

# Strengthening Local Boards & Commissions to Support Affordable Housing

## *A Case Study in Lenox: Forge*

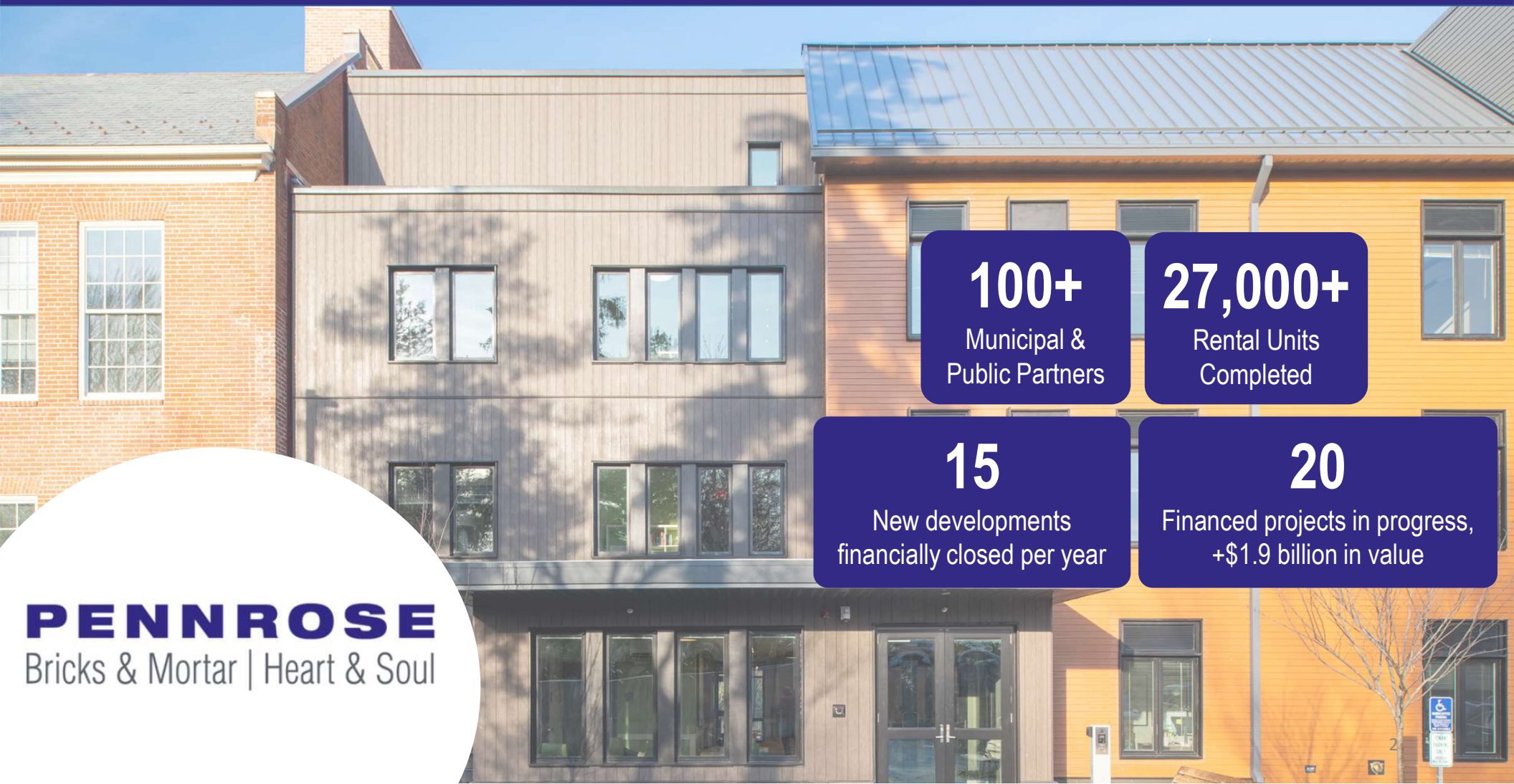
*March 13, 2025*



**Karmen Cheung**  
Regional Vice President, New England  
Pennrose



**Marybeth Mitts**  
Selectboard & Affordable Housing Trust  
Town of Lenox



**100+**  
Municipal &  
Public Partners

**27,000+**  
Rental Units  
Completed

**15**  
New developments  
financially closed per year

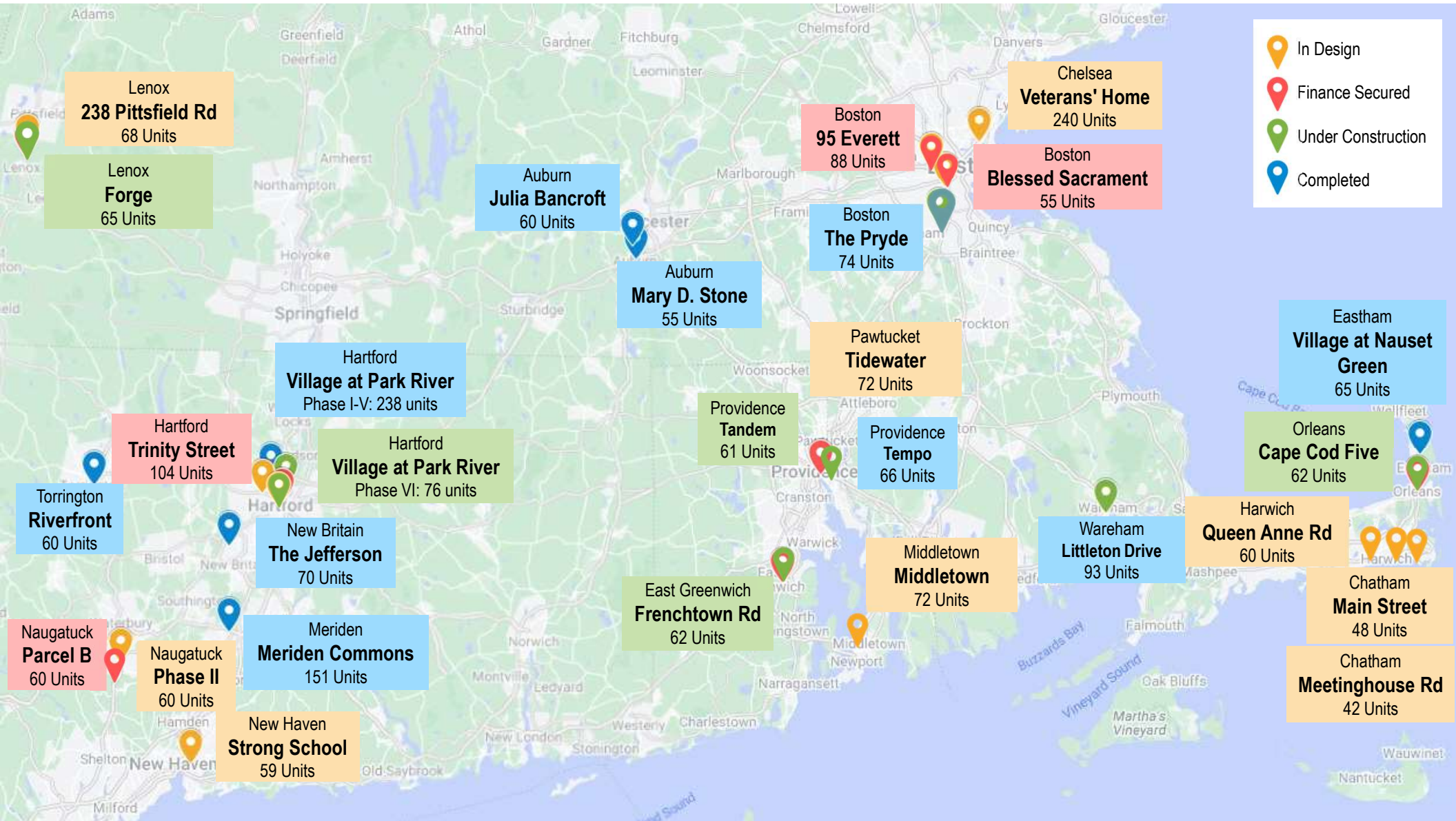
**20**  
Financed projects in progress,  
+\$1.9 billion in value

**PENNROSE**  
Bricks & Mortar | Heart & Soul

# **PENNROSE** Management Company

- 35+ years of management experience with specialty in affordable and mixed-income multifamily
- Employs 400+ trained professionals
- Manages majority of the Pennrose portfolio
- Portfolio of 140+ properties, 10,500 units, across 15+ states and DC
- Integrated in development process from conceptual design to construction



