

Sammie Kul

From: Fran Stanley
Sent: Monday, March 11, 2019 11:48 AM
To: Sammie Kul
Cc: Takashi Tada; Mark Haddad
Subject: CPC: complete final proposal for Housing Production Plan
Attachments: 2019 HPP-CPC-CompleteApplicationMarch11_2019.pdf

Dear Sammie:

Please see the attached complete proposal. This version of the application contains a detailed proposal from the contractor who responded to the Town's request for proposals. Also, please see the Select Board's letter of support for this proposal.

The CPC has asked to be kept updated on the status of a pending Montachusett grant. On March 7, 2019, the Montachusett Regional Planning Commission (MRPC) board gave conditional approval to the Town's application. Two of the main conditions are (a) DHCD approval of the grant, and (b) a fully executed Memorandum of Understanding between MRPC and the Town of Groton. Groton needs to have a DHCD approved HPP done. Groton hopes to gain a more definitive commitment from MRPC in the next few weeks such that it would be reasonable to expect that Montachusett can meet Groton's planning needs. If Groton receives necessary assurances, then this CPC funding proposal will be withdrawn. Until then, please keep this Housing Production Plan proposal in the current batch of proposals and please give it all due consideration.

Thank you.

-Fran

Fran Stanley
Housing Coordinator
Land Use Department
Town of Groton
173 Main Street
Groton, MA 01450
fstanley@townofgroton.org
work 978.732.1913
fax 978.448.1113

Please note that the Massachusetts Attorney General has determined that emails are a public record. Privacy should not be expected.

11. CPA PROJECT APPLICATION FORM

[CPC Use Only: Date Received 3/11/19 By: SAMMIE KUL
Assigned CPC #2020- 01]

If possible, use word processor to fill out form. Please answer all questions, use "N/A" if not applicable.

1. a.) Applicant Name and Organization: Last Stanley First Fran
Organization(s) (if appropriate) Town of Groton
- b.) Regional Project: Yes ☐? or No? ☒ If Yes, Town/Organization: _____
2. Submission Date: 01/14/2019
3. Applicant Address: St. Town Hall, 173 Main Street
City/ State: Groton, MA ZIP: 01450
4. Ph. # (978) 732-1913 Email: fstanley@townofgroton.org
5. CPA Purpose. Check all that apply:
Community Housing ☒ (Affordable Housing) ☒ Historic Preservation ☐ Open Space: ☐
Recreation ☐
6. Town Committee or boards participating: Planning Board, Affordable Housing Trust. Plus, input from all town committees invited.
7. Project Location/Address: Town wide
8. Project Name: 2019 Housing Production Plan
9. Additional Responsible Parties (If applicable):

Role (specify)	Name	Address	Ph. (w) (cell)	Email
Property/Site Owner				
Project Manager	Fran Stanley	173 Main Street, Groton, MA 01450	(978) 394-5619	fstanley@townofgroton.org
Lead Architect				
Project Contractor				
Project Consultants				
Other:				
Other				

10. As appropriate, indicate if proposal requires P&S agreement ☐ Deed ☐
Option agreement ☐ Other-describe: _____
11. a.) Assessor info. (map/ block/ lot id.(s)): _____ b.) Tax classification type: _____
12. Permits required: Zoning: ☐ Historic Preservation: ☐ Other: _____
13. Historic Commission Approval signoff (when required): _____ Date: _____
14. Funding: a.) Requested from CPC: \$ 16,900.00 b.) Committed from other sources: \$ 0.00
c.) Annual anticipated total income: \$ 0.00 d.) Annual anticipated total expense: \$ 0.00
d.) Anticipated net income (loss): \$ 0.00 e.) Estimator name/company: Fran Stanley
15. CCP Objectives - use codes from Section 5 to indicate all that apply: 5.2.1
16. Project Timelines: Proposed Start Date: 04/29/2019 Projected Complete Date: 10/01/2019
17. Estimated Delivery Date of Completion Report to CPC: 10/15/2019


18. Project description and explanation (attach additional sheets as needed): _____

Please see attached description and explanation.

19. Feasibility: Completely feasible. The Town of Groton has produced Housing Production Plans in the past and its current Housing Production Plan was approved by DHCD.
20. List of attachments: 1. Description and Explanation; 2. Contractor's Proposal; 3. Select Board Letter of Support.

