



# Neighborhood Public Update

## MA EOHLC Local Initiative Program

### March 5, 2024; 6:00pm-8:00pm

*... a public / private housing opportunity*

**OWNER**  
**DEVELOPER**  
**ARCHITECT / PLANNER**  
**LIP LEGAL COUNSEL**  
**FISCAL PLANNING**  
**HOUSING CONSULTANT**

Carlisle Road Bedford LLC  
DeVellis Group LLC  
Maugel Architects  
Brown & Brown PC  
Fougere Planning  
SEB Housing

**DEVELLIS**

**DEVELLIS CONSULTING GROUP**  
*Strategic Consulting & Development Services for*  
Recreation • Hospitality • Multifamily • Municipal



Brian DeVellis is a Landscape Architect & Land Use Attorney designing award winning master-planned open-space residential communities since 1991.

The Residences at GCNE, a 38 home residential community integrated into Golf Club of New England located in Stratham NH

Pine Hills Community Masterplan, an award winning 2,900 home Master Planned community in Plymouth MA

Woodlands at Parkman Brook, a 38 home planned Cluster Development community located in Stratham NH

Villages at University Park, a 175 home Senior and Continuing Care community located in West Hartford CT

Highborne Cay, a 20 home Master Planned Residential Island Community located in Exuma Cays Bahamas

Leah Farms, a 55 home senior Master Planned residential community located in Ashland MA

Sewall Farms, a 32 home planned Cluster Development community located in Stratham NH

Prescott Orchards, a 139 home Open Space residential community located in Epping NH

DNA Lofts, a 58 home Mill Conversion residential loft community located in Boston MA

Huckins Farm, a 92 home Open Space residential community located in Bedford MA (1992)

Sweeney Ridge, a 25 (+1) home residential community located in Bedford MA (1995)

Hosmer Way, an 8 home Planned Residential Development in Bedford MA (2017)



Since 2016, we have specialized in being the **Private** recreational developer with now 13 facilities in various **Public / Private Partnerships** and **Live Work Play** communities ... all starting with the **EDGE Sports Center** in Bedford in 2008.



Who We Are

DEVELLIS



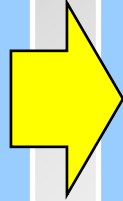


The Bedford Planning Board published a Comprehensive Plan in December 2013. This plan was generated as a result of various stakeholders in Town examining every aspect of local life, including land use, natural and cultural resources, economic development, transportation, housing needs, and services, facilities, recreation, and energy. Under the housing needs section, the Comprehensive Plan discussed housing issues facing Bedford and laid out some goals and action steps for how to address them. One of the issues identified in the 2013 plan was that the housing stock does not include enough options to meet the needs of the variety of the Town's residents. One of the housing-related action items in the Comp Plan was to "fund and conduct necessary housing studies to better document and understand Bedford's potentially underserved markets, including a) empty-nesters already residing in Bedford; b) seniors; c) households seeking starter homes; d) workers in Bedford businesses who would like to live here and not commute; and 3) veterans. This housing study marks the culmination of the work that has been done to complete this action item.

# Local Initiative Program

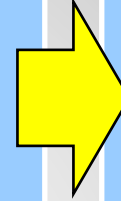
## LIP Application

- Early presentation by development team to town boards & staff starting 2021
- Dozens of committee, neighborhood and personal meeting from 2021 - 2023
- Formal support by Select Board & Housing Partnership (support letters) Fall 2023



## Project Eligibility

- Applicant submits LIP 40B Application to EOHLC
- EOHLC performs site visit and opens formal comment period
- Town provides comments to EOHLC
- EOHLC issues Project Eligibility Letter (*West Site PEL 2/21/2024*)



## Comprehensive Permit

- Applicant files 40B application with ZBA
- ZBA has public hearing process, with residents and Boards and Committees, and residents
- Studies conducted in anticipation of and likely at the request of ZBA (traffic, drainage, economic, market, conservation) ... *we are here*

1. Bedford Housing Partnership Endorsed (2X)
2. Select Board Endorsed (2X)
3. With endorsements above, Owner filed LIP application with MA EOHLC
4. EOHLC Reviews and Solicits Public Comment
5. EOHLC Issues Project Eligibility Letter (PEL)
6. Owner Prepares Design Plans & Files LIP Application with Zoning Board of Appeals
7. ZBA Public Process, Review & Approval



The Process





Commonwealth of Massachusetts  
EXECUTIVE OFFICE OF HOUSING &  
LIVABLE COMMUNITIES

Maura T. Healey, Governor ♦ Kimberley Driscoll, Lieutenant Governor ♦ Edward M. Augustus, Jr., Secretary

February 21, 2024

Bopha Malone, Chair  
Bedford Select Board  
10 Mudge Way  
Bedford, Massachusetts 01730

Brian DeVellis  
Carlisle Road Bedford LLC  
c/o BV Devellis LLC, Manager  
900 Worcester Street  
Wellesley, Massachusetts 02482

RE: Carlisle Road, Bedford, Massachusetts  
Determination of Project Eligibility under the Local Initiative Program (LIP)

Dear Ms. Malone and Mr. DeVellis:

I am pleased to inform you that your application for project eligibility under the Local Initiative Program (LIP) for the proposed Carlisle Road project has been approved. This approval is based on your application that sets forth a plan for the development of 78 homeownership units and 42 rental units. The proposed rents for the LIP units are generally consistent with the standards for affordable housing to be included in a community's Chapter 40B affordable housing stock.

As part of the review process, Executive Office of Housing and Livable Communities (EOHLC) staff has performed an on-site inspection of the proposed project sites. EOHLC has made the following findings:

1. The proposed project appears generally eligible under the requirements of LIP, subject to final program review and approval;
2. The site of the proposed project is generally appropriate for residential development;
3. The conceptual plan is generally appropriate for the site on which the project is located;
4. The proposed project appears financially feasible in the context of the Bedford housing market;
5. The initial pro forma for the project appears financially feasible and consistent with cost examination and limitations on profits and distributions on the basis of estimated development costs;

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Carlisle Road  
Page 2

6. The project sponsor and the development team meet the general eligibility standards of LIP;
7. The project sponsor has an executed Purchase and Sale agreement for the site.

The proposed project must comply with all state and local codes not specifically exempted by a comprehensive permit.

*Please provide us with a copy of the comprehensive permit as soon as it is issued. The EOHLC legal office will review the comprehensive permit and other project documentation. Additional information may be requested as is deemed necessary. Following the issuance of the comprehensive permit, the specifics of this project must be formalized in a regulatory agreement signed by the municipality, the project developer, and EOHLC prior to starting construction.*

As stated in the application, the Carlisle project will consist of 120 units, 30 of which will be affordable; all will be eligible for inclusion in the Town's subsidized housing inventory. The affordable units will be marketed and sold/rented to eligible households whose annual income may not exceed 80% of area median income, adjusted for household size, as determined by the U.S. Department of Housing and Urban Development.

The conditions that must be met prior to final EOHLC approval include:

1. A final affirmative fair marketing and lottery plan with related forms shall be submitted that reflects LIP requirements including consistency with the *Comprehensive Permit Guidelines, Section III, Affirmative Fair Housing Marketing Plans*;
2. Any changes to the application it has just reviewed and approved, including but not limited to alterations in unit mix, sales prices, rents, development team, unit design, site plan and financial pro forma reflecting land value, must be approved by EOHLC;
3. The project must be organized and operated so as not to violate the state anti-discrimination statute (M.G.L. c151B) or the Federal Fair Housing statute (42 U.S.C. s.3601 et seq.). No restriction on occupancy may be imposed on the affordable unit (other than those created by state or local health and safety laws regulating the number of occupants in dwelling units); and
4. The Town shall submit to EOHLC the finalized details of the comprehensive permit.

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Commonwealth of Massachusetts  
EXECUTIVE OFFICE OF HOUSING &  
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Carlisle Road  
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4. The Town shall submit to EOHLC the finalized details of the comprehensive permit.

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As the Carlisle Road project nears completion of construction, EOHLC staff may visit the site to ensure that the development meets program guidelines.

When the units have received Certificates of Occupancy, the developer must submit to both EOHLC and the Bedford Select Board a project cost examination for the comprehensive permit project.