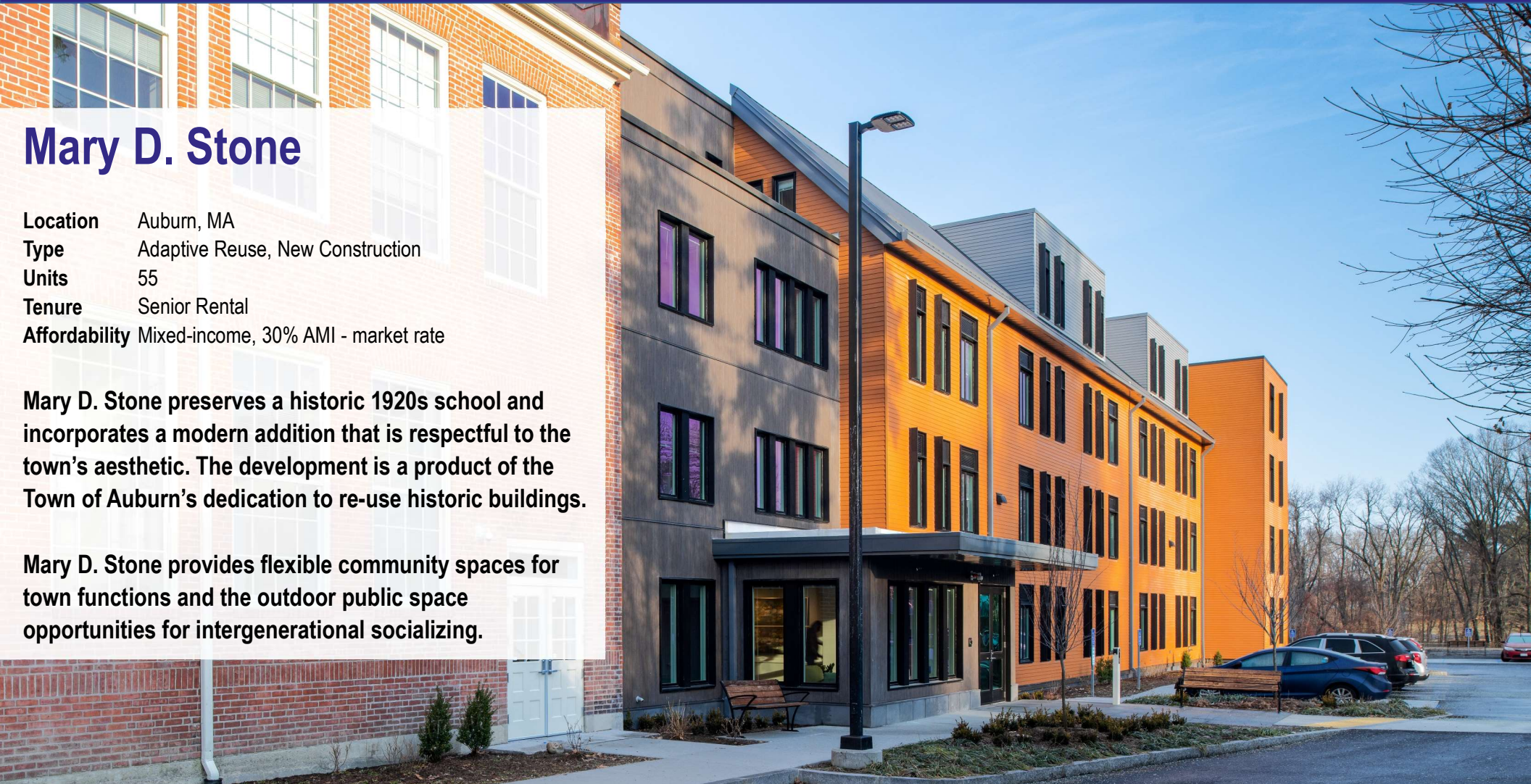


## Mary D. Stone

**Location** Auburn, MA  
**Type** Adaptive Reuse, New Construction  
**Units** 55  
**Tenure** Senior Rental  
**Affordability** Mixed-income, 30% AMI - market rate

Mary D. Stone preserves a historic 1920s school and incorporates a modern addition that is respectful to the town's aesthetic. The development is a product of the Town of Auburn's dedication to re-use historic buildings.

Mary D. Stone provides flexible community spaces for town functions and the outdoor public space opportunities for intergenerational socializing.



# PENNROSE IN NEW ENGLAND

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## Swifts Landing

**Location** Wareham, MA  
**Type** New Construction  
**Units** 92  
**Tenure** Family and Senior  
**Affordability** Affordable, 30% AMI – 100% AMI

Littleton Drive is an intergenerational community, with a mix of townhouses for families and 3-story serviced building for seniors. The development was created in partnership with the Town of Wareham, on land owned by the WRA.

Littleton Drive boasts ample greenery and includes a clubhouse with a fitness center and community areas.



## Phare

**Location** Orleans  
**Type** Adaptive Reuse, New Construction  
**Units** 62  
**Tenure** Family  
**Affordability** 30% AMI – 120%

The Orleans Cape Cod Five development will bring 62 units of sought-after affordable and workforce housing to Orleans.

The program includes a mix of 1-, 2-, and 3-bed units. The project consists of the re-use of a now-vacant former bank headquarters building, combined with a new construction addition and two separate townhouse buildings of five units each.





## Forge

**Location** Lenox, MA  
**Type** New Construction  
**Units** 65  
**Tenure** Family  
**Affordability** Affordable, 30% AMI – 120% AMI

Together with the Town of Lenox, Pennrose is proposing Brushwood Farm as a family-friendly, affordable community in the Berkshires.

The residential community consist of 13 residential buildings containing a mix of 1, 2 and 3-bedroom apartments, as well as a community building and a playground.

