

Exhibit O



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Executive Director
Aaron Gornstein

January 28, 2004

Ms. Mary Jean Shultz
Board of Appeals Administrator
Town of Hingham
Board of Appeals
210 Central Street
Hingham, MA 02043-2759



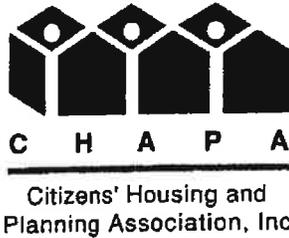
Dear Mary Jean:

Enclosed is an interim report from CHAPA regarding the Linden Ponds 40B development in Hingham. Please forward this to the ZBA members.

If you have any questions, please feel free to call me at 617-742-0820.
Thank you very much.

Sincerely,


Aaron Gornstein
Executive Director



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TO: Hingham Zoning Board of Appeals

CC: Scott Hayward, Erickson Retirement Communities
Joshua Davis, Mintz, Levin

FROM: Aaron Gomstein, Executive Director *Aaron Gomstein*

SUBJECT: Interim Report on Linden Ponds at Hingham

DATE: January 28, 2004

Citizens' Housing and Planning Association (CHAPA) has been retained by Erickson Retirement Communities to monitor compliance with the regulatory agreement for Linden Ponds. We have been in regular communication with Erickson staff and have met three times to discuss implementation of various aspects of the regulatory agreement.

Below is a brief interim report on CHAPA's monitoring activities for Linden Ponds at Hingham.

Provision of Affordably Priced Apartments

The regulatory agreement requires that 27.7% of all the apartments be affordably priced. Of the 118 apartments under construction, 70% of the apartments for single occupants and 79% of the apartments for double occupants meet this criterion. CHAPA has reviewed the methodology for determining the affordable prices and finds it acceptable.

Documentation of the pricing is included in the appendix to this memo.

Income Qualifications of Residents

At least 27.7% of the apartments must be reserved for occupants who earn no more than 80% of area median income. According to the regulatory agreement, this provision applies across the entire project, not within each individual building. The latest data provided to CHAPA shows that 65 applicants have provided income documentation to Erickson. Of these households, 18 or 27.5% fall below 80% of area median income.

In May, 2004—six months prior to the projected opening of Linden Ponds—applicants will be required to submit income documentation. CHAPA will be reviewing this income documentation to ensure that the requirements are met.

Scholarship Applications

To date, Erickson has provided us with documentation showing 46 requests for scholarship information. One \$160,000 scholarship has been tentatively awarded.

The scholarship application and qualification process has been reviewed and approved by CHAPA. Tentative scholarships are awarded on a first-come, first-serve basis to qualified individuals. Qualified applicants must be at least 62 years of age at the time of moving to the community, they must pass the same health interview process as all residents, they must meet minimum income standards, and must show a demonstrated financial need for the scholarship. Finally, applicants must have assets that are less than the minimum Linden Ponds' asset requirement. The amount of the scholarship award is the difference between their assets and the minimum Linden Ponds' asset requirements.

CHAPA has emphasized the importance of ensuring that those who contact Erickson be made aware of the scholarship fund. Erickson has assured us that they are complying with this requirement. CHAPA has reviewed Erickson's preliminary scholarship tracking, promotion, and award administration and has determined that it is acceptable.

Outreach and Affirmative Marketing

Erickson has undertaken extensive marketing of the affordable units through newspapers, radio, television, and direct mail. We have made several suggestions on marketing and outreach—all of which have been implemented by Erickson.

Their outreach has included video kiosks in three shopping malls, presentations to various community agencies, such as the councils on aging, chambers of commerce, and civic groups. They have also hosted outreach luncheons in communities such as Brockton, Quincy, and Braintree. Erickson has also advertised in minority newspapers as required in the regulatory agreement.

CHAPA has reviewed Erickson's outreach and affirmative marketing practices and has determined they are acceptable.

Documentation

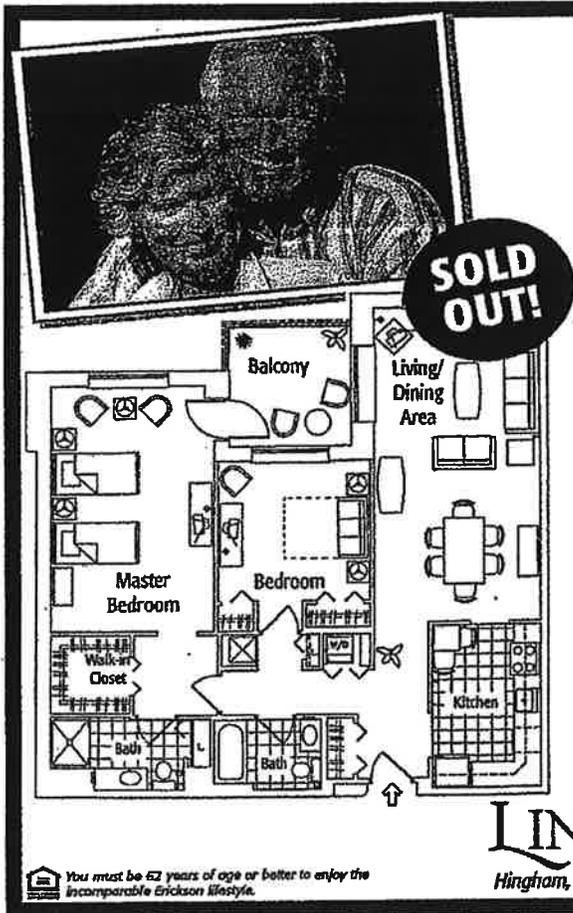
The regulatory agreement requires that Erickson carefully document various aspects of their provision of affordable housing. Examples of this documentation are in the attachments to this memo.

CHAPA has reviewed Erickson's documentation standards and has determined that they are acceptable.