This letter shall expire two years from this date or on February 21, 2026, unless a comprehensive permit has been issued.

We congratulate the town of Bedford and BV Devellis, LLC on your efforts to work together to increase the Town's supply of affordable housing. If you have any questions as you proceed with the project, please contact Rieko Hayashi at [rieko.hayashi@mass.gov](mailto:rieko.hayashi@mass.gov).

Sincerely,



Catherine Racer  
Undersecretary

cc: D. Anthony Fields, Planning Director  
Matthew J. Hanson, Town Manager  
Angelo Colasante, Zoning Board of Appeals  
Office of the Chief Counsel, EOHLC

Enc.

#### RESPONSIBILITY FOR COST CERTIFICATION:

By your signature below, BV Devellis, LLC, acknowledges and accepts this approval letter, including the obligation under law to provide the Executive Office of Housing and Livable Communities and the town of Bedford with a project cost examination.

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

Name (print): \_\_\_\_\_

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

*Upon receipt, please make a copy of this letter and return a signed copy to the Executive Office of Housing and Livable Communities, 100 Cambridge Street, Boston, MA 02114 ATTN: Local Initiative Program.*

Carlisle Road, Bedford, Massachusetts

#### LOCAL INITIATIVE PROGRAM – COMPREHENSIVE PERMIT

##### Sponsor:

Carlisle Road Bedford LLC  
c/o BV Devellis LLC, Manager  
900 Worcester Street  
Wellesley, MA 02482

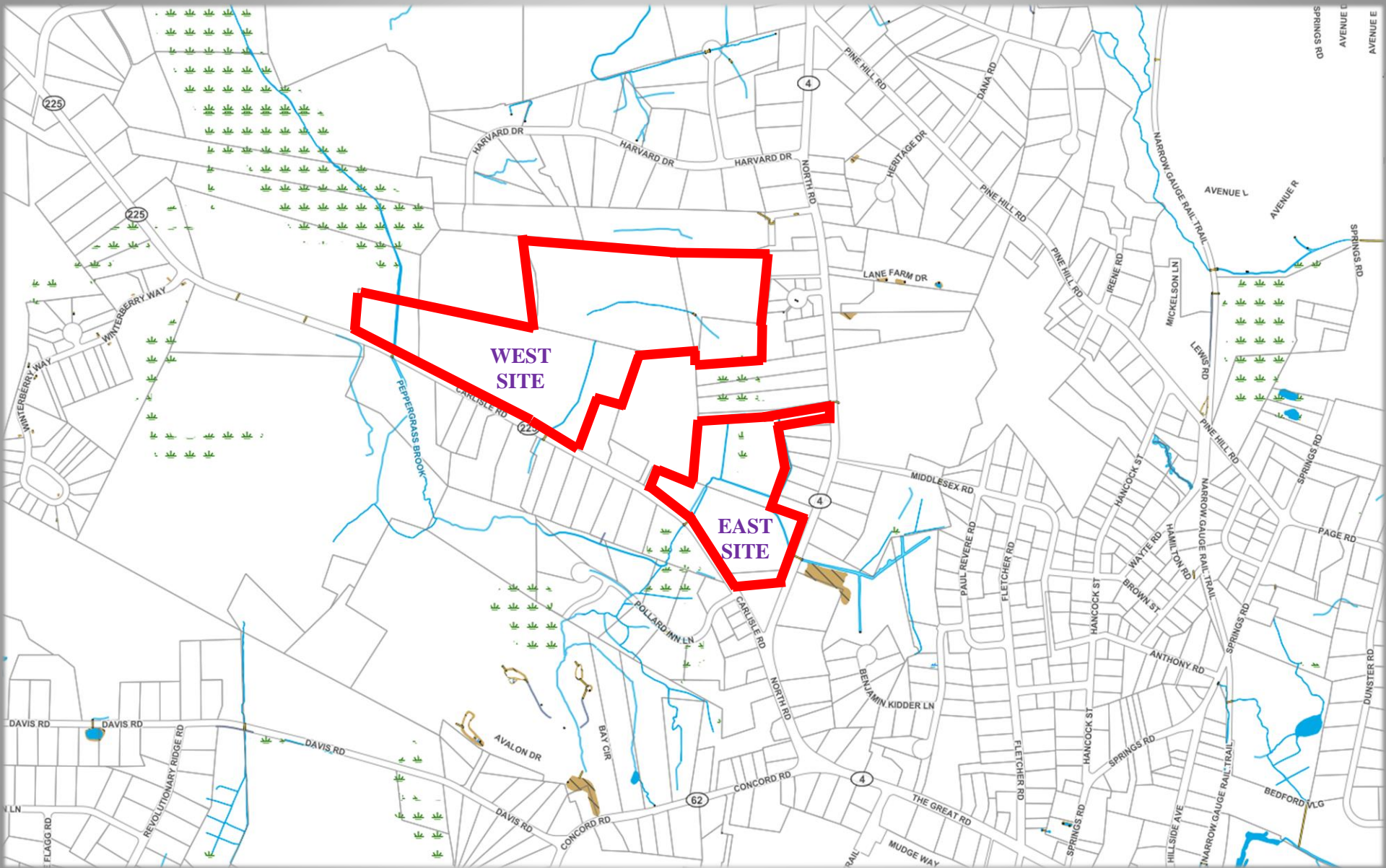
##### Project Addresses:

82 Carlisle Road  
Bedford, MA 01730

This project will provide rental opportunities according to the following breakdown:

Type of Unit	# of Units	# of Bdrms.	# of Baths	Gross SF	Utility Allowance/ Condo Fee	Sales Price/ Maximum Rent
LIP Units (owner)	9	3	2.5	1,591	\$200	\$325,000
	10	2	2	1,279	\$200	\$285,000
LIP Units (rental)	6	2	2	1,050	\$211	\$2,267
	5	1	1	700	\$144	\$2,068
Market Units (owner)	29	3	2.5	1,591	\$412	\$763,000
	30	2	2	1,279	\$300	\$710,000
Market Units (rental)	18	2	2	1,050	N/A	\$3,300
	13	1	1	700	N/A	\$2,600
Total Units	120					







TOWN OF BEDFORD CAS  
LEADING TO  
GREAT MEADOW NATIONAL  
WILDLIFE REFUGE

TOWN OF BEDFORD  
COMPOST FACILITY

WEST  
SITE

CARTER  
WAY

EAST  
SITE

CARLISLE ROAD

NORTH ROAD

NORTHSIDE  
CONVENIENCE

In Context

DEVELLIS



TOWN OF BEDFORD CAS  
LEADING TO  
GREAT MEADOW NATIONAL  
WILDLIFE REFUGE

TOWN OF BEDFORD  
COMPOST FACILITY

WEST  
SITE  
(35 acres)

CARTER  
WAY

Limits of  
Development  
(8.5Ac.+/-)

1,700+ Ft.  
0.33 Mi.

2,080+ Ft.  
0.39 Mi.