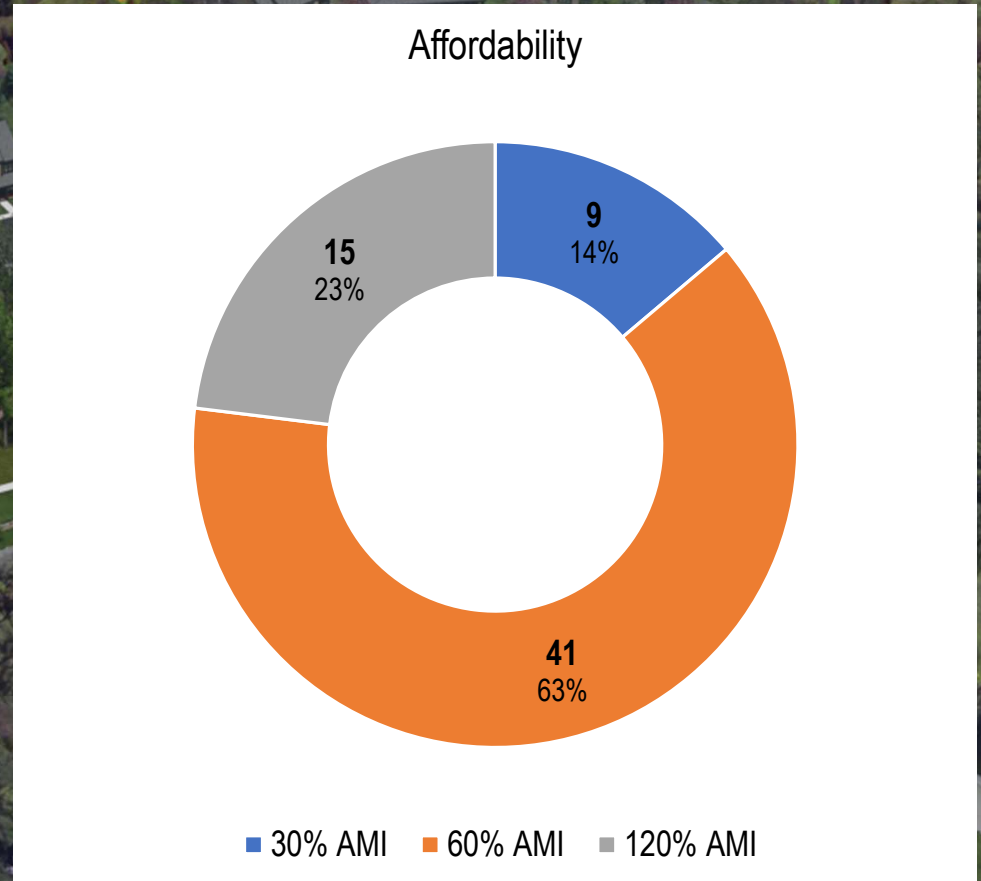
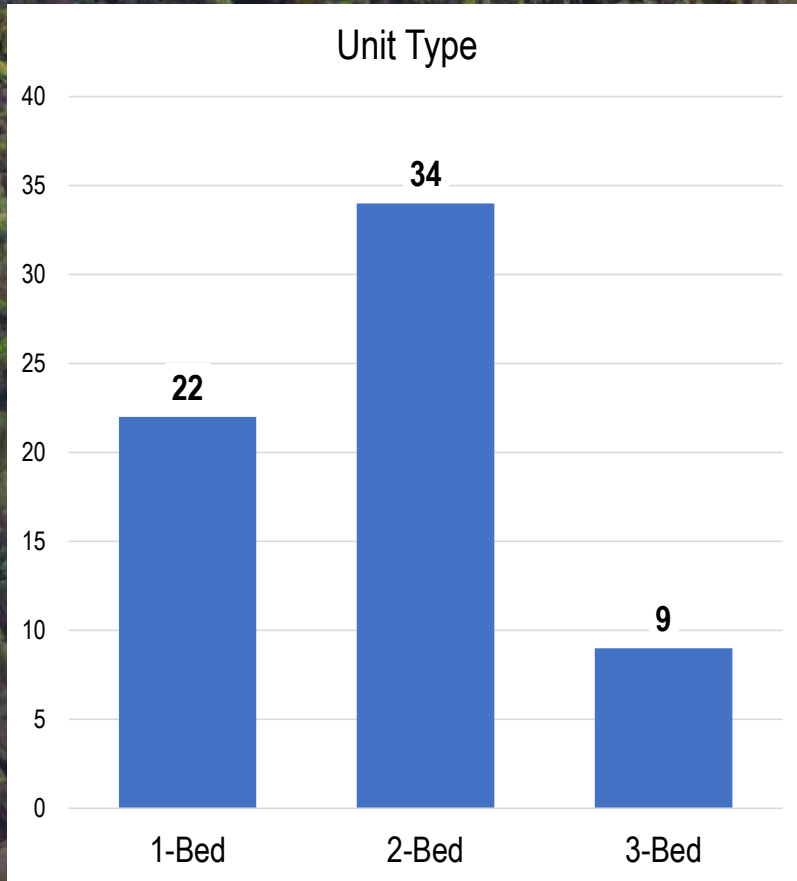