Ongoing Communications

CHAPA will be meeting with Erickson staff on a quarterly basis or as frequently as needed to ensure compliance with the regulatory agreement. Our next meeting will be in April, after the reservation process is complete for Phase 1 of the second residential building. CHAPA expects to provide a second interim report to the Hingham ZBA in late spring after we review all relevant documentation. We welcome any input and communication from the Hingham ZBA.

Samples of Marketing Materials



**You can afford to
live at Linden Ponds.
But you definitely can't
afford to wait!**

Linden Ponds' gorgeous apartment homes have been a huge hit with South Shore retirees. In fact, we're completely sold out!

But due to overwhelming demand, we're considering adding more spacious floor plans. If you're wondering when the best time is to join the Priority List, you can stop wondering. The time is now.

**Call today to request your FREE
Information Kit**

(781) 337-2255

or toll-free

1-800-832-5319

LINDEN PONDS

Hingham, Massachusetts www.LindenPonds.com



 You must be 62 years of age or better to enjoy the incomparable Erickson lifestyle.

Change your winter forecast to clear and bright with temps in the 70's.

Does the thought of last winter still leave you with a chill? Discover the warm and inviting lifestyle of Linden Ponds, coming soon to the South Shore. Our endless list of amenities and unbeatable social life will make it easy to stay active all winter long. Be sure to call today—demand for our apartment homes is really heating up.

To learn more, call to request your FREE Information Kit.



(781) 337-2255 or toll-free 1-800-832-5319

 Erickson's scholarship program is available to qualified applicants. Call for details. You must be 62 years of age or better to enjoy the incomparable Erickson lifestyle.

Log of Outreach activities

LPH Outreach Activity Tracking Tool

Date	Activity/ (brochure drop, show, meeting, etc.)	Location	Met with/ attended by	# of attendees	Resources (teasers, table top booth, video, refreshments)	Cost	LPH Staff	Planned Follow up
12/31/2002	Competitor visit	The Highlands	Nancy Nowacek & Jennifer Landry 328-7900					Rec'd comp. info/in file 55 & over Apts.
12/31/2002	Competitor visit	The Atrium	Tracy Shea					Tracy gave me a tour of facility (Alzheimer's unit) and invited me to the S.Shore Retirement Marketing Directors Brunch at Springhouse in Jamaica Plain 1/8/03
12/31/2002	Brochure Drop		S.Sh.Hosp.Statio n Bldg. xray & mamo wait areas					F/U w/More Brochures
1/6/2003		Dux. Council/Ag. Comm. Ctr.	Juanne Moore/Kristan Andrews - 934- 5774					Will sponsor for month of March w/entertainment & St. Pat Dinner and responsible for keeping brochures in stock.
1/6/2003	Competitor visit	Village of Duxbury	Laura Wendrow/Sandy O'Shea 585- 2334					Sending TY letter as F/U
1/6/2003	Brochure Drop	Jordan Hosp.Lab Office						Very Receptive - Keep stocked
1/6/2003	Brochure Drop	Medical Bldg.						Receptive - Brochures in with magazine rack as well as on tables. Keep replenished.
1/6/2003	Presentation/In c.Scholarship Presentation	Jack Conway Realtors	Michael Gill					Michael gave me the name of Jill Evans/Sr. Specialist. Will be in on Fri. 1/10/03 for meeting. Trying for a luncheon in trailer to be scheduled sometime in April w/ other 40 - 80 Sr. S.Shore Specialists.
1/7/2003		Grove Manor Estates	Mary Gaynor/Mary Bailey					F/U w/ Ty Letter - will be seeing again at brunch (S.Shore Retirement Marketing Directors Meeting at Springhouse) Mary Gaynor started org.
1/7/2003	Brochure Drop		Dr. Wolfert					Parents interested - brochures in wait area - keep filled
1/7/2003		Han. Mall/Walker's	Lisa Mazzotta					spoke w/ Lisa on 1/6/03, and dropped info off to her per request on 1/7/03. Will follow up in hopes of being able to speak on Feb. 5 along with Kate Granigan C.A.R.E., consultation and resources for Elders
			sponsored by Employ&Ability					
1/8/2003	S.Shore Retirement Directors Brunch	Springhouse, Jamaica Plain	Brunch w/Mkt. Directors of Retirement/Assi sted Living & Skilled Nursing Facilities	25	Business Cards	N/C	jmac	Networking/Sent TY Letter as F/U to Catherine Gulman, Director of Springhouse and also to Janet Pozen, Speaker
1/9/2003	Meeting/Presen tation Inc. Scholarship Info	Sub. Housing - Discussion/ referrals and Linden Ponds info	Went w/ DJ and met with Paul Bahartan, Director		Brochures/Pens/Kit & 2 Gen. Info	N/C	jmac	Sent TY letter to Paul who is also Pres. Of the Quincy Rotary and asked about speaking at Rotary. Will f/u to that inquiry.
1/9/2003	Presentation/S cholarship Presentation	Hingham Rotary Meeting/S.S. Country Club- Hingham	Attorney Michael Holden Invited to be his guest	45	Meeting w/ Dinner - VCR/Screen and LPH Informational Speech	N/C	jmac	Sent TY letter to Michael and added that we would be willing to have construction experts at another meeting of their choosing for questions left unanswered at my presentation.

