

## HOUSING COMPONENT OF THE WAKEFIELD MASTER PLAN



*SUSTAINING STRONG NEIGHBORHOODS*



*MAINTAINING CHARACTER*



*PRESERVING OPEN SPACE*



*ENSURING AFFORDABILITY*



## HOUSING COMPONENT OF THE WAKEFIELD MASTER PLAN

THE TOWN OF WAKEFIELD  
TOWN HALL  
ONE LAFAYETTE STREET  
WAKEFIELD , MASSACHUSETTS

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Wakefield must develop a strong Master Plan that reflects a community consensus as to how Wakefield should grow. Backed up by a strong zoning ordinance that encourages appropriate growth and discourages inappropriate growth with a combination of incentives and controls, a Master Plan vision can become a reality.

## **INTRODUCTION**

### **HOUSING COMPONENT OF MASTER PLAN IN RELATION TO THE ENTIRE WAKEFIELD MASTER PLAN**

Although the hopes, needs, and fears of Wakefield's residents may differ, this Housing Component of the Master Plan is intended to establish a series of generally shared values that can form the basis for future actions that benefit the greatest number of the Town's citizens.

This Housing Component is one in a series of components that will make up the Wakefield Master Plan. The preparation of a new Master Plan was authorized by Town Meeting in April 1999. The Wakefield Planning Board has organized the Master Planning process as a series of steps intended to protect and enhance the Town's character.

By adapting this Housing Component the Planning Board effectively replaces all housing goals contained in the 1989 Master Plan with this document. It is the Committee's intention that the new Master Plan propose actions and develop strategies for responding to the changing needs of the Town. Changes in the Town's Zoning bylaws are among the recommendations that are embodied in the Master Plan to encourage the citizens of Wakefield to control and direct growth.

To be an effective document the Master Plan must help build a consensus on the Town's needs and the most appropriate responses to them. The will of the Town is expressed at Town Meetings where zoning changes are authorized, and in the selection of public officials. To build consensus

the Housing Component of the Master Plan has been developed in close collaboration with the Town Planner, the Planning Board, the Housing Sub-committee, and the citizens of Wakefield through a series of meetings and a full day Forum.

### **PREVIOUS MASTER PLANS AND STUDIES**

In 2001 the Planning Board adopted a Preservation Plan prepared by Alfred J. Lima, Planning Consultant. Many of its recommendations are embodied in the Housing Component planning approaches and Design Guidelines. The Historic Districts noted in the Plan are included in the maps that form a part of the Housing Component.

A Housing Issues Report, prepared in January 2001 by the Town of Wakefield, eloquently articulated many of the concerns that form the basis for the Housing Component of the Master Plan

Abacus Architects & Planners contracted in December, 2002, to prepare the Economic Development Component of Wakefield's Master Plan. Several of the sites studied, and many of the planning approaches taken in the Housing Component will be further developed in this document.

### **KEY MASTER PLAN ISSUES**

Two overarching concerns are addressed by this Housing Component. Wakefield shares these issues with many other communities in Massachusetts:

- Wakefield has a distinct character that is threatened by recent and anticipated residential development. A loss of open space, an underutilization of downtown areas, and the construction of housing types and site layouts at odds with their surroundings are too often the result.
- Housing prices have risen far faster than incomes. Many people who live, or would like to live in Wakefield, cannot afford a home.

The resolution of these issues is complicated by Chapter 40B. This state regulation allows developers to override local zoning in towns with less than 10% affordable housing when proposing developments with a minimum of 25% affordable units.

Chapter 40B serves an important function in encouraging the development of affordable housing in Massachusetts. According to the Boston Foundation's report "Greater Boston Housing Report Card 2002", between 1997 and 2001, 77 percent of the affordable housing created in suburbs that did not meet the 40B threshold is a direct result of 40B. For Wakefield, however, the result has been development out of character with its context. One goal of this component of the Master Plan is to using 40B development not only to increase the supply of affordable housing in Wakefield but to channel it into areas that can benefit from new pedestrian-oriented residential development. If carefully planned such housing can help in the preservation of open space.

## **RECOGNIZED PROBLEMS WITH MASSACHUSETTS OUTDATED LAND USE REGULATIONS**

Massachusetts zoning law establishes the context within which development takes place in Wakefield. Established in 1920 and amended in a piecemeal fashion ever since, it is considered outdated in its ability to respond to issues of affordability, open space, sprawl, urban redevelopment, and responsiveness to context. The American Planning Association describes it as among the most outdated in the nation. Although proposals for significantly changing or replacing the legal framework within which towns can develop their zoning and planning guidelines have been developed, there is no expectation that they will be adopted soon. Desires to cut commuting time, traffic jams, and loss of open space are countered by a resistance to increasing urban density and the trend towards larger houses on larger lots. Chapter 40A, the zoning law, and Chapter 41, the subdivision law, continue to encourage spread-out and ill-planned development according to many planners.

An understanding of the limitations of Massachusetts zoning law will help in understanding those tools that are available, and those that are not, to the Town of Wakefield as it seeks to guide development in appropriate directions. Some of these limitations are outlined below:

- **Home Rule** Current Massachusetts guidelines make no provisions for regional planning beyond the borders of the Commonwealth's 351 cities and towns. The principle of "Home Rule" allows them to govern themselves independently, undermining broader planning initiatives. Proposals to channel development pressures into the



decaying urban centers of one city while allowing the rural character of an adjacent town to be maintained would require a change from the current “Home Rule” approach.

- **Lack of Coordination** Unlike two thirds of the states, Massachusetts does not require a link between each Town's planning and zoning that would establish a set of planning principles backed up by zoning regulations to guide all development. Wakefield's often contradictory Zoning and Planning requirements are typical of the confused priorities that are used to evaluate proposals in most towns. Better coordination between Planning and Zoning would make responsible development easier.
- **No “Smart Growth” Provisions** Unlike many states, Massachusetts does not require or expressly authorize the use of contemporary planning strategies that would encourage clustered development and conservation planning. Responding to market forces and zoning that requires large lots, developers often spread out construction in ways that diminish available open space and lead to sprawl. Urban growth boundaries, such as those adopted in Oregon, are not encouraged by current legislation.
- **Lack of Limits** Massachusetts is the only state in the nation that allows the creation of building lots along existing roads without review and approval by the local Planning Board. Inappropriate development and the loss of rural character are often the result as development is stretched out along public roads. (Chapter 41, Section 81-p)
- **Rural Zoning Prohibited** Zoning that limits development to rural densities - one unit per 25 acres, for example, is not allowed under current state zoning guidelines. If paired with incentives for higher density development in town centers, such zoning could help maintain both rural and urban character.
- **Lack of Financial Incentives and Disincentives** Imposing extra fees on development in areas that require new water, road, or sewer infrastructure to subsidize denser urban development near public transportation encourages sustainable growth. These “greenfield fees” have been proposed, but have not been implemented to date.
- **Limited Tools for Encouraging Affordable Housing** Although Chapter 40B has been successful in encouraging the development of affordable housing, there are other measures the state could take to increase the amount that is available and encourage its location in appropriate places. These measures include:
  1. Expansion of the affordable housing trust.
  2. Increasing the bonding cap for state housing funds.
  3. Creating financial incentives for affordable housing development in urban centers near public transportation, schools, and shopping.

- 
4. Providing additional funding for schools in towns that encourage multi-family housing to relieve overburdening of local school systems that can result.

Massachusetts' outdated land use regulations create a challenging environment for comprehensive planning. None-the-less, Wakefield can develop a strong Master Plan that reflects a community consensus as to how the Town should grow.

## **STRATEGIES FOR CHANNELING GROWTH IN PRODUCTIVE DIRECTIONS:**

There are many opportunities for Wakefield to strengthen its Zoning Ordinance in ways that encourage appropriate growth and discourage inappropriate growth with a combination of incentives and controls. These opportunities include:

**Conservation Subdivision Design/Cluster Zoning** Compact development clusters building on one portion of a site and leaves the remainder as shared open space. Open space can be “social space,” such as a formalized green that can be used for entry, or “natural space”, that remains as untouched land. Such development requires a consensus on the value of open space and changes to current zoning. Incentives for this kind of development include unit bonuses for affordable housing and open space creation or preservation. The compact nature of the design can reduce site development costs and create another incentive.

**Transferable Development Rights** Rights to build on land that the Town would rather be left undeveloped are transferred to other sites in public or private ownership that the Town would prefer to have developed. Public and private interests are balanced as open space is preserved, urban areas requiring rejuvenation are developed, and property owners profit in the process. Increased unit counts are an incentive for affordable housing and open space preservation.

**Inclusionary Zoning** This allows or requires developers to provide an affordable housing component as part of a market rate development. Affordable units can be on or off site. Affordable units can be required or a town can create other incentives for affordable housing production. Inclusionary zoning allows a town that has met Chapter 40B’s 10% requirement to maintain that level of affordability.

**Special Districts** Special Districts encourage multi-family growth in specifically zoned locations, generally near public transportation or downtown, where greater densities can be accommodated. Planned overlay districts and other zoning mechanisms can be used to implement this kind of planning goal.

**Main Street Zoning** This type of zoning allows a mix of commercial and residential uses. Housing above stores is typical. Units can be affordable or market rate. The convenience for residents and increased business for stores helps renew urban areas while providing the kind of compact housing that the market is not providing in sufficient quantities. Changes to current zoning may be required to implement this kind of growth strategy.

## ORGANIZATION OF THE HOUSING COMPONENT OF THE MASTER PLAN

This Master Plan is intended to have a clear narrative structure, outlining needs and providing strategies for fulfilling those needs in ways that balance public and private interests.

- **Section 2 – Housing Needs Assessment and Action Plan** documents housing needs in relation to changing demographics and housing costs.
- **Section 3 – Physical and Governmental Constraints and Opportunities** documents the physical and governmental constraints and opportunities that define the context in which housing needs can be satisfied.
- **Section 4 – Town Character** shows examples of how housing needs have been met in the past and establishes guidelines for future development in relation to Wakefield's natural and man-made features.
- **Sections 5 – Development Scenarios** explores suggested sites for housing development and the form these developments could take in order to reinforce the positive qualities of Wakefield.
- **Section 6 – Design Guidelines** gives more detail on how the strategies proposed in Section 5 can be developed to insure public benefits.
- **Section 7 – Implementation** proposes changes to zoning and identifies programs that could encourage development that satisfies housing needs while strengthening the physical and social fabric of the Town.

## ***HOUSING NEEDS ASSESSMENT AND ACTION PLANS***

During the past decade Wakefield's median household income increased by an estimated 29%, but the median price of a single-family home increased by more than twice that, 67%.

Historically a community that attracted first-time homebuyers and young families, Wakefield has 25% fewer 20-34 year olds today than it had in 1980 and 1990.

Housing production continues to fall further behind demand. The rate of new construction has declined steadily since the 1950s. Affordable rental units have been converted to condominium ownership. Much of what is being built is at the top of the market and no new affordable rental housing is being built.

Most of the citizens of Wakefield can no longer afford to buy a house in Wakefield if they don't already own one. More than a third can't afford to rent at today's prices.



## **INTRODUCTION**

The evaluation of housing need that follows was prepared by Bonnie Heudorfer, Housing and Community Development Consultant.

Although anecdotal evidence and well publicized analyses of regional housing trends have led to a broad recognition that affordable housing is in short supply, the following analysis quantifies the degree to which needed housing is not available and available housing does not meet a full range of needs.

Recent housing development in Wakefield has tended toward large houses on large lots, meeting the needs of some, but by no means all, of those people who would like to move to or remain in the town. Demographic projections based on the 2000 census suggest that this problem will only become more acute over the next decade.

This section ends with specific recommendations on policy changes and program development that would help create more affordable housing, keep current housing affordable, or make existing housing more affordable.

The development of more affordable housing should be a Wakefield priority in order to maintain the diversity of the community. It is essential to the well being of the town that its school teachers, police officers, office workers and building trades people, not just its CEO's and professionals, be able to afford housing.

An additional benefit of affordable housing creation is that it helps Wakefield satisfy Chapter 40B, which allows developers to override local zoning if towns have less than 10% affordable housing. To this extent, affordability and preservation of town character go hand in hand. Wakefield's plans for meeting 40B requirements are illustrated on pages 2.25 through 2.27.

Wakefield has traditionally provided a diverse, relatively affordable range of housing options. A mature suburb, conveniently located with ample public amenities, its housing inventory includes modest five and six room Capes and bungalows, two-family homes and apartments and attractive larger homes dating from different periods in the town's rich history. Recent construction has added about forty new single family homes per year. This variety of housing has enabled the community to attract and maintain a population diverse in income, age and lifestyle.

Like the rest of the region, Wakefield experienced a run-up in housing prices during the mid-to-late 1980s, followed by a slump during the early 1990s. Still mirroring the regional trend, prices have been on the rise since 1995. The combination of rising home prices, a shrinking supply of affordable rental units, an aging housing stock, and a large elderly population—many of them homeowners—has created tremendous challenges for the community, a situation that is aggravated, not alleviated, by the fact that housing prices are even higher—and options more limited—elsewhere in the region. The escalating cost of both rental and ownership housing in Wakefield was cited as the #1 housing issue by the community as it began the process of updating its Master Plan.

## PURPOSE OF HOUSING NEEDS ASSESSMENT

The development and implementation of an affordable housing strategy is a two-step process. It includes a needs assessment and an action plan. The needs assessment examines current conditions and trends. It identifies and prioritizes the most critical housing needs, and provides a framework for determining what strategies are appropriate. The action plan details how the community will address its needs. This section examines Wakefield's current and projected housing needs and the town's ability to meet those needs. It is based on an analysis of, among other information:

- Previous plans and surveys;
- Supply and demand influences: demographic characteristics, housing stock, cost, etc.;
- Recent and projected trends in housing development, local and regional
- Qualifying income necessary to rent or purchase housing in town compared to the income distribution of existing residents;
- Relevant by-laws, regulatory and permitting procedures;
- Building and land inventories;
- Special considerations: constraints or opportunities unique to Wakefield.

## ORGANIZATION OF SECTION 2

This section of the Housing Masterplan is divided into five parts, in addition to the introduction and the executive summary:

- **An Affordable Housing Primer:** what it is, who is it for, who the players are in Wakefield, and what they have done;
- **Wakefield's Housing Context:** A look at the regional influences that shape Wakefield's housing market;
- **Housing Market Conditions in Wakefield:** An examination of market conditions in Wakefield: the town's existing population, its housing profile, recent trends and their impact, and a look at who can "buy into" the community today;
- **Housing Needs:** An assessment of the town's housing needs: affordability and other considerations.
- **Housing Strategies:** A housing plan for Wakefield.

## AN AFFORDABLE HOUSING PRIMER

### THE FEDERAL DEFINITION OF AFFORDABLE HOUSING

There are many ways to define affordable housing, but the most widely accepted definition is that used by the federal government. The U.S. Department of Housing and Urban Development (HUD) calls housing costs—rent plus basic utilities or mortgage, tax and insurance payments—affordable when they consume no more than 30% of a household's income. Under HUD definitions, households are deemed to have an affordability problem, or cost burden, if they pay more than 30% of income for housing; those paying over 50% of income are said to have a severe cost burden. Under these definitions:

- A family earning Wakefield's estimated 2000 median income—\$65,724—can afford to spend about \$1650 a month on housing, far short of what would be required to purchase the median priced house, which was \$275,000 in 2000 and \$300,000 through the first six months of 2003.
- An estimated 37% of Wakefield's families earn less than 80% of the median income for a family of four in greater Boston, making them potentially eligible—depending on family size—for housing assistance under most state and federal programs.
- A quarter of Wakefield's homeowners and more than a third of its renters are cost burdened, spending in excess of 30% of income on housing. While the situation is growing worse as rent levels and home prices continue to rise, affordability has persisted as a problem in town, especially for low-income households, for more than two decades.
- A family of three on Transitional Assistance to Families with Dependent Children (TAFDC) receives about \$7,000/year and a full-time worker earning the minimum wage earns about \$11,000. These households can “afford” to pay only \$174 and \$273/month in rent, respectively. Not only have they been long since priced out of Wakefield, but there is no place in greater Boston where they could find rental accommodations in that price range in the private market.

## THE MASSACHUSETTS DEFINITION OF AFFORDABLE HOUSING

“Affordable housing” also has a specific regulatory meaning in Massachusetts, which, more than 30 years ago, enacted its Comprehensive Permit Law (Chapter 40B) to facilitate the development of low- and

moderate-income housing, particularly in the suburbs.<sup>1</sup> This statute established an affordable housing goal of 10% for every community in the Commonwealth. The State defines affordable, or low- or moderate-income housing, for purposes of determining whether a community has met the 10% standard, as housing developed with a state or federal subsidy or financing mechanism, in which at least 25% of the units are reserved for households with incomes not exceeding 80% of the area median *and* which restricts rents or home prices for a specific period of time (generally at least 30 years for new construction and 15 years for rehabilitation). In rental projects all units count, even if not affordable; in homeownership projects only the affordable units count. The State's Department of Housing and Community Development (DHCD) maintains an inventory of all subsidized units by community:

- 4.4% of Wakefield's existing housing stock—some 440 units in 11 developments—was considered affordable under this standard on the 2001 inventory, but the town has made considerable progress since that time.
- Having set for itself an aggressive goal of getting to 10% within 3-5 years, Wakefield has recently increased its subsidized housing count to 5.7% (including 66 existing units/beds in group homes that provide long-term housing for individuals who are mentally ill or mentally retarded).<sup>2</sup>

## INCOME ELIGIBILITY

For some time, the issue of affordability has exceeded substandard conditions, overcrowding, and other deficiencies, as the nation's most widespread housing problem, and this is no less true in Wakefield. Less than ½ of 1% of the housing stock—only 23 units—is overcrowded, i.e., occupied by more than one person per room, and only 45 units lack kitchen and/or bath facilities.<sup>3</sup> An array of public policies and programs



has been developed to address the problem of affordability. In no state is there a wider assortment of resources or a more well established network of public, private and non-profit affordable housing practitioners than in Massachusetts. Income eligibility varies by program, depending on their specific programmatic goals, and often changes over time. While most housing assistance is targeted to the poorest households, in high cost areas—such as greater Boston, where the median income for a family of four is \$80,800—some public resources can be used to benefit households earning up to 120%, or even 150%, of the area median. *Most* programs use the following categories to define need, but even these definitions have shifted over time<sup>4</sup>:

Extremely low-income — income at or below 30% of median  
 Very low-income — income between 30% and 50% of median  
 Low-income — income between 50% and 80% of median  
 Moderate-income — income between 80% and 95% of median

In general, rent subsidy programs *target* those with incomes below 50%, though they can go up to 80%; homeownership programs *target* those earning 80% or less, though eligibility limits are usually higher. Throughout this report the abbreviation “LMI” will be used for low- and moderate-income (80% of median or less). Table 1 shows the current income guidelines for the Boston metropolitan area (including Wakefield) for most major housing programs.

**Table 1**  
**Commonly Targeted Income Levels for Affordable Housing Programs in Greater Boston**

Household	Homeownership		Median	Rental		
Size	MHFA	MHP	Income	80%	50%	30%
1	\$80,800	\$52,400	\$56,600	\$43,850	\$28,300	\$16,950
2	80,800	52,400	64,600	50,100	32,300	19,400
3	92,900	56,400	72,700	56,400	36,350	21,800
4	92,900	62,650	80,800	62,650	40,400	24,250
5	92,900	67,650	87,300	67,650	43,650	26,200
6	92,900	72,650	93,700	72,650	46,850	28,100

In addition, maximum sales prices and fair market rents (FMRs) have been established to ensure that the targeted income groups are not overly cost burdened. The current monthly FMRs for greater Boston (including heat), as well as the maximum sales prices for the two major homebuyer programs, are shown below:

**Monthly Fair Market Rent for Greater Boston (incl. Heat)**

Efficiency	1 Br.	2 Br.	3 Br.	4 Br.	5 Br.
\$953	\$1,074	\$1,343	\$1,680	\$1,972	\$2,268

Maximum Sale Prices for Major First Time Homebuyer Programs				
Program	1 Family*	2 Family	3 Family	4 Family
MHP Soft 2 <sup>nd</sup> **	\$180,000	\$225,000	\$270,000	
MHFA 1 <sup>st</sup> Time	\$311,000	\$350,100	\$423,800	\$492,900
* includes condominiums				
**may go higher in some communities, including Wakefield				

### AFFORDABLE HOUSING IN WAKEFIELD: A BRIEF HISTORY

For many years, Wakefield offered a wide range of affordable housing opportunities within its private housing stock. While the town remains relatively more diverse and affordable than many other Boston area communities, the privately owned affordable inventory is being eroded on a number of fronts.

The development and management of the town's publicly assisted affordable housing programs and services has been the primary responsibility of three entities: the Wakefield Housing Authority (WHA), the Town's Community Development Department, and the regional non-profit Community Service Network, Inc. (CSN). WHA is a public housing agency established to administer housing programs for low- and moderate-income families and individuals. It owns and operates nearly 200 units of public housing on six sites and administers rent voucher (the Federal Section 8 and Massachusetts Rental Voucher) programs for another 300 households.

The town's Community Development Department applies for grants

and other funding for a range of community needs, and administers the programs associated with this funding. For the past several years, Wakefield has outsourced this role to a consulting firm specializing in community development and grants administration, Community Opportunities Group (COG).

CSN is a certified regional community housing development organization (CHDO), formed originally by the towns of Wakefield, Stoneham, Woburn, and Reading to administer home repair and first-time homebuyer programs in those communities. CSN provides a broad range of other services as well, including homelessness prevention, landlord/tenant mediation, advocacy, and case management. Its expanded service area now includes Burlington, Lexington, Melrose, North Reading, Wilmington, and Winchester.