**PENROSE**  
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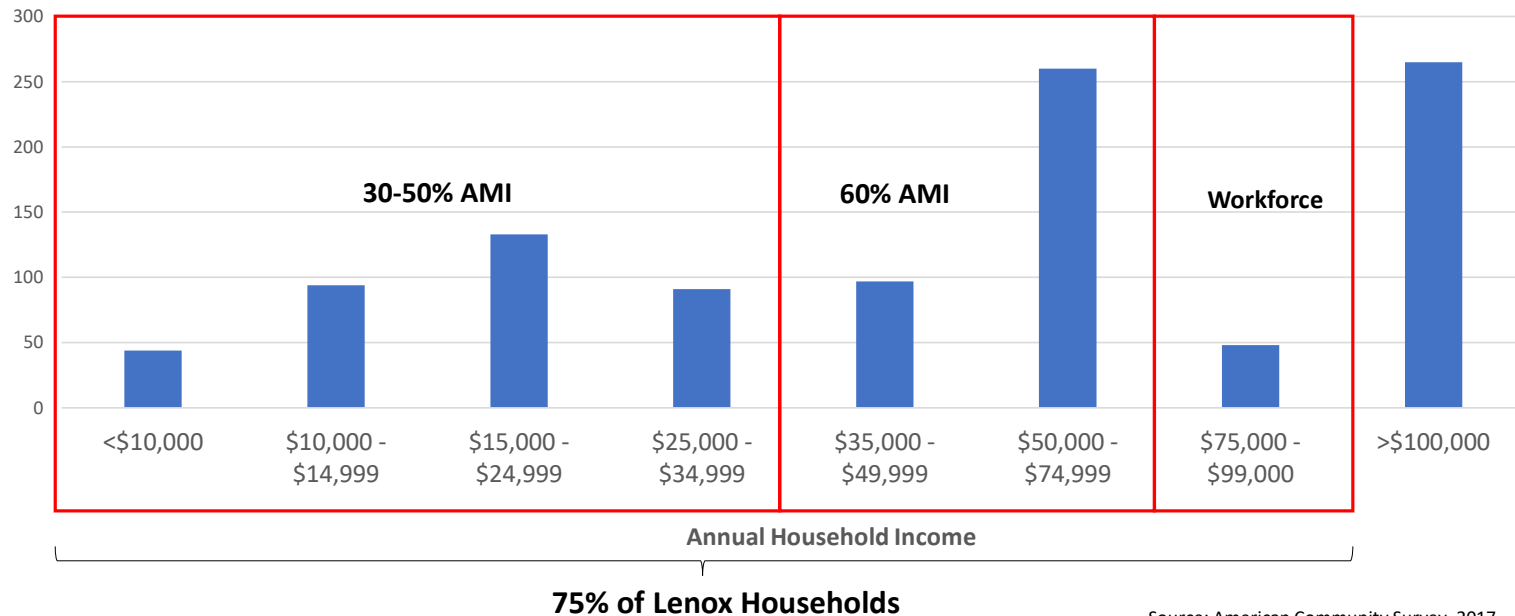


# UNIT & AFFORDABILITY MIX



## LOCAL HOUSING NEED

Lenox Household Income



Source: American Community Survey, 2017  
Income Limits Ranges are based on a 2-person Household

**Town/Municipal Role**

**Developer Role**

**May 2006**

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*Adoption of Community Preservation Act*

**September 2009**

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*Establishment of Affordable Housing Trust*

**June 2017**

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*2017-2021 Housing Production Plan*

**June 2021**

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*Lenox Master Plan*

# Town of Lenox, Massachusetts

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## Master Plan

Adopted June 8<sup>th</sup>, 2021



*If Lenox hopes to attain its vision of being a diverse community, it is important that the Town take proactive steps towards becoming more age-friendly community, as well a community welcoming and inclusive to residents of all incomes and all cultural and ethnic backgrounds.*

*-Town of Lenox, Master Plan 2021*

## DEMOGRAPHIC TRENDS

- *Aging & declining population, especially year-round and younger age groups*
- *37% of Lenox students are School Choice transfers (vs. Lenox residents)*

## HOUSING GAPS

- *Deed-restricted family housing (most affordable units are senior)*
- *Existing affordable housing stock is aging, in poor condition*
- *Extremely limited 40-B activity; last Project Eligibility Letter from Lenox submitted in 2004*
- *Vulnerable to seasonal cost inflation (e.g. short-term rentals)*

## GOALS

- *2017-2021 goal to **add 60 affordable units** – no progress*
- *Increase **diversity of housing** types*
- *Increase **affordable/mixed-income rental** options*
- *Focus housing near commercial areas, **promote smart growth***