LPH Outreach Activity Tracking Tool

1/10/2003	Live Promotional Interview	WJDA Radio/Quincy	Live on radio w/Joe Catalano	Joe expressed that he might have 50,000 listeners during that time slot	Talk/Music Live Radio Directed towards Seniors	N/C	L. Kramer & Jmac	Will be advertising w/WJDA & possibly additional live interviews
1/10/2003	Meeting/ Spoke about Scholarship	At LPH/Visitor's Center	Jill Evans, Dir./Senior Specialist		Brochures/Kit/Gen. Info	N/C	Jmac	Let Jill know that she and all Sen. Specialists will be invited to luncheon (also Jack Conway) when we are on site in approx. April.
1/13/2003	Meeting	Hanover Mall Office: re: Mall Walkers Club	Lisa Bernardinelli/Specialty Retail Coordinator		Brochures	\$250	Jmac	Will be setting up a push cart w/LPH Info & Sign for informational purposes 7-10 am Mond. - Sat. w/Flex Time w/o 2/10/03 directed towards Mall Walkers. We will follow-up 7/10/03 with a presentation 8:30 - 9:15 incl. breakfast (N/C)
1/13/2003	Brochure Drop	Eye Health/Weymouth	Wait Area	30 Brochures	Brochures/Erickson Tribunes			High Traffic Eye Health Care Center/Will keep stocked.
1/14/2003	Luncheon Event/Scholarship Presentation	Tosca/Hingham	Potential Residents		46 AV		LK,LH,JM, Jmac	Regular F/U Procedures
1/16/2003	Meeting & Brochure Drop	Council On Aging/Community Ctr., Duxbury	Front Desk	20 Brochures	Brochures & Erickson Tribune	\$300 Advance Payment/ March Event	Jmac	We will sponsor entertainment (Tim O'Reilly's) for St. Pat. Event 3/11/03, and will be sponsored the month of March because of that during any meal or activity via brochures. I will make a presentation in April (no data yet) during at an event where others will speak on senior housing alternatives.
1/16/2003	Brochure Drop	Ortho. Assoc./Duxbury Medical Bldg.	Wait Area - Tables & Magazine Rack	40 Brochures	Brochures & Erickson Tribune	N/C	Jmac	Busy Office, Keep Stocked - 2nd drop
1/16/2003	Brochure Drop	Jordan Hospital Med. Office & Lab/Duxbury Medical Bldg.	Table in wait area & also brochure/Info table	40 Brochures	Brochures & Erickson Tribune	N/C	Jmac	High Traffic Lab- Keep Refilled
1/16/2003	Brochure Drop	Dr. Lamb at Health Stop/ Marshfield	Wait Area	30 Brochures	Brochures	N/C	Jmac	Keep Filled
1/16/2003	Discussion relative to Feb. Presentation & Luncheon	Quincy Council on Aging/ Quincy	Nancy Diapolo			Anticipated Cost: Luncheon Exp. \$5/pp approx.	Jmac	Need to follow up with fax of date/menu. Nancy will put info in their bulletin and we will have luncheon based on the amount of people who sign up for event.
1/21/2003	Luncheon Event/Scholarship Presentation	Tosca/Hingham	NR/Non-Residents		43 AV		LK,LH,JM, Jmac	Regular F/U Procedures
1/23/2003	Presentation/Scholarship Presentation	Hingham Centre Realtors	Michelle Robitcaud & 9 Agents		10 Brochures/Pens/Gen. Info	\$26.00	Jmac	Sent Thank You F/U letter w/additional info re: scholarships
1/28/2003	Presentation/Scholarship Presentation	Quincy Y, Quincy	Seniors and Linda Schuhwerk/Y Rep.	31 Seniors & Reps. From The Atrium, Highlands and Deb/BBV	Brochures/Kits/Gen. Info/Pens	Atlantic Dev Expense	Jmac	May be interested in a van (theirs) trip to BBV, Linda at Y will let me know.
1/28/2003	Brochure Drop	Weymouth	Dr. Crane, MD/Wait Area		40 Brochures		Jmac	Will check for refilling
1/29/2003	Luncheon Event/Scholarship Presentation	Tosca/Hingham	NR/Non-Residents		42 AV		LK,LH,KC, Jmac	Regular F/U Procedures
1/31/2003	Luncheon Meeting/scholarship		Carol Taylor-Mkt. Dir.		1 Kit		Allerton House Exp. Jmac	Thank you letter and f/u with tour of their facility approx. 2 wks.