21. Additional Information: Start date of April 29, 2019 was selected as this is the first day of Spring Town Meeting. There are sufficient reserve community housing funds to fully fund this application without waiting for future appropriations or future fiscal years. The sooner the contractor is able to start work on the new HPP, the sooner the new document can be generated and eventually approved by DHCD. While overlapping effective dates are not efficient, it is not desirable to have a large gap between the expiration of the current plan and the approval of the new Housing Production Plan.

22. Management Plan: Project Manager will manage the project while receiving direction from the Planning Board and key input from the Affordable Housing Trust. The nature of a community wide project involves invitations for all town boards and committees to submit input. Two public hearings will be held to solicit input from the community. All community input will be shared with the contractor. Once approved by the Town, a draft HPP will be submitted to DHCD. After that review, the document will be returned to the Town for revisions. A final HPP expected to receive DHCD approval will be submitted. The project concludes once DHCD issues an approval letter for Groton's HPP. Project funding consists of \$16,500 for the contractor's work, plus \$400 to cover advertising costs for the two public hearings as well as any needed printing costs for a total amount of \$16,900.

23. Applicant Signature:  Date: March 11, 2019
Co Applicant Signature: _____ Date: _____
Co Applicant Signature: _____ Date: _____

18. Project Description and explanation

This application seeks funds to contract with a planning consultant to draft a new Housing Production Plan for the Town of Groton.

The bulk of the funding requested will be used to pay for a planning consultant to help draft the Housing Production Plan. The other anticipated costs are the advertising costs for holding two public hearings related to this proposal.

What is a Housing Production Plan?

A Housing Production Plan identifies housing needs, identifies development constraints and limitations, assesses local implementation capacity, and identifies community housing goals and strategies to address housing needs. An HPP is also a state-recognized regulatory tool that must be prepared in accordance with state regulations (760 CMR 56.03(4)) in order to be approved by the Department of Housing and Community Development (DHCD).

As per the regulations, the new Housing Production Plan must have a comprehensive housing needs assessment, affordable housing goals, and implementation strategies. The Plan must describe how the community plans to produce affordable units in order to obtain state approval. The resulting document can be used as a guide to help the Town focus on encouraging identified affordable housing priorities.

Additionally, there is one particular benefit to having a current DHCD approved Housing Production Plan. If Groton were to produce at certain number of affordable units which are Subsidized Housing Inventory eligible then the Town can request a Certification of Municipal Compliance. A certified HPP is a statutory safe harbor that allows the Zoning Board of Appeals to decline to consider any unwanted new comprehensive permit project (a "40B") for a certain period of time – usually 1 to 2 years.

It can be prudent for Groton to retain local control over the pace of housing production. The Zoning Board of Appeals can always decide to consider a comprehensive permit project that appears beneficial and desirable regardless of Groton's number of SHI affordable units. However, if a town has less than 10% affordable units, then the only way to decline to consider such a project is by relying on a certified municipal compliance (of qualifying interim progress) and that requires an approved Housing Production Plan.

Groton's HPP Background

Groton's 2011 Master Plan recommends the creation of a Housing Production Plan (HPP) as an aid for the Town's efforts to create more affordable housing. Groton hired a consultant to write a HPP as part of the initial implementation of the Town's Master Plan. The Department of Housing and Community Development approved Groton's housing production plan on June 30, 2014. The HPP had a five-year term and the term is due to expire on June 29, 2019.

How Community Housing Funding Relates to State and Local Housing Development

The regulation of land use in Massachusetts is largely decentralized with control delegated to municipalities. While state legislation defines the limits of local authority, local boards retain a significant amount of power to shape land use in their communities through the permitting process. State law charges Planning Boards with the responsibility of adopting a Master Plan (MGL chapter 41, § 81D). A Master Plan is a forward-looking document that assesses the current status and the recommended direction in eight areas, one of which is housing. Similarly, CPC funds are also forward looking as funding represents an opportunity for a municipality to preference certain land uses over others.