More recently, Wakefield added two new housing entities: a local housing partnership, charged by the selectmen with promoting "affordable housing that enhances the community," and the nonprofit Wakefield Affordable Housing LLC, a partnership formed between the Housing Authority and Mystic Valley Elder Services for the purpose of developing government subsidized, supportive housing for the elderly. An application to HUD for funding of 50 units under the Section 202 program was not funded, but the following year approval was granted for 23 units.

Wakefield has trailed many of its neighbors in expanding its subsidized housing inventory, but with 124 additional units expected to qualify for inclusion on the 2003 inventory, 5.7% of the town's housing stock will be subsidized. This represents a healthy 30% increase over the 2001 level.

Wakefield also houses a number of low-income mentally ill and mentally retarded residents in group homes. In addition, in its request for FY2001 housing certification under Executive Order 418, the town reported that it produced more “affordable homeownership” units—defined as those assessed for less than \$300,000, whether subsidized or not—than all but two of its neighbors. (See **Appendix 1** at the end of this section, A Regional Affordable Housing Report Card, for Wakefield’s performance relative to its abutters and the cities and towns that abut them.)

## **WAKEFIELD’S HOUSING CONTEXT**

### **THE REGION’S HOUSING CHALLENGES**

To understand the pressures that Wakefield faces, and to realistically determine which of those the town can control or influence, it is important to understand what is happening in the larger marketplace. Throughout eastern Massachusetts, high and rapidly rising house prices and rent levels, slower growth of household income, and low levels of new construction have combined to create a crisis in housing affordability.<sup>5</sup> The growth of the Boston area economy over the past five years fueled a surge in regional housing demand, but residential construction has not kept pace and is estimated to be little more than half of what is needed to meet the regional demand.

The economy of the region grew from 1992 through 2000. While the first four years of growth were essentially “catching up” for the job losses that occurred during the recession of 1988-1992, job growth since 1996 has attracted new residents to the area. The population of metro Boston

registered a 5% increase in the 2000 census. As the economy flourished, housing costs skyrocketed. Yet, even as price increases led the nation, housing production fell further behind.

The Executive Office of Administration and Finance noted in its October 2000 study, *Bringing Down the Barriers: Changing Housing Supply Dynamics in Massachusetts*, that the problem is not that Massachusetts spends less than other states on housing. In fact, the Commonwealth subsidizes considerably more housing than most states. The difference is that the private sector here produces less than in other parts of the country, especially less multi-family housing. This is due to a number of factors, including the high cost and relative scarcity of land available for residential development, higher production costs associated with the development of more marginal sites, and a complex maze of restrictive local zoning and subdivision controls. Massachusetts ranked 47<sup>th</sup> in the nation in 1999 and 46<sup>th</sup> in 2000 in number of building permits issued per capita, producing multi-family housing at about one third the per capita rate of the nation as a whole. Wakefield exemplifies the problem:

- Only three multi-family rental developments (52 units) have been built in the town in the past decade.
- No multi-family rental housing has been built since 1995.

While the average house price in Massachusetts was increasing by nearly 50 %—the highest rate of growth in the country—between 1995 and 2000, household incomes increased by only a fraction of that amount. The state’s median household income is about 9% above the nation’s, but its cost-of-living is 10-26% higher, fueled by home prices that are more than double the national average.<sup>6</sup> Such high housing costs make

it difficult for people to live in the communities in which they grew up or currently work, and hurt the economic competitiveness of the state. During the 1990s, Massachusetts lost population in the important young worker group (20 to 34 year-olds) at a rate more than triple the nation as a whole and, correspondingly, saw its wage and salary employment grow at only a third of the national rate.<sup>7</sup> Wakefield's own experience again reflects these trends:

- Historically a community that attracted first-time homebuyers and young families, Wakefield has 25% fewer 20-34 year olds today than it had in 1980 and 1990.
- Wakefield's median household income increased by an estimated 29% during the past decade, but the median price of a single-family home increased by more than twice that, 67%.
- Starting salaries for many town employees, including teachers, police and firefighters—typically in the mid \$30s to low \$40s—are insufficient to enable them to purchase in Wakefield. Fewer than 20 single-family houses sold in 2000 for less than \$225,000, the approximate amount affordable for someone earning the townwide median household income of \$66,117. (Median *family* income, significantly higher—\$77,834 in 1999—boosts the maximum “affordable” level to about \$275,000, and the 2000 affordable inventory to some fifty homes, but even this represents less than 20% of all single family sales transactions.)

Other factors, too, have exacerbated the housing squeeze: diminishing state and federal resources for affordable housing; tax law changes; loss of low-rent units due to market forces—disinvestment on the one end and gentrification on the other; loss of older subsidized inventory as developments come to the end of their required, “affordable” lock-in periods; the end of rent controls and regulations in Boston, Cambridge and Brookline; and the increase in demand fueled by in-migration to the area from other regions and especially other countries. Here, too, the impact of these pressures can be seen in Wakefield:

- More than 350 rental units were converted to condominiums—usually at a higher cost—over the past decade.
- When apartments change hands, even if the new owner maintains the units as rentals, rents typically go up reflecting the new financing and market realities. Sixty-three percent of Wakefield's renters live in 1-4 family structures, and this inventory is extremely susceptible to price increases as long-term owners are replaced by recent purchasers.
- The continued affordability of one of the town's major housing resources—the 176 unit Colonial Point—was jeopardized when its “use restrictions” expired in 2001. Its owner could have elected to withdraw from the subsidy program and convert all of the units to market rate. The Housing Authority and Housing Partnership, among others, lobbied successfully for its preservation as affordable housing. (While only forty-four of these units are so-called “project-based Section 8s,” in which an income-eligible tenant pays 30% of income toward rent and the federal government subsidizes the difference between that and the “fair market rent,” it is estimated that many more

of Colonial Point's long term residents are also low- and moderate-income.) The town is now negotiating with the owner to construct a second subsidized building on the adjacent site.

## GROWTH IN THE NORTH SUBURBAN PLANNING COUNCIL (NSPC) REGION

Wakefield is one of 101 member communities of the Metropolitan Area Planning Council (MAPC). MAPC is a regional planning agency created by the Legislature nearly forty years ago to address planning related issues of regional importance. Its jurisdiction extends roughly from Boston to Interstate 495, and includes most, but not all, of the Boston primary metropolitan statistical area (PMSA). With neighboring Reading, North Reading, Lynnfield, Burlington, Wilmington, Woburn, Stoneham, and Winchester, Wakefield constitutes MAPC's North Suburban Planning Council (NYSCP), one of eight such subregions that are linked by common concerns and market dynamics. Understanding how these communities have changed over the past decade provides additional context for understanding Wakefield's housing market, and the forces that influence it.

In some respects Wakefield mirrors the regional market, but in others it marches to its own drummer. **Tables 2** and **3** summarize the similarities and differences between Wakefield and its neighbors. Like the other communities in the NSPC region, Wakefield experienced a number of trends during the past decade that have altered, or put pressure on, its housing market:

- Household and family size has decreased, and the number of people living alone has increased (mirroring state and national trends).
- There are more housing units and a higher rate of occupancy, both indicators of increased demand.
- The additional units were overwhelmingly for homeownership.
- The drop in number of 20-34 year-olds in the NSPC towns was greater than that experienced in the region, state or country (28% versus 16%, 18%, and 5% respectively; Wakefield's drop was 25%).
- Like the rest of the country, the population over the age of 85 is the fastest growing segment of the population.

Trends that set Wakefield apart from the other NSPC communities include:

- Wakefield's population has remained essentially unchanged for forty years. Its growth spurt was well under way when construction was completed in 1951 on Route 128 from Wakefield to Wellesley, spurring growth in the other NSPC communities.
- Notwithstanding the *absolute* drop in its young adult population, Wakefield registered a much greater *increase* in the number of 25-34 year olds—the prime age for first time homebuying—than would have been expected had its own (1990) population simply aged in place (16%). By comparison, the NSPC communities in total registered only a 3% increase in this age group over what would have been expected, suggesting that Wakefield continues to draw younger householders.

- Non-family households increased as a percent of all households in most of the country, but Wakefield experienced an actual *decline* in the number of families.
- Unlike the other communities in the planning sub-region, Wakefield lost population in the “under 5” age group as well and saw its public school enrollment drop since 1993.
- Wakefield’s population had been, and remains, older than the other communities in the NSPC, but the other communities are now catching up. Unlike the other communities—and most of the rest of the state and nation—Wakefield *lost* population also in the “65+” age group between 1990-2000.

**Table 2**  
Wakefield in Its Regional Context:  
Demographic Shifts and Housing Supply

Trend: Percentage Change	Wakefield	NSPC	MAPC
Change in Population, 1990-2000	-0.1%	4.4%	4.9%
% Population < 5 years	6.4%	6.7%	6.1%
Change, 1990-2000	-2.6%	7.7%	0.5%
% Population 5-18 years	16.2%	17.3%	16.0%
Change, 1990-2000	8.1%	16.1%	19.8%
% Population 20-34 years	18.7%	17.4%	23.1%
Change, 1990-2000	-25.4%	-27.7%	-15.8%
% Population 35-54 years	33.1%	32.5%	30.3%
Change, 1990-2000	-25.9%	-24.2%	-24.1%
% Population 65+	15.1%	14.8%	13.3%
Change, 1990-2000	-2.9%	21.7%	5.0%
% Population 85+	2.1%	1.9%	1.8%
Change, 1990-2000	33.7%	48.0%	24.2%
Median Age	38.9	38.5	36.1
Change, 1990-2000	9.2%	9.4%	9.8%
% Minority*	3.6%	7.0%	21.4%
Change, 1990-2000, in # Households	4.9%	9.5%	7.7%
Change, 1990-2000, in # Family Households	-1.2%	5.3%	3.5%
Change, 1990-2000, in # Non-family Households	20.5%	22.0%	15.2%
Change in # Housing Units, 1990-2000	4.4%	8.5%	5.0%
Change, 1990-2000, in # Occupied Units	4.9%	9.5%	7.7%
Change, 1990-2000, in # Vacant Units	-15.2%	-24.1%	-37.8%
Rental vacancy rate	1.8%	na	na
Change, 1990-2000	-55.6%	na	na
Renter Occ Units/All Occ Units	28.0%	23.5%	42.5%
* excludes “white alone, not Hispanic”			



**Table 3**  
**Trends in the North Suburban Planning Council Communities**

Trend	Burlington	Lynnfield	N Reading	Reading	Stoneham	Wakefield	Wilmington	Winchester	Woburn
Median Household Income	\$75,240	\$80,626	\$76,962	\$77,059	\$56,605	\$66,117	\$70,652	\$94,049	\$54,897
Population change 90-00	-1.83%	4.46%	15.29%	5.19%	0.70%	-0.80%	21.03%	2.68%	3.66%
Population change 70-00	4.08%	6.61%	22.84%	5.19%	7.21%	-2.35%	24.92%	-6.55%	-0.40%
Single family home value, FY2001	\$237,110	\$313,268	\$244,635	\$280,965	\$219,813	\$208,513	\$220,281	\$424,857	\$204,268
Appreciation since 1995*	41%	39%	39%	55%	29%	25%	45%	51%	44%
Average single family tax bill FY2001	\$2,276	\$4,304	\$3,782	\$3,796	\$3,381	\$2,928	\$2,679	\$5,570	\$2,078
Increase since 1995	13%	29%	32%	21%	24%	19%	43%	31%	43%
Avg annual chg in school enroll. since '93	1.64%	1.79%	3.68%	3.04%	0.79%	-0.13%	2.55%	1.90%	0.79%

\* Based on average assessed values of single family properties, FY 1995 to FY2001

Source: Commonwealth sources as quoted in Your Town, Boston Globe Electronic Publishing, 2001

## WAKEFIELD'S ECONOMIC PROFILE

The preceding sections highlighted some of the demographic and market forces that are influencing Wakefield's housing market, but it is important to take a closer look at the economic influences as well. *Household*<sup>8</sup> income in Wakefield increased by roughly 50% over the past decade, more than the 43% increase experienced by the larger metro area.



Year	Metro Area <sup>9</sup> Median Household Income	Wakefield Median Household Income
1990	\$38,530	\$43,960
2000	\$55,234	\$66,117

Wakefield's median *family* income also increased by 50%, from \$51,815 to \$77,834. Fifty-four percent of Wakefield's families had two wage earners in 2000, up from less than half in 1990; another 16% had three or more workers. The impact on a family's financial well-being of additional workers is striking: families with two wage earners earned 40% more than those with only one in 1990, and a similar pattern is expected to hold when this level of detail is released by the Census for 2000.

Wakefield's household income is somewhat lower than that of the North Suburban Planning Council communities in total, (Table 3) but by most measures its population is fairly well off, generally in the top third of the state's cities and towns. Even so, an estimated 37% of the town's families earn less than 80% of the median income for a family of four in greater Boston, making them potentially eligible—depending on family size—for housing assistance under most state and federal programs. About 8% earn less than \$15,000 per year, putting them at or near the federal poverty level.

<b>Table 4</b> <b>Total Household Income</b> <b>2000 Income by Age (estimate)</b> <b>Wakefield, Massachusetts</b>	
Age of Head of Household	Median Income
15-24	\$38,463
25-30	\$50,771
30-35	\$56,799
35-40	\$59,051
40-45	\$67,895
45-50	\$78,146
50-55	\$78,755
55-60	\$76,716
60-65	\$56,576
65-70	\$36,007
70-75	\$34,952
75-80	\$25,140
80-85	\$19,333
85+	\$19,102

Source: CACI Marketing Systems

**Table 4** shows the estimated distribution of household income by age of head of household. As is true in most places, heads of household in their mid-forties to late-fifties have considerably higher incomes than do younger and older heads of household, and the drop-off in income is quite dramatic for those over age seventy-five.



## HOUSING MARKET CONDITIONS IN WAKEFIELD

Even though Wakefield remains relatively more diverse and affordable than many other towns, its supply of affordable housing—as noted—is being eroded on a number of fronts, and any comprehensive housing strategy will need to have as a key focus the preservation and improvement of the existing inventory:

- The housing stock is aging. Over half the town's housing is more than 50 years old. Many units need repairs, often major systems replacements. Lead paint is a problem.
- Much of the older stock is owned by elderly homeowners, who have neither the resources nor desire to upgrade. Many of these long-term residents would like to remain in town, in more appropriate accommodations. Since few such opportunities are available, they stay put—over-housed but under-maintaining their homes.
- Affordable rentals have been converted to condominium ownership, with resulting higher carrying costs. No new affordable rental housing is being built.
- Prices here, as elsewhere in the region, are rising. New construction has been predominantly targeted to the high end of the market.

## HOUSING CHARACTERISTICS – EXISTING INVENTORY

The following is a snapshot of the 9,937 units of housing that the Census enumerated at the millennium:

Distribution of Housing Types -- Wakefield, Massachusetts

Structure Type	% of Units
Single family (including more than 500 condos)	66%
2 family	15%
3-4 units	7%
5 or more units	13%

- Single-family homes comprise the majority of units throughout the town. There is no single district where multi-family structures predominate.
- 72% of all units are owner occupied, up from 71.1% in 1990 and 70.7% in 1980.
- 52% of Wakefield's housing units were built prior to 1950 (**Table 5**), and more than 40% are over 60 years old. The average annual growth rate has been a comparatively modest one half of one percent for twenty years<sup>10</sup>.
- The rate of new construction has declined steadily since the 1950s.
- The town, historically, has enjoyed low vacancy rates. The 2000 vacancy rate for homeowners, 0.4%, was an increase over the 0.3% rate posted in 1990 and 1980, but still considered negligible. The rental vacancy rate was reported to be an extremely low 1.8% in 2000, down from 4.1% in 1990 and 2.8% in 1980.
- 11% of the units have one bedroom or less; 20% are two-bedroom; 33% three-bedroom; and 36% have four or more bedrooms, an extremely well balanced mix.

- The average unit size is six rooms, unchanged in thirty years, even as the average household size has dropped from 3.3 persons in 1970 to 2.52 in 2000.
- Of roughly 300 subsidized rental units, two thirds are restricted to elderly and/or special needs; only 83 of the remaining units have 2 or more bedrooms.

Wakefield has a high percentage of long-term residents, particularly homeowners. As **Table 6** indicates, over 38% of the town's homeowners in 2000 had lived in their current homes for more than twenty years, and nearly a quarter had been in the same residence for more than thirty years.

<b>Table 5</b> <b>Age of Wakefield's Housing Stock and Growth Rate</b>				
Year Built	Number of Units	Percent of Total	10 Year Growth Rate	Average Annual Rate
1990-2000	611	6.1%	6.6%	0.4%
1980-1989	657	6.6%	7.6%	0.7%
1970-1979	1009	10.2%	13.2%	1.3%
1960-1969	782	7.9%	11.4%	1.4%
1950-1959	1706	17.2%	33.0%	3.1%
1940-1949	1216	12.2%	30.7%	2.7%
1939 and earlier	3956	39.8%		

<b>Table 6</b> <b>Wakefield, Massachusetts - Length of Time in Current Home</b>			
Homeowners who lived in their current homes for:	1980 Census	1990 Census	2000 Census
15 months or less	7.80%	5.50%	7.40%
More than 15 months but less than 10 years	31.50%	29.50%	32.00%
10-20 years	23.50%	21.60%	22.40%
20-30 years	37.3%*	19.10%	14.20%
30+ years		24.40%	24.00%

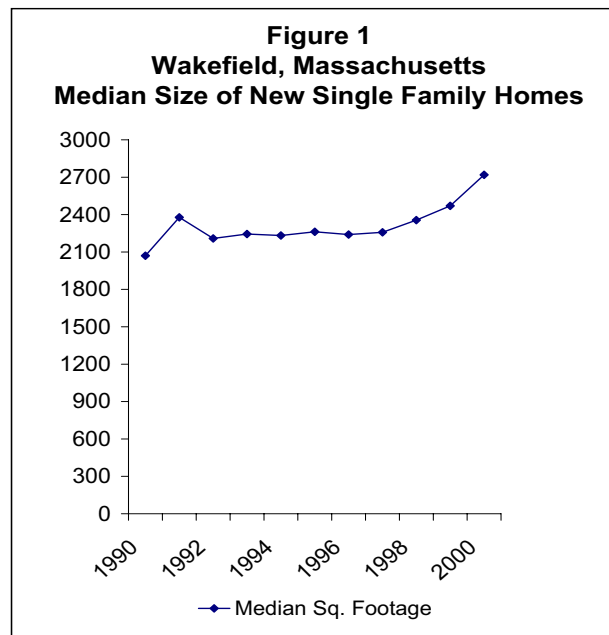
\* 1980 Census combined all 20+ year residents

## NEW CONSTRUCTION

New construction during the decade of the nineties was overwhelmingly single family and condominium ownership. The Assessing Department identified 587 units added between 1990 and 2000:

- 399 units in single family, detached structures
- 126 units in single family, attached structures (16 condominium developments ranging in size from 2 units to 26 units)
- 10 units in 5 two-family structures (though not specified as such, most likely condominiums)
- 52 units in 3 multi-family structures

While newly constructed single-family homes are increasingly larger (**Figure 1**), they have been complemented by the construction of smaller condominium units so that the overall inventory remains diverse in terms of size, as **Table 7** demonstrates.



The new single-family development has resulted from a combination of small-scale subdivisions—generally of fewer than a dozen homes—and individual owner-built units, both constructed on vacant parcels in established neighborhoods. Some twenty-five sub-divisions were built between 1990 and 2000, ranging in size from five to forty units. Nearly 80% of the past decade's new single-family homes were sited on one quarter- to one half-acre lots, corresponding to a loss of open space: the number of parcels of vacant land in town declined by more than 30% during the same period. Recent condominium construction has also been of a relatively small scale, with half the decade's new developments containing only two units. In an earlier era, these duplex structures would have provided one rental unit with each owner occupied unit created.

Both trends—the construction of larger, higher-priced single-family homes on sites that had been passed over by previous developers, and the condominiumizing of new two-family homes—reflect market realities: high acquisition and site preparation costs limit what gets built to what will cover these expenses. The higher home prices go, the more feasible costly and difficult sites are to develop. Building lots have been selling for more than \$150,000 for some time, and more recently, \$200,000 listings have become the norm. That the pace of new construction in Wakefield has been much *slower* than in the region as a whole has been overshadowed by the fact that what does get built often appears overwhelming and out of character with its surroundings. This is attributable not to the size or numbers of the dwellings being created, however, but to the jarring visual impact that results when they are inharmonious with the town's traditional development patterns and/or built on marginal, but geographically prominent, sites.

<b>Table 7</b> <b>Wakefield, Massachusetts - Size of Housing Units</b>				
Number of Rooms	1980 Census	1990 Census	New Construction Since 1990	2000 Census
1	0.8%	0.9%	0.0%	0.8%
2	2.5%	3.7%	0.0%	2.4%
3	7.4%	7.8%	0.2%	8.3%
4	15.3%	13.0%	3.3%	12.4%
5	16.2%	14.3%	9.4%	13.5%
6	25.7%	20.8%	38.7%	20.5%
7	16.7%	17.5%	29.3%	20.1%
8 or more	15.5%	22.0%	19.1%	21.8%

Three condominium developments were permitted in recent years under the State's comprehensive permit statute: Meadow View, Heron Pond and Millbrook Estates. Meadow View and Heron Pond were both approved as Local Initiative Projects, meaning their comprehensive permits were supported by the Board of Selectmen. While Meadow View resulted in the addition of seven permanently affordable homeownership units as part of a larger twenty-eight-unit development, Heron Pond moved into construction on the market-rate units but deferred construction of the affordable units. The original developer encountered financial problems and the project was foreclosed, casting in doubt its future as an affordable housing resource. A new owner has since taken over and is negotiating affordability options with the Town. The recently completed forty unit Millbrook Estates yielded ten affordable homeownership units. The lottery for these ten units drew more than 200 families.