LPH Outreach Activity Tracking Tool

2/6/2003	Presentation/Scholarship	VNA/Norwell	Tina Dwyer RN, Community Health Liaison		3 Kits/Teasers/Refreshments	\$25.00	Jmac	Thank you letter. May be asking for me to give another presentation to nurses that were not available at that time. Call for F/U
2/10 - 2/15/03	Table/ALL WEEK w/ Teasers and LPH Board Signage	Hanover Mall / Mall Walkers Club	Available 7 AM - 10 Am / Information & Mail List Sign Up Sheet	Leaving Brochures for people to take throughout the day/mall hours 10-930	Teasers/Sign Up Sheet/Snacks/Pens/Kits	\$25.00	Jmac	Will be making a presentation 7/2/03 sponsored by the Stepping Healthy Mall Walkers. Will include coffee/muffins /Mall expense
2/11/2003	Luncheon Event/Scholarship Presentation	Tosca/Hingham	NR/Non-Residents	28	AV/Kits		LK,LH,JM, Jmac	Regular F/U Procedures
2/24/2003	Brochure Drop	Weymouth	Dr. Martin Crane, Walt Area	40 Brochures	Brochures		Jmac	Will check for refilling
2/24/2003	Brochure Drop	Weymouth	Stetson Building	40	Brochures		Jmac	Will check for refilling
2/24/2003	Brochure Drop	Weymouth	Harbor Medical Bldg., Stetson W.	40	Brochures		Jmac	Will check for refilling
2/24/2003	Brochure Drop	Weymouth	Eye Health	40	Brochures		Jmac	Will check for refilling
2/24/2003	Brochure Drop	Hingham	Hingham Savings	Refill/20	Brochures		Jmac	Will check for refilling
2/24/2003	Brochure Drop	Hingham	Fleet Bank	40	Brochures		Jmac	Will check for refilling
2/25/2003	Luncheon/Scholarship Presentation	Tosca/ Hingham	NR/Non-Residents	36	AV/Kits		LK, LH, JM, Jmac	Regular F/U Procedures
2/26/2003	Outreach Presentation/Scholarship Presentation	Quincy Council on Aging/ Quincy	Members	6	Kits/Teasers/3-fold Signage	\$25.00	Jmac	Will be following up w/other Q Council on Aging Wards
2/27/2003	Luncheon/Scholarship Presentation	Tosca/ Hingham	NR/Non-Residents	47	AV/Kits		LK,LH,KC, Jmac	Regular F/U Procedures
3/5/2003	Outreach-Booth Presentation Scholarship	Hanover/Table Outreach	Mail		Mail Walkers/Walk-Bys Kits/Teasers/Erickson Tribune	\$50.00	Jmac KC	1 Ap't w/Linda
3/11/2003	Luncheon/O'Reillys entertainment sponsorship	Duxbury Council On Aging Community Ctr.	Seniors	125	Teaser&/Helped w/Luncheon set-up & serving	\$300/O'Reillys entertainment	Jmac	
3/13/2003	Luncheon	Tosca/ Hingham	NR/Non-Residents	32	AV/Kits		LK,LH,JM, Jmac	Regular F/U Procedures
3/18/2003	Luncheon	Tosca/ Hingham Union	NR/Non-Residents	39	AV/Kits		LK,LH,TN,SC, Jmac,T.Godfrey	Regular F/U Procedures
3/20/2003	Outreach /Presentation-scholarship	Congregational Church of Weymouth/Brain tree	Mens' /Womens' Retirement Club and Rev.Earl Alter	9	Kits/Teasers/Sign Panel/Pens/Pastries	\$25.00	Jmac	Rec'd 2 Names for Mailing List and will follow reg. f/u procedures there.
3/20/2003	Outreach/scholarship	Tufts Library/Weymouth	Sponsored by Tullish & Clancy Brokers/Senior Seminar	25	Teasers/Pens		Jmac	2/Mailing List
3/25/2003	Luncheon/Scholarship Presentation	Tosca/ Hingham	NR/Non-Residents	44	AV/Kits		LK/LH/Jmac	Regular F/U Procedures
3/26/2003	Luncheon/Scholarship Presentation	Sheraton Braintree	NR/Non-Residents	56	AV/Kits		LK/LH/Jmac	Regular F/U Procedures

LPH Outreach Activity Tracking Tool

4/2/2003	Outreach Booth/ Presentation/scholarship	Hanover Mall/Table w/signage	Hanover Mall	Mall Walkers/Walk-Bys	Kits/Teasers/ Signage/Erickson Tribune/BBV Activities Calendar	\$50.00	Jmac	Regular F/U Procedures
4/8/2003	Luncheon/ Scholarship Presentation	Tosca/Hingham	NR/Non-Residents	44	AV/Kits		LK/LH/Jmac	Regular F/U Procedures
4/14/2003	Book Mark Drop	Library/Front Desk	Weymouth (2); Braintree; Quincy; Hanover; Hingham; Norwell	200	Book Marks		Jmac	Possibly some outreach w/various Librarian personnel.
4/15/2003	Luncheon/Scholarship Presentation	Tosca/ Hingham	NR/Non-Residents	34	AV/Kits		LK/LH/ Jmac/Des visiting from Chicago	Regular F/U Procedures
4/16/2003	Outreach Luncheon/Scholarship Presentation	Hanover Y	Senior Aquatics Program		Teasers, Pens, Water Bottles, Water, Snacks			
4/22/2003	Outreach/ meeting	Ramada/ Rockland	S.S. Women's Business Network	Members/ Guests - Networking	Teasers	\$195 Membership	Jmac	Regular F/U Procedures SO or LK approval membership. Great networking/outreach potential Various representation (Welch, Rockland Trust, Small Business)
4/23/2003	Outreach/ meeting	S.S. Elder Services/ Braintree	S.S. Coalition of Workers with the Elderly	Members/ Guests- Networking	Teasers/Pens	\$15 Membership	Jmac	LK approval membership - Excellent networking/outreach potential/COA, Nurses, General Elder Svs., Logan Healthcare
4/29/2003	Luncheon/Scholarship Presentation	Tosca/ Hingham	NR/Non-Residents	24	AV/Kits		LK/LH/ Jmac	Regular F/U Procedures
4/30/2003	Meeting	Plymouth Library	Marianna Mele-Development Coordinator				Jmac	Will be sponsor for October which will give us a table at front entrance for teasers, banner up for the month and rotated for a year; bookmarks; plaque, posters if we would like to use the conference center for an open house.
5/6/2003	Luncheon/ Scholarship Presentation	Tosca/ Hingham	NR/Non-Residents	40	AV/Kits		LK/LH/ Jmac	Regular F/U Procedures
5/13/2003	Luncheon/ Scholarship Presentation	Tosca/ Hingham	NR/Non-Residents	59	AV/Kits		LK/LH/ Jmac	Regular F/U Procedures
5/15/2003	Luncheon/Scholarship Presentation	Marriott/ Quincy	NR/Bought List Weymouth, Quincy, Braintree, Milton	105	av/kits/Door Prizes/DVD Push Cart w/Graphics and TV/DVD looped commercials/ Bookmarks, Teasers		LK/LH/Jmac/ SO' c/DL	Regular F/U Procedures Rec'd 4 Ap'ts and 4 Checks at event
5/16/2003	Outreach Luncheon/ Scholarship Presentation	SS Plaza/ Braintree	Plaza customers/ potential residents				Jmac	Generating Kits/Regular Procedures
5/20/2003	Luncheon/ Scholarship Presentation	Tosca/Hingham	NR/Non-Residents	28	AV/Kits		LK/LH	Regular F/U Procedures
5/21/2003	Health Fair	Duxbury Council On Aging Community Ctr.	Seniors	175	Signage/Teasers/ Pens/Bookmarks/ Kits	Raffle/\$30	Jmac	Outreach Event/Health Fair Mailed Kits to seniors signing up on mailing list that day.