2019 Housing Production Plan

For housing, all Community Preservation funding applications are weighed against the CPP's objectives which are drawn from the Town's Master Plan (see CPP key objectives). The Commonwealth has been issuing and promoting the use of master plans since the mid-1930s but smaller communities such as Groton rarely promulgated their own master plans until the 1960s. Such plans strive for consensus and aim to enumerate community wishes.

When the Community Preservation Act was enacted in 2000, state legislators sought to assist housing needs for households earning up to 100% of the area median income. So, to distinguish the broader CPA income eligibility from the 1960s era Chapter 40B legislation, the Community Preservation Act uses the term "community housing". The advancement of community housing represents one of the main purposes of the Community Preservation Act (MGL c. 44B). Specifically, "[t]he community preservation committee shall make recommendations to the legislative body... for the acquisition, creation, preservation and support of community housing" (See MGL c. 44B §5(B)(2)). Under this statute, community housing includes both low income and moderate income housing. Using CPA terminology, low income housing is housing for persons and families earning less than 80% of the area median income. The CPA defines moderate income housing as housing for persons and families earning up to 100% of the area median income.

Housing Production Plans evolved as a planning tool to measure progress and express community preferences for the development of affordable housing under MGL Chapter 40B. The Regional Planning Law, which is identified most frequently by its Massachusetts General Laws chapter number of '40B', was enacted in 1969. As a part of Chapter 40B, developers may be permitted to bypass local zoning in order to build affordable housing. Chapter 40B defines affordable housing as housing for persons and families earning up to 80% of the area median income.

A caveat is that a municipality retains local zoning controls and is not required to consider a developer's 40B proposal if the municipality has met certain conditions such as already having 10% affordable housing in its year-round housing stock. For communities with an approved Housing Production Plan, it is also possible to pause and defer consideration of new 40B development proposals for one to two years if a community has made good progress on its affordable housing goals. The state measures a community's housing progress through use of the Subsidized Housing Inventory (SHI).

The Subsidized Housing Inventory (SHI) maintained by the Department of Housing and Community Development is the official list of affordable housing units that meet all of the Commonwealth's Chapter 40B requirements. Examples of **affordable** units range from a deeply subsidized apartment aimed at extremely low-income households (earning up to 30% area median income), units designed for low-income people with disabilities, or other households earning somewhat higher income gradients. The upper income restriction of 80% is only one of the qualifications for a SHI eligible unit. For example, fair housing requirements and equality of opportunity are two other necessary pre-conditions before an affordable unit can be added to the SHI.

By contrast, community housing funding through the CPC includes all of the SHI eligible housing units and more by reaching up to fund housing for households earning up to 100% of the area median income. There is no zoning mechanism that specifically incentivizes income qualified housing for incomes above 80% of the area median income. Even so, Groton's Master Plan encourages the development of housing types to meet a diversity of income levels and that goal syncs with Community Preservation Act purposes.

Proposal for Consulting Services

Town of Groton Housing Production Plan

January 11, 2019

Submitted to:
Fran Stanley
Housing Coordinator
Land Use Department
Town of Groton
173 Main Street
Groton, MA 01450

Submitted by:
Barrett Planning Group LLC





OVERVIEW

Barrett Planning Group LLC is pleased to submit this proposal to assist the Town of Groton with updating the Chapter 40B Housing Production Plan. We bring 30 years of planning, zoning, and housing policy experience to this engagement, and our firm is ideally qualified to serve you. We offer the following competitive advantages:

- Recognized expertise in housing needs analysis, strategic planning, and real estate economics for affordable and market-rate housing;
- Extensive experience with local government planning and policy analysis, particularly in Massachusetts cities and towns;
- High comfort level working with professional staff, boards and commissions, the general public, and developers;
- Extraordinary depth of knowledge and experience in Greater Boston housing conditions and in particular, conditions on the South Shore;
- Planners with top-notch skills in demographic studies and GIS analysis.