CARLISLE ROAD

NORTH ROAD

NORTHSIDE  
CONVENIENCE

In Context

DEVELLIS





TOWN OF BEDFORD CAS  
LEADING TO  
GREAT MEADOW NATIONAL  
WILDLIFE REFUGE

WEST  
SITE

CARLISLE ROAD

Site Aerial

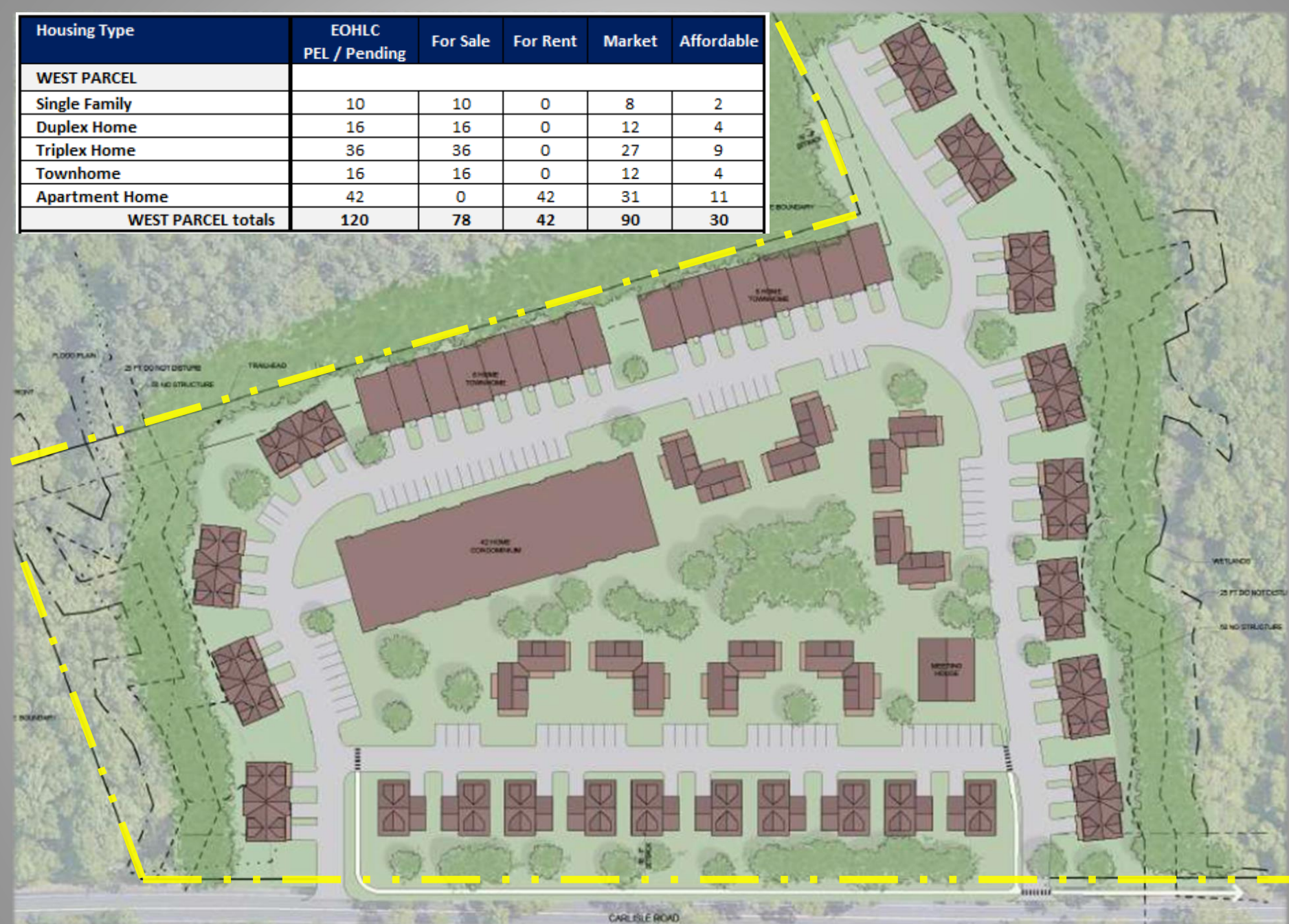




In Context



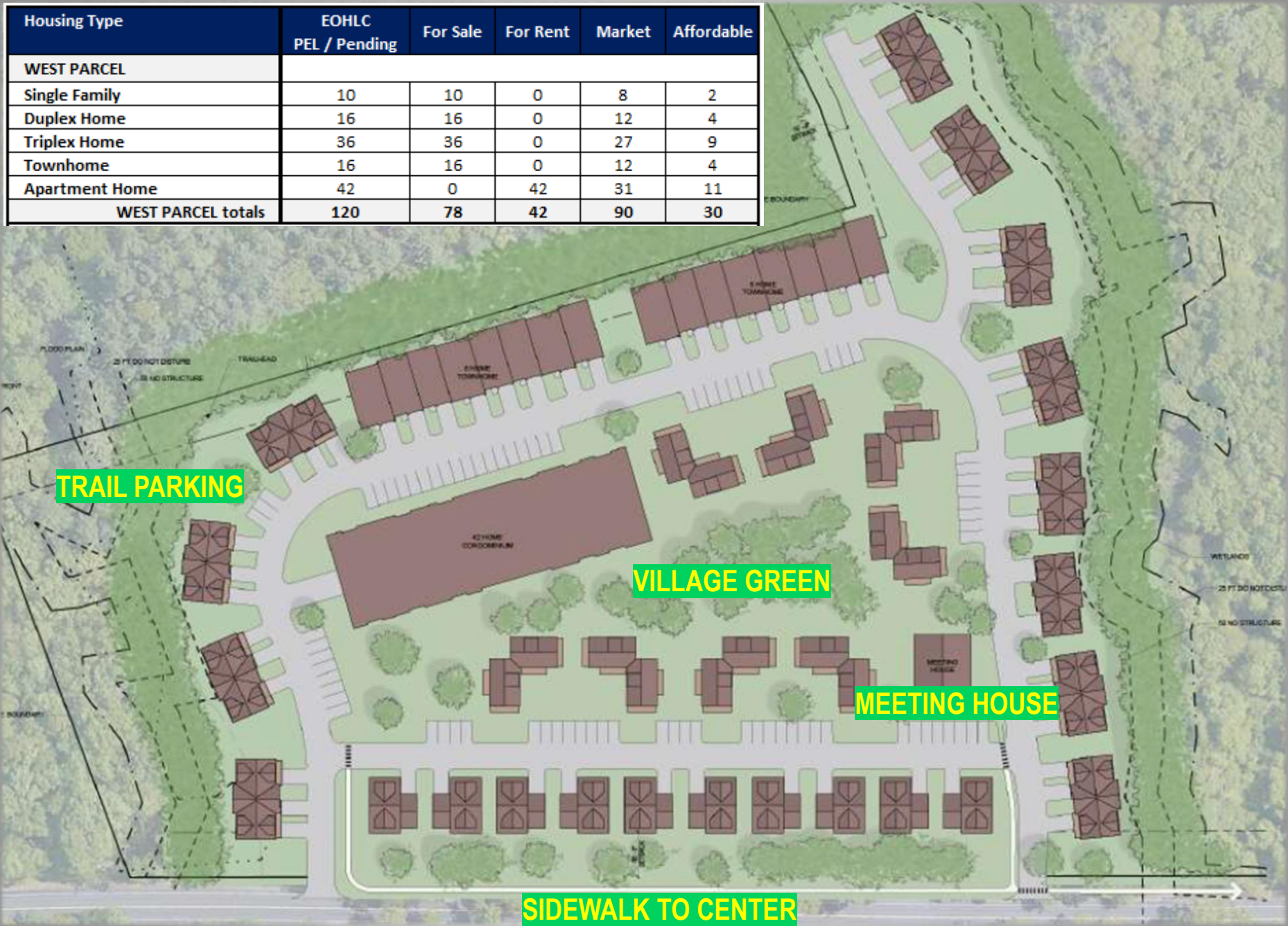
Housing Type	EOHLC PEL / Pending	For Sale	For Rent	Market	Affordable
<b>WEST PARCEL</b>					
Single Family	10	10	0	8	2
Duplex Home	16	16	0	12	4
Triplex Home	36	36	0	27	9
Townhome	16	16	0	12	4
Apartment Home	42	0	42	31	11
<b>WEST PARCEL totals</b>	<b>120</b>	<b>78</b>	<b>42</b>	<b>90</b>	<b>30</b>