LPH Outreach Activity Tracking Tool

5/22/2003	Hingham Council on Aging Scholarship Presentation	Hingham Senior Center	Seniors	30	Signage/ Teasers/ Pens/Bookmarks/ Kits Brought sandwiches/dessert/co ld drinks	\$100	Jmac	Outreach Event/Met w/seniors - 7 Kit requesters
5/27/2003	Luncheon/Scholarship Presentation	Tosca/ Hingham	NR/Non-Residents	27	Av/Kits		LK/LH/Jmac	Regular F/U Procedures
5/27/2003	SSWomens' Bus. Network	Radison/ Rockland	Brunch w/ Mkt. Directors of Retirement/ Assisted Living & Skilled Nursing Facilities/Banks/ Small Bus.	100	Teasers/Pens	\$20	Jmac	Networking
5/28/2003	Outreach/ Meeting	SS Elder's Services/ Braintree	SS Coalition of Workers for the elderly	30	Teasers/Pens		Jmac	Networking
6/2/2003	Outreach/ Scholarship	SS Plaza/ Braintree	Push Cart	Shoppers	Teasers/Kits for sign-ups/pens/ bookmarks		Jmac	Regular F/U Procedures
6/4/2003	Outreach/ Scholarship	Hanover Mall	Table In Mall Area	Shoppers	Teasers/Kits for sign-ups/pens/ bookmarks	\$50	Jmac	Regular F/U Procedures
6/6/2003	Outreach	SS Plaza/ Braintree	Push Cart	Shoppers	Teasers/Kits for sign-ups/pens/ bookmarks		Jmac	Regular F/U Procedures
6/13/2003	Outreach/ Scholarship	SS Plaza/ Braintree	Push Cart	Shoppers	Teasers/Kits for sign-ups/pens/ bookmarks		Jmac	Regular F/U Procedures
6/16/2003	Outreach	Fore Seasons Golf	Table/Tent	20 Golfers	Teasers/Kits for sign-ups/pens/ bookmarks	\$10pp Bucket of Balls	Jmac	F/U w/2 more outreach events July/August
6/17/2003	Luncheon/ Scholarship Presentation	Tosca/ Hingham	NR/Non-Residents	38	Av/Kits		LK/LH	Regular F/U Procedures
6/18/2003	Luncheon/ Scholarship Presentation	Tosca/ Hingham	NR/Non-Residents	38	Av/Kits		LK/LH	Regular F/U Procedures
6/19/2003	Outreach	Cohasset Council on Aging	Seniors	25	Teasers/Kits for sign-ups/pens/ bookmarks	\$110	Jmac	Regular F/U Procedures
6/24/2003	Luncheon/ Scholarship Presentation	Tosca/ Hingham	NR/Non-Residents	33	Av/Kits		LK/LH	Regular F/U Procedures
6/25/2003	Luncheon/ Scholarship Presentation	Tosca/ Hingham	NR/Non-Residents	35	Av/Kits		LK/LH/ Jmac	Regular F/U Procedures
7/2/2003	Outreach/Presentation/ Scholarship	Hanover Mall	Mall Walkers/ Seniors	28	Teasers/Kits for sign-ups/pens/ bookmarks	Sponsored by Employ & Ability/Mall Walkers Club of Hanover Mall/ Table \$50.00 day	Jmac	Regular F/U Procedures
7/8/2003	Luncheon/ Scholarship Presentation	Visitor's Center	NR/Non-Residents	37	Av/Kits		LK/LH/ Jmac	Regular F/U Procedures
7/14/2003	Outreach/ Scholarship Presentation	Fore Seasons Golf	Table/Tent	19	Teasers/Kits/Pens/Water bottles/Bookmarks	\$10 pp Bucket of Balls	Jmac	Regular F/U
7/15/2003	Luncheon/ Scholarship Presentation	Visitor's Center	NR/Non-Residents	40	Av/Kits		LK/LH/ Jmac	Regular F/U