## OTHER STRENGTHS, WEAKNESSES, THREATS, AND OPPORTUNITIES AFFECTING HOUSING SUPPLY

Market forces have already contributed to a reduction in the inventory of permanent rental housing.<sup>11</sup> During the past decade, some 20 rental properties, containing 350 units, were converted to condominium ownership. In addition, another 25-30 two- and three-family homes were converted to condominium ownership. While no record was kept of the number of existing tenants who purchased units, anecdotal evidence suggests that only a small minority did so. During the same period, a number of rental properties changed hands. Again no records of "before and after" rents are available, but often a sale triggers an increase in rent levels. Only a handful of homes were demolished and not rebuilt during the past decade. A more common and recent phenomenon that has resulted in the loss of affordable units is the razing of older, smaller homes, and their replacement by larger ones. Six single-family and a couple of two-unit structures were created on the sites of such "tear downs."

Conversely, investment in and rehabilitation of the existing stock, or creation of new housing through the adaptive reuse of non-residential properties, as well as the addition of accessory apartments can expand housing opportunities. The town does have an accessory apartment by-law, but it has significant restrictions and it is estimated that only about a dozen homeowners have taken advantage of this ordinance to create additional units in their homes for family members. In 1999 and 2000 the Housing Authority made upgrades and renovations to its existing stock, but there is no state funding to add to that inventory. The recently announced award of twenty-three units under the highly competitive HUD Section 202 program is likely to represent the last such funding for some time.

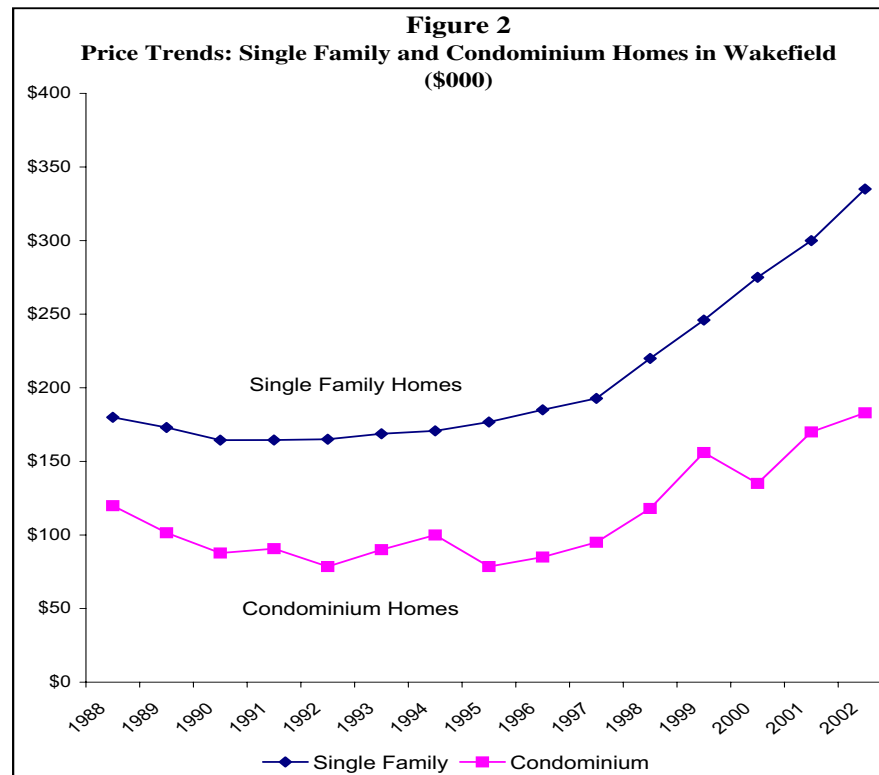
The Town-owned Montrose School, currently housing the Police Department while the new public safety facility is under construction, has been identified as a potential site for housing. Reuse options are being formulated as part of the master planning process. Additional opportunities may exist to create housing in underutilized spaces within the commercial district and through the adaptive reuse of industrial and commercial properties.

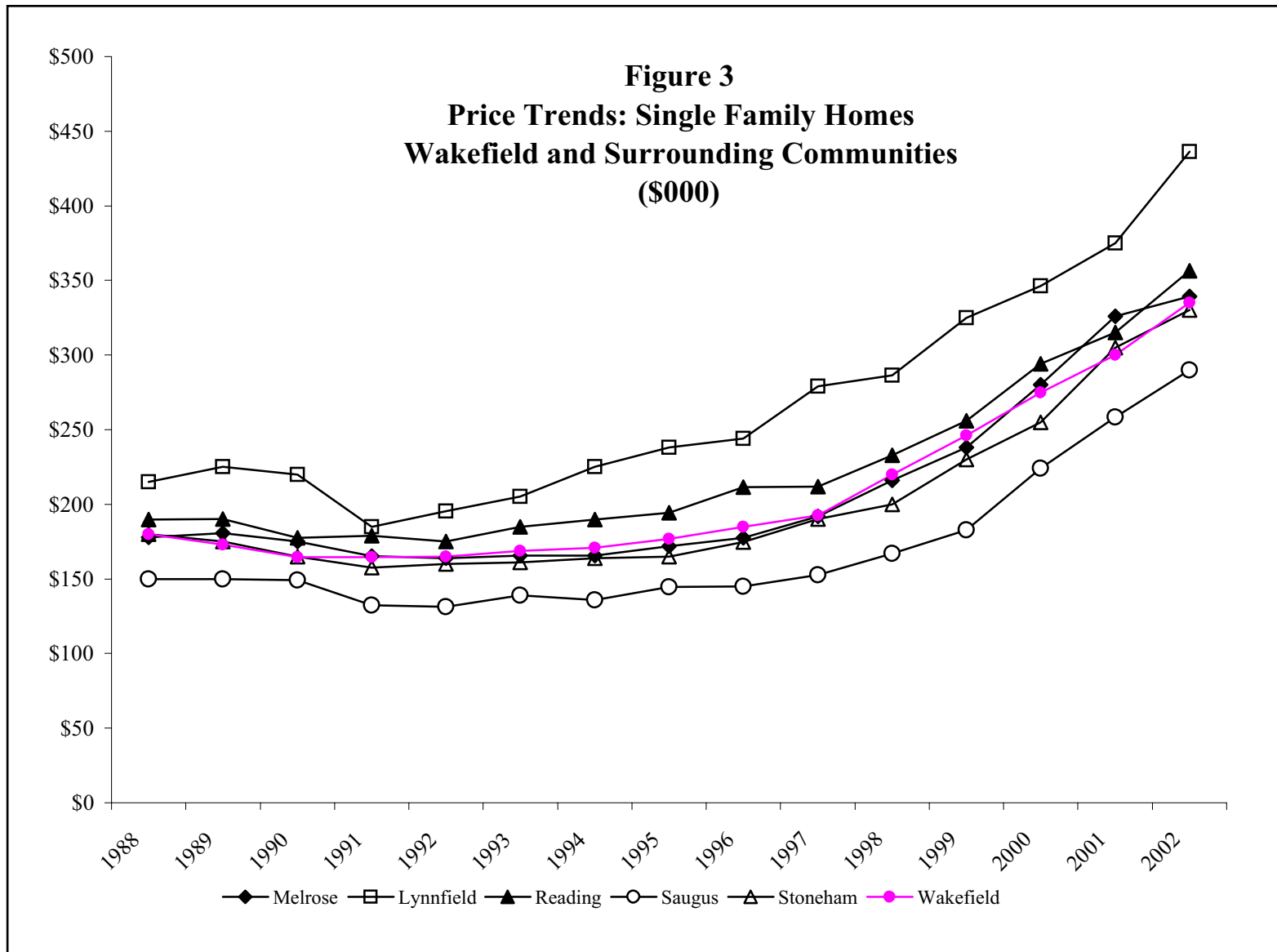
### HOUSING COSTS: HOMEOWNERSHIP

**Figure 2** tells the story of what has happened to home prices in Wakefield over the past ten years. The median house price has increased by more than

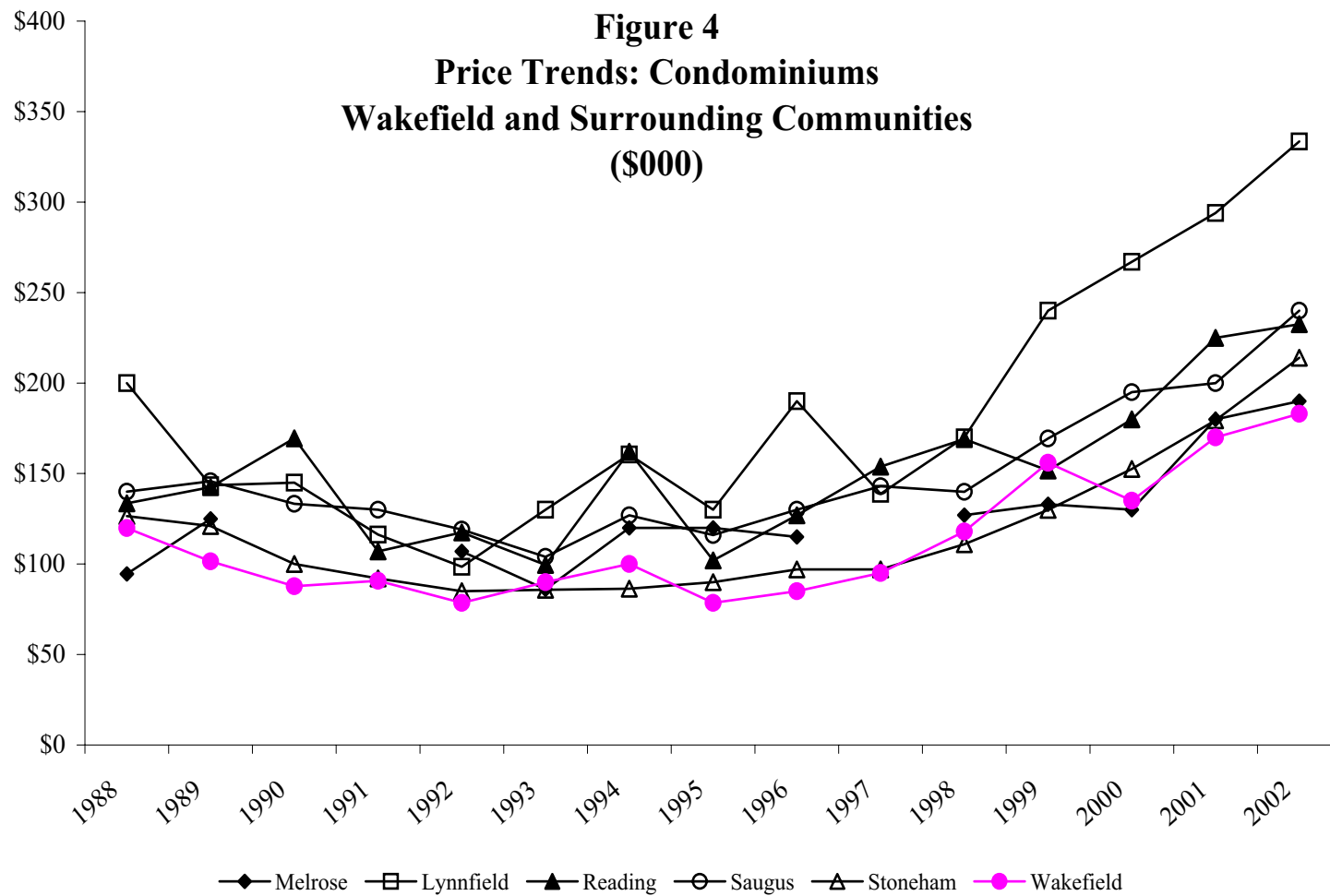
50% in just 4 years. The steep rise in house prices with new construction leading the market is a regional phenomenon.

Wakefield has been—and continues to be—in the middle of the pack in terms of the affordability of its single-family housing relative to neighboring communities (**Figure 3**). Median condo prices, in all communities, show much greater variation year-to-year, influenced by whether the available inventory in a given year is high-end new construction, moderately priced conversion of older rentals, etc. In general, though, Wakefield's condominium stock has been relatively more affordable than that of other communities (**Figure 4**).





**Figure 4**  
**Price Trends: Condominiums**  
**Wakefield and Surrounding Communities**  
**(\$000)**



**Table 8** shows the price distribution of homes sold in 2000, along with the approximate incomes required to purchase. The “affordability gap” is discussed in more detail in the later section entitled “Housing Needs”, but it is clear that a Wakefield family earning the town median — \$77,834 — in 2000 would have had limited options. The situation has deteriorated in the years since. Declining interest rates have been offset by escalating

prices: the median single family home price in 2002 reached \$335,000, and would have required an income to purchase of nearly \$100,000. Turnover is low: less than 4% per year for single-family homes and only 3% for 2 and 3 family homes. There is little room for negotiation; properties sell at or near (within 1-2% of) asking price.

<b>Table 8</b> <b>Wakefield, Massachusetts</b> <b>Distribution of Single Family Homes Sold in 2000</b>				
Price	% of Sales in Range	Cumulative % of All Sales	Income Required to Purchase*	% of Wakefield Households with Required Income
<\$100K	0.0%	0.0%	NA - \$32,500	85%
\$100M-149.9	0.4%	0.4%	\$32,500 - \$47,500	75%
\$150M-199.9	6.6%	7.0%	\$47,500 - \$62,500	67%
\$200M-249.9	25.6%	32.6%	\$62,500 - \$75,000	50%
\$250M-299.9	31.8%	64.3%	\$75,000 - \$97,500	40%
\$300M-349.9	15.9%	80.2%	\$97,500 - \$110,000	25%
\$350M-399.9	8.9%	89.1%	\$110,000 - \$130,000	17%
\$400M-449.9	6.6%	95.7%	\$130,000 - \$142,500	10%
\$450-499.9	2.3%	98.1%	\$142,500 - \$160,000	7%
\$500M-549.9	0.8%	98.8%	\$160,000 - \$172,500	5%
>\$550K	1.2%	100.0%	\$172,000 -	4%

\*Assumes a fixed rate 30 year mortgage, 0 points, for 90% of the purchase price, including private mortgage insurance, and allowing 30% of income for PITI



## HOUSING COSTS- RENTAL

Renters face an even more acute shortage of affordable options. Units are scarce, and those who have a place often stay put. More than half of all renters lease units in two- and three-family structures, most of which are owner-occupied. Historically, this form of tenancy has benefited both the landlord—often a moderate-income, or first-time homeowner—and the tenant, who frequently pays a very favorable rent and enjoys a good rapport with the landlord.

Many tenants in this situation today are long-term residents,<sup>12</sup> paying rents significantly below what the market now commands. When these properties sell, at prices of \$290,000 and \$350,000 (the median for two- and three-unit properties sold through the Multiple Listing Service in 2000 and 2001), their rental units disappear from the affordable inventory. The same holds true when larger apartment buildings change hands. **Table 9** dramatically illustrates the phenomena of the town's shrinking supply and escalating cost of rental housing.

Table 9 Wakefield, Massachusetts Advertised Rents, 1991-2001*			
Year	# Units Advertised for Rent	Average Price	
		1BR	2BR
1991	22	\$600	\$700
1992	18	\$600	\$700
1993	15	\$615	\$725
1994	10	\$625	\$750
1995	8	\$650	\$800
1996	6	\$675	\$825
1997	5	\$750	\$850
1998	3	\$750	\$900
1999	3	\$775	\$1,100
2000	4	\$850	\$1,300
2001	3	\$950	\$1,350

\* Number of Wakefield apartments advertised for rent in The Wakefield Item, second Wednesday in August. Advertised rents included both heated and unheated units. The rents shown here are typical of those that do not include heat, but they are not necessarily the true average.

## **HOUSING NEEDS**

The well-being of a community's housing market depends on its ability to meet the housing needs, desires and budgets of its residents. A well-balanced housing supply can accommodate a cross-section of the population in terms of age, income and tenure. This section on housing needs assesses the affordability of Wakefield's housing stock and also whether it adequately meets local and regional needs—needs which vary, depending on a household's income and characteristics. Clearly, some groups have fared worse than others in this tight housing market:

- Generally, the need for greater affordability is most acute among the poorest households renting in the private market. Often this group includes single parents and their children, large families and/or people with disabilities or special needs.
- Some fixed-income elderly are house-rich and cash poor (if homeowners) or are priced out of the market (if renters). Frequently, they are in need of supportive services. The number requiring assistance with daily living is growing exponentially as the population ages.
- Low-income homeowners are increasingly unable to maintain or make necessary repairs to their homes; some, who bought recently and are highly leveraged, are only a layoff or hospital visit away from default.
- Young adults and families are often unable to accumulate the necessary savings to purchase a home because of high rent payments. Many, who in prior years would have purchased, are precluded from doing so now because of high prices.

Some of these households simply need help with affordability, but others may also need help with:

- *Structurally adapting housing for accessibility:* Some elders and people with disabilities need accessible or adapted housing to live independently. Some families need financial assistance to adapt their current residence to meet the needs of a child, or other family member, with disabilities.
- *Support services:* Some households—including elders, people with cognitive or psychiatric disabilities, teen parents, recently homeless families, or people recovering from substance abuse—need support services to increase or maintain their capacity for independent living. Services can include access to medical or social service providers, home care, and counseling.
- *Access to homeownership:* Many households, including those whose members provide the services essential to maintaining a strong economy, cannot accumulate the down payment and closing costs, even if they can carry the monthly mortgage payment—which is often no greater than their current rent expense.
- *Home repairs and lead paint abatement:* Low-income homeowners and landlords often need financial help to maintain their units; remove lead paint, asbestos, or other toxins; and comply with housing codes.

### **AFFORDABLE HOUSING NEEDS OVERVIEW**

More than a quarter of Wakefield's homeowners and renters were cost burdened in 2000. As would be expected, the lower the household's income, the more likely it is to be cost burdened<sup>13</sup> (**Tables 10 and 11**). A number of factors contribute to the affordability squeeze, including:

- The cost of housing—both rental and ownership—has increased faster than incomes.
- Increases in income have not been evenly realized across different demographic groups.
- Recent homebuyers are spending a higher percent of their incomes on housing (and also significantly more on non-housing debt).

<b>Table 10</b> <b>Wakefield, Massachusetts</b> <b>Cost Burdened Households, 1980-2000</b>						
Income Level	1980		1990		2000	
	Own	Rent	Own	Rent	Own	Rent
<\$10M	93.30%	73.80%	100.00%	65.90%	92.10%	70.50%
\$10-19.9M	41.10%	28.70%	58.70%	86.80%	75.10%	74.60%
\$20M+	7.60%	2.20%	17.90%	21.00%	18.40%	16.60%
All Households	24.60%	35.00%	24.90%	36.20%	22.40%	28.10%

Most cost burdened renters are non-elderly (under age 65); however, elderly renters are *disproportionately* cost burdened: about a third of the non-elderly renter households compared to more than half of the elderly were paying more than 30% of income for rent in 1990. In the case of homeowners, older and younger households were equally likely to be cost burdened, with about a quarter of each group paying more than 30%. This is most likely a reflection of the fact that, while the elderly have lower incomes, of which taxes and insurance consume a disproportionate amount, they are less likely to have mortgages outstanding. Younger homeowners, who have higher incomes, are more likely to be highly leveraged, and 27.7% of homeowners with a mortgage were cost burdened.

<b>Table 11</b> <b>Wakefield, Massachusetts</b> <b>Cost Burdened Low- and Moderate-Income Households*</b>				
Income Level	Population	Renters	Owners	Total
< 30%	elderly	213	243	456
	non-elderly	189	119	308
	total	402	361	763
31-50%	elderly	50	139	189
	non-elderly	104	96	200
	total	154	235	389
51-80%	elderly	6	53	59
	non-elderly	179	151	330
	total	185	204	389
81-95%	elderly	49	0	49
	non-elderly	82	144	226
	total	131	144	276
Total LMI HHs (0-95% MFI) w/ cost burden	elderly	318	434	753
	non-elderly	554	510	1,064
	total	872	945	1,817

\* Source: Wakefield CHAS, Table 1C

## GOALS FOR AFFORDABLE HOMEOWNERSHIP

Wakefield's "housing affordability gap" was illustrated in Table 8, which showed what percent of Wakefield's *existing* households could afford to "buy in" at 2000 prices. **Table 12** narrows the impact to municipal employees, and demonstrates that most could not afford to purchase a home in Wakefield or its neighboring towns, an important consideration for emergency service providers.

**Table 12**  
**Wakefield's Home Prices vs Income Required**

2000 Home Price	% of Sales	Income Required*	Town Employees
Under \$150,000	0.4%	\$45,000	Examples: teachers, highway foreman, firefighters, etc.
\$150-250,000	32.2%	\$45,000 - \$73,000	Examples: teacher with PhD, police lieut, deputy fire chief
\$250-350,000	47.7%	\$73,000 - \$102,000	Examples: Fire Chief, DPW Director, School Principal
\$350-450,000	15.5%	\$102,000 - \$130,000	Example: School Superintendent
\$450-550,000	3.1%	\$130,000 - \$159,000	None
Over \$550,000	1.2%	\$159,000+	None

\* The example used in this illustration is that of a borrower with a 10% downpayment, allowed to spend 30% of income on principal, of income on principal, interest, taxes, and insurance (PITI); 30 year fixed rate mortgage @ 7.125% including pmi. A borrower making a larger downpayment, of course, will enjoy a lower monthly payment and greater affordability. On the other hand, a borrower with significant non-housing debt (student or auto loans, credit cards) may be held to 28% of income for housing expenses, reducing affordability. The table below demonstrates the impact of such differing assumptions, underscoring the difference that flexible underwriting, homebuyer education and first-time homeowner programs can make in expanding affordability. The fact remains, however, that homeownership in Wakefield is increasingly beyond the means of many of its municipal workers and others who aspire to live there.