**Town/Municipal Role**

**Developer Role**

**May 2006**

*Adoption of Community Preservation Act*

**September 2009**

*Establishment of Affordable Housing Trust*

**June 2017**

*2017-2021 Housing Production Plan*

**June 2021**

*Lenox Master Plan*

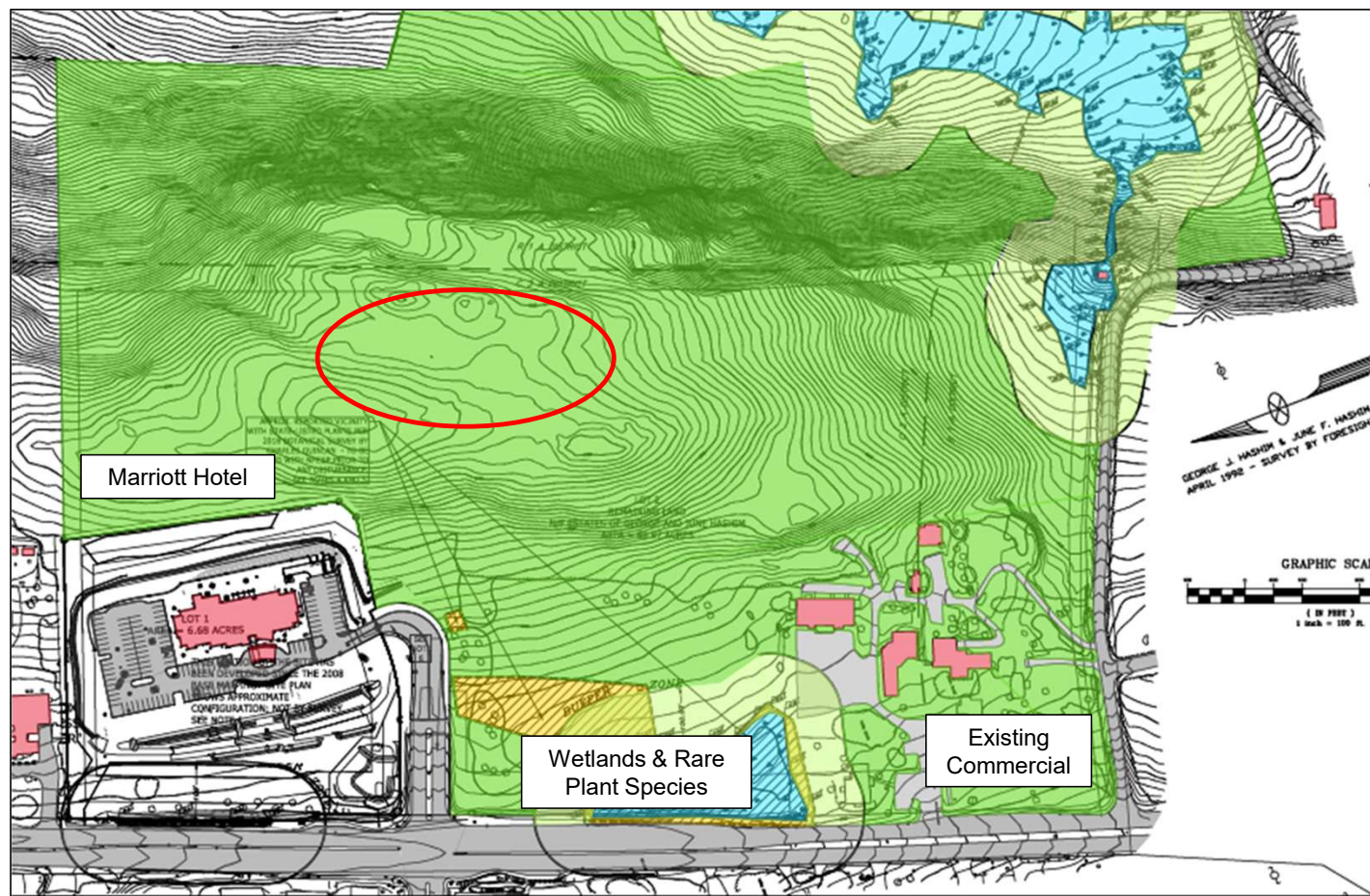
**Spring 2021**

*Pennrose meets with (patient) Landowner about parcel*

*Pennrose meets with Selectboard*

*Pennrose meets with Lenox Conservation Commission*

*Pennrose meets with Affordable Housing Trust*



60 Acre Parcel

Owned by a patient seller

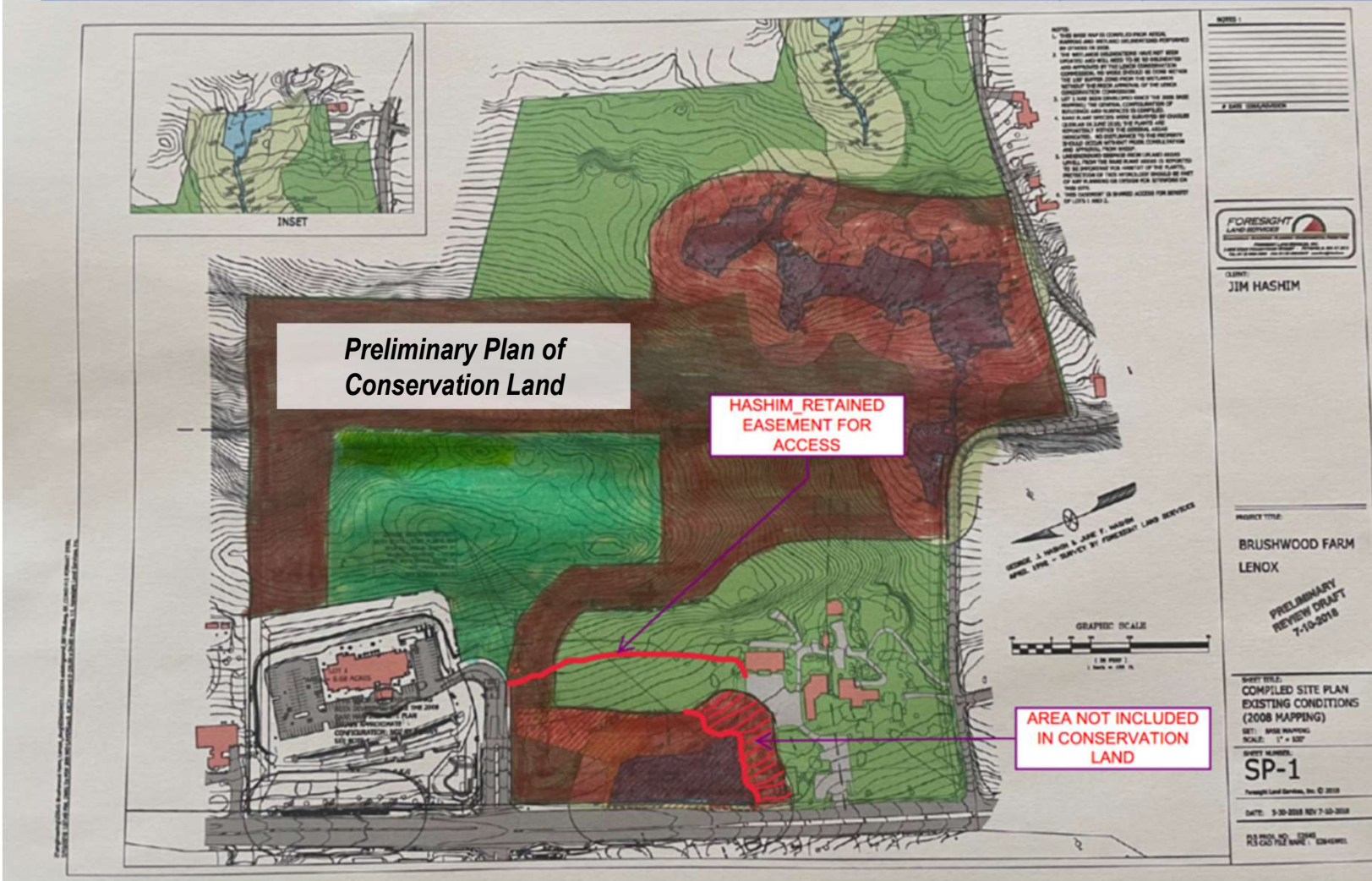
Very Steep Topography

Wetlands & Rare Species



Wetlands,  
Habitat of Rare /  
Endangered Species

Existing Commercial  
Buildings



- NOTES:
1. THIS MAP IS TO BE USED FOR GENERAL REFERENCE ONLY. FIELD SURVEY AND MEASUREMENTS SHOULD BE PERFORMED AS SHOWN ON THIS MAP.
