVOC formed a distinct entity [Bellevue Veterans Community LLC], and enter into a development agreement, land disposition agreement and long-term lease prior to the start of construction. The letter from the Select Board serves as proper proof of site control.

3. The application was accompanied by a package entitled 'Bellevue Veterans and dated February 23, 2024 that includes detailed elevations and floor plans. Specifically:

- a) IHT Comprehensive Permit Cover Letter dated March 12, 2023.
- b) Bellevue Veterans Community Summary, Design Strategy, Phasing and Schedule, and Zoning Relief Narrative.
- c) Bellevue Veterans Community LLC ZBA Application dated March 15, 2024.
- d) Proof of Site Control – Letter from Oak Bluffs Select Board dated June 29, 2023.
- e) Site Plan Set prepared by Horsley Witten Group, dated October 13, 2023, stamped by Richard A. Claytor, PE.
- f) Architectural Plans prepared by Union Studio Architecture & Community Design, dated February, 2024.
- g) Traffic Memorandum prepared by Vanasse & Associates, Inc., dated March 14, 2024.
- h) Bellevue Veterans Community – Master Plan, prepared by Union Studio Architecture & Community Design, dated February 23, 2024.
- i) Project Eligibility Letter from Massachusetts Executive Office of Housing and Livable Communities, dated December 4, 2023.
- j) Stormwater Management Operation and Maintenance Guide, prepared by Horsley Witten Group, dated February 2024.

4. The Applicant submitted a copy of their presentation materials, which included an overview of the proposed project, details on the community review process, eligibility requirements, a synopsis of the requested relief needed from the Oak Bluffs zoning bylaws, detailed design and site plans – including elevations and floor plans of all proposed structures, proposed signage, sustainable building features, landscape plan, lighting plan, and affordability guidelines.
5. The project involves the construction of twelve 1-bedroom rental units in 3 separate structures.
6. All building entries and ground floor apartments will be located along visitable paths. One of the six ground floor homes will be fully accessible, and the other five will be constructed as adaptable units, per the MA 521 CMR requirements. All apartments will include universal design features to best accommodate the ages and abilities of the residents.
7. The property will be served by Town sewer and water.
8. Landscaping and exterior lighting plans are designed to be environmentally conscious, preserving the natural landscape where possible. The design proposes a substantial vegetative buffer between the development and Edgartown-Vineyard Haven Road, as well as from the sides and rear of the property. Additional trees and shrubs will be planted for additional screening.
9. The development was designed to be bike and pedestrian friendly, to blend with the island architecture, and to connect with the local amenities available to residents. It is also designed to maintain preserved areas of the property, limit the disturbed area, and integrate walking paths. The southern roofline maximizes solar opportunity, and all plantings will be native species. There will be one parking space per unit as well as three convenience spaces. The required 50-foot setback will be maintained, and building footprints will be kept approximately 20 feet in from that line to maintain a vegetative buffer.
10. A Transportation Impact Assessment found that the traffic generated by the development will not have a detrimental effect on overall traffic in the neighborhood.
11. The applicant is seeking the following waivers from the zoning bylaw:
 - (a) Multi-family use from Section 3.1.3 Appendix A to allow the property to be used for multiple dwellings; (b) a waiver of Section 4.1.1 which allows an increase in the number of principal buildings per lot from one to three; (c) a waiver from Section 4.1.3 Appendix B and Section 4.2.4 to allow for 12 units per lot; (e) a waiver from Section 4.1.3 Appendix B to allow a reduced front setback of 21' for Buildings 1 and 3.
12. The Town and the island as a whole are in dire need of affordable housing.
13. There was no opposition to the Project from town boards or departments. The Fire Chief wrote to detail the requirement of a commercial sprinkler system and monitored commercial fire alarm for fire suppression, as well as the need for an evaluation of the water mains/ supply in that area done in conjunction with a certified Fire Protection Engineer to ensure that there is enough water and pressure to sustain sprinkler activation. The Water District submitted an email expressing support and the district's ongoing technical review of the water system. The Planning

Board and Historical Commission expressed support. Some abutters/members of the public spoke in support of the Project, but expressed concerns about potential traffic issues that they believed could be resolved by installing a buffer of supplemental plantings. The following correspondence was received from Town departments:

- a) Email from Oak Bluffs Fire Chief, dated March 21, 2024.
- b) Email from Oak Bluffs Water Department Superintendent dated March 20, 2024.
- c) Email from Oak Bluffs Water Department Superintendent dated May 31, 2024.
- d) Email from Oak Bluffs Planning Board dated June 3, 2024.
- e) Email from Oak Bluffs Affordable Housing Committee dated June 11, 2024.
- f) Email from Oak Bluffs Historical Commission dated March 28, 2024.
- g) Email from Richard Toole, dated March 25, 2024.
- h) Letter from Judi O'Donoghue dated March 31, 2024.