Income Required to Purchase a Home		
<i>House Price</i>	<i>With 28% of income allowed and 10% downpayment</i>	<i>With 33% of income allowed and 20% downpayment</i>
Under \$150,000	\$52,000	\$36,000
\$150-250,000	\$52,000 - \$86,000	\$36,000 - \$59,000
\$250-350,000	\$86,000 - \$120,000	\$59,000 - \$82,000
\$350-450,000	\$120,000 - \$154,000	\$82,000 - \$104,000
\$450-550,000	\$154,000 - \$188,000	\$104,000 - \$127,000
Over \$550,000	\$188,000+	\$127,000+

A recent study of housing costs statewide by Citizens' Housing and Planning Association (CHAPA) presented the dimensions of the affordability gap in a different way. Instead of focusing on the income required to carry the average house, it calculated the amount by which current prices exceeded the ability of a community's residents to pay.<sup>14</sup> In Wakefield's case, the typical (median priced) single family home in 2001 was priced more than \$75,000 above what the town's typical family (one earning the median of \$77,834) could afford to pay. The CHAPA study cautioned that:

"Prices in many communities are now so far beyond the means of even middle-income families to afford that a market downturn will do little to help those with low- and moderate incomes become homeowners. On the other hand, a market downturn could create real hardship for those who just recently bought and/or overextended to do so."

Perhaps the most compelling evidence of the demand for more affordable homeownership options is the 200+ families who signed up for the ten affordable housing units at the recently completed Millbrook Estates development. The Wakefield Housing Partnership assisted in the lottery, and CHAPA is the monitoring agent. CHAPA provided a ten-page deed rider restricting the maximum resale price and ensuring the units remain affordable for ninety-nine years. The process for Millbrook Estates is an effective model for all subsequent affordable housing developments.

As Long as there is a gap between regional home prices and the ability of Wakefield's residents to acquire housing, the Town of Wakefield will need a sustained effort to promote affordable housing and enforce use restrictions for the housing units that are created.

## **GOALS FOR AFFORDABLE RENTAL HOUSING**

One indication of the need for housing for LMI individuals and families is the length of the waiting list for publicly assisted housing. Wakefield's supply of publicly assisted housing is in high demand, relatively new and in good condition. The Housing Authority owns only eight family units, however, and vacancies are rare. The estimated wait for family housing is 7-8 years, and the situation is similar in most of the surrounding communities. Local housing authority directors report that when they do have an opening it is filled with "priority" cases, e.g. households displaced by fire or natural disaster, demolition or public action, and other special categories of homeless or near homeless. Most say it has been years since they've been able to place a "working poor" family from their regular waitlist. The waiting period for elderly housing varies by development, from 1-2 years up to 7 years.

Wakefield's Housing Goals (see Projects Encouraged by the Master Plan on page 2.26) can be achieved by encouraging additional rental housing. Approvals for new developments should require the affordable units be maintained for the maximum term of years. The Town of Wakefield should monitor housing legislation and assist developers in locating programs to build and maintain affordable housing units.

## **HOUSING STRATEGIES FOR WAKEFIELD - GETTING TO 10%**

Notwithstanding the affordability pressures and the fact that housing in Wakefield is increasingly out-of reach for its current residents and employees, the town remains one of the area's great housing opportunities, a fact that has recently drawn the attention of househunters who wish to "buy in." Wakefield is in an enviable position. The town has a number of tools, including its regulatory powers (zoning and subdivision), surplus land and buildings, the ability to apply for and receive grants, etc., that it is willing to leverage to expand affordable housing in ways that complement its other planning goals.

Wakefield has already initiated steps to address two of its most pressing housing needs—the preservation of existing affordable housing and the addition of housing with supportive services—with the extension of affordability restrictions at Colonial Point and the award of 23 units of Section 202 funding. Other initiatives involve:

- New mixed income rental housing
- First time homebuyer assistance programs: soft second mortgages, down payment assistance, purchase/rehab loans
- Expansion of home repair programs
- Additional new units for first time buyers (locally initiated or supported projects)
- Adaptive reuse of non-residential properties
- Mixed use in commercial districts
- Inclusionary zoning

Wakefield should also make every effort to have all of the Town's affordable units documented and counted by the Commonwealth toward the 10% objective. There are currently many accessory apartments, both documented and undocumented, that should be qualified as counting toward the 10% requirement.

## GETTING TO 10%

The Town has embraced the goal of having 10% of its year round housing stock eligible for inclusion on the State's Subsidized Housing Inventory, the so-called 40B list. On the most recent inventory (dated April 24, 2002 and based on units qualified as of October 1, 2001) Wakefield was at 4.4%.

40B Goals for the Master Plan				
<b>2000 Census: Housing Units in Wakefield</b>		<b>9914</b>		
<b>10% Requirement</b>		<b>992</b>		
		<b>Additional</b>	<b>Cumulative</b>	
	<b>Location</b>	<b># Units</b>	<b># Units</b>	<b>% Affordable</b>
<b>Existing Unit Count</b>			440	4.44%
<b>Existing Units that Could Be Counted</b>				
	Millbrook Estates	10		
	Nahant Street	2		
	Water Street Lodging House by Caritas	26		
	Group Homes	66		
	Completed CD Funded Rehabs	20		
		124	564	5.69%
<b>Proposed Projects Submitted for Reviews</b>				
	Wakefield Crossing (11 Lake Street)	16		
	Parker Road Conversion	2		
	Housing Authority (202 Proposal)	23		
	CD Rehabs with FY2000 Funds	3		
	CD Rehabs with FY2003 Funds	11		
	Nahant St. Group Home (4 units funded by CD)	8		
		63	627	6.32%
<b>Projects Encouraged by Master Plan</b>				
	Colonial Point (2nd Building)	224		
	Hopkins Street (Granite Circle)	144		
		368	995	
<b>Total Affordable (Units and Percentage)</b>			995	10.04%

Note: Once Wakefield reaches 10%, the implementation of an inclusionary zoning bylaw will allow the Town to maintain the 10% affordable standard.



## HOUSING STRATEGIES MAP

Hopkins Street/Granite Circle  
Type D4  
144 units new rental housing

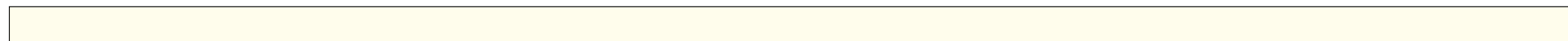
Colonial Point  
Type D4  
224 units new rental housing

North Avenue  
Type D3  
200 units new rental housing

Housing Authority 202 Proposal  
Type D2  
23 units new rental housing

Wakefield Crossing  
Type D4  
134 units new condominium housing  
16 affordable units





Appendix 1 Regional Affordable Housing Report Card										
City/ Town	Total Year Round HUs	DHCD Subsidized Units(1)	% Subsidized Units	10% State Goal	Deficit	% of Subsid- ized units for <80% MFI(2)	# of Subsid- ized units for <80% MFI for families(3)	Population in Group	Executive Order 418 Year 1 Certification Results	
									New affd units/ all new units	# Proactive Steps
Lynn	34,569	4,323	12.5%	3,457	-866	84.6%	1,917	738	71/73HO, 20/ 20R(5)	18
Lynnfield	4,249	78	1.8%	425	347	100.0%	6	0	0/0	9
Malden	23,561	2,585	11.0%	2,356	-229	79.8%	893	379	46/64HO, 134/ 324R	11
Medford	22,631	1,586	7.0%	2,263	677	75.5%	592	536	2/2HO, 1/1R	9
Melrose	11,200	777	6.9%	1,120	343	100.0%	17	291	5/11HO	13
Middleton	2,337	125	5.3%	234	109	100.0%	12	1,357	Did not submit for certification	
North Reading	4,839	47	1.0%	484	437	100.0%	7	113	41/70HO	3
Peabody	18,838	1,278	6.8%	1,884	606	93.9%	117	535	0/0	18
Reading	8,811	387	4.4%	881	494	81.9%	10	146	0/0	8
Revere	20,102	1,798	8.9%	2,010	212	84.5%	534	255	31/32HO, 72/72R	17
Saugus	10,111	600	5.9%	1,011	411	100.0%	109	160	Did not submit for certification	
Stoneham	9,231	494	5.4%	923	429	100.0%	72	282	32/47HO	9
Wakefield	9,914	440	4.4%	991	551	70.0%	83	213	80/123HO	7
Wilmington	7,141	367	5.1%	714	347	58.3%	128	247	98/108HO	17
Winchester	7,860	141	1.8%	786	645	100.0%	11	370	0/0	10
Woburn	15,312	877	5.7%	1,531	654	70.0%	399	100	82/137HO	9
TOTAL	176,137	15,903	9.0%		1,711	84.0%	2,990	4,984		

Lynn and Malden account for:

43.4% of all DHCD subsidized units

Lynn alone accounts for:

27.2% of all DHCD subsidized units

(1) From preliminary 2001 DHCD inventory

(2) Update of 1999 inventory

(3) Market rate units in mixed income developments and 1 BR units excluded

(4) Those enumerated in 2000 Census as “institutionalized in group quarters”

(5) “HO” Home Ownership, “R” Rental

<sup>1</sup> The Comprehensive Permit Law (Chapter 774, or MGL Chapter 40B) provides two tools to facilitate the development of subsidized housing: 1.) it requires all communities to use a streamlined review process for such proposals, including requests for zoning and other local regulatory waivers, and 2.) if less than 10% of a community's year round housing stock meets the statute's definition of low- and moderate-income housing, a State Housing Appeals Committee can overrule an adverse local decision unless the proposed development presents serious health or safety concerns that cannot be mitigated. The types of housing programs and financing mechanisms that constitute a subsidy for purposes of determining whether a community has met the 10% threshold have been subject to modification over time.

<sup>2</sup> Another 62 units have been approved, or are before the Zoning Board of Appeals. As part of this master planning process, sites, funding sources and a timetable have been identified for the additional units required to bring the town to the 10% threshold.

<sup>3</sup> Most of these, it is believed are single room occupancies, with shared kitchen and bathroom facilities.

<sup>4</sup> Until 1998, all federal agencies adhered to these definitions of low- and moderate-income; 80-110% was considered middle-income. Since that time, however, HUD has begun to call 30% of median, extremely low-income; 50%, very low-income; 80%, low-income; and 95%, moderate-income. It now targets its resources to those with extremely low-incomes. For purposes of this report, the more widely accepted 80% LMI standard is used, unless otherwise noted.

<sup>5</sup> Andrew Sum, The Center for Labor Market Studies of Northeastern University, quoted in "The Story of Household Incomes in the 1990s," MassINC, March 2001.

<sup>6</sup> By comparison, right before the market began its 1989 freefall, Massachusetts' median housing price was almost 90% higher than that of the nation and its median household income was 25% higher.

<sup>7</sup> The overall drop in this age group was predictable, reflecting as it does the aging of the post-war generation. In 1990, this cohort included those born between 1956 and 1970; by 2000, it included those born between 1966 and 1980. The "baby boom generation" is typically considered those born between 1946 and 1964. What is problematic for the region is that it is increasingly disadvantaged relative to other areas of the country. The Rocky Mountain states, by comparison, gained workers in this age group during

the same period—some 600,000, nearly the number the New England states lost—and those states saw overall payroll levels increase by 32%. Andrew Sum, The Center for Labor Market Studies of Northeastern University.

<sup>8</sup> A *Household* is defined as any group of people living in a single housing unit, and includes single persons living alone or in groups and multiple families living together as well as families (the more limited category that is profiled under *Family Income*).

<sup>9</sup> CACI calculates median household income at the Consolidated Metropolitan Statistical Area (CMSA) level. The Boston CMSA includes the Boston, Worcester, Lawrence, Lowell, and Brockton metropolitan areas.

<sup>10</sup> Source: Unless otherwise noted, data are from the 2000 Census.

<sup>11</sup> The modest 2% increase between 1990 and 2000 in number of renter-occupied units (versus a 6% increase in owner-occupied units) most likely represents renters living in investor-owned single family or condo units that may at any time be sold to liquidate the investment. In recent years, investor purchases represented between 15-30 transactions a year in town.

<sup>12</sup> More than 21% of Wakefield's renters had lived in the same unit for more than ten years at the time of the 2000 census, and only 26% were recent movers (fifteen months or less in their current location).

<sup>13</sup> Many housing analysts believe that the 30% yardstick by which the government measures housing affordability is inappropriate. They suggest that it is unrealistic to think that large families and/or those with the lowest incomes can meet basic non-housing needs at a minimum level of adequacy if 30% of their income is earmarked for housing. Conversely, they suggest that smaller, or more affluent households, can quite reasonably pay more than 30%, and still have adequate resources available for non-housing necessities. Michael Stone, a professor at the University of Massachusetts and a leading researcher on the subject, has devised an alternative sliding scale to measure "shelter poverty." According to this standard, the affordability gap in Wakefield—and throughout eastern Massachusetts—is much greater than represented here.

<sup>14</sup> Allowing 30% of income for principal, interest, taxes and insurance payments.



## PHYSICAL AND GOVERNMENTAL CONSTRAINTS AND OPPORTUNITIES

### METHODOLOGY AND DATA SOURCES.

The maps that follow combine a number of data sources to define as clearly as possible the factors that limit housing development.

Base maps showing topography, property lines, and buildings were provided by the Town of Wakefield based on aerial surveys. Additional information supplied by MASSGIS has been overlaid on this base map information to identify the physical and governmental constraints and opportunities that create the context for the creation of housing. This information can be used in two ways:

For a specific site these maps identify the zoning district, the presence or absence of significant flooding, historic district designation, slopes, and other features of the site that suggest limitations on housing development.

When seen from a town-wide perspective, these maps also suggest broad patterns in the natural landscape and urban fabric that give character to each neighborhood and the town as a whole. Bands of green along a ribbon of blue suggest water-oriented open space that could sponsor pedestrian connections from one part of town to another. Dense clusters of building suggest the nucleus of a local community that could be reinforced by sensitive infill construction. Steep topography indicates the hills and valleys where development threatens a loss of open space if not handled carefully.

This Master Plan identifies many of these broad patterns and proposes housing development strategies that work with, rather than against this context.

Some of the information conveyed by these maps is prescriptive – zoning, for example. Other information can be used in a more subjective manner, requiring a sensitivity to the nuances of topography and architectural context that maps can only suggest. Sections 5 and 6 of this Master Plan component show how this information can be put to use in designing and evaluating housing proposals.



*The sensitive design of stairs and retaining walls help connect houses to the public street while allowing them to feel part of the natural landscape.*

*A roadway wrapping a hilltop leads to a series of houses on Curve Street.*



## TOPOGRAPHY

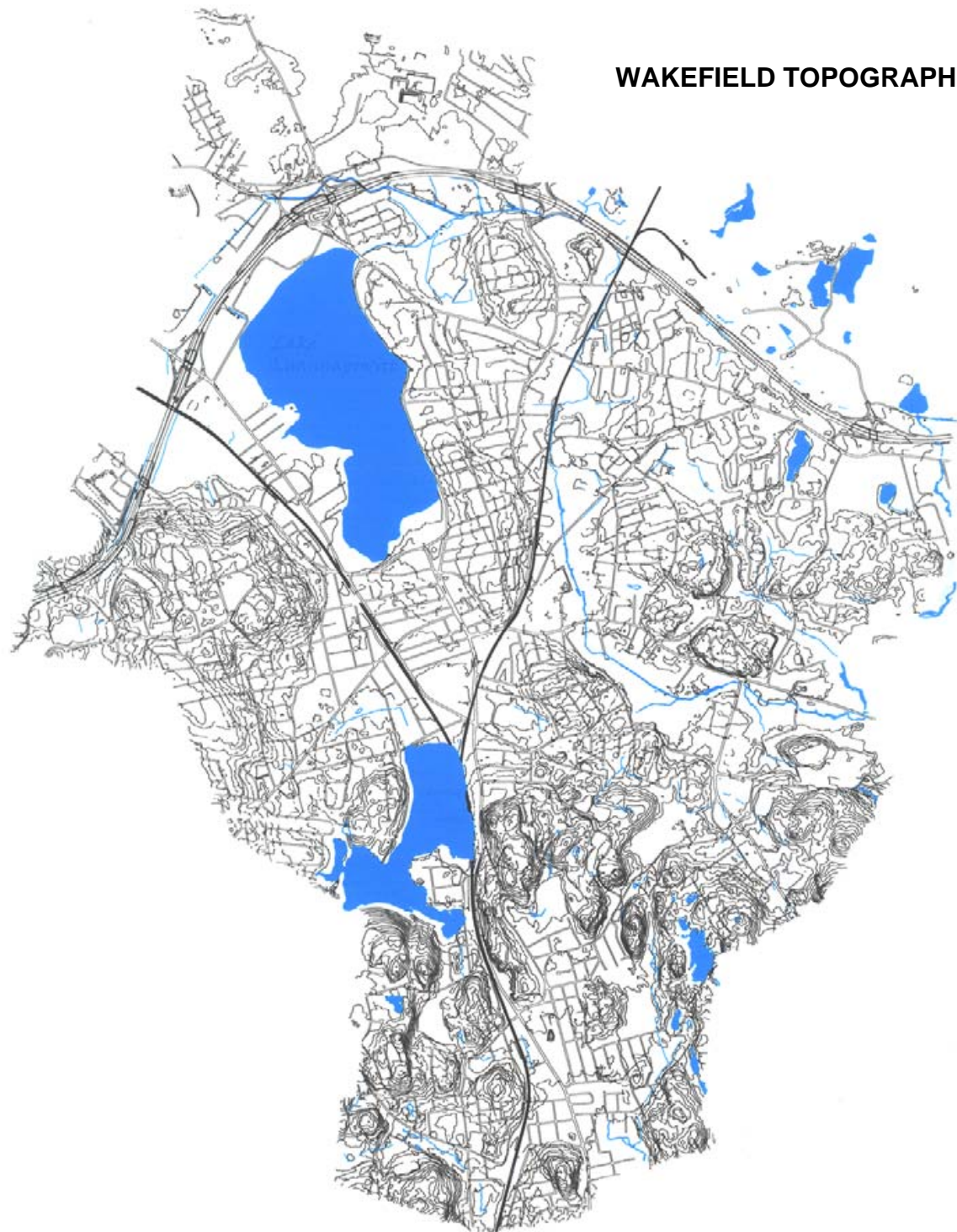
Historically, development in Wakefield has been defined by its topography. Relatively level areas have been developed first. In general, steeper areas have been developed only recently. A street layout that works with the topography and thoughtfully designed retaining walls and stairs can allow housing on hillsides to be integrated into the landscape.

Low-lying areas have generally remained undeveloped due to water control issues and, more recently, wetland regulations. Hillsides have not received the same kind of protection.

To a significant extent the topography defines the experience of moving through and living in Wakefield. The hill lining Main Street through Greenwood, the low areas on either side of the Mill River as it snakes its way through town, and the hills that define intimate neighborhoods in Montrose help give Wakefield its character.

The topographic map suggests that housing development needs to be understood in the context of larger patterns in the landscape. Opportunities for open space networks connecting wetlands or hilltops, the visibility of a site in relation to the surrounding landscape, or the secluded nature of a parcel that suggests its appropriateness for development can all become more apparent when individual parcels are seen in the context of landscape features.





*Topographic lines show the steep slopes that define many areas in Wakefield.*



*The Mill river provides opportunities for scenic open areas, but requires accommodations from adjacent property owners.*

*Wakefield's lakes help define the community, creating scenic places for recreation.*



## WETLANDS

Wakefield's water resources - lakes, streams, and wetlands - are valuable assets, providing recreational opportunities and a connection to nature for residents. Housing development can take advantage of proximity to these areas. Development can also open vistas to lake views and provide access to waterfronts. Controlled public access as part of a greenspace network utilizing easements on private land and publicly owned open space would encourage respect for Wakefield's lakes, rivers, and wetlands.

It is important, however, that new development not exacerbate problems with Wakefield's overburdened drainage system. More effective enforcement of flood zone requirements and a clear definition of the vegetated wetlands would help prevent construction in areas subject to flooding. Prohibitions on increases in flow volumes and a reduction in impervious surfacing can help reduce runoff and the problems that come with it.

Channeling housing development into areas with required drainage infrastructure and away from areas with steep slopes and low-lying land can help preserve wetlands while accommodating new construction.