  2. THE AREA INDICATED BY THIS MAP IS NOT TO BE CONSIDERED AS A GUARANTEE OF THE ACCURACY OF THE INFORMATION CONTAINED HEREIN. THE USER SHALL BE RESPONSIBLE FOR VERIFYING THE DATA AND INFORMATION CONTAINED HEREIN.
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CLIENT:  
**JIM HASHIM**

PROJECT TITLE:  
**BRUSHWOOD FARM  
LENOX**

*PRELIMINARY  
REVIEW DRAFT  
7-10-2018*

SHEET TITLE:  
**COMPILED SITE PLAN  
EXISTING CONDITIONS  
(2008 MAPPING)**

SET: BRUSH MAPPING  
SCALE: 1" = 100'

SHEET NUMBER:  
**SP-1**

DATE: 5-30-2018 REV 7-10-2018

P.L.S. PROJ. NO.: 17046  
P.L.S. CAD FILE NAME: 17046.dwg

**Preliminary Plan of  
Conservation Land**

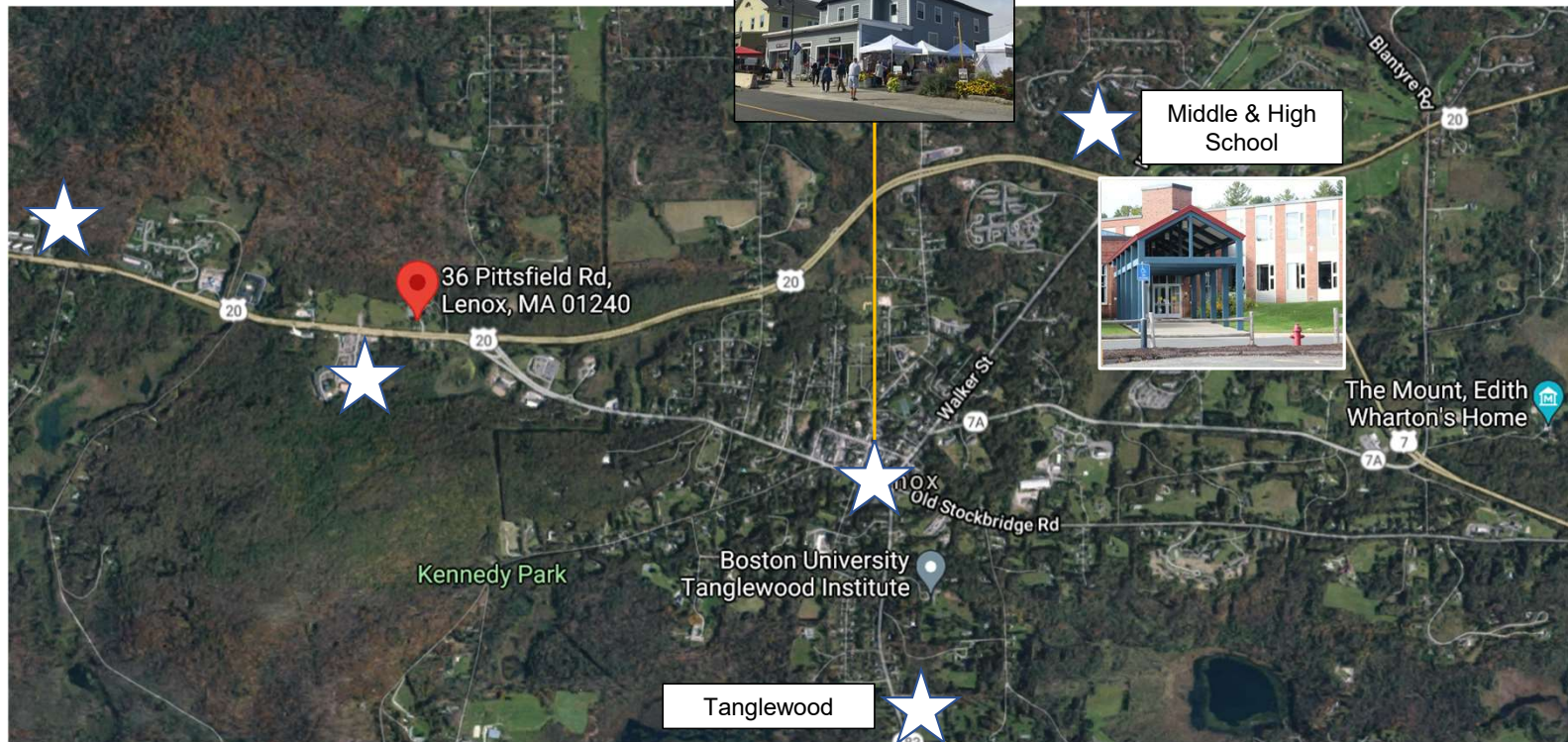
**HASHIM\_RETAINED  
EASEMENT FOR  
ACCESS**