LPH Outreach Activity Tracking Tool

7/22/2003	Luncheon/Scholarship Presentation	Visitor's Center	NR/Non-Residents	33	Av/Kits		LK/LH/ Jmac	Regular F/U
7/30/2003	Luncheon/Scholarship Presentation	Visitor's Center	NR/Non-Residents	33	Av/Kits		LK/LH/ Jmac	Regular F/U Procedures
7/31/2003	Luncheon/Scholarship Presentation	Atlantica Restaurant /Cohasset	NR/Non-Residents	145	Av/Kits		LK/LH/ Jmac	Regular F/U Procedures
8/5/2003	Luncheon/Scholarship Presentation	Visitor's Center	NR/Non-Residents	34	Av/Kits		LK/LH/ Jmac	Regular F/U Procedures
8/11/2003	Outreach/Scholarship Presentation	Fore Seasons Golf	Non-Residents w/Table/Tent	24	Teasers/Kits/Pens/Water bottles/Bookmarks	\$10 pp Bucket of Balls	Jmac	Regular F/U Procedures
8/12/2003	Luncheon/Scholarship Presentation	Visitor's Center	NR/Non-Residents	28	Av/Kits		LK/LH/ Jmac	Regular F/U Procedures
8/14/2003	Luncheon/Scholarship Presentation	Neighborhood Club/Quincy	NR/Non-Residents	82	Av/Kits		LK/LH/ Jmac	Regular F/U Procedures
8/19/2003	Luncheon/Scholarship Presentation	Visitor's Center	NR/Non-Residents	47	Av/Kits		LK/LH/ Jmac	Regular F/U Procedures
8/21/2003	Outreach/Scholarship Presentation	S.S. Plaza/ Braintree	Non-Residents/ Kiosk	25	Av/Kits/Pens/\$3 Coupons-McDonald's & AuBonPain		Jmac	Regular F/U Procedures
8/26/2003	Luncheon/Scholarship Presentation	Visitor's Center	NR/Non-Residents	42	Av/Kits		LK/LH/ Jmac	Regular F/U Procedures
8/27/2003	Luncheon/Scholarship Presentation	Visitor's Center	NR/Non-Residents	33	Av/Kits		LK	Regular F/U Procedures
8/28/2003	Luncheon/Reserved	S.S. Country Club/Hingham	PL/Reserved Members	99	Linda's Update		LK/LH/SO/C/BBV Residents	
9/9/2003	Luncheon/Scholarship Presentation	Visitor's Center	NR/Non-Residents	42	Av/Kits		LK/LH/ Jmac	Regular F/U Procedures
9/10/2003	Outreach	Military Officers Assoc. of America	Military Officers	65	Kits/Pens/Bookmarks/Water Bottles/Teasers		Jmac	Follow Up Letter to Myles McCabe/President (He & wife made an ap't w/LH.)
9/16/2003	Luncheon/Scholarship Presentation	Visitor's Center	NR/Non-Residents	48	AV/Kits		Jmac	Regular F/U Procedures
9/18/2003	Outreach	Westwood Sr. Men's Group	Seniors	40	Kits/Teasers/Pens/Water Bottles		Jmac	Follow Up letter to John Longmoore/PL Member
9/23/2003	Luncheon/Scholarship Presentation	Visitor's Center	NR/Non-Residents	50	Av/Kits		Jmac	Regular F/U Procedures
9/25/03	Luncheon/Scholarship Presentation	Ridders Country Club/Whitman	NR/Non-Residents Bought List-Geo.Blast	155	Av/Kits		Jmac/LK/LH/KC	Regular F/U Procedures
10/2/2003	Outreach/Scholarship	Plymouth Public Library	Local Residents/ Library Patrons	12	Kits/Teasers/Bookmarks/Water Bottles/Pens		Jmac	Kits/Mailing
10/7/2003	Luncheon/Scholarship Presentation	Visitor's Center	NR/Non-Residents	45	AV/Kits		Jmac/LK/LH/KC	Regular F/U Procedures
10/9/2003	Outreach/Scholarship	House of Prayer	Members of Church	30	Kits/Teasers/Bookmarks/Water Bottles/Pens	\$25.00	Jmac	Kits/Mailing
10/14/2003	Luncheon/Scholarship Presentation	Visitor's Center	NR/Non-Residents	50	AV/Kits		Jmac/LK/LH	Regular F/U Procedures

LPH Outreach Activity Tracking Tool

10/16/2003	Outreach/Scholarship	Plymouth Public Library	Local Residents/Library Patrons	15	Kits/Teasers/Bookmarks/Water Bottles/Pens		Jmac	Kits/Mailing
10/21/2003	Luncheon/Scholarship Presentation	Visitor's Center	NR/Non-Residents	40	Av/Kits		Jmac/LK/LH	Regular F/U Procedures

**Income and asset
information on reserved
residents**

Linden Ponds 40B Income Tracking

11/6/2003

Reserve	Hometown		Monthly \$ from	Stated	40 B income	Count toward	Scholarship
				40 B Eligibility			
		Stated Assets	assets (- Ed.)(1)	Monthly \$	By formula	27.7% (2)	Award
3/18/2003	Weymouth	\$1,062,614.00	\$3,381.73	\$3,720.00	\$7,101.73	No	
5/27/2003	Gloucester		-\$1,045.83		-\$1,045.83	IDD	
5/27/2003	Colorado Springs		-\$1,585.42		-\$1,585.42	IDD	
5/28/2003	Bridgewater		-\$1,025.00		-\$1,025.00	IDD	
5/28/2003	Cotuit		-\$1,079.17		-\$1,079.17	IDD	
5/28/2003	Hingham		-\$1,079.17		-\$1,079.17	IDD	
5/29/2003	Watertown		-\$1,045.83		-\$1,045.83	IDD	
5/29/2003	Braintree		-\$1,064.58		-\$1,064.58	IDD	
5/29/2003	Weymouth	\$494,000.00	\$1,012.50	\$1,932.00	\$2,944.50	Yes	
5/30/2003	Hingham		-\$1,045.83		-\$1,045.83	IDD	
6/2/2003	Hingham		-\$941.67		-\$941.67	IDD	
6/2/2003	Duxbury		-\$1,354.17		-\$1,354.17	IDD	
6/2/2003	Hingham		-\$987.50		-\$987.50	IDD	
6/2/2003	Hingham		-\$1,585.42		-\$1,585.42	IDD	
6/3/2003	Rockland		-\$1,064.58		-\$1,064.58	IDD	
6/3/2003	Lexington		-\$1,008.33		-\$1,008.33	IDD	
6/3/2003	Hingham		-\$1,585.42		-\$1,585.42	IDD	
6/4/2003	Hingham	\$683,000.00	\$1,491.67	\$5,920.00	\$7,411.67	No	
6/4/2003	Cohasset	\$984,182.00	\$3,036.18	\$2,406.00	\$5,442.18	No	
6/5/2003	Hingham		-\$1,585.42		-\$1,585.42	IDD	
6/5/2003	North Easton	\$554,418.00	\$1,524.66	\$2,969.00	\$4,493.66	No	
6/5/2003	Barnstable	\$850,000.00	\$2,345.83	\$1,500.00	\$4,045.83	Yes	
6/6/2003	Quincy	\$1,100,000.00	\$3,383.33	\$2,248.00	\$5,631.33	No	
6/6/2003	Weymouth	\$532,300.00	\$1,153.33	\$6,175.00	\$7,328.33	No	
6/6/2003	Chatham		-\$1,358.38		-\$1,358.38	IDD	
6/6/2003	Duxbury	\$1,226,850.00	\$3,511.88	\$8,956.00	\$12,467.88	No	
6/9/2003	Canton	\$731,206.00	\$2,000.86	\$1,809.00	\$3,809.86	No	
6/9/2003	Hingham	\$778,000.00	\$1,887.50	\$8,700.00	\$10,587.50	No	
6/10/2003	Weymouth	\$701,800.00	\$1,899.17	\$6,233.37	\$8,132.54	No	
6/10/2003	Hingham	\$1,158,000.00	\$3,691.67	\$6,641.00	\$10,332.67	No	
6/10/2003	Michigan	\$1,116,523.16	\$3,606.35	\$6,280.66	\$9,887.01	No	
6/11/2003	Hingham	\$1,744,003.00	\$5,912.51	\$5,053.00	\$10,965.51	No	
6/11/2003	Hingham	\$1,137,996.00	\$3,622.90	\$5,025.00	\$8,647.90	No	
6/11/2003	South Boston	\$700,000.00	\$2,131.25	\$2,000.00	\$4,131.25	No	
6/11/2003	Weymouth	\$1,548,990.00	\$5,466.63	\$1,014.00	\$6,480.63	No	
6/12/2003	Hingham	\$502,000.00	\$737.50	\$4,405.00	\$5,142.50	No	
6/13/2003	Braintree		-\$945.83		-\$945.83	IDD	
6/13/2003	Brockton		-\$1,045.83		-\$1,045.83	IDD	
6/13/2003	North Eastham		-\$785.42		-\$785.42	IDD	
6/16/2003	North Pembroke	\$457,507.00	\$964.61	\$6,239.00	\$7,203.61	No	
6/16/2003	Castine, ME		-\$1,233.33		-\$1,233.33	IDD	
6/17/2003	Hingham		-\$941.67		-\$941.67	IDD	
6/19/2003	Quincy	\$259,441.00	\$206.00	\$4,434.00	\$4,640.00	No	
6/19/2003	Silver Spring, MD	\$284,847.88	\$401.45	\$2,311.91	\$2,713.36	Yes	
6/19/2003	Marion	\$571,000.00	\$1,354.17	\$2,852.00	\$4,206.17	Yes	
6/20/2003	Dorchester	\$578,075.00	\$1,344.06	\$3,879.78	\$5,223.84	No	