West Site Plan



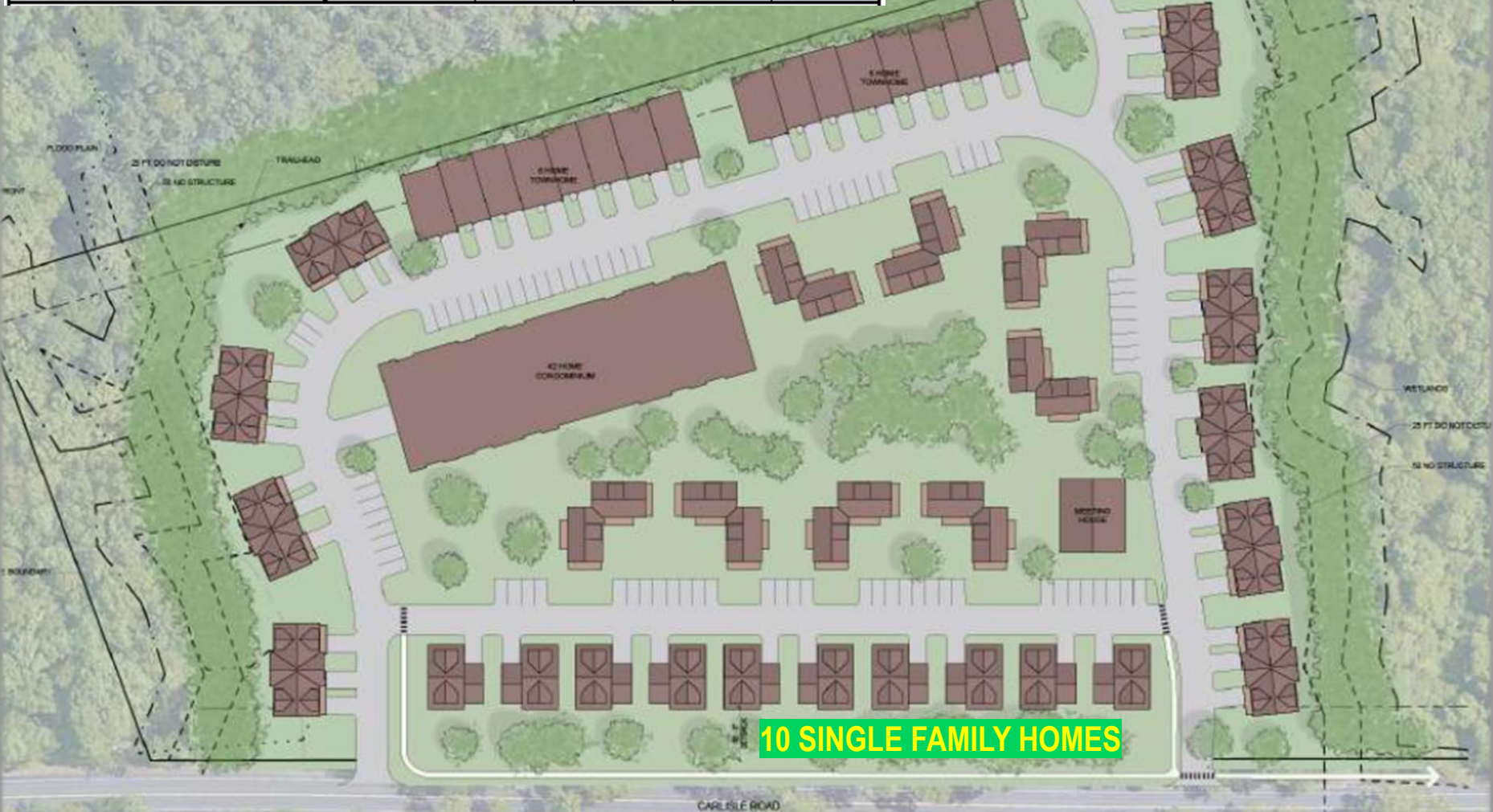
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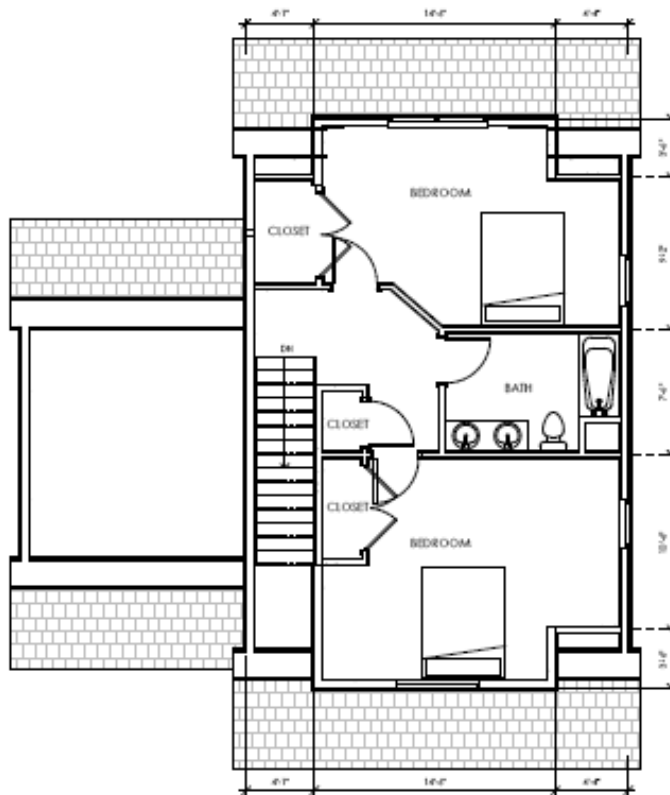
West Site Plan



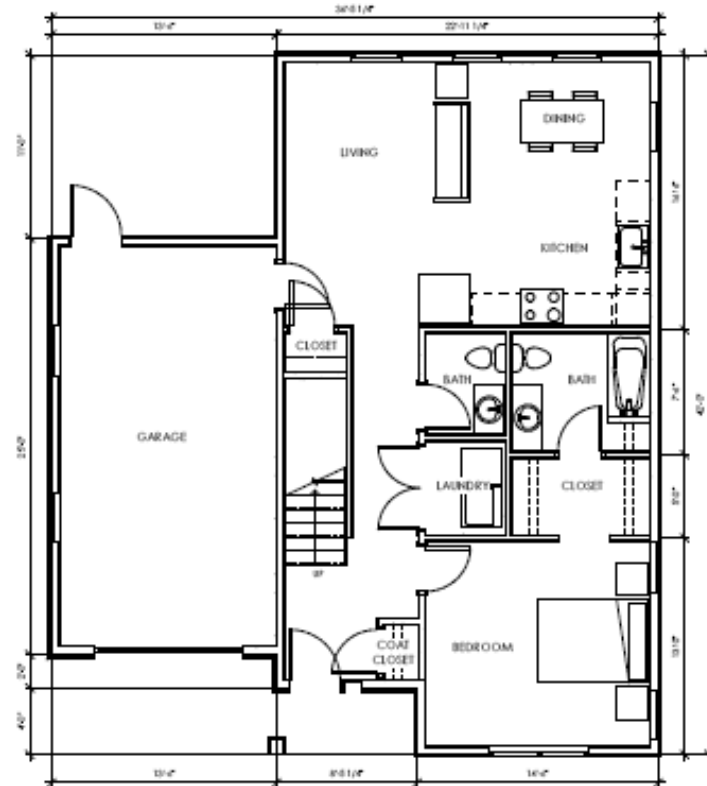
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West Site Plan



3-BED GARAGE - SECOND FLOOR  
1/4" = 1'-0" 2



3 BED GARAGE - FIRST FLOOR  
1/4" = 1'-0" 1

CARLISLE ROAD /

SINGLE FAMILY PLANS

/ 11.28.2023

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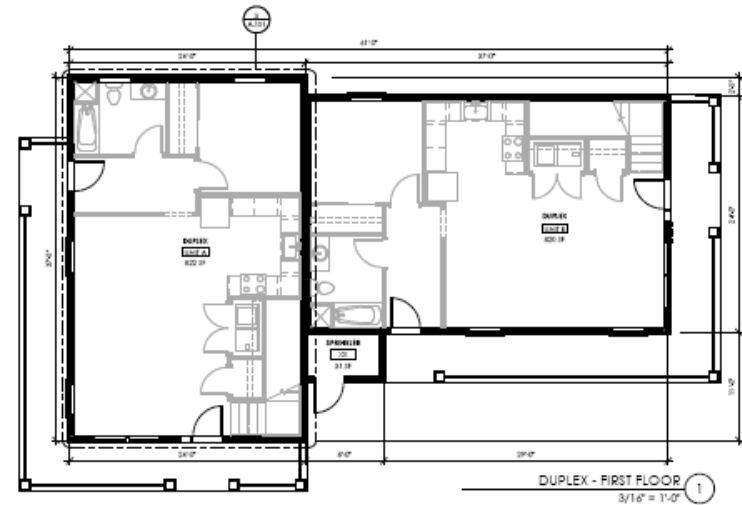
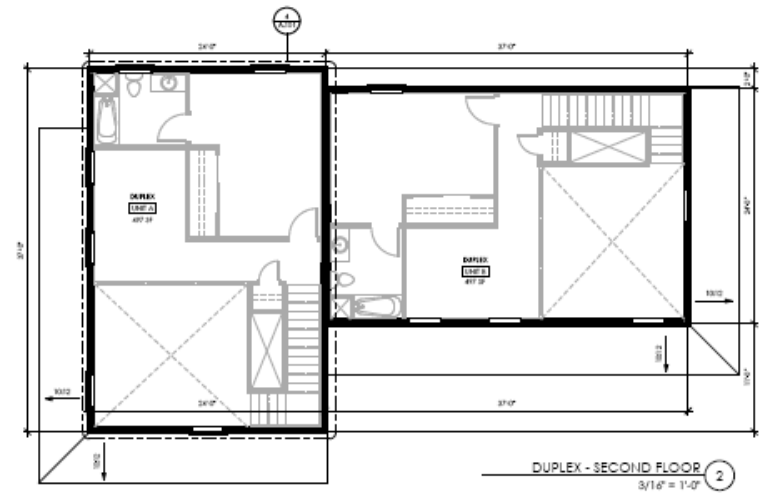