## WAKEFIELD WETLANDS MAP


Lake Quannapowitt


Mill River and  
associated wetlands

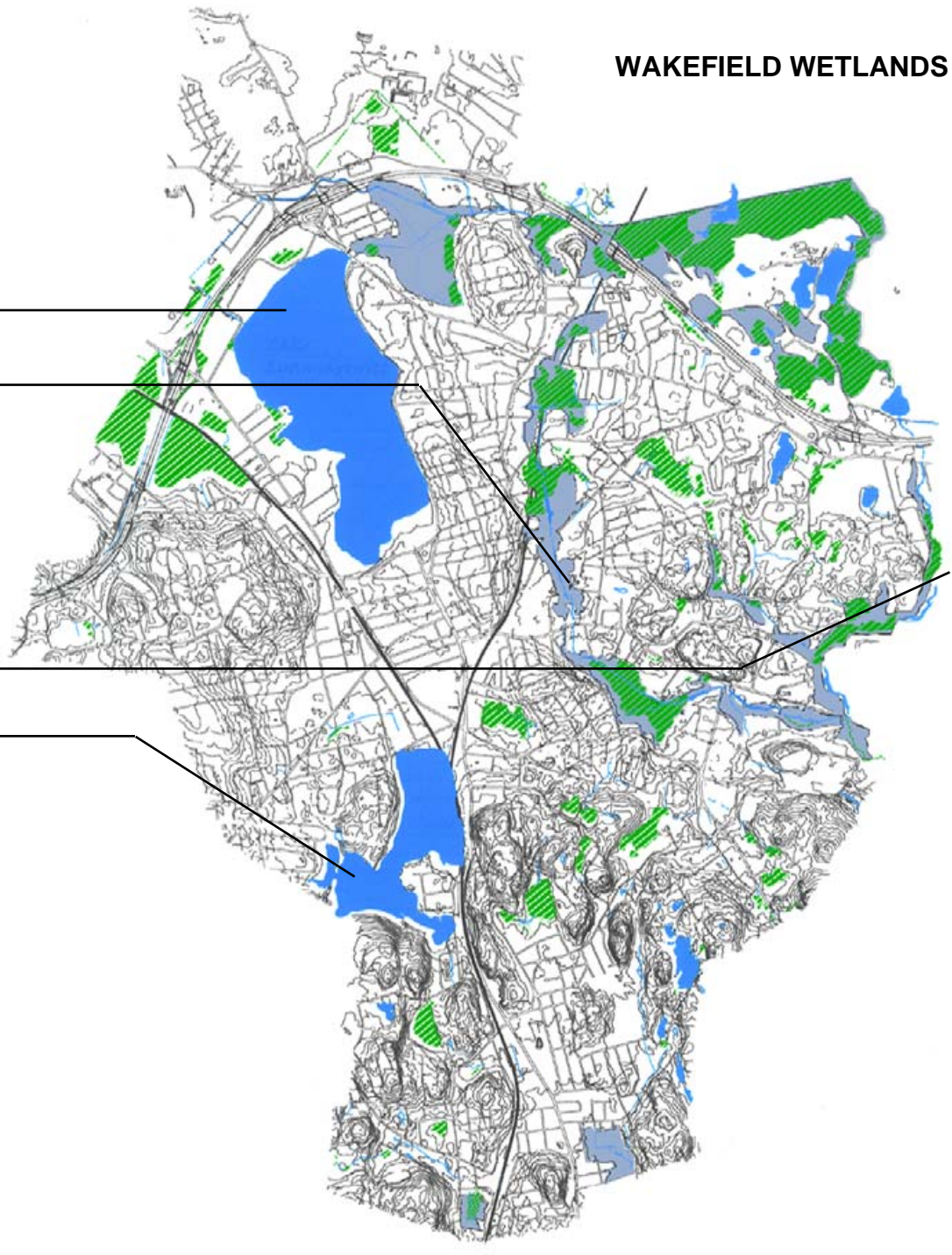
Saugus River

Crystal Lake

 = Streams and Lakes

 = Areas Subject To Flooding

 = Wetlands







*Small commons are the focus of some West Side neighborhoods.*

*The Mill River is potentially part of an open space network connecting different neighborhoods.*



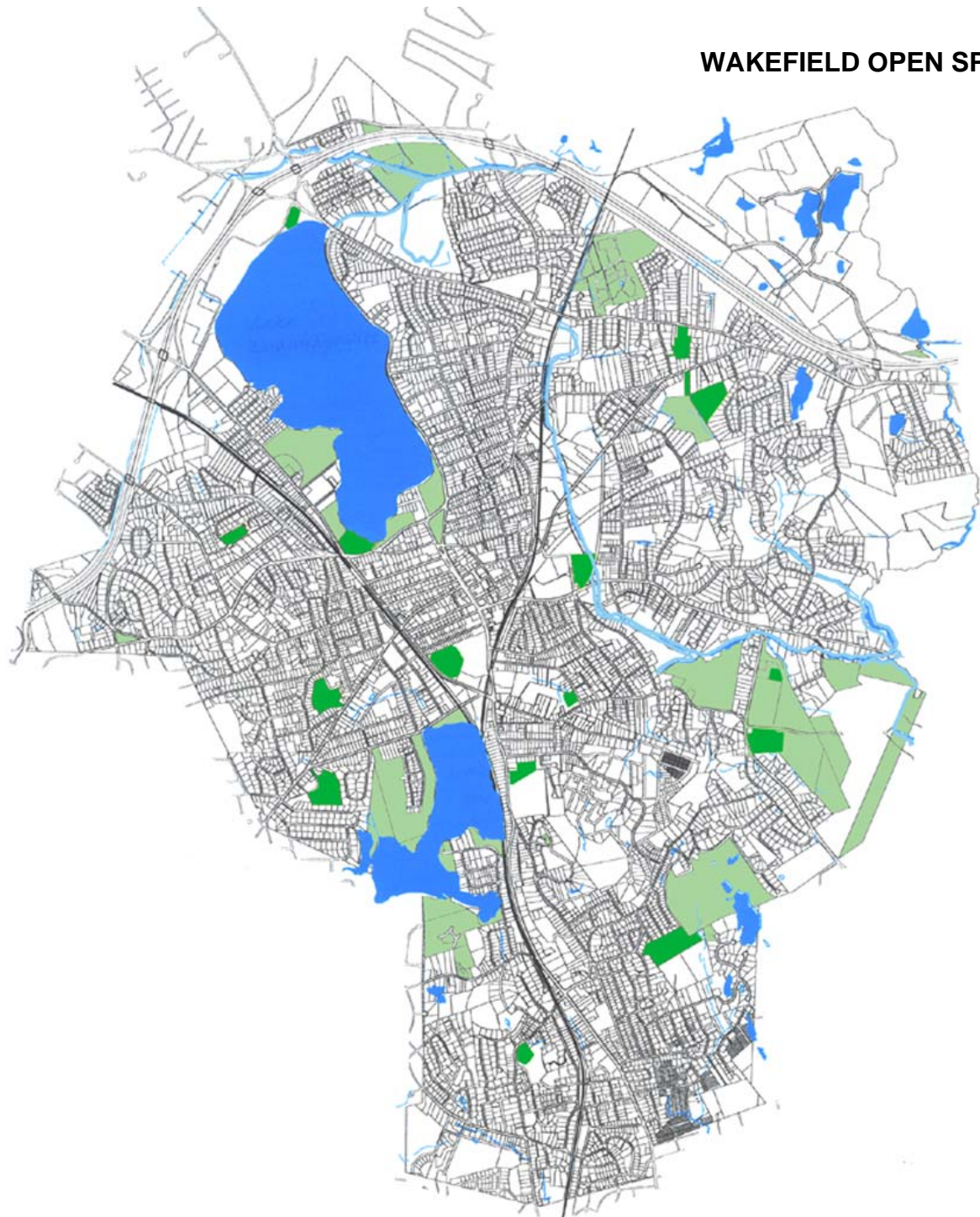
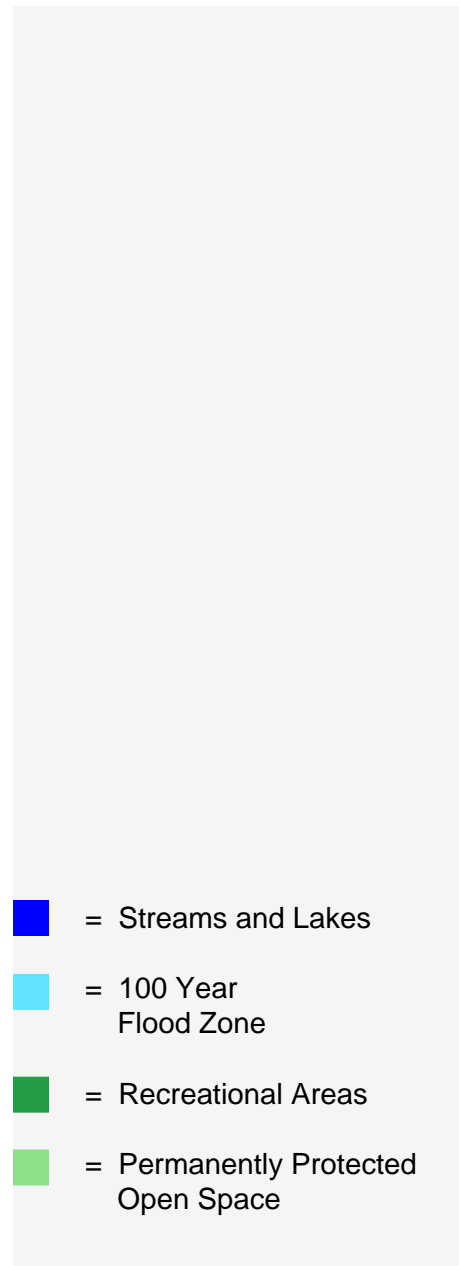
## OPEN SPACE

There is a significant amount of land in Wakefield that has been preserved as open space. Parcels vary in size and are scattered throughout the neighborhoods. Some are parks, some are schools or the land around municipal buildings, and some are parcels that are protected as watersheds, wetlands, areas subject to flooding, or as woodlands. Many properties have significant natural attributes. Others are tucked into residential neighborhoods providing recreation space. And while the wetlands are protected, the hillsides are not and are being steadily developed. These developments to date have been large lot subdivisions involving extensive clear cutting and blasting.

Small greens and other common open spaces are found throughout Wakefield and are much beloved features of many neighborhoods. These features were often built by housing developers because the enhancements made the developments desirable places to live, with corresponding improvements in sales.

Open space is relatively evenly distributed throughout the different neighborhoods, insuring accessibility no matter where residents live. Yet the isolation of one parcel from the next makes it difficult for them to coalesce into an open space network. Such a network would allow the creation of bike trails, walking trails, and wild life habitat that could connect different neighborhoods with an alternative to streets and roadways.

The Mill River, Crystal Lake and Lake Quannapowitt waterfronts, and the wooded hillsides in Greenwood all offer the opportunity for more extended open space systems utilizing publicly owned land and easements on private property. The creation or formalization of these open space networks will help with the evaluation of development proposals for individual parcels, the consideration of the transfer of development rights with private owners and developers, as well as possible Town purchases of additional properties.





*Winding streets and large trees characterize many of Wakefield's neighborhoods.*

*Stone walls and piers mark the entries to several West Side neighborhoods or the parks associated with them.*



## NEIGHBORHOODS

Neighborhood boundaries do not define governmental or administrative areas. They derive from a combination of meaningful natural and constructed features that establish a sense of place with which a person or family feels associated.

These neighborhoods are not homogenous. Many contain a mix of residential and commercial areas giving them a sense of independence. All contain a mixture of open space and denser development, small side streets and major arteries that together create a pleasing sense of variety. They are each of a size that they can be traversed by foot in less than an hour.

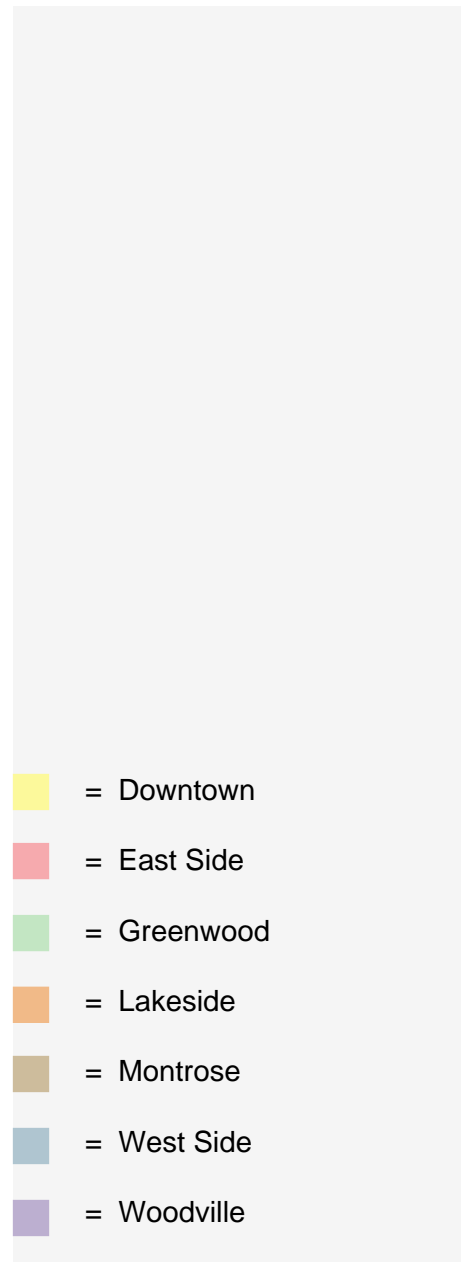
Each neighborhood has its own character. The big Victorians of the West Side, the small bungalows and wooded hills of Greenwood, and the urbanity of Downtown clearly differentiate each neighborhood from the next.

The neighborhood map suggests the relationship of each neighborhood to defining features: a lake, a network of roads, the railroad tracks, a series of hills or wetlands.

This combination of variety and clear character makes prescriptive design guidelines tailored for each neighborhood difficult to define. Yet each neighborhood's sense of identity should help define the appropriateness of development proposals and housing types that are considered. Preserving neighborhood identity while allowing carefully considered change should be a goal of Planning and Zoning Policy.



## WAKEFIELD NEIGHBORHOODS





*Stately houses close to the street give Lafayette St. a distinct character.*

*Wakefield Park's rambling houses are centered on a triangular green.*



## HISTORIC DISTRICTS

Wakefield's Historic Districts form the geographic and cultural core for the Town, a physical link with the past that connects residents to a shared heritage. Their preservation is important in helping the Town to maintain its character. New interventions in these, and surrounding areas, should carefully consider the form and scale of existing buildings.


The real lesson of these districts is not in the nostalgia they induce, nor in the traditional forms and details of their architecture, but in the urban planning principals that structure their use of land.

The homes in the West Side district may be grand, but they are close enough together to form a real neighborhood. Trees, fences and sidewalks along the street make walking a rich experience. Generous porches suggest a connection between public streets and private houses. The streetscape is detailed and evocative, with small parks and green spaces forming a focus for public life. The West Side is an excellent model for new residential development, no matter the size or style of the houses.

The Downtown district's mixture of residential, institutional, and commercial uses, integrated into a dense urban center, is another valuable model for future Wakefield development. The pedestrian oriented scale, the integration of open spaces, and the rich mix of building types is an attractive prototype for new development Downtown or in the smaller commercial cores. The new architecture need not replicate the old to create the strong sense of urbanity that makes this district so attractive.



## WAKEFIELD HISTORIC DISTRICTS

 = Streams and Lakes

 = EXISTING HISTORIC DISTRICTS


1 = Common Historic District


2 = Church-Lafayette Streets

3 = Yale Avenue


4 = Wakefield Park


### PROPOSED


 = Prospect Street Historic District


 = Salem Street Historic District


 = Yale Avenue/Avon-Chestnut Streets


 = Downtown Wakefield Historic Districts

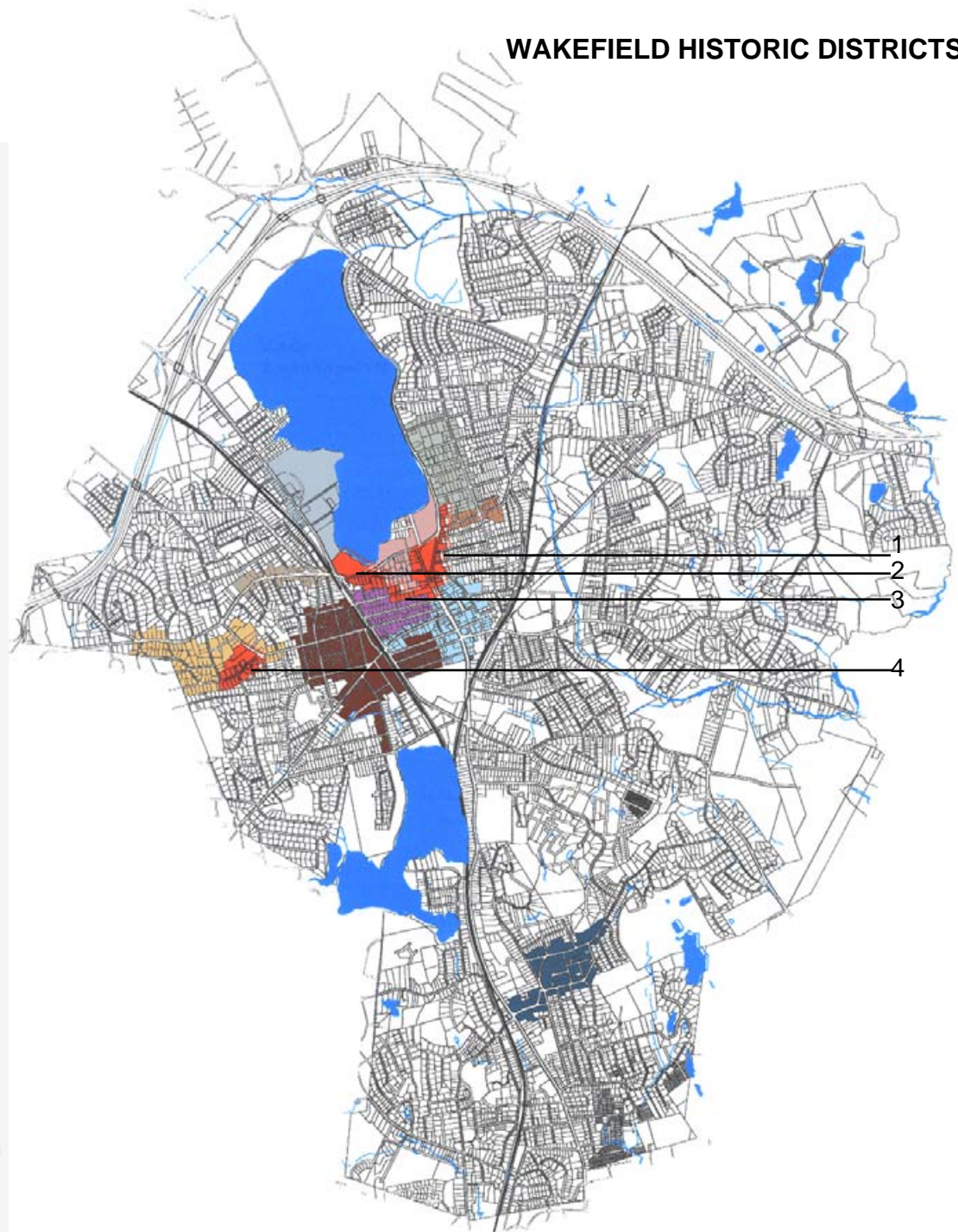
 = North Avenue Historic Districts

 = Lakeside Historic District

 = Greenwood Historic District

 = Common/Church-Lafayette Streets

 = Wakefield Park Historic District Extension





*Zoning that allows mixed use development: retail combined with housing can create strong connections between residential areas and neighborhood centers.*

## ZONING







Zoning is the primary tool towns use to define appropriate and inappropriate uses, dimensional requirements and densities, and design features. It is a crude tool at best, designed to prevent the worst abuses of the public interest, but rarely requiring design excellence or creative problem solving.

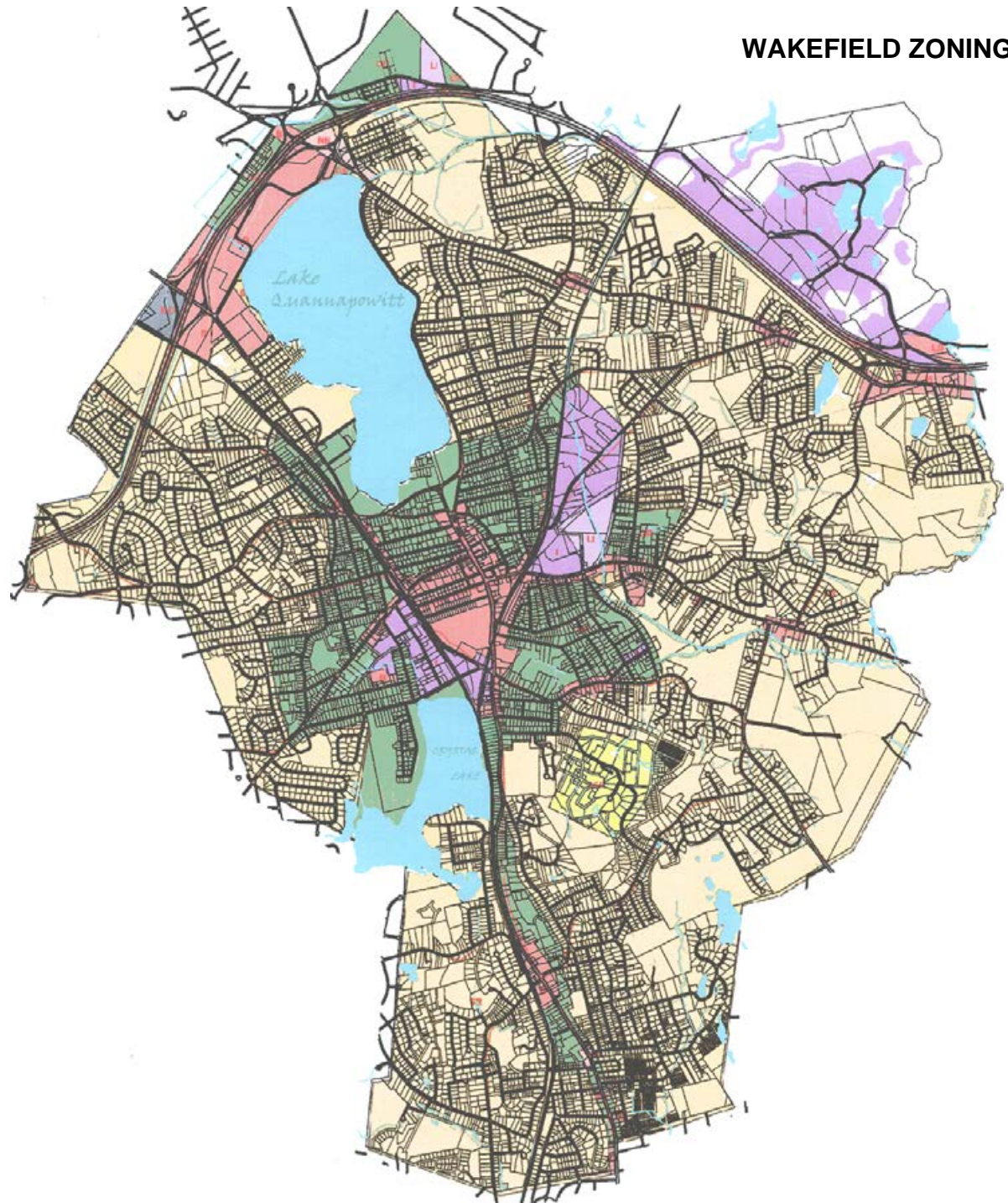
Segregation of uses to prevent the incursion of business and industry into residential areas, and large setback and lot size requirements have not necessarily protected neighborhood character and rural charm as anticipated. The definitive nature of the zones and associated requirements contrast with the fluid nature of town life and the variety of uses and development types accommodated within a zone.