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Linden Ponds 40B Income Tracking

11/6/2003

6/20/2003	Lexington		-\$1,354.17		-\$1,354.17	IDD	
6/20/2003	Taunton	\$388,664.00	\$631.93	\$2,878.19	\$3,510.12	Yes	
6/23/2003	Braintree	\$740,515.00	\$2,039.65	\$2,852.49	\$4,892.14	No	
6/23/2003	Norwell	\$1,944,000.00	\$6,745.83	\$16,066.00	\$22,811.83	No	
6/24/2003	ENGLAND	\$5,475,000.00	\$21,458.33		\$21,458.33	No	
6/25/2003	Block Island, RI	\$900,391.00	\$2,755.80	\$2,216.00	\$4,971.80	No	
6/26/2003	Hingham		-\$1,045.83		-\$1,045.83	IDD	
6/26/2003	Braintree	\$520,000.00	\$1,291.67	\$1,800.00	\$3,091.67	Yes	
6/27/2003	Hingham	\$896,601.00	\$2,617.09	\$4,809.00	\$7,426.09	No	
6/27/2003	Framingham		-\$1,025.00		-\$1,025.00	IDD	
6/27/2003	Cohasset		-\$1,200.00		-\$1,200.00	IDD	
6/30/2003	Abington	\$405,924.00	\$905.93	\$2,691.06	\$3,596.99	Yes	
6/30/2003	Sudbury	\$1,216,544.00	\$3,989.77	\$5,487.00	\$9,476.77	No	
7/1/2003	Weymouth	\$286,000.00	\$195.83	\$3,320.66	\$3,516.49	Yes	
7/1/2003	Yarmouth	\$284,000.00	\$397.92	\$2,200.00	\$2,597.92	Yes	
7/2/2003	Weymouth		-\$987.50		-\$987.50	IDD	
7/2/2003	Braintree	\$651,000.00	\$1,725.00	\$3,170.02	\$4,895.02	No	
7/2/2003	Hyde Park	\$332,520.00	\$410.50	\$1,965.91	\$2,376.41	Yes	
7/3/2003	Scituate		-\$995.83		-\$995.83	IDD	
7/3/2003	North Chatham	\$2,500,000.00	\$9,416.67		\$9,416.67	No	
7/7/2003	Quincy	\$524,550.00	\$1,185.63	\$2,961.00	\$4,146.63	Yes	
7/7/2003	Hingham		-\$1,212.50		-\$1,212.50	IDD	
7/8/2003	Weymouth	\$357,146.00	\$702.69	\$2,553.00	\$3,255.69	Yes	
7/8/2003	California	\$942,313.00	\$2,938.80	\$4,067.00	\$7,005.80	No	
7/8/2003	Lexington		-\$1,029.17		-\$1,029.17	IDD	
7/9/2003	Marstons Mills	\$4,480,000.00	\$17,308.33	\$8,000.00	\$25,308.33	No	
7/10/2003	Braintree	\$1,272,000.00	\$4,100.00	\$3,335.00	\$7,435.00	No	
7/10/2003	Waban		-\$1,025.00		-\$1,025.00	IDD	
7/11/2003	Quincy		-\$1,200.00		-\$1,200.00	IDD	
7/14/2003	Block Island, RI	\$3,112,000.00	\$11,941.67	\$12,553.00	\$24,494.67	No	
7/14/2003	Weymouth	\$1,098,625.00	\$3,458.85	\$8,478.00	\$11,936.85	No	
7/14/2003	Centerville	\$475,877.00	\$957.82	\$1,675.00	\$2,632.82	Yes	
7/15/2003	Dennis		-\$1,000.00		-\$1,000.00	IDD	
7/15/2003	Quincy	\$810,000.00	\$2,350.00	\$3,730.00	\$6,080.00	No	
7/17/2003	Norwell	\$871,725.00	\$2,686.35	\$3,650.73	\$6,337.08	No	
7/17/2003	Scituate		-\$1,000.00		-\$1,000.00	IDD	
7/18/2003	Hingham	\$568,000.00	\$1,379.17	\$2,494.96	\$3,874.13	No	
7/18/2003	Quincy		-\$1,000.00		-\$1,000.00	IDD	
7/21/2003	Marblehead		-\$1,025.00		-\$1,025.00	IDD	
7/22/2003	Weymouth	\$723,500.00	\$2,072.92	\$3,005.00	\$5,077.92	No	
7/22/2003	Braintree	\$577,694.00	\$1,432.06	\$6,040.13	\$7,472.19	No	
7/23/2003	Lutz, FL		-\$766.67		-\$766.67	IDD	
7/23/2003	Weymouth	\$515,756.98	\$1,115.65	\$3,699.38	\$4,815.03	No	
7/23/2003	Scituate	\$1,101,135.00	\$3,600.56	\$5,808.00	\$9,408.56	No	
7/24/2003	Chelsea		-\$800.00		-\$800.00	IDD	
7/24/2003	Braintree	\$498,670.00	\$1,077.79	\$4,666.00	\$5,743.79	No	
7/24/2003	Milton		-\$1,000.00		-\$1,000.00	IDD	
7/24/2003	Norwell		-\$987.50		-\$987.50	IDD	
7/24/2003	Weymouth	\$453,662.00	\$861.09	\$3,653.00	\$4,514.09	No	
7/24/2003	Watertown		-\$1,000.00		-\$1,000.00	IDD	
7/25/2003	Rockland	\$318,473.00	\$451.97	\$2,052.03	\$2,504.00	Yes	