**AREA NOT INCLUDED  
IN CONSERVATION  
LAND**

Prepared by: [illegible]  
 Checked by: [illegible]  
 Date: 7-10-2018

## HOUSING WITH AMENITIES NEARBY

**PENNROSE**  
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- Health Clinic: <0.2 miles
- Lenox Town Center: 1.5 miles
- Grocery Stores: 1.6 miles, 2.3 miles
- Lenox Memorial Middle & High School: 2.3 miles
- Tanglewood: 2.8 miles



# HOUSING WITH AMENITIES NEARBY



## Marriott Hotel

*At entrance from Pittsfield Rd*



## Lenox Commons, Mixed-Use Plaza (retail, restaurants, medical offices, fitness center)

*Across the street*

# SITE PLAN

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**LEGEND**

- PROPERTY LINE
- - - - ZONING DISTRICT BOUNDARY
- SCENIC ELEVATION
- GRANITE CURB
- CONCRETE PAVING
- ASPHALT PAVING
- STONEDUST PAVING
- RUBBER PLAY SURFACING
- MULCH TRAIL
- LAWN
- FIRE HYDRANT
- LIGHT BOLLARD
- POST LIGHT
- RETAINING WALL
- STAIRS WITH HANDRAIL
- BENCH
- BIKE RACK
- TABLES
- CHARCOAL GRILL
- PLAY EQUIPMENT

**PLANT SCHEDULE**

ID	QTY	COMMON NAME	PLANTING SIZE	MATURE SIZE	EXAMPLE SPECIES

**Developer Role**

**Town/Municipal Role**

***Summer 2021***

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*Site Control / Due Diligence Period  
Meet with Department Chairs, Planning  
Board, ZBA, and other Town stakeholders  
Schematic Design*

***Fall/Winter 2021***

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*40B Comp Permit Zoning Submission  
Pre-Application to EOHLC (1<sup>st</sup> time)*

***January – April 2022***

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*Not Invited into the HLC round  
Zoning Approval  
CPC Application – awarded \$500,000 (applied  
for \$900k)*



**Developer Role**

**Town/Municipal Role**

***Summer 2021***

*Site Control / Due Diligence Period  
Meet with Department Chairs, Planning Board, ZBA, and other Town stakeholders  
Schematic Design*

*Have a “champion” for the project  
Make introductions to departments and important stakeholders*

***Fall/Winter 2021***

*40B Comp Permit Zoning Submission  
Pre-Application to EOHLC (1<sup>st</sup> time)*

*Prepare ZBA Board for 40B Application*

***January – April 2022***

*Not Invited into the HLC round  
Zoning Approval  
CPC Application – awarded \$500,000 (applied for \$900k)*

*Provide support for CPC application*

## Developer Role

## Town/Municipal Role

### ***Summer/Fall 2022***

*Design Development  
2<sup>nd</sup> Pre-App – Invited into the round!*

### ***January 2023***

*Full Tax Credit Application to EOHL*

*Letters of support from the Town*

### ***Summer 2023***

*Award announcement!*

*Attend the announcement!*

### ***Fall 2023 – Spring 2024***

*Additional CPC Award of \$500,000  
100% Construction Drawings  
Building Permits & Final Approvals  
Assemble Financing & Closing*

*Assisting developer with navigating  
town approvals needed for final  
approvals and building permit*

### ***Summer 2024 – Fall 2025***

*Construction & Lease-Up (Lottery)  
Ribbon Cutting!!!*

*Attend Ribbon Cutting*



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