The zoning map clarifies the interrelationship of different zones and suggests how zoning can be associated with planning strategies for specific areas with unique needs and opportunities. All of the constraints and opportunities represented in the maps on the previous pages can be brought to bear on zones and their requirements to reflect a policy consensus on desired patterns of growth.



## WAKEFIELD ZONING

-  = Streams and Lakes
-  = General Residential
-  = Single Residential
-  = Special Single Residence
-  = Business/ Limited Business
-  = Neighborhood Business
-  = Light Industrial
-  = Industrial
-  = Municipal Disposal







## METHODOLOGY AND DATA SOURCES.

The development of housing proposals appropriate for various neighborhoods in Wakefield requires a clear understanding of the patterns of land use and the natural and man-made features that give the town its character. Although there is a tremendous variety from one neighborhood to another – from Main Street’s continuous street wall to Greenwood’s bungalows and wooded hillsides – together they create a tapestry that is uniquely Wakefield’s.

This section of the Housing Master Plan looks at town character from two perspectives. One is qualitative. Photos and text illustrate the feelings evoked by different patterns of building and open space that define Wakefield. These photos and texts are intended to make explicit those qualities that are implicit in people’s impression of the town. They will allow development proposals to be evaluated in terms of a clear set of qualities that make Wakefield attractive.

The second perspective looks quantitatively at four existing neighborhoods that have provided attractive housing for residents. Although their house and lot sizes are relatively small compared to some new developments today, these dimensions help create friendly, coherent, walkable neighborhoods. Relative density is a critical parameter that determines people’s perception of a place and where they put it on the urban to rural continuum. Each of these four neighborhoods is defined by its density in terms of square footage of land per housing unit. This analytical process of quantifying the specific characteristics of these desirable streets and

neighborhoods provides the data to formulate zoning requirements which will continue positive development patterns and scenarios.

**Section 6 – Design Guidelines** of this Master Plan defines more specific architectural features and spatial relationships that make houses into neighborhoods.

Together **Section 4 – Town Character**, **Section 5 – Development Scenarios** and **Section 6 – Design Guidelines** create a kind of Wakefield development primer that suggests alternatives to the development that has reduced the town’s open space and created developments that break from established patterns that define the Town.



*Winding roads, such as Montrose Ave. still maintain a rural character.*

*Protected open spaces along Crystal Lake provide a green buffer for adjacent neighborhoods.*



## NATURAL CHARACTER

Wakefield has a series of natural landscape features that, on the one hand, distinguish it from so many other small towns, and on the other hand, give it an archetypal “small town” character. Unlike so many suburbs that seem to be a part of a seemingly endless sprawl of featureless streets, identical ranch houses, pretentious mansionettes, and could-be-anywhere strip malls, Wakefield has a clear character. Bodies of water, steep hillsides, and wooded lowlands create a series of intimate neighborhoods and scenic vistas that give the Town a unique identity.

Many of these features are threatened by development that fails to recognize the value they bring to residents and visitors. The major features and their contribution to defining Wakefield’s unique identity are described below.

## GLACIATED LANDSCAPE

Wakefield’s finely scaled landscape of hills and valleys was shaped by receding glaciers 20,000 years ago. They create a series of intimate neighborhoods separated by steep slopes and thickly vegetated wetlands. The growth of many residential areas has been limited by unbuildable areas that allow neighborhoods to back up to, or be surrounded by open green areas. These residential pockets, connected to, yet somewhat separate from the remainder of the town, create a sense of place that roots people to the land. This has allowed an urbanized suburb of a large metropolitan area to maintain a semi-rural character that evokes images of pastoral living.

Rocky ledges and steep hillsides provide the kind of dramatic picturesque landscapes that evoke a sense of nature’s drama and beauty. The way they emerge out of wooded low-lands suggest the timelessness of the natural order.

Maintaining the green borders, wetland edges, and rocky ridges that create intimate pockets for living and work is essential if Wakefield is going to continue to offer residents charming landscapes and verdant vistas.

**Many tracts of wetlands and wooded areas should be protected from development. This is especially important when they can be part of an interconnected network of open space for walking and biking.**

**When development does take place in areas of natural beauty it is appropriate to cluster development in order to retain significant areas of open space elsewhere on the property.**

**Steep slopes should be protected from development. Recent housing sited on slopes is often perched in awkward ways that disturb the equilibrium of the area and interfere with its scenic beauty.**

## **TREES**

Despite a century of development, much of Wakefield has an abundance of trees. The older suburbs have tree-lined streets that provide shade and a pleasant place to walk. Protected areas such as the Town Forest and the Crystal Lake watershed provide a forested respite from traffic and congestion. Many streets that pass by wetlands or steep slopes maintain a forested rural character that complements the more urbanized areas of the Town. Due to the finely scaled glaciated landscape, these green areas are spread throughout Wakefield; one is never far from green natural areas.

**New housing developments should leave existing trees in place wherever possible. It takes generations to grow the towering maples and oaks that residents enjoy.**

**New developments should have trees bordering the streets to provide attractive places to walk.**

## **LAKES**

Wakefield's two lakes are important defining elements. With its open shoreline, Lake Quannapowitt offers scenic beauty, recreational opportunities, and a focus for community life. Crystal Lake, on the other hand, is bordered by railroad tracks to the east, protected



*Stone retaining walls can make an attractive transition from hillside, to yard, to street.*



*Excessive blasting and excavation can mar the natural landscape.*



*Protection of critical open space for recreation should be coordinated with development in adjacent areas.*

*Crystal Lake's wooded shoreline provides a striking contrast to downtown Wakefield nearby.*



watershed to the south and west, and public works land to the north. These features protect it from over-development but make it inaccessible for enjoyment and use.

**Redevelopment of multi-family housing in former industrial areas adjacent to Crystal Lake could open up view corridors to the water as well as physical connections from nearby streets to the water's edge. If construction is carefully designed, excessive runoff can be avoided while taking advantage of the Lake's natural beauty.**

## **WETLANDS**

Wetlands occur throughout many neighborhoods in Wakefield and give definition and variety to the townscape. Because they are not appropriate for many kinds of development they provide green edges to many neighborhoods. Purple loosestrife and cattails add color and character to these areas.

In many places wetlands are neglected "backyard" areas removed from public access. In other areas wetland trails make them scenic and recreational features. Wetlands adjacent to the Saugus River become part of a larger network of greenspaces.

**Wetlands are an important part of the local ecosystem and should be protected from excessive development. Development should be located a suitable distance from wetlands to avoid flooding. Appropriately sited housing development, however, could open up to wetland trails and take advantage of wetland views. This would connect residents to the natural beauty of these landscape features.**

## **MILL RIVER**

The Mill River was once an important Wakefield feature along which both housing and industry developed. In recent years the River has been neglected, virtually disappearing in overgrown backyards and industrial areas. Lack of access prevents the public from enjoying its natural beauty and historic importance.



Although turning the Mill River into an improved public resource providing enhanced views, access and recreation is a long term project requiring a substantial public commitment, the development of housing on streets and greenways adjacent to it can provide public access that will help support a renewal effort.

## ARCHITECTURAL / URBAN CHARACTER

### CLEAR URBAN STRUCTURE

Wakefield's system of major streets defined by closely spaced buildings threaded between two lakes and steep hills creates a clearly defined urban structure. Unlike many newer suburbs with major arteries scaled for high speed automobile traffic and residential areas oriented inward on arbitrarily curving streets, Wakefield forms a coherent whole. It is connected to neighboring towns but, like a small rural town, has a center that hold the edges together. A grid of smaller streets connect to main streets, most of which connect to downtown. This creates a sense of belonging which roots citizens to their community.

**New development should be part of Wakefield's urban structure - major streets connecting the central business and civic district, the lakefronts, and neighborhoods. New streets should be woven into the grid-like fabric of the town rather than pulling away from the other neighborhoods that surround them. The creation of rural-feeling enclaves is appropriate, yet not at the expense of civic unity.**

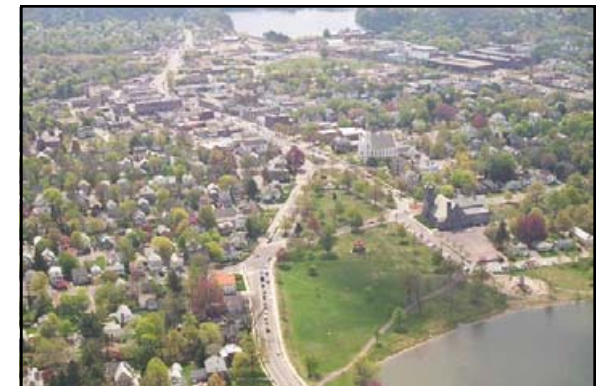
### DEFINED DOWNTOWN

Unlike many towns that have demolished much of their downtown areas to make way for parking and large scale development, Wakefield has preserved its traditional small town center. Public and commercial buildings line Main Street, holding the street edge and maintaining a 1-4 story height. There are some "holes" in the continuous line of buildings downtown, and some buildings, at 1 story, seem too low for the downtown. None-the-less, Main Street retains a sense of place that is clear and dignified and the overall feeling is pleasant, intimate, and traditional, while still keeping up with the times.



*The Mill river seen from Wiley Street is an underutilized natural resource for Wakefield.*

*Downtown's density makes it a social center for Wakefield.*





*The train station on North Ave. is a focus for community life in Wakefield.*

*A line of shops with offices or apartments above defines an intimate pedestrian scale for Main Street.*



North Avenue is a more difficult situation. Like Main St., it has a downtown feel, yet the street wall is less continuous, and due to the commuter rail line on its west edge North Avenue has buildings on only one side. Albion Street running between Main and North is lined with commercial uses and helps give the whole area a unified downtown character.

Other sections of North Avenue also feature commercial buildings, although the development is not quite substantial enough to create a “downtown” feeling.

**New development can and should reinforce the urban quality of Main Street, North Avenue, and other streets in the downtown area. Residential uses above commercial uses reinforce the street wall and bring people into the heart of town where public transportation and stores don’t require car ownership. Higher density in these areas reinforces the vitality of the town center, takes advantage of the commuter rail line, and should be encouraged. Empty lots and underutilized industrial properties should be the focus of development efforts.**

## **ATTRACTIVE RESIDENTIAL NEIGHBORHOODS**

Most of the residential areas in Wakefield are composed of tree-lined streets, relatively closely spaced houses facing the streets, and house designs featuring porches, bays, and other scaling elements. The street grid connects one block to the next and neighborhoods to the center of Wakefield, and along with public spaces defined by trees, this grid of streets reinforces a sense of civic order. This kind of urban coherence and architectural richness creates strong communities.

Some of these neighborhoods are 100 years old or more and have real historic value. Others are of more recent vintage but have a character that is well worth preserving.

**The infilling of empty lots in older neighborhoods with new buildings in scale with the old reinforces the continuity of the streetscape. Extending the fabric of these neighborhoods into unbuilt areas can reinforce the community structure as long as sufficient open space is preserved in the process.**

**New developments can benefit from following the “rules” that make some of the older neighborhoods so attractive - houses that reinforce the public space of the street with porches and bays, sidewalks, narrow streets, trees along the street, and a combination of relatively high density and generous green space.**

### **FINELY SCALED NEIGHBORHOOD ENCLAVES**

Wakefield is composed of defined neighborhoods that are part of the larger town but have their own distinct character. The topography, major thoroughfares and railroad tracks, the grid of streets, the two lakes, greenspaces, and proximity to downtown and other commercial areas give the neighborhoods their own clear identity. Some of the older neighborhoods are organized around small parks or are marked by stone pillars that create gateways. The fine scale and sense of intimacy that these features create avoids the sense of sprawl that characterizes many newer suburbs. At the same time, few of these areas feel isolated or are cut off from other neighborhoods.

Some residential areas have been cut into wooded or sloping areas creating small enclaves with a distinctly rural quality. These enclaves contribute to the character of Wakefield.

**New construction should reinforce the character of Wakefield’s neighborhoods through architectural design, siting, and the use of landscape features. New developments can create their own unique characters that both connect to and distinguish them from other Wakefield neighborhoods. The focal green spaces and gateways that define older enclaves can be a model for new neighborhoods.**



*Large trees, rolling hills, stone walls and grass, tie houses to the landscape.*

*Stone pillars mark the entry to a West Side neighborhood.*





## DENSITY: NEIGHBORHOOD STUDIES

Density is important to our perception of the built environment. Although the way in which buildings are distributed on the site - along the street or set back, clustered together or spread out - is also important, we can quantify building density to suggest how urbanized a site will feel. This allows us to measure the attributes and character of a neighborhood and establish standards for future developments.

Density is neither good nor bad. Appropriate densities for a site depend on where it is located, the density of nearby development, adjacent uses, presence or absence of parking and public transportation, and the appropriateness of the site for use as open space. Downtown areas, for example, can sustain higher densities than rural sites, especially if parking lots or garages are provided.

It is important, however, to look not just at the density of areas, but at their density in relation to un-built areas adjacent to them. Dense development on one part of a site may leave another part of the site clear for use as open space. This type of clustered development may in fact be more effective for maintaining the small-town character of an area than less-dense development distributed more evenly across an entire site. Parks, wetlands, wooded hillsides, planted intersections, and even the streets themselves, if lined with trees, contribute to open space. These historic patterns of building are similar to what is now termed “conservation subdivision” or “cluster” development.

Four existing neighborhoods are shown on the following pages. Their densities have been tabulated in terms of square footage per dwelling unit, and their spatial character is described. They exemplify many of the urban design virtues that give Wakefield its character, and provide a key for how new development can reinforce the best qualities of the town.

Although the way in which buildings are disposed on their lots and along the streets in these neighborhoods is as important as the square footage of lot area per unit, this number is a way of describing these existing neighborhoods and helping the city to build more such neighborhoods where appropriate.

## DEVELOPMENT OPTIONS

**To conceptually define development options, this Master Plan establishes four density levels that will be used to characterize existing neighborhoods and proposed development models. The Implementation section of this report will then key these densities to zoning requirements that will help insure that housing construction will have public as well as private benefits.**

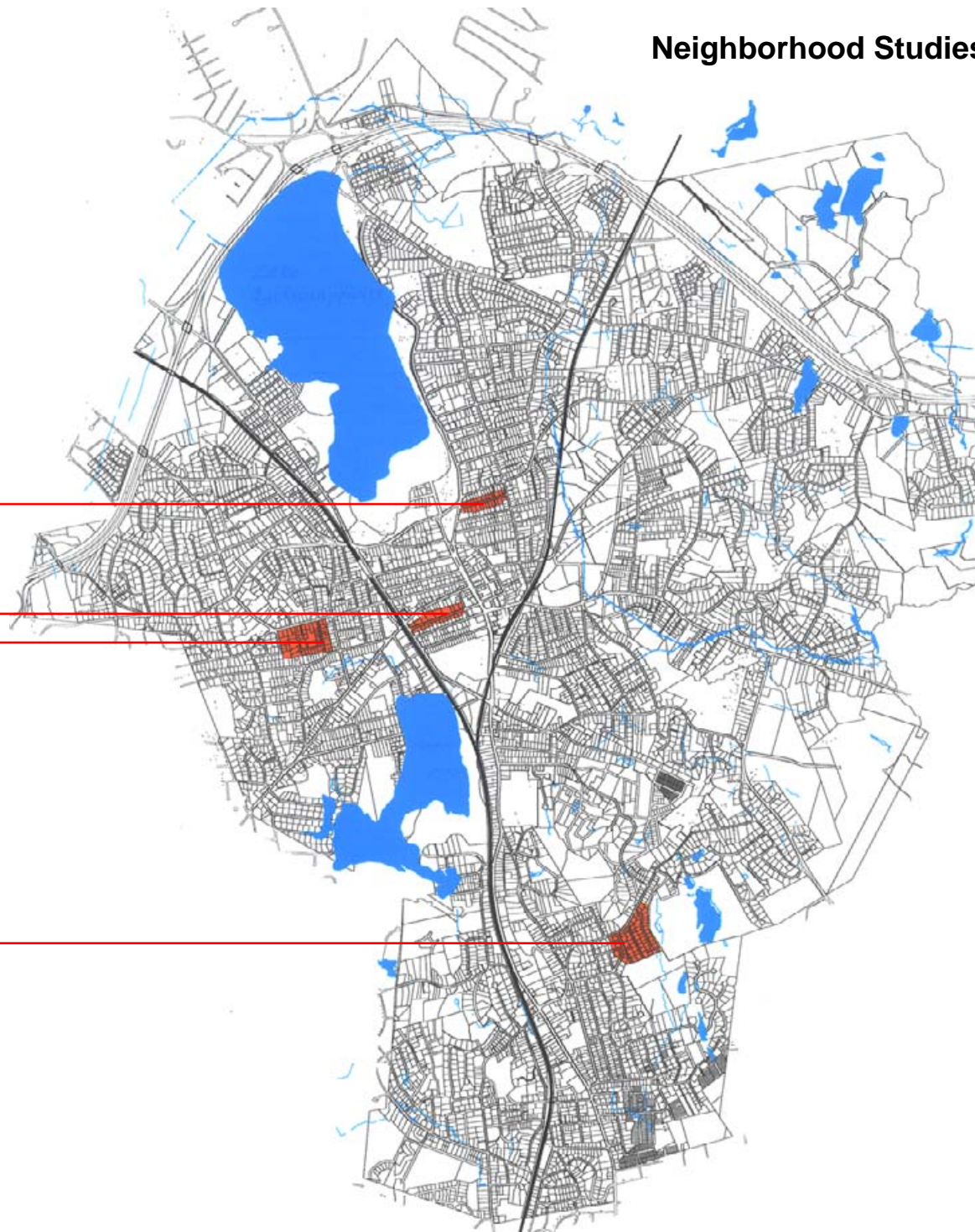
- **D1 density:** Greater than 5,000 square feet of lot area per dwelling unit  
**D1 Development Model:** a set of recommendations for a new single family cluster ordinance modeled on Conservation Subdivision Design or CSD, intended to replace the current Cluster bylaw;
- **D2 density:** 3,000 to 5,000 square feet per unit  
**D2 Development Model:** an attached single-family version of D1 that is meant to fit in well with existing neighborhoods and provide new affordable housing;
- **D3 density:** 1,500 to 3,000 square feet per unit  
**D3 Development Model:** a mixed use housing and retail concept modeled on traditional New England main street development and intended for use along North Avenue near the commuter rail station downtown, and on Main Street, both downtown and in Greenwood;
- **D4 density:** Less than 1,500 square feet per unit  
**D4 Development Model:** a medium density, mid-rise model for additional development on the Colonial Point housing site in Edgewater Office Park, and perhaps at other locations that have yet to be identified.

Pearl Street Study Area

Richardson Avenue Study Area

Ashcroft Street Study Area

Fell Street Study Area





*Houses and hillside create a distinctive neighborhood character.*

*Relatively small houses, big trees, fences and landscaping help define Greenwood's narrow streets.*



## **ATWOOD STREET/ FELL STREET/ MAPLE WAY**

### **DENSITY D1: 7155 SQ. FT. OF LOT AREA/DWELLING UNIT**

The Greenwood section of Wakefield is composed of fairly small houses on small lots surrounded by open green space. The density creates a strong sense of neighborhood while the open space ties it to the rural landscapes associated with New England communities. This pattern of building provides a model for future development, balancing affordability, a strong neighborhood, accessible open space, and an appropriate character.

Greenwood neighborhoods generally conform to these design and planning principals:

- Level areas have been developed while sloped areas and wetlands have been left open reducing costs and damage to the landscape.
- Lots are small and houses are clustered along streets creating a sense of community. They share the surrounding landscape for visual and recreational pleasure - many houses look out onto parks and wooded hillsides. The density prevents a sense of sprawl while maintaining a rural character.
- Houses face the street with consistent setbacks, welcoming porches and attractive facades while street trees reinforce the civic quality of the public sidewalks.
- Houses are within walking distance of public transportation and commercial areas reducing dependence on cars.