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WEST PARCEL totals	120	78	42	90	30



West Site Plan



CARLISLE ROAD / DUPLEX FLOOR PLANS / 11.22.2023

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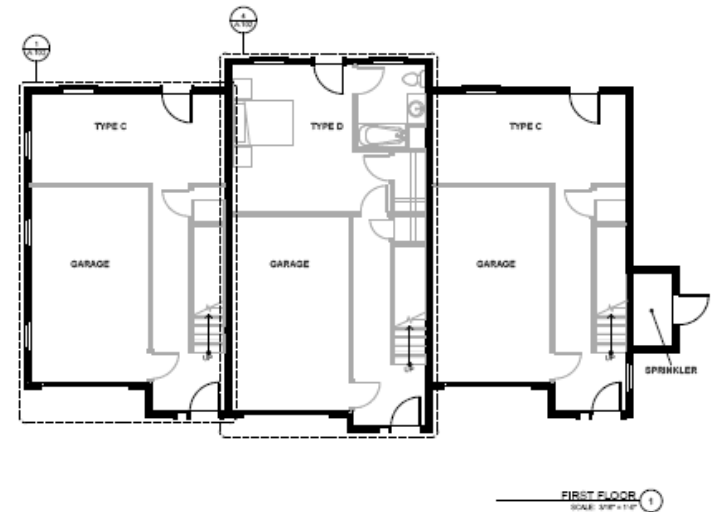
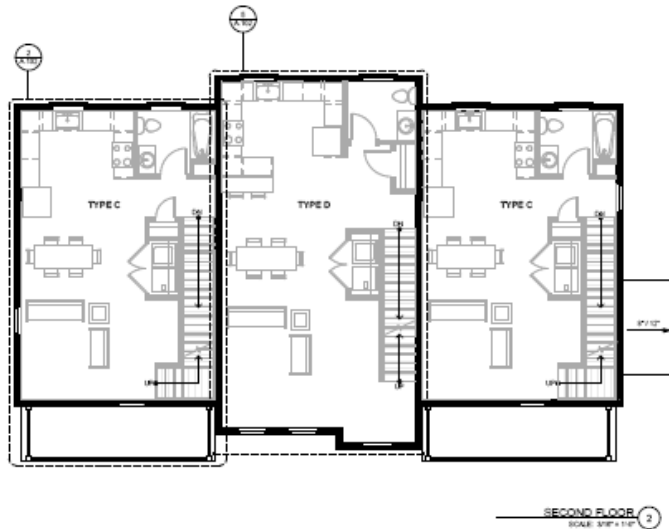
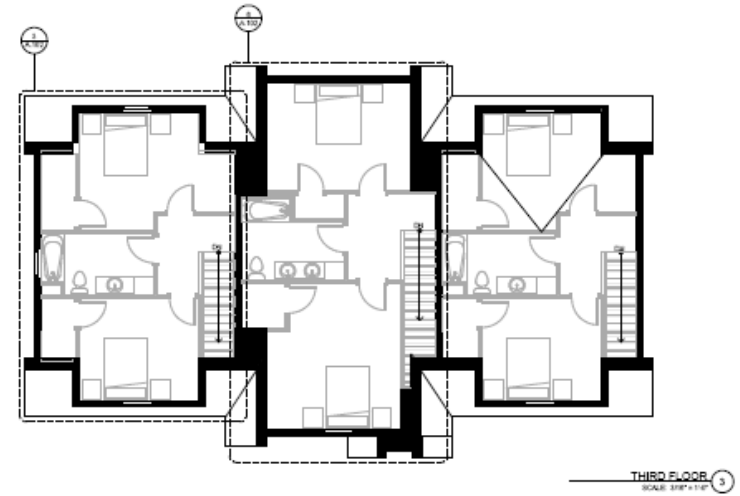
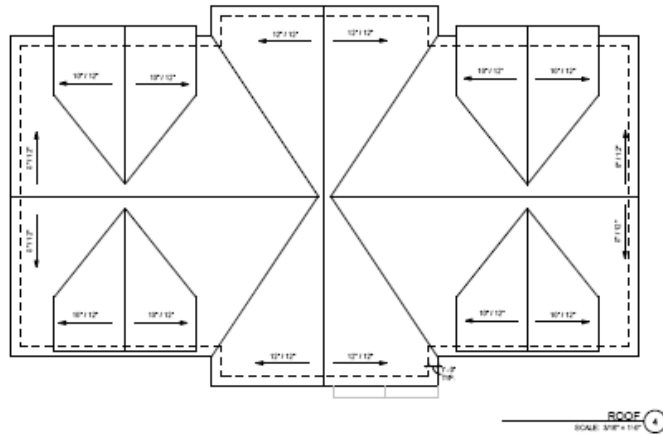




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West Site Plan



Carlisle Road / TOWNHOUSE FLOOR PLANS / 11.21.2023

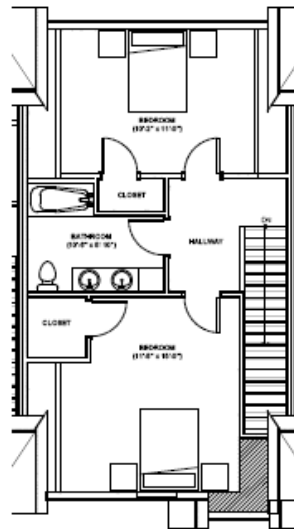
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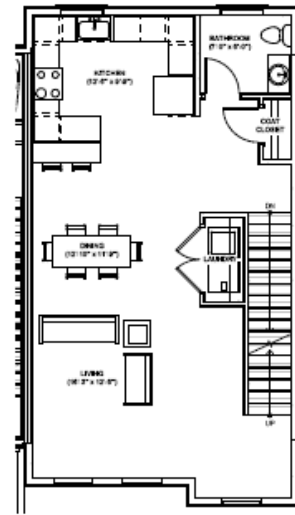
Triplex Home Plans

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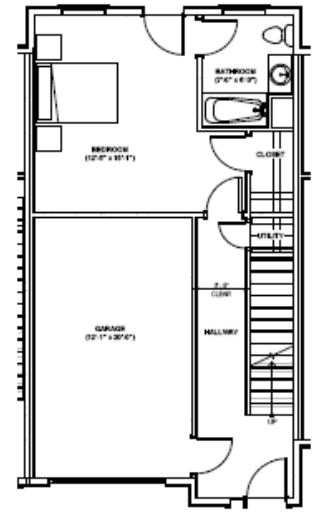




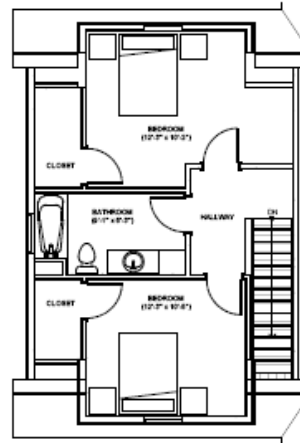
TYPE D UNIT - THIRD FLOOR  
SCALE: 1/4" = 1'-0"