FINDINGS:

1. The Board found that the proposal meets all conditions required for the approval of a 40B Comprehensive Permit including: design guidelines; protection of natural resources; energy efficiency; affordability thresholds; and proven community need for affordable housing.
2. The Board found that the Project will not be detrimental to the community with respect to Appropriate setbacks and the detriments are sufficiently mitigated by the conditions imposed herein.
3. The Board further found that the relief sought from the Oak Bluffs Zoning Bylaws can be granted without an overall negative impact to the health and safety of the community and without overburdening municipal services.
4. The Board found that the construction of this project is consistent with 'smart growth' principles: it is both pedestrian and bike-friendly, within walking distance of public transportation, connects with numerous walking paths and trail systems, is served by public water, and will not negatively impact traffic or natural resources.
4. The Board finds that the benefits provided by the increase of affordable housing stock outweigh any probable detriments and that the Applicant has put in place adequate mitigation measures to ensure the continued health and safety of the community and the natural environment, with the conditions outlined below.

CONDITIONS:

1. A reasonable effort will be made by the Applicant to mitigate the dust, noise, or any disturbances during the construction of the Project.
2. The sign for the Project shall be constructed of wood.

This Decision of the Zoning Board of Appeals and a record of proceedings are on file in the Zoning Board office and in the office of the Town Clerk.

Signing on Behalf of the Zoning Board of Appeals:

Llewellyn Rogers* (Chair)



*By a vote of the Oak Bluffs Zoning Board of Appeals on September 15, 2022, certified by Town Clerk Colleen Morris, and recorded in the Dukes County Registry of Deeds in Book 01638 Page 341, Llewellyn Rogers was authorized to be the sole signatory on behalf of the Board relative to Section 81K through 81GG of Chapter 41 of the General Laws.

Filed with the Town Clerk on JUNE 28TH, 2024.

Appeals, if any, should be made pursuant to Section 17 of Chapter 40A of the Massachusetts General Laws and should be filed within 20 days of the filing of this decision in the office of the Town Clerk.

_____, 2024
Date Appeal Period Expired

I hereby certify that no appeal has been filed in the twenty-day period following the date of filing this decision.

Attest: _____
Colleen Morris, Town Clerk

GREEN BUILDING PRACTICES

Goals and Purpose:

IHT (Island Housing Trust) is committed to using best green building practices to decrease maintenance and energy costs in order to ensure ongoing (monthly) affordability for our tenants, as well as in construction. Developing durable, thoughtful, and efficient buildings is critical to our mission, our resident's needs, and making progress towards a sustainable Martha's Vineyard.

Site Design & Landscaping

- Use cluster development strategies to minimize area of impact on the land.
- Preserve prime conservation (and agricultural) land in partnership with conservation organizations where possible
- Create shared systems (wells, septic, etc.) and functions (common land, driveways, etc.)
 - Utilize state-of-the-art denitrification septic systems requiring minimal maintenance, electric usage, and no chemical additives (currently: NitROE technology)
- Design pedestrian friendly neighborhoods that limit vehicular traffic, paving, and maximize permeable surfaces
- Provide resident-access EV charging stations
- Model our designs on local vernacular and neighborhood scale
- Provide enough clear south facing roof to accommodate solar collection
- Site houses utilizing terrain features to increase ease of physical access
- Protect existing trees, plants, and landscaping features on site from construction damage
- Minimize grass lawns and use local drought resistant plant species well-adapted to the climate
- Avoid use of fertilizer, pesticides and chemicals that may leach into groundwater

Building Construction

- Meet or exceed Energy Star V1.2 for Homes Standards with third party testing that achieves a Home Energy Rating System (HERS) Index of 40 or better, including:
 - Highest quality insulation (cellulose or Demilac foam) with third party inspection to Grade #1 insulation
 - Airtight construction.
 - High performance double-glazed casement windows, fiberglass, or wood
 - High efficiency Air Source Heat Pumps for both HVAC and Hot Water
 - Energy Star certified appliances, with all light fixtures to be LED
- Use high efficiency water conservation fixtures (toilets, showers, faucets)
- No fossil fuels; All electric design
- Efficient use of square footage and volume of our apartments
- Design good daylight and cross ventilation throughout for natural summer cooling
- Use zero-maintenance exterior materials that are durable and require no paint and/or finishes
- Avoid toxic construction materials (i.e., high VOC paints, glues, particle board, etc.)
- Incorporate materials with high recycled content, FSC certification, and/or locally sourced
- Design and construction for moisture, mold, and mildew prevention
- During construction, install all conduit needed for future rooftop solar panels and future radon mitigation (if it becomes needed)
- Actively recycle as much construction and demolition waste as possible



Veridian at County Farm, Ann Arbor, MI. Union Studio

PLACES OF VALUE. VALUE OF PLACE.

ABOUT UNION STUDIO

Union Studio is an award-winning architecture and design firm based in Providence, Rhode Island with a national presence. Union recognizes the power of design to connect people to place and cultivate community and builds places that deliver long-term value for clients and communities.

Union STUDIO brings a comprehensive approach to the design of buildings. They bring unity to the entire process, from design to building, infuse their work with rigorous technical detail, and pull from a breadth of design experience to integrate broad understanding and respect for key building trades

into their architectural practice. Union's designs and successful collaborations are shown in the Perlman House in Vineyard Haven, the forthcoming Southern Tier in Oak Bluffs, Meshacket Commons in Edgartown, and an upcoming project with Island Autism Group, along with similar projects on Cape Cod.

Union is driven by values, including Smart-growth—where people, communities and markets all thrive together. With an emphasis on beautiful, inspiring, and sustainable buildings and spaces that are designed to stand for generations and are grounded in market realities. Union's unique approach has attracted clients—and awards—from across the United States and Canada.