*Clustering of houses along Ashcroft Place allows open space to be maintained behind and creates a strong sense of community.*

## **ASHCROFT PLACE**

### **DENSITY D1: 6700 SQ. FT. OF LOT AREA/DWELLING UNIT**

Located in the West Side off of Chestnut Street, Ashcroft Place embodies urban design principals common to both new development and traditional development in Wakefield. These include:

- Houses are on a cul-de-sac, removed from through traffic and creating a close-knit sheltered sense of community. The village-like character is appealing.
- The enclave is a part of the grid of streets that connect Ashcroft to nearby neighborhoods and downtown. Houses are tied to the larger urban context.
- Houses are clustered close together around an access drive allowing a significant area of surrounding land to remain open. Lot area for each house is small; common open space is relatively large. Paved area is minimized by avoiding long driveways.
- Houses are built on relatively flat land; the open space has more topographic variation.
- Houses anchor the corner of Ashcroft and Chestnut, reinforcing the sense of a walkable street animated by houses.

This small development that undoubtedly predates any zoning regulation in Wakefield embodies many of the design principles of the “conservation subdivision” proposed as a contemporary approach to reducing sprawl and maintaining open space.







*Trees, porches, and sidewalks help create a comfortable pedestrian environment.*

*Simple house plans can accommodate well designed additions and changes allowed by zoning without disturbing the character of the neighborhood.*



## PEARL STREET

### DENSITY D1/D2: 5000 SQ. FT. OF LOT AREA/DWELLING UNIT

Pearl Street is typical of many of the older neighborhoods in Wakefield and throughout the United States. Development took place before most families had two or three cars, allowing close spacing of houses with parking on a narrow driveway or on the street. Although current automobile use makes the development of houses and lots of with these proportions difficult to build, they still offer a neighborhood model that defines the character of Wakefield.

The Pearl Street neighborhood is defined by the following characteristics:

- Houses enfronting the street with similar setbacks from house to house, defining the street as a neighborhood-oriented public space.
- Consistency of streetscape - curb, planting, street-trees, sidewalk, front yards, porches, house facades - to unify street and neighborhood and provide a lively streetscape.
- Long narrow proportions of houses and lots allow a balance between high density with adequate yards on front, sides and rear. Density allows significant population near downtown amenities supporting retail and recreational facilities without overloading parking.







*Multi-family buildings allow relatively high density near downtown transit and shopping, while maintaining green space.*

*Attached housing increases density while providing amenities like porches and front lawns.*



## RICHARDSON AVENUE

### DENSITY D3: 2500 SQ. FT. OF LOT AREA/DWELLING UNIT

Immediately adjacent to downtown retail, Richardson Avenue between Main Street and North Avenue is lined by multi-family housing. Buildings on the north side of the street consist of “bars” of units in various configurations. Buildings on the south side are the size of large single-family houses on small lots containing multiple (two, three, or four) units. Although open space is limited, density is appropriate for a central business district. These buildings are characterized by:

- Long, low and relatively narrow building proportions that allow multi-family aggregation of units while avoiding massive, block-size developments that would be out of scale with the neighborhood.
- A variety of configurations that allow a single building type to be adapted to many different urban configurations including housing on upper floors above retail.
- A transitional building type between continuous “Main Street” retail and neighborhood single and two-family housing.
- High unit count per acre close to downtown and public transportation - appropriate for elderly who may not have or need cars.







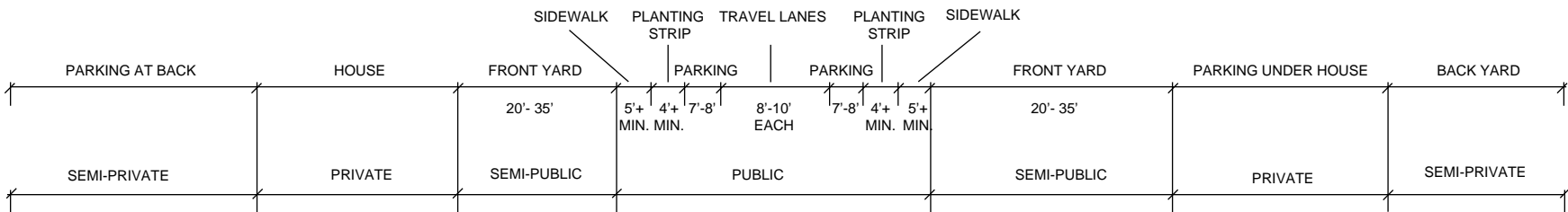
*Aerial view of single and multi-family housing on Wakefield's West Side looking east toward Harvard Mills at upper right.*

Traditional patterns of development in Wakefield give the town a distinct character, making it an attractive place to live. These patterns are defined by density, and by the relationships between buildings, streets, and the landscape. Private and public space are both given the kind of coherent form that creates a strong sense of community.

The neighborhood densities noted on page 4.8 form the basis for the development option scenarios described in the next section of this report, and for the design guidelines and implementation strategies in Sections 6 and 7.

The intention is not to create a nostalgic evocation of a bygone era. It is to encourage the development of housing that meets a broad range of contemporary needs while protecting the natural environment and the town's strong neighborhood structure. The result will be the creation of the kinds of pedestrian oriented communities that have attracted people to Wakefield for well over a century.

FENCES, PLANTINGS, STEPS  
AND PORCHES MEDIATE  
FROM PUBLIC TO PRIVATE  
ZONE







## DEVELOPMENT OPTION SCENARIOS

### INTRODUCTION AND METHODOLOGY

The sites, planning strategies, and housing types that developers choose are governed by a series of factors including economics, governmental regulation, and the imagination (or lack thereof) of the developers and those reviewing their proposals. The long-term quality of life for the residents of Wakefield does not always set the standards for the development that takes place.

Having established a need for certain types of housing, and having documented existing patterns of development that have created a positive environment in many parts of Wakefield, the Housing Master Plan proposes four specific development scenarios to fulfill those needs while reinforcing the patterns that define Wakefield's character. Enhancing the quality of life in Wakefield while being realistic about economic and regulatory constraints is the goal of these proposals. Proposed changes to regulations and a list of programs to help overcome economic constraints follow in later sections of the Housing Master Plan.

Although these planning proposals are specifically tailored for their sites, they are intended to provide models for the development on a range of similar sites. For each site we have illustrated existing conditions. For the D1/D2 (Wiley Street) site the build-out allowable under current zoning is illustrated. The development proposals for all of the sites require some regulatory changes that are necessary in order to offer the strongest

possible planning solutions to a range of Wakefield needs. Density, defined by square footage of lot area per dwelling unit, is noted. Density classifications D1 - D4 allow comparisons to sites discussed in the Density and Neighborhood Studies portions of the Town Character section of this Master Plan and to Wakefield's Zoning Ordinance.

These models can be used to build a consensus around the enacting of changes in the Town's regulatory requirements. They can also provide physical models for development, suggesting the design and dimensional qualities that create strong communities balancing private and public good. The design approaches shown differ from much of the development that has taken place in Wakefield in recent years. However, these approaches have a lot in common with the traditional development that has given Wakefield its attractive small-town character, as well as progressive development in communities around the country that are tackling issues similar to those faced by Wakefield. These approaches are often called "smart growth" proposals in their emphasis on a comfortable pedestrian scale that leads to a reduction in regional sprawl.

Four detailed development scenarios, two on Wiley Street, one on North Avenue, and one at Colonial Point, are followed by additional development scenarios on other sites that are typical of those in Wakefield.

## THE CONCEPTUAL DESIGN MODELS:

- D1 – a set of recommendations for a new single family cluster ordinance modeled on Conservation Subdivision Design or CSD, intended to replace the current Cluster bylaw;
- D2 – an attached single-family version of D1 that is meant to fit in well with existing neighborhoods and provide new affordable housing;
- D3 – a mixed use housing and retail concept modeled on traditional New England main street development and intended for use along North Avenue near the commuter rail station downtown, and on Main Street, both downtown and in Greenwood;
- D4 – a medium density, mid-rise model for additional development on the Colonial Point housing site in Edgewater Office Park, and perhaps at other locations that have yet to be identified.

The conceptual models have been designed to fit on specific sites in Wakefield. These sites are shown on the Site Locations Map. However, the models are more than specific site solutions. They are more generally intended as illustrations of design principles and planning approaches that should be implemented in Wakefield in order to direct and encourage private development toward the best interests of the Town.

## Site Locations Map





*The Mill river provides an attractive open space towards which a development could be oriented if properly protected.*

*Wiley Street site in winter:  
Wakefield's wooded hillsides are natural assets that are well worth preserving.*



### EXISTING CONDITIONS

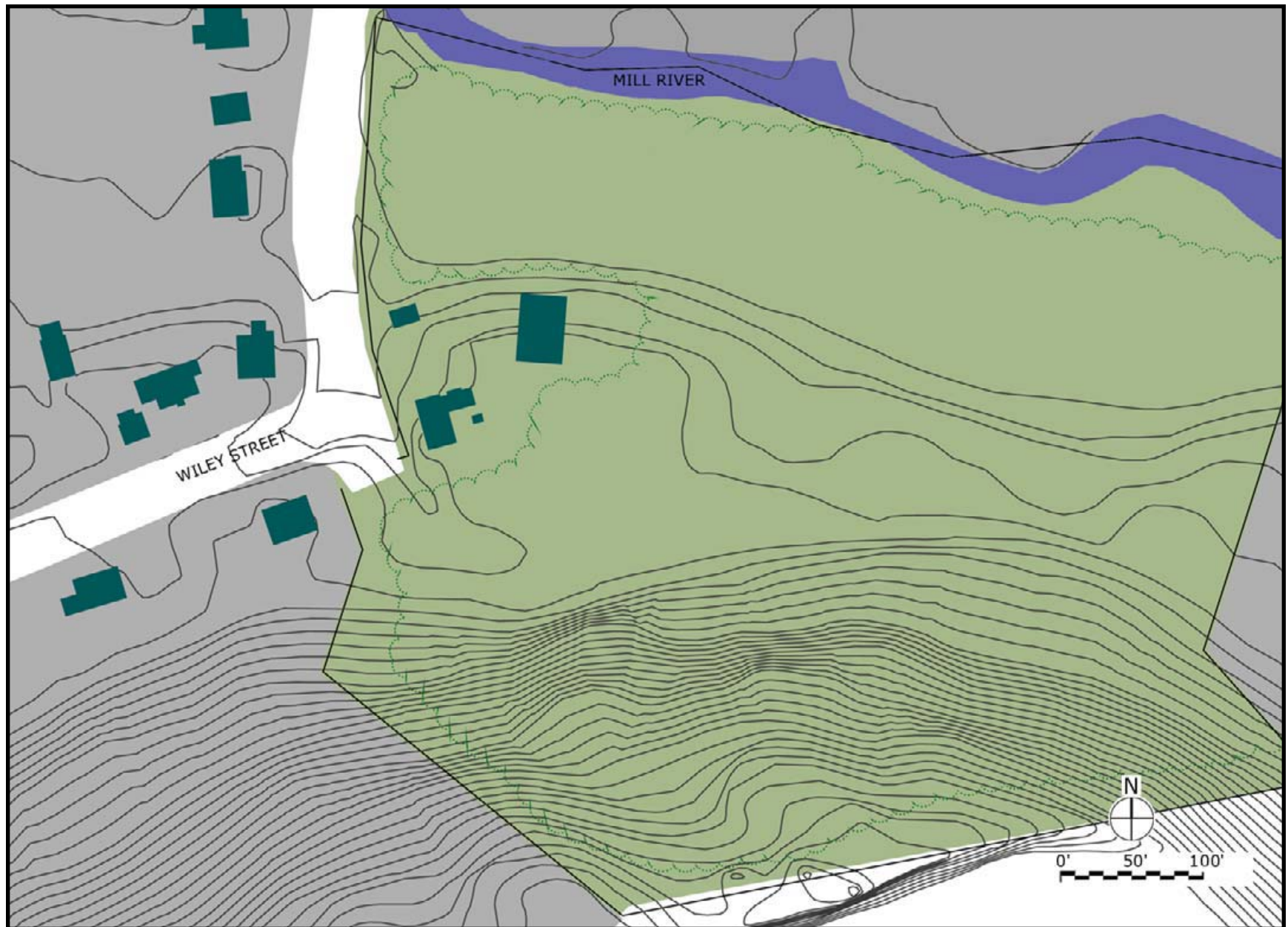
The tract of land that the D1 concept model is illustrated on is an 8.5 acre parcel off Wiley Street in the East Side/Woodville neighborhood. The property is bounded by the Mill River to the north, Breakheart Reservation to the east, and the Vocational Technical High School ball fields to the south. Like many of Wakefield's undeveloped parcels, it is also dominated by both wetlands and steep hillside. Despite this, it had been targeted for development, and engineering plans had been developed and submitted for a twelve unit large lot subdivision. However, the MDC intervened and purchased the property, preserving it as open space.

This parcel was chosen for the design of the D1 concept model because it is an excellent example of the environmental and visual sensitivity of the remaining open spaces in Wakefield, sites that are at a high risk of being developed. At the same time, the illustrated D1 proposal is only conceptual because the site is now permanently protected. The choice to design for a permanently undevelopable site reinforces the point that the Master Plan is not actively proposing development on any sites in Wakefield. Rather, it is proposing best practices for development that others may propose, now and in the future.

Wiley Street existing conditions include:

- Connection to an existing residential street on one end, and connection to open space and the Mill River on the other sides.
- A limited zone of relatively flat, dry land.
- Steeply sloping areas on one side of the flatter area, developable with additional expense and with extensive clear cutting, blasting, and altering of the existing topography.
- Wetlands on the other side of the flatter area, offering scenic views as well as development constraints due to flooding and drainage concerns.





### SITE DESCRIPTION

Site 24, Map 40  
8.55 Acres, 372,506 sq.ft.  
Zone – SR Single Residence



*Houses scattered along a road often lack a comfortable sense of community and pedestrian scale.*



*Insensitive development on steeply sloping sites can result in damage to a once attractive landscape.*

### PROPOSAL DESCRIPTION

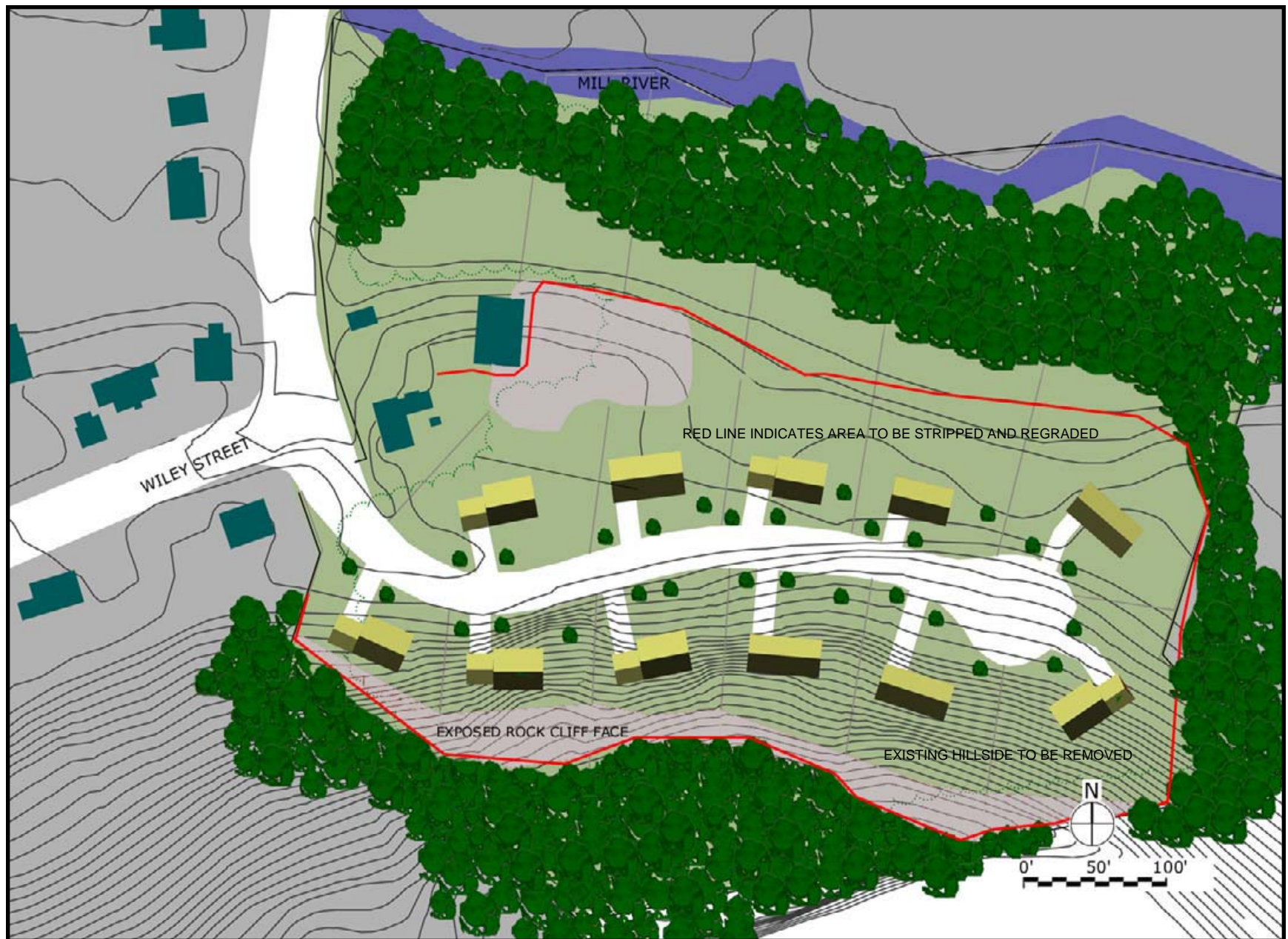
New subdivision of single family lots between 12,516 and 43,000 sq. ft. as per developer's recent application to city under the current zoning requirements.

- Average lot 24,000 sq.ft.
- House footprint 2,000 sq.ft.+  
2 – 3 car garage for each house.
- 1.4 units per (total) acre.
- Would require significant cut and fill to create level building sites.  
Requires clear cutting of extensive portions of the site along with substantial blasting, removal of bedrock, and alteration of topography.
- Would require significant storm water retention and other wetlands engineering.

### PUBLIC BENEFITS

- 12 new houses for buyers at upper income level.
- Tax revenue (offset by cost of municipal services).
- No public open space or affordability benefits provided other than paved cul-de-sac.







*Large lot development requires clearing and regrading of extensive land areas.*

### IMPLEMENTATION REQUIREMENTS – LEGAL

- No change from current zoning required.
- Given the limited usable area between the flood zone and the steep slope, this site is inappropriate for large lot development. A slope ordinance would prevent the most environmentally damaging cut and fill on these kinds of sites. Changes in zoning requirements would encourage Conservation Subdivision Development instead of large lot development.

### IMPLEMENTATION REQUIREMENTS – ECONOMIC

- Changing economic conditions affect desirability and feasibility of this kind of development proposal.
- Requirements for other development options change the economic context for subdivision development.

*Current zoning does not always encourage preserving landscape features.*









### SITE DESCRIPTION:

Site 24, Map 40  
8.55 Acres, 372,506 sq.ft.  
Zone – SR Single Residence



*A 100 year old development in Cambridge clusters three houses around a green.*



*Careful siting can work around natural site features.*

### PROPOSAL DESCRIPTION

The D1 concept is a new model for single family cluster development. It is intended to replace Wakefield's current cluster ordinance. More importantly, it is intended as the preferred model for all future single family residential development in Wakefield, in contrast to the current cluster bylaw which has never been put to use.

The D1 concept model is based on Conservation Subdivision Design guidelines, or CSD, which uses a yield plan to determine the number of home sites allowable under conventional zoning, and provides the same number of units organized differently on the property. Basing the yield on the as-of-right yield of 12 lots in the conventional subdivision design, the D1 scheme, therefore, will also have 12 sites.

The D1 concept model preserves a minimum of 40% of the land for common use. 30% of the land is preserved in an undisturbed condition and 10% as a shared green or other common area as shown in the illustration. Features include:

- 12 new houses cluster around a public entry green with common open space surrounding the conservation subdivision type development.
- Average lot 8,000 sq.ft. House footprint 1600+ sq.ft.
- Parking for two cars in detached garage behind or in lower level. Shared driveways minimize paving and maximize green space.
- 1.4 units per (total) acre. Approx. 225,000 sq. ft. of public open space. Density excluding conservation land: approximately 5 units/acre or 8,712 square feet lot area per dwelling unit. Density similar to D1 development in Greenwood - see Neighborhood Studies, Section 4.

### PUBLIC BENEFITS

- Clustering of units around open community green creates a public open space as an extension of Wiley street
- Clustering of units and reduction in lot size allows approximately 225,000 sq.ft. of land to be retained as common space in a natural condition.
- Open space connects to Mill River and other public or potentially public land contributing to creation of an open space network.
- 12 new houses contribute to overcoming the housing shortage. Smaller lots and houses lower cost, helping families with income levels whose needs are not being met.
- Inclusionary zoning can insure affordable units.