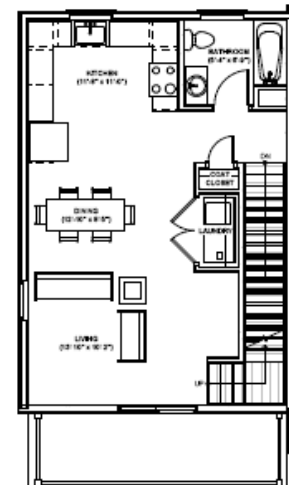
TYPE D UNIT - SECOND FLOOR  
SCALE: 1/4" = 1'-0"



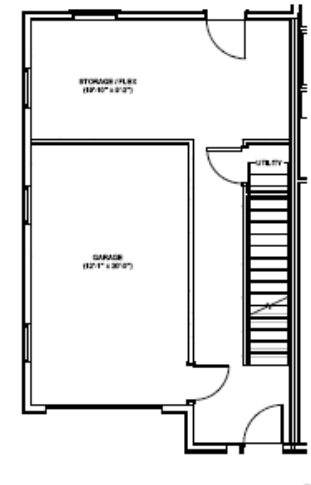
TYPE D UNIT - FIRST FLOOR  
SCALE: 1/4" = 1'-0"



TYPE C UNIT - THIRD FLOOR  
SCALE: 1/4" = 1'-0"



TYPE C UNIT - SECOND FLOOR  
SCALE: 1/4" = 1'-0"



TYPE C UNIT - FIRST FLOOR  
SCALE: 1/4" = 1'-0"

Carlisle Road / TOWNHOUSE FLOOR PLANS / 11.21.2023

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Triplex Home Plans

DEVELLIS



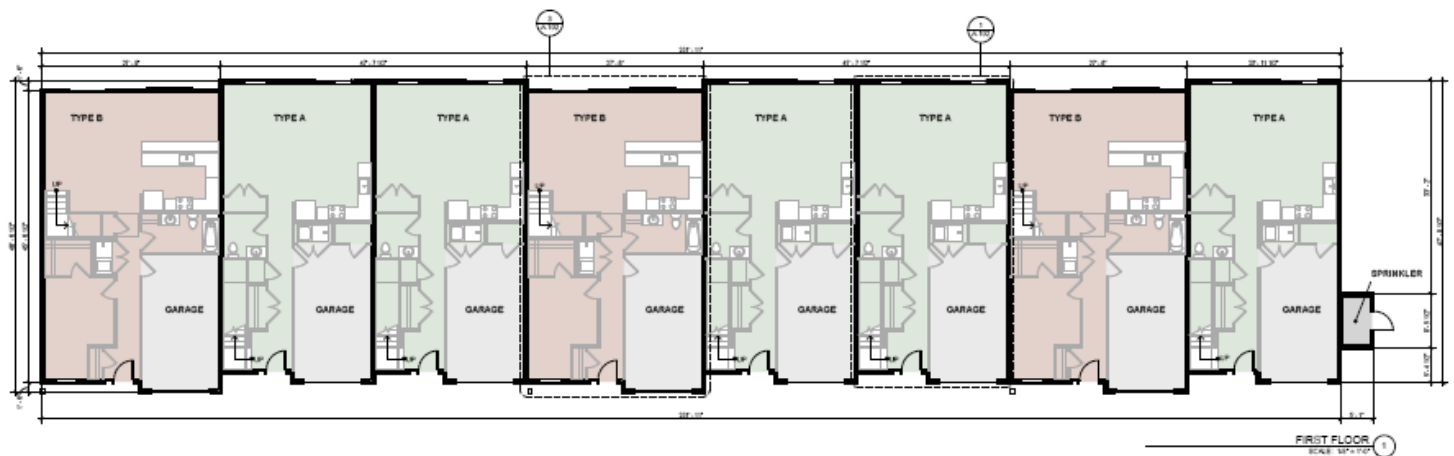
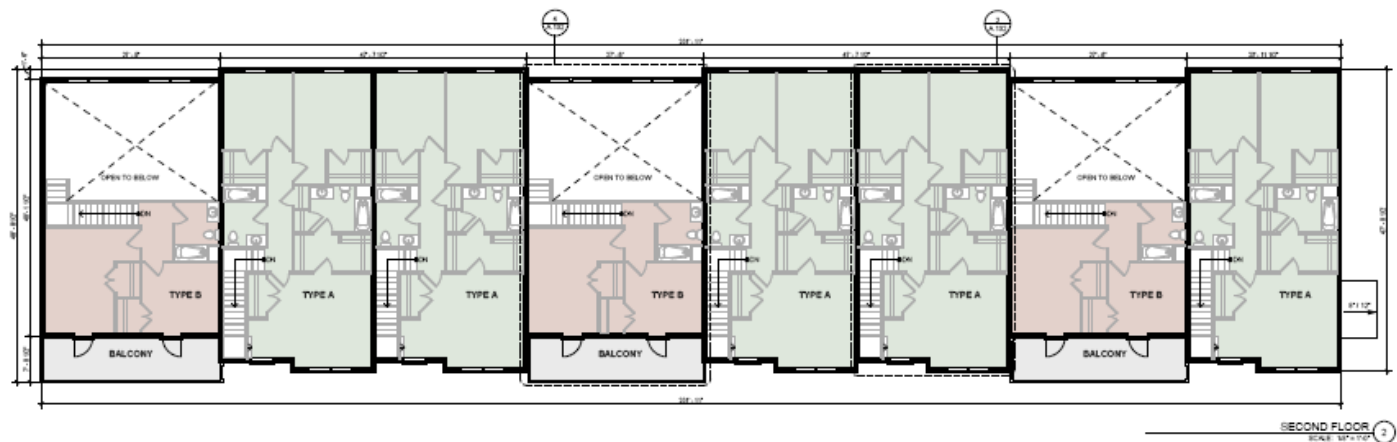
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**16 TOWNHOMES**



West Site Plan





TYPE A BREAKDOWN	
1 BED, 2 BATH	
APPROX. UNIT AREA	785 SF
1ST FLOOR	485 SF
2ND FLOOR	300 SF
BALCONY	0 SF
<b>TOTAL</b>	<b>1,085 SF</b>

TYPE B BREAKDOWN	
1 BED, 2 BATH	
APPROX. UNIT AREA	785 SF
1ST FLOOR	485 SF
2ND FLOOR	300 SF
BALCONY	0 SF
<b>TOTAL</b>	<b>1,085 SF</b>