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Linden Ponds 40B Income Tracking

11/6/2003

7/25/2003	Marstons Mills	\$143,000.00	-\$189.58	\$3,245.00	\$3,055.42	Yes	\$160,000.00
7/25/2003	Rockland		-\$975.00		-\$975.00	IDD	
7/25/2003	Hingham	\$1,100,000.00	\$3,608.33	\$5,259.00	\$8,867.33	No	
7/25/2003	Weymouth	\$365,653.00	\$756.89	\$1,068.00	\$1,824.89	Yes	
7/25/2003	Weymouth		-\$766.67		-\$766.67	IDD	
7/25/2003	Osterville	\$611,000.00	\$1,670.83	\$2,336.45	\$4,007.28	No	
7/25/2003	Hingham	\$401,430.00	\$887.21	\$1,547.00	\$2,434.21	Yes	
7/28/2003	Cohasset		-\$962.50		-\$962.50	IDD	
7/29/2003	Falmouth	\$3,597,266.00	\$13,634.44	\$8,677.00	\$22,311.44	No	
7/29/2003	Brighton	\$389,000.00	\$854.17	\$2,180.00	\$3,034.17	Yes	
7/30/2003	Needham	\$4,491,400.00	\$17,360.00	\$14,214.00	\$31,574.00	No	
8/11/2003	Hingham		-\$1,025.00		-\$1,025.00	IDD	
	Weymouth		-\$785.42		-\$785.42	IDD	
	Cataumet	\$1,890,000.00	\$6,841.67	\$13,000.00	\$19,841.67	No	
8/21/2003	Quincy		-\$800.00		-\$800.00	IDD	
	Walpole	\$1,197,942.00	\$3,966.43	\$3,816.00	\$7,782.43	No	
8/26/2003	Rockland	\$600,000.00	\$1,537.50	\$2,883.00	\$4,420.50	No	
	Braintree	\$1,500,000.00	\$5,250.00	\$3,151.91	\$8,401.91	No	
8/27/2003	Rockland	\$341,922.37	\$428.84	\$2,610.09	\$3,038.93	Yes	
8/29/2003	Madison, CT		-\$1,200.00		-\$1,200.00	IDD	

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Calculations for unit pricing compliance

Notes:

(1) 2004 Entrance Deposits

(2) 2004 Monthly fee. Double occupant fee includes \$612 second person fee.

(3) Our regulatory agreement requires that we add 5% of the apartment's entrance deposit to the income of our residents for purposes of determining whether they are eligible for affordable housing. The reason for this is to measure the lost potential income of the deposit.

(4) Our regulatory agreement requires that at least 27.7% of the apartments at LPH must be affordably priced. The method for calculating affordability of apartments is as follows: For singles, the apartments must be less than 60% of 80% of the Median income for our geographic area, as determined in single person, two person, and three person households. For our purposes, we use the 1 person household number to calculate the affordability of efficiencies, the two person household number to calculate the affordability of one bedroom apartments, and the three person household number to calculate the affordability of our two bedroom apartments. The methodology is the same for couples, but the factor changes from 60% to 75%. This column tells us what the maximum price we could charge for an apartment that would still be considered affordable. The median number was taken from the 2003 Metropolitan and Non-Metropolitan income limits as published by HUD according to the methodology defined in the 9/11/01 Zoning permit. (Using the published February 2003 Mass housing income limits, we determined that the area median income for a 4 person household in the Boston Primary Metropolitan Statistical Area was \$80,800. 80% of \$80,800 is \$64,640, which is 3.17% higher than the number listed in the 4 person column. We multiplied the numbers in the 1 person, 2 person, and 3 person columns by a similar factor to establish our targets.)

(5) This column represents the difference between the maximum affordable price, and the price we charge for the apartment on a monthly basis. A negative number means the apartment is affordable. Another point that is worth noting is that the factor that makes many borderline apartments "unaffordable" is the entrance deposit. In some cases, a scholarship of just 10,000 dollars will reduce the monthly fee enough to make the apartment affordable.

Potential Scholarship Award List