BARRETT PLANNING GROUP LLC

Judi Barrett, principal of Barrett Planning Group LLC, is a veteran planner and community development professional with 30 years of experience in state and local government and the private sector, mainly in New England. She has prepared numerous municipal comprehensive plans, neighborhood revitalization plans, zoning ordinances and bylaws, and housing plans, and she is highly respected for her work in socioeconomic and fiscal impact analysis. Judi is known nationally for her work in inclusionary zoning. As a consultant for the Massachusetts Housing Partnership (MHP) Chapter 40B Technical Assistance Program, Judi has worked with Boards of Appeal throughout the state. She is the principal author of MHP's *Chapter 40B Handbook for Zoning Boards of Appeal* (2017). Her most recent experience with Housing Production Plans includes the Towns of Wellesley, Brookline, Nantucket, Lenox, and Brewster, in all cases serving as project manager and lead consultant (in some cases while employed at another firm).

Claire Bayler, Planner, and Alexis Lanzillotta, Planning Assistant, will assist with Groton's plan, focusing on the statistical update, needs analysis, and strategies. Claire recently joined Barrett Planning Group after completing her master's degree in International Development and Social Change at Clark University and working as a planner for Central Massachusetts Regional Planning Commission (CMRPC). Alexis has been supporting Barrett Planning Group projects for over a year, focusing primarily on data analysis and graphics.

APPROACH AND PLAN OF SERVICES

Barrett Planning Group's work plan includes the tasks outlined below. If selected for this engagement, we would be pleased to negotiate work plan adjustments to meet the Town's needs. A chart outlining the following tasks and identifying the primary team member(s) responsible for each task can be found at the end of this section.

- **Mobilization**

Our team will participate in a kickoff meeting with Town staff and, if desired by the Town, members of the Affordable Housing Trust or other Town boards that will serve as a working group. The kickoff meeting should include time set aside for a tour of the Town, with staff or a member of the committee assisting as a guide. The kickoff meeting will provide an opportunity to make any necessary adjustments in the plan of services, finalize the public participation plan and determine the best approaches to civic engagement in Groton, and obtain data or documentation that is not readily available on the Town's website.

- **Housing Market Analysis and Needs Assessment**

To provide useful policy and program recommendations, it is essential to understand the local and regional context for affordable housing in Groton. The tasks outlined below will help to accomplish that objective and make optimum use of the Town's existing plans, studies, and databases.

- *Existing Plans.* We will review local plans and pertinent information from outside sources, and identify data gaps that should be addressed during development of the Housing Production Plan. Barrett Planning will verify the adequacy of available data for understanding and documenting historic trends and future projections, e.g., building permits and demolition permits, assessor's parcel data employment, business establishments, incomes, affordability, and other key variables from existing secondary sources.
- *Local Housing Conditions.* We will prepare an inventory of existing housing conditions and housing market trends, using available data from the Land Use Department (e.g., pipeline projects and recent approvals), Board of Assessors, GIS, and other sources such as the American Community Survey (ACS), ESRI Business Analyst, Social Explorer, HUD CHAS Data, and so on. Relevant trends will be reviewed, spatially analyzed, and mapped at the sub-market level for up to four sub-markets.
- *Affordable Housing Barriers and Opportunities.* No housing needs study is complete without an assessment of local capacity and barriers to affordable housing development. Accordingly, we will review the Town's land use regulations and permitting procedures, infrastructure, and public services for their potential impact on future housing development, and specifically on the creation and preservation of affordable housing. In addition, we will review, analyze, and describe existing housing development capacity in Groton, considering local and regional organizations, both public and private.
- *Issues Analysis.* Barrett Planning will identify and document key issues and findings from the research and analysis tasks performed above, and generate a discussion document for

review and comment by the Town. The issues analysis will focus on not only statistical indicators of housing need, but also regulatory, physical, infrastructure, and capacity impediments that have to be accounted for in developing housing plan strategies and recommendations.

- **Housing Goals**

Our team will assist the Town in developing goals for the Housing Production Plan. “Goals” are numeric on one hand – number of units – and qualitative on the other hand, e.g., types of housing the Town needs, or underserved settings with critical housing needs. What is most important is a clear description of Groton’s own quantitative and qualitative goals and the results of the Needs Assessment. If the goals fail to align with the Needs Assessment, the Plan will lack coherence.

- **Housing Strategies (Action Plan)**

In our experience, DHCD’s review of strategies and the action plan is a more rigorous process today than it was when Groton’s present HPP was approved. DHCD is particularly interested *actionable* strategies, attention to removing zoning barriers, the use of innovative zoning strategies to increase the supply of affordable housing, and a thoughtful review of areas and sites where the Town will actively encourage affordable housing. With these standards in mind, we recommend the following approach.