Carlisle Road / TOWNHOUSE FLOOR PLANS / 11.20.2023

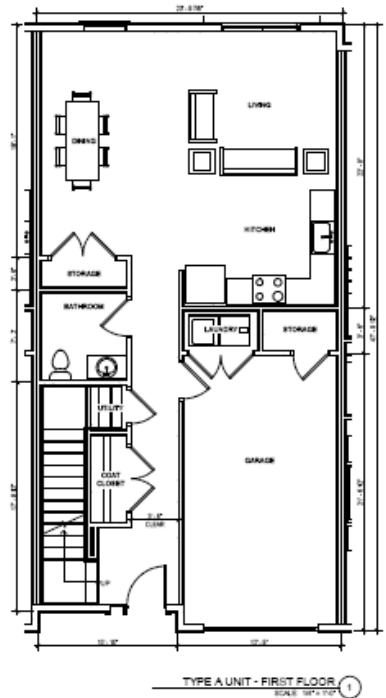
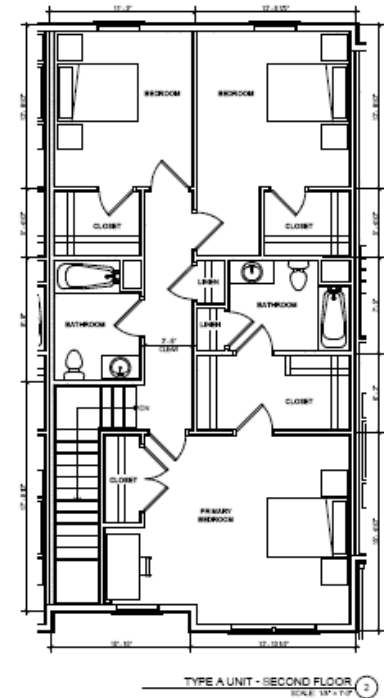
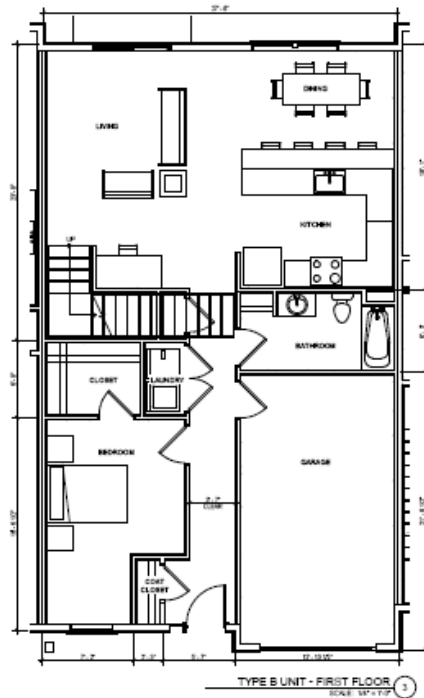
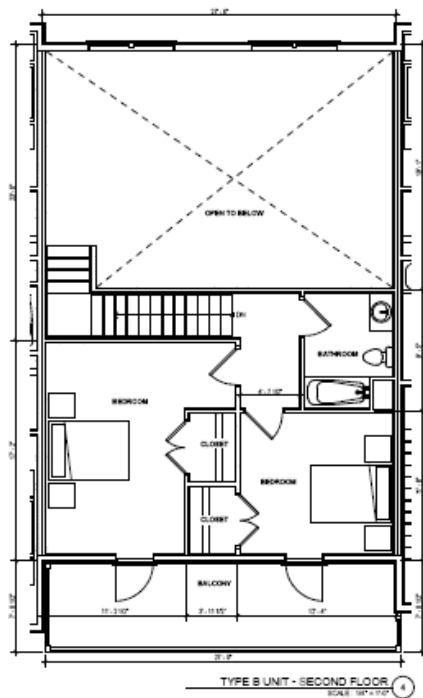
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TYPE A BREAKDOWN	
1 BRD, 2.5 BATH	
APPROX. 1,875 SQ. FT.	
1ST FLOOR	775 SQ. FT.
2ND FLOOR	800 SQ. FT.
3RD FLOOR	297 SQ. FT.
TOTAL	1,872 SQ. FT.

TYPE B BREAKDOWN	
1 BRD, 2 BATH	
APPROX. 1,875 SQ. FT.	
1ST FLOOR	775 SQ. FT.
2ND FLOOR	800 SQ. FT.
3RD FLOOR	297 SQ. FT.
TOTAL	1,872 SQ. FT.



Carlisle Road / TOWNHOUSE FLOOR PLANS / 11.20.2023

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Housing Type	EOHLC PEL / Pending	For Sale	For Rent	Market	Affordable
WEST PARCEL					
Single Family	10	10	0	8	2
Duplex Home	16	16	0	12	4
Triplex Home	36	36	0	27	9
Townhome	16	16	0	12	4
Apartment Home	42	0	42	31	11
WEST PARCEL totals	120	78	42	90	30



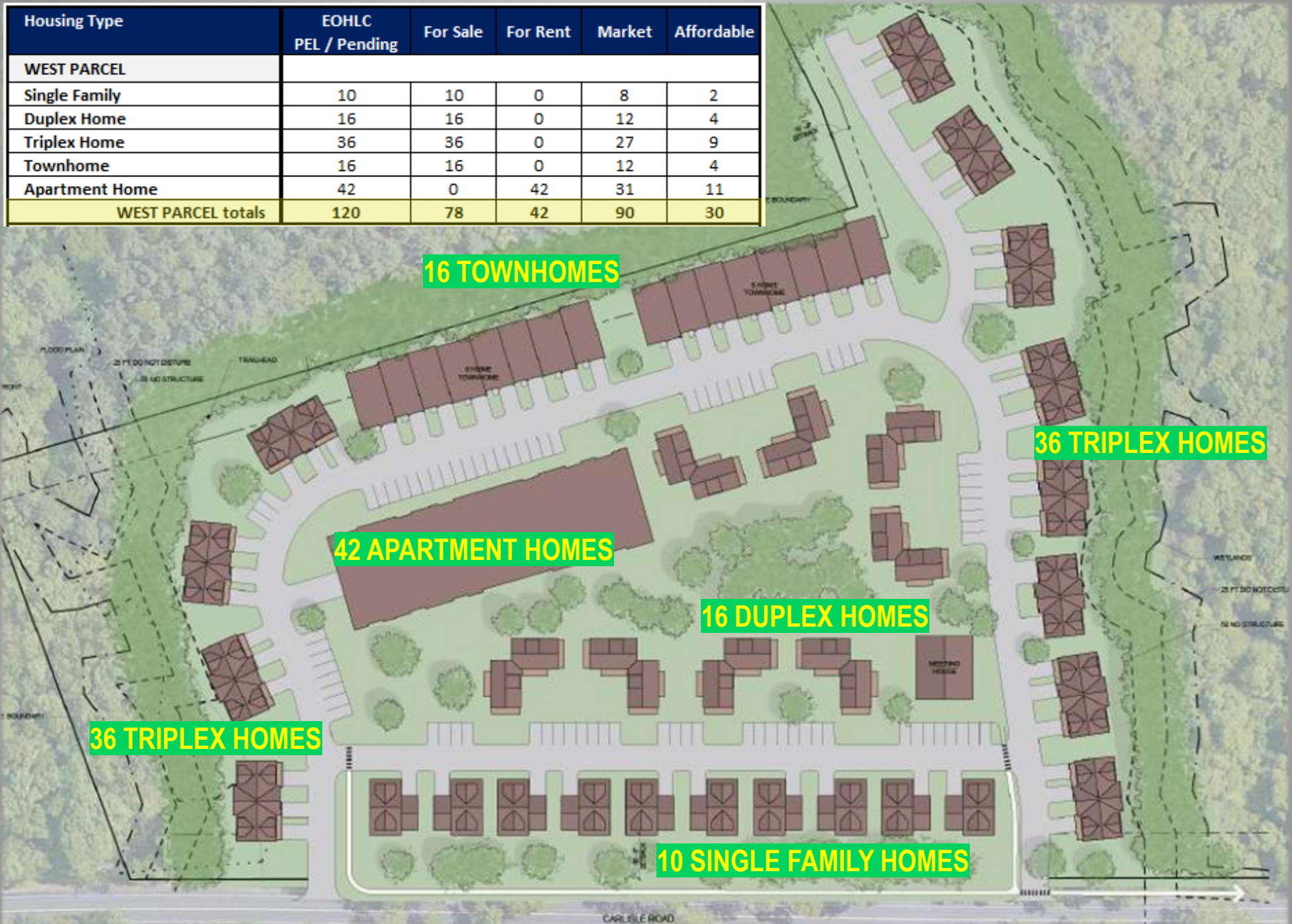
## West Site Plan







Housing Type	EOHLC PEL / Pending	For Sale	For Rent	Market	Affordable
<b>WEST PARCEL</b>					
Single Family	10	10	0	8	2
Duplex Home	16	16	0	12	4
Triplex Home	36	36	0	27	9
Townhome	16	16	0	12	4
Apartment Home	42	0	42	31	11
<b>WEST PARCEL totals</b>	<b>120</b>	<b>78</b>	<b>42</b>	<b>90</b>	<b>30</b>