- *Site Suitability Criteria.* We will work with Town staff and boards to determine criteria that can be used to identify and evaluate potential sites for affordable or mixed-income housing, or housing in mixed-use developments. For site identification decisions, we encourage municipal boards to identify properties or areas they think would be appropriate and let the consultants conduct a technical review of those sites. This approach has always worked well, in our experience, largely because it respects the knowledge that already exists in local government and reinforces that the community owns the plan.
- *Identification of Suitable Sites; Prioritization.* Using zoning assumptions provided by Town staff (e.g., effective FAR multipliers) and GIS technology, we will work with the Town to apply a reasonable set of criteria and identify potentially suitable locations for affordable and mixed-income housing. Sites meeting all or a substantial majority of the previously agreed-upon criteria will be determined in consultation with town boards and the public at a meeting for review and comment.
- *Recommendations.* Barrett Planning will identify opportunities for regulatory reform and other mechanisms to bridge the gap between existing conditions and Groton’s affordable housing needs. The recommendations should include, at a minimum:
 - Land development regulations;
 - Financial mechanisms to support the development of affordable housing;
 - Employer and institutional involvement;
 - Potential use of Chapter 40B, Chapter 40R, and other measures;

- Staffing needs for carrying out affordable housing initiatives;
- Potential for partnerships or regional collaborations; and
- A review of “best practices” from other communities in New England and beyond, considering communities with similar demographics and location characteristics.
- *Implementation Schedule.* Barrett Planning will propose a five-year action plan schedule to guide the Town’s implementation of strategies outlined in the plan.
- *Presentations.* Our team will present a draft of key findings, goals, and strategies at a public meeting sponsored by the Planning Board or Affordable Housing Trust and, if the Town wishes, we will present the final Housing Production Plan at a public meeting of the Board of Selectmen. If possible, the Board of Selectmen and Planning Board should conduct a joint hearing to consider the proposed Housing Production Plan because both boards are required to approve the plan prior to submission to DHCD.
- *Technical Appendix.* Summary metrics of current and projected demands for affordable housing, a report glossary, comparable community case studies, and other documentation as needed.

COMMUNITY PARTICIPATION; PROPOSAL ASSUMPTIONS

Barrett Planning Group assumes the following meeting commitments and project coordination responsibilities in order to complete this project:

- A kickoff meeting with Town Staff and others to discuss the project approach and timetable, refine the scope of work, and develop a public participation plan.
- One public meeting which should occur in conjunction with the Housing Needs Analysis and Draft Goals & Strategies stages of the project. Meeting design will be determined as part of the public participation plan, though normally we find that “open house” events are often the most conducive to involving the widest variety of participants. We tailor our approach to engagement to the needs of each town and we look forward to crafting a plan that is most appropriate for Groton.
- A work session with the Affordable Housing Trust, ideally aligned with the major components of the plan;
- One day of individual or small-group interviews and/or focus groups conducted as part of developing the Housing Strategies (Action Plan).
- Reasonable number of daytime project coordination meetings with Town staff, which may be done face-to-face or by videoconference, e.g., Webex.

Barrett Planning Group understands that these assumptions may need to be adjusted following discussions at the kickoff meeting. We recommend including opportunities for civic engagement during the early phases of the project so the public will know this project is underway and that residents will have a chance to participate well before the plan is substantially developed.

PROJECT SCHEDULE

Barrett Planning agrees that the proposed project can be completed in four to five months. For a Housing Production Plan, the schedule issues that can arise have less to do with the consultant's level of effort than with the community's need for time to hear, digest, reach agreement about, and work with the information the consultants submit along the way. If Groton determines that it needs additional time for consensus building, deliberation, or negotiation, we will consider a modest extension of the contract to meet the Town's needs. Otherwise, we assume the project should be completed promptly and our proposed schedule is based on that assumption.

DELIVERABLES

Barrett Planning Group will provide the following deliverables to the Town:

- Interim reports: Housing Needs, Goals, and Strategies, submitted to the Town in electronic format (PDF);
- PowerPoint presentations for public meetings; and
- The final plan in PDF format, including a separate stand-alone Executive Summary.