West Site Plan





West Renderings





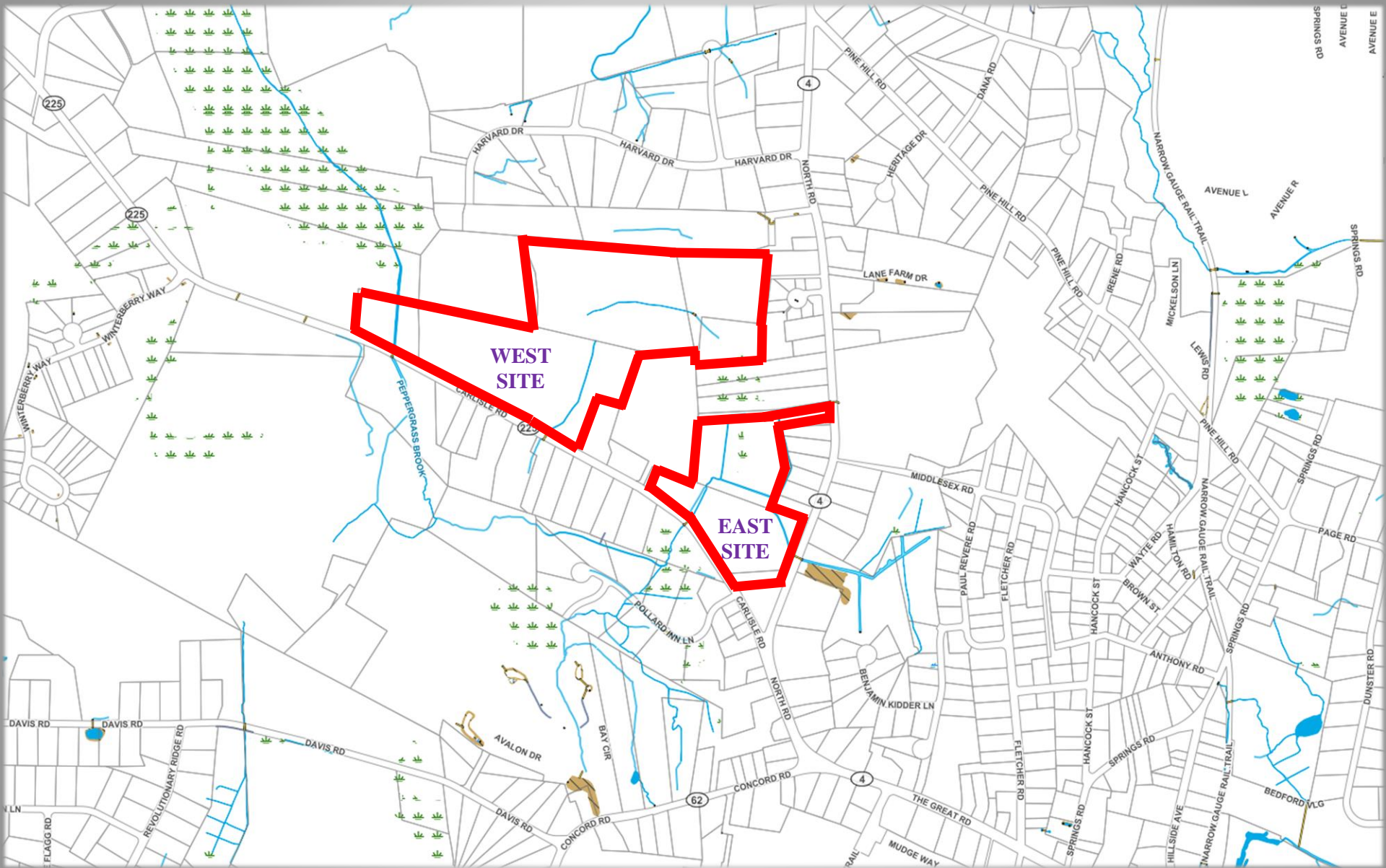
West Renderings



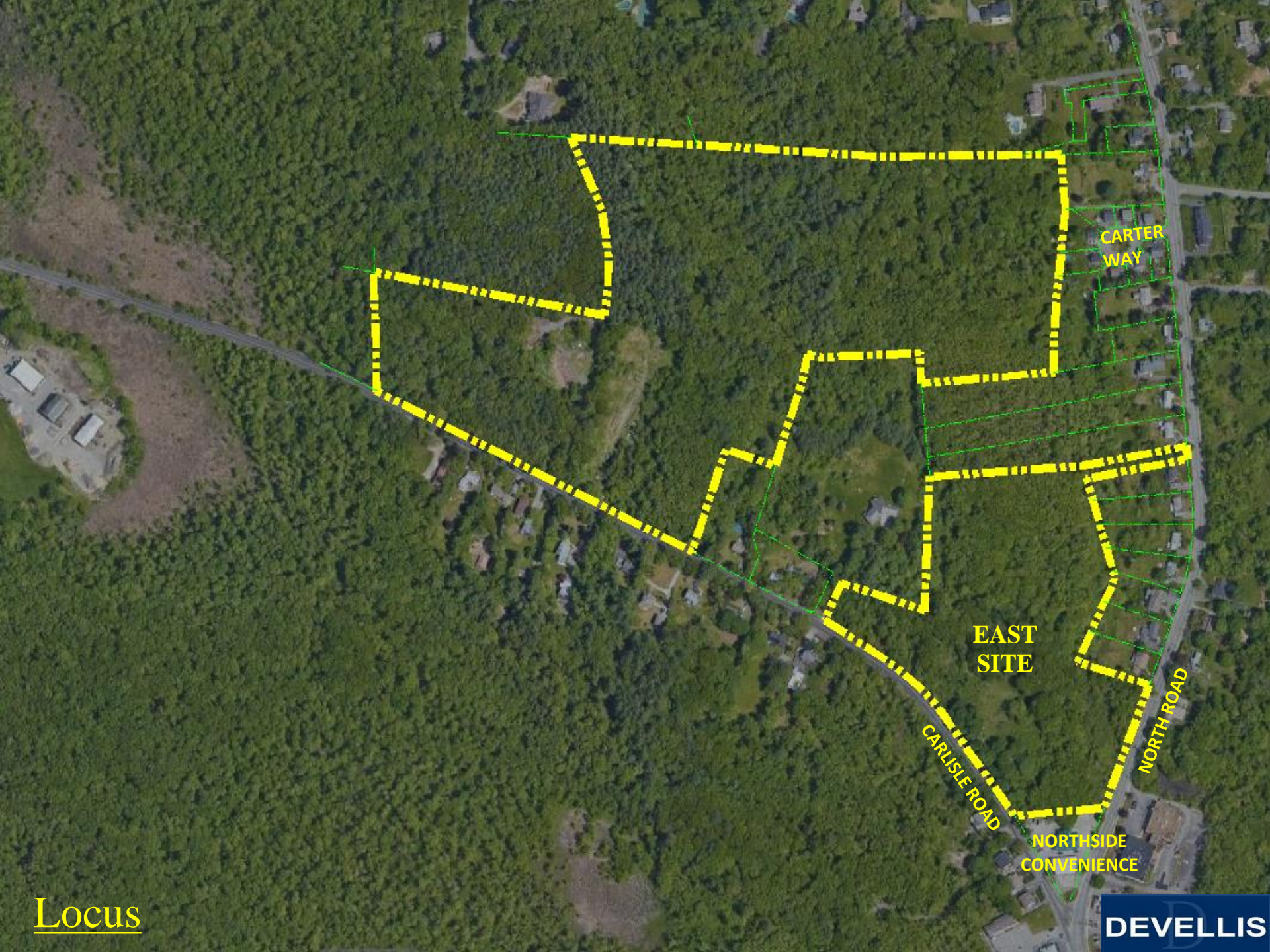
Housing Type	EOHLC PEL / Pending	For Sale	For Rent	Market	Affordable
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Single Family	10	10	0	8	2
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<b>WEST PARCEL totals</b>	<b>120</b>	<b>78</b>	<b>42</b>	<b>90</b>	<b>30</b>



## West Site Affordable Distribution













# Responding to Select Board Conditions and Relocating Senior rental homes to the East Parcel



Housing Type	EOHLC PEL / Pending	For Sale	For Rent	Market	Affordable
EAST PARCEL					
Apartment Home (55+ design)	51	0	51	38	13









East Site Floor Plans





East Site Perspectives





East Site Perspectives





Housing Type	EOHLC PEL / Pending	For Sale	For Rent	Market	Affordable
<b>WEST PARCEL</b>					
Single Family	10	10	0	8	2
Duplex Home	16	16	0	12	4
Triplex Home	36	36	0	27	9
Townhome	16	16	0	12	4
Apartment Home	42	0	42	31	11
<b>WEST PARCEL totals</b>	<b>120</b>	<b>78</b>	<b>42</b>	<b>90</b>	<b>30</b>

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