SIMILAR EXPERIENCE

The following list identifies the recent Chapter 40B Housing Production Plans and related housing planning work completed by Judi Barrett.

- *Housing Production Plan*, Town of Wellesley, completed 2018.
- *Housing Production Plan*, Town of Brookline; completed 2016
- *Housing Production Plan*, Town of Nantucket; completed 2016
- *Nantucket Workforce Housing Needs Assessment*, Housing Nantucket, Inc.; completed 2015
- *Housing Production Plan*, Town of Lenox; completed 2017
- *Newton Housing Strategy*, City of Newton; completed 2015
- *Falmouth Housing Needs Study and Demand Analysis*; completed 2014 (received APA-MA Project Planning Award)
- *Good Neighbors: Kingston Affordable Housing Plan*, Town of Kingston; completed 2012
- *Housing Production Plan*, Town of Groton; completed 2014
- *Amherst Housing Market Study; Inclusionary Zoning Review and Tax Incentive Subsidy Strategy*; Town of Amherst, 2015
- *Chapter 40B Handbook for Zoning Boards of Appeal* (prepared for Massachusetts Housing Partnership); completed 2017



FEE PROPOSAL

Barrett Planning Group will complete the work described in this proposal for a lump sum fee of \$16,500. Our fee breaks down as follows:

Mobilization (Kickoff, Initial Research):	\$1,000
Housing Needs Assessment (Draft)	\$5,000
Housing Goals (Draft)	\$1,500
Action Plan (Draft)	\$5,000
Housing Production Plan	\$2,500
Public Participation/Major Meetings	\$1,000
Selectmen/Planning Board Public Hearing	\$500
TOTAL:	\$16,500

Per our normal billing policy, we will invoice the Town once a month for percent completion based on the milestones listed above.



REFERENCES

The following references are for projects recently completed by Judi Barrett.

Wellesley Housing Production Plan (2018)
Michael Zehner, AICP, Planning Director
Town of Wellesley
Phone: (781) 431-1019, ext. 2232
Email: mzehner@wellesleyma.gov

Brookline Housing Production Plan (2016)
Alison Steinfeld, Director
Joseph Viola, Assistant Director
Brookline Planning Department
Phone: (617) 730-2130
Email: asteinfeld@brooklinema.gov or jviola@brooklinema.gov
**Project with Barrett-Goldson collaboration*

Nantucket Housing Production Plan
Andrew Vorce, AICP
Director of Planning and Land Use Services
Phone: (508) 325-7587
Email: avorce@nantucket-ma.gov

Chelsea Housing Strategic Plan (2017)
Bethany Rosa, Housing Planner
Phone: (617)-466-4185
Email: brosa@chelseama.gov

Lenox Housing Production Plan (2016)
Gwen Miller, AICP, Land Use Director
Phone: (413) 637-5500, ext. 6
Email: gmiller@townoflenox.com

Brewster Housing Production Plan (2016)
Ryan Bennett, AICP
Brewster Planning Department
Phone: (508) 896-3701 x1133
Email: rbennett@brewster-ma.gov



TOWN OF GROTON

173 Main Street
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Select Board

Barry A. Pease, *Chairman*
Alison S. Manugian, *Vice-Chairman*
John R. Giger, *Clerk*
Joshua A. Degen, *Member*
Rebecca H. Pine, *Member*

Town Manager
Mark W. Haddad

March 5, 2019

Carolyn Perkins, Chair
Community Preservation Committee
Town of Groton
173 Main Street
Groton, MA 01450

RE: Community Preservation Committee Funding Application
2020-01 2019 HOUSING PRODUCTION PLAN

Dear Ms. Perkins:

As Chairman, I am writing on behalf of the Select Board to convey the Select Board's support for the above-referenced funding application for the preparation of a new Housing Production Plan.

Groton's current Housing Production Plan (HPP) expires on June 29, 2019. Having previously discussed the need to replace Groton's expiring HPP with an updated plan that can be approved by the Department of Housing and Community Development (see January 28, 2019 regular meeting), the Select Board voted on March 4, 2019 to support this application.

Thank you for your attention to this matter.

Sincerely,

Barry A. Pease
Chair, Select Board

BAP/fs