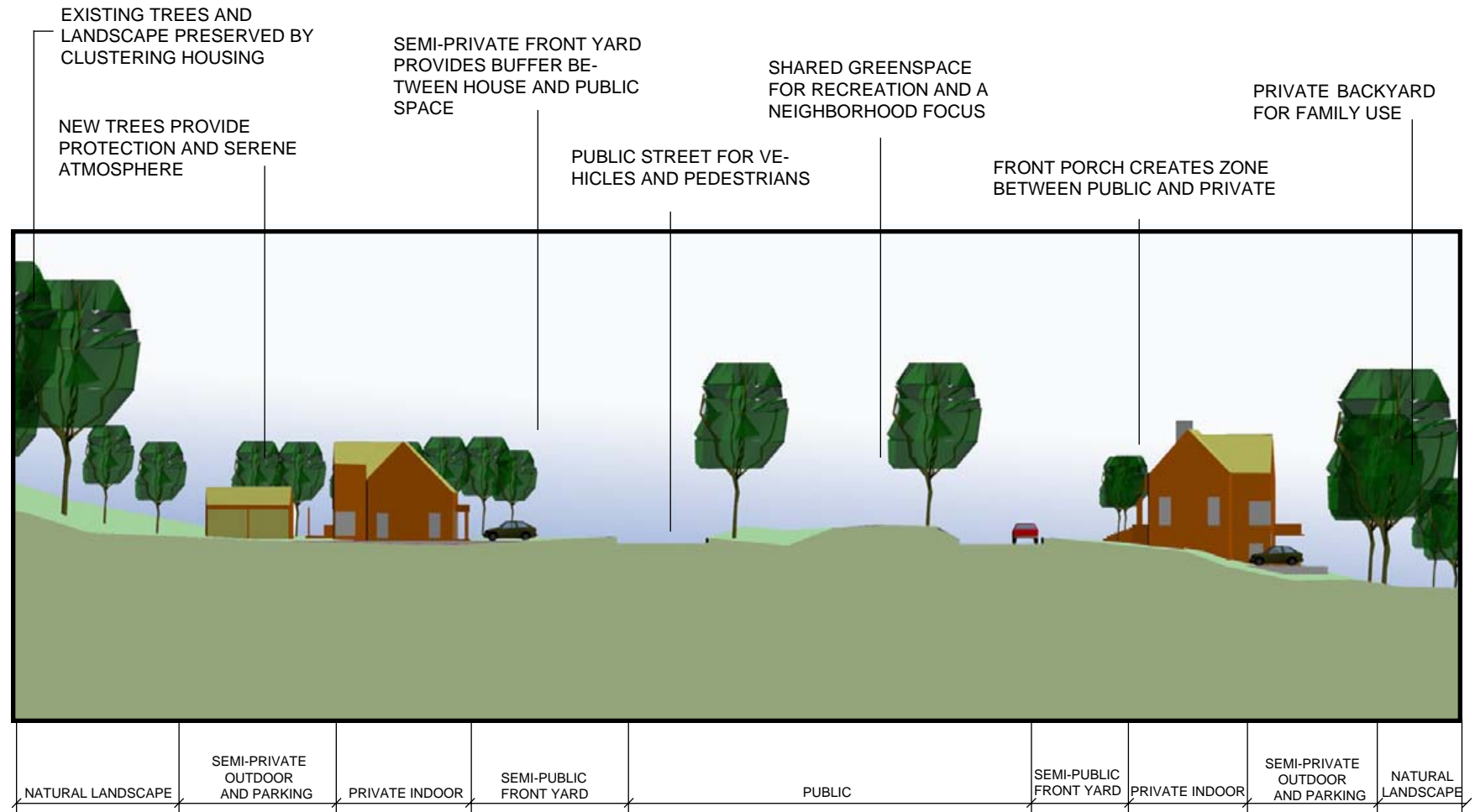
*Placing garages behind houses allows porches and landscaping to define public street.*

### IMPLEMENTATION REQUIREMENTS – LEGAL

- Adopt a Conservation Subdivision Design type zoning bylaw.
- Permit cluster development on smaller parcels than currently allowed.
- Allow multi-family in SR District under controlled circumstances. (See Section 7 - Implementation)
- Revise dimensional requirements for clusters – reduced frontage, etc.. Consider reducing 30' setback to adjacent property.
- Allow shared driveways.
- Revise road requirements – less asphalt and more green. Reduce developer expense in return for other Town benefits.
- Create an expedited special permit process to encourage Type D1 development in SR zoning districts.
- “Friendly 40B” - private sector negotiation with Town - can help balance public and private benefits.

### IMPLEMENTATION REQUIREMENTS – ECONOMIC

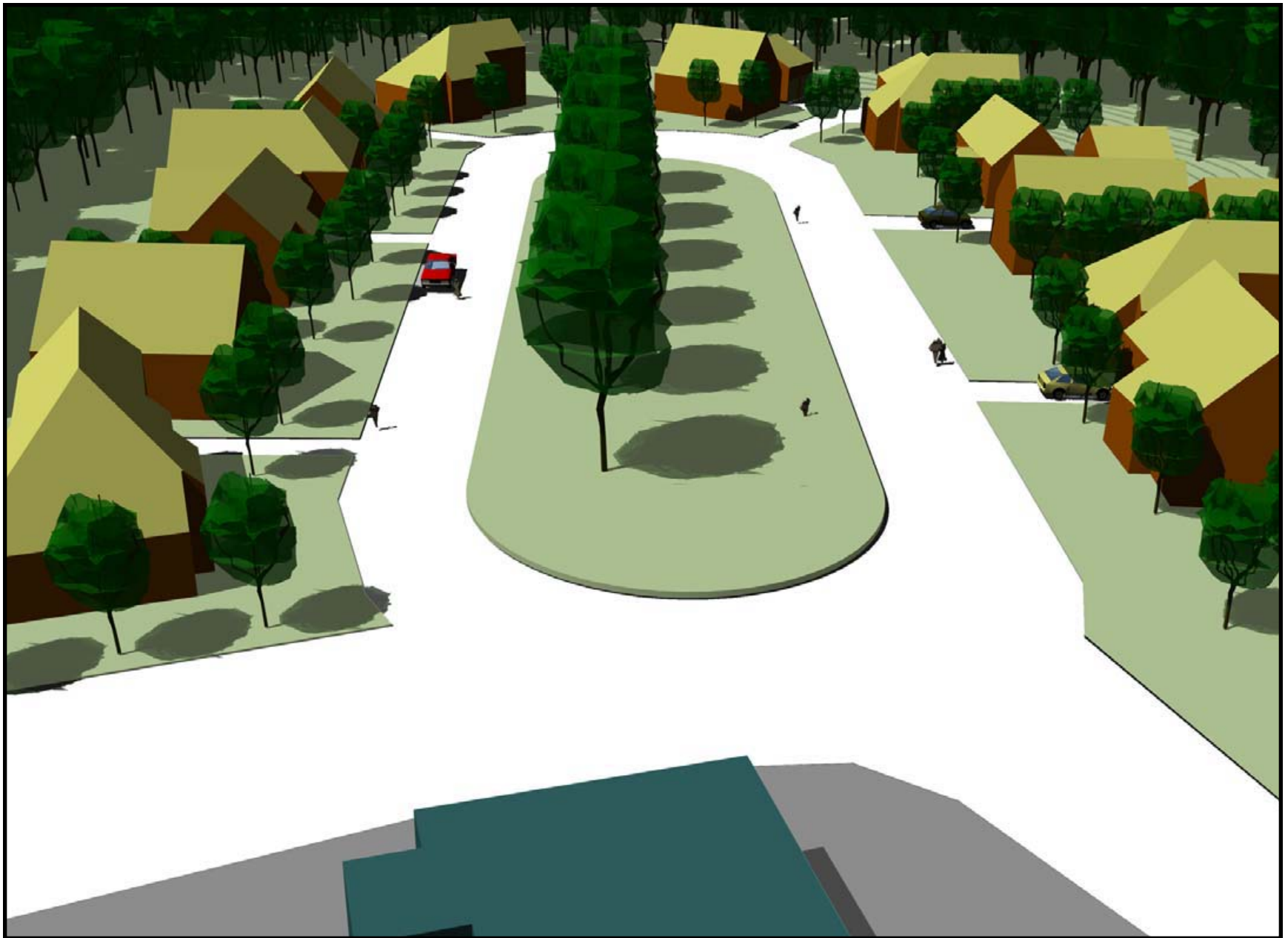
- Negotiate with DPW and Fire Department to reduce infrastructure cost while protecting public safety.
- A much denser project with a 40B override of Zoning or a large lot subdivision with larger houses are likely to remain more economically attractive options for many developers unless cluster is equally economically advantageous to land owner.
- Inclusionary zoning provision for permanently affordable units.



The common area at the heart of the development provides both a focus for the community and a generous green space that reinforces the semi-rural character of the streets around it.







### SITE DESCRIPTION

Site 24, Map 40  
8.55 Acres, 372,506 sq.ft.  
Zone – SR Single Residence

### PROPOSAL DESCRIPTION

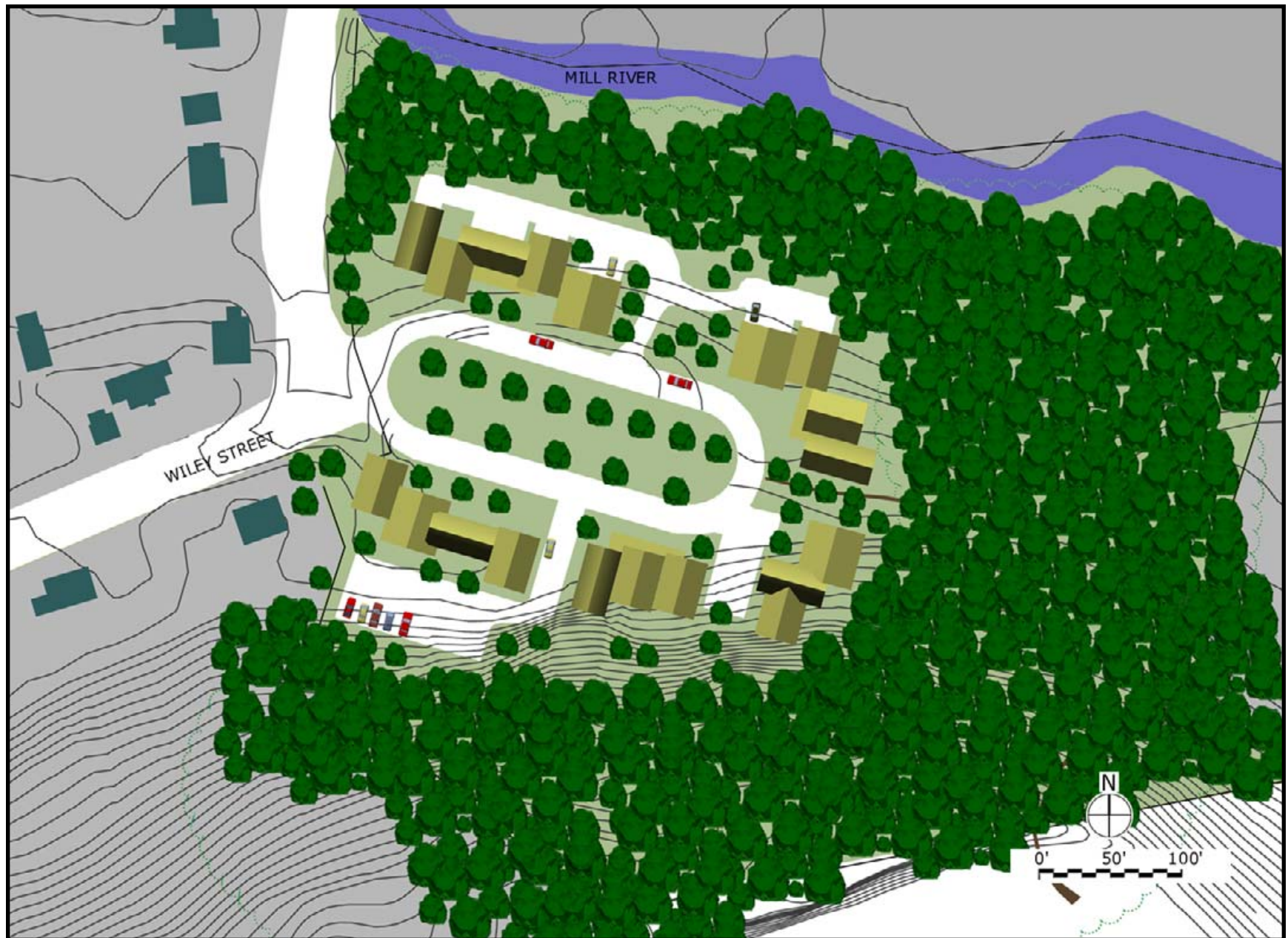
The D2 concept is an attached single-family variant of the D1 cluster design. The D2 concept will provide Wakefield with a preferred design to recommend to 40B developers.

Like D1, the D2 concept also sets aside a minimum of 40% of the land for common use, 30% preserved in an undisturbed condition and 10% as a shared green or other common as shown in the illustration. Features include:

- 18 new units in four buildings clustered around a common entry court and surrounded by common open space in the conservation subdivision type development.
- Two cars for each house in small lots behind or below buildings.
- 2.1 units per (total) acre (20,690 s.f./unit) overall site density. Approximately 225,000 square feet of common open space. Density excluding conservation land: approximately 9 units per acre or 4,840 square feet per unit.

### PUBLIC BENEFITS

- Clustering of units around a green creates a public open space as an extension of Wiley Street.
- Greater density compared to single family development decreases construction cost and lowers unit cost.
- Clustering of units and reduction in lot size allows approximately 225,000 sq.ft. of land to be retained as common open space.
- Open space connects to Mill River and other public or potentially public land contributing to creation of an open space network.
- 18 new units contribute to overcoming the housing shortage. Smaller units lower cost, helping to serve families with income levels whose needs are not being met. 25% of units could be affordable counting towards 40B requirements.







*Atwood Street in Greenwood: Smaller, denser development allows natural areas to be protected.*

*Heron Pond Development, Wakefield:  
Careful zoning of the streetscape keeps multi-family development from overwhelming pedestrian areas.*

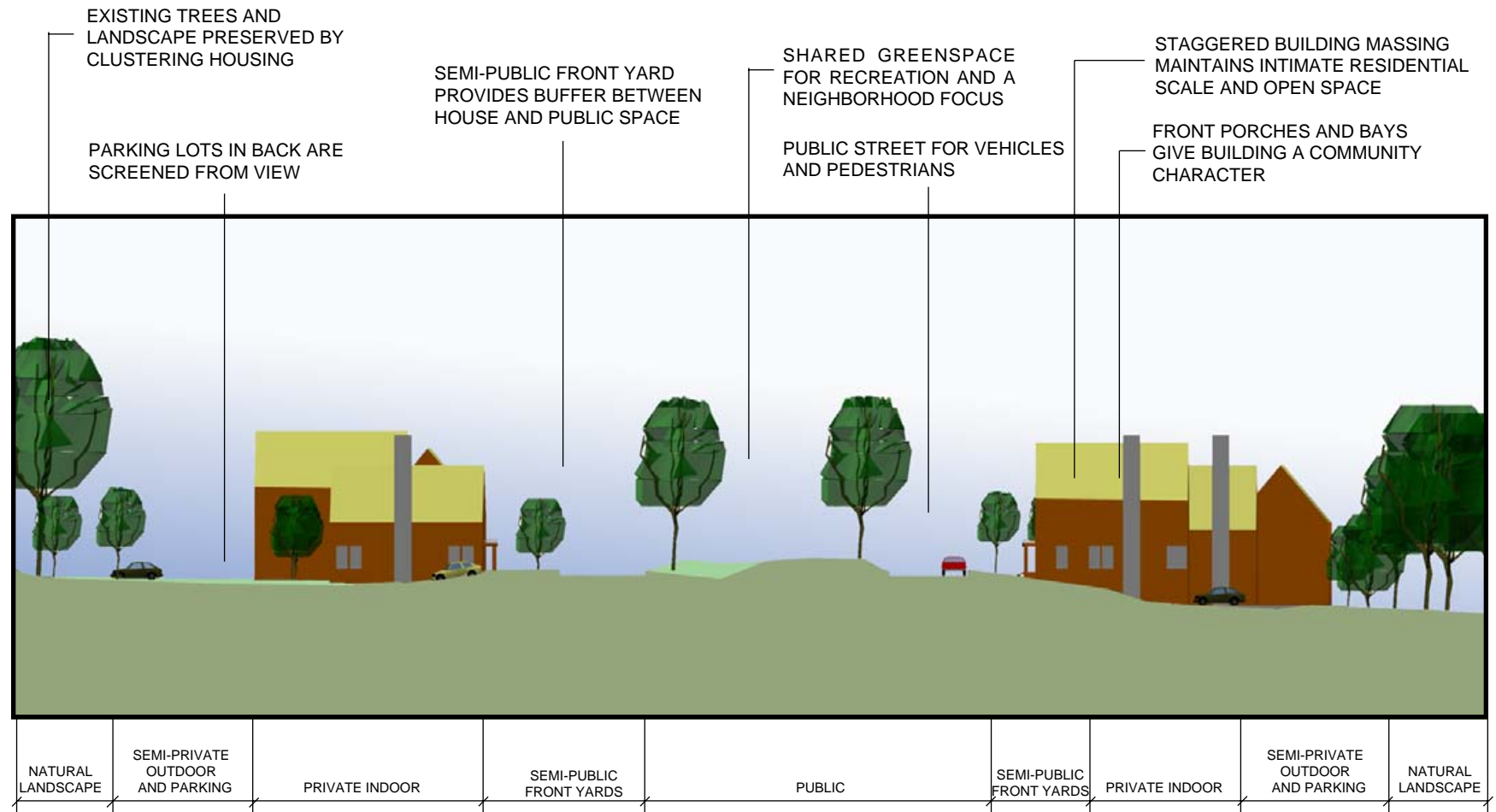


### IMPLEMENTATION REQUIREMENTS – LEGAL

- Adopt a conservation subdivision type zoning bylaw.
- Allow cluster development on smaller parcels than currently allowed.
- Allow multi-family development in Single Residence Zones with Planning/Zoning review.
- Revise dimensional requirements for clusters – reduced frontage, etc. Consider reducing 30’ setback to adjacent property.
- Allow shared driveways.
- Revise road requirements – less asphalt and more green. Reduce developer expense in return for other Town benefits.
- Inclusionary zoning provision for permanently affordable units.
- “Friendly 40B” - private sector negotiation with Town - can help balance public and private benefits.

### IMPLEMENTATION REQUIREMENTS – ECONOMIC

- Negotiate with DPW and Fire Department to reduce infrastructure costs while protecting public safety.
- A much denser project with a 40B override of Zoning or a large-lot subdivision with larger houses are likely to remain more economically attractive options for many developers unless cluster is equally economically advantageous to land owner.
- Inclusionary zoning provision for permanently affordable units.











Coppersmyth Way, Lexington: *Clustered units create a strong image in this Lexington development. Built on a two-acre former used car lot under the Town of Lexington's revamped cluster by-law, this eight unit project in three buildings includes undeveloped open land, developed common open space, and a landscaped island in the cul-de-sac.*

*It also has private decks, patios and garages.*

*It is designed and scaled to fit in with the surrounding homes, and landscaped with stone walls and other amenities. This is a very successful project and the attached homes have sold for over \$700,000.*



### WILEY STREET CONSERVATION SUBDIVISION CONCLUSIONS

Conservation subdivision development in lieu of typical suburban development offers advantages at the Wiley Street site and at other sites facing development, since many of these are currently open space that contribute to the natural character of Wakefield. These advantages include:

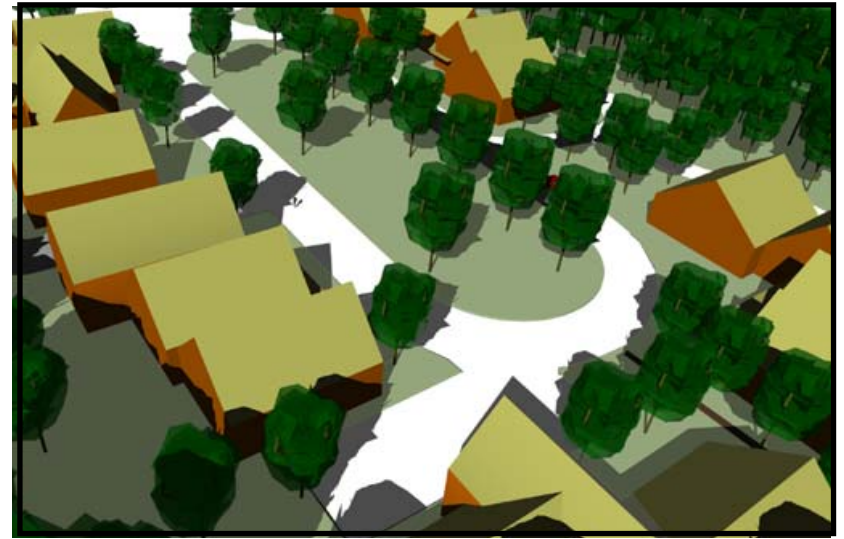
- Developers investment in common open space improvements that help maintain Town character.
- Reduction in the regrading that alters the natural landscape to the detriment of the Town's character and that can create drainage and other problems on adjacent properties.
- Reduction in required paving that adds to development cost, disturbs the rural character of the town, and increases runoff problems on adjacent properties.
- Creation of shared open space at the front of dwellings that reinforces community character.
- Shared open space surrounding the cluster that helps maintain rural character and potentially contributes to an open space network for the entire town.
- Potential for increasing the number of affordable units through inclusionary zoning.

Changes to zoning that encourage conservation subdivision development should be pursued by the town.





**Wiley Street Single Family - D1**



**Wiley Street Attached Single Family - D2**

## INCLUSIONARY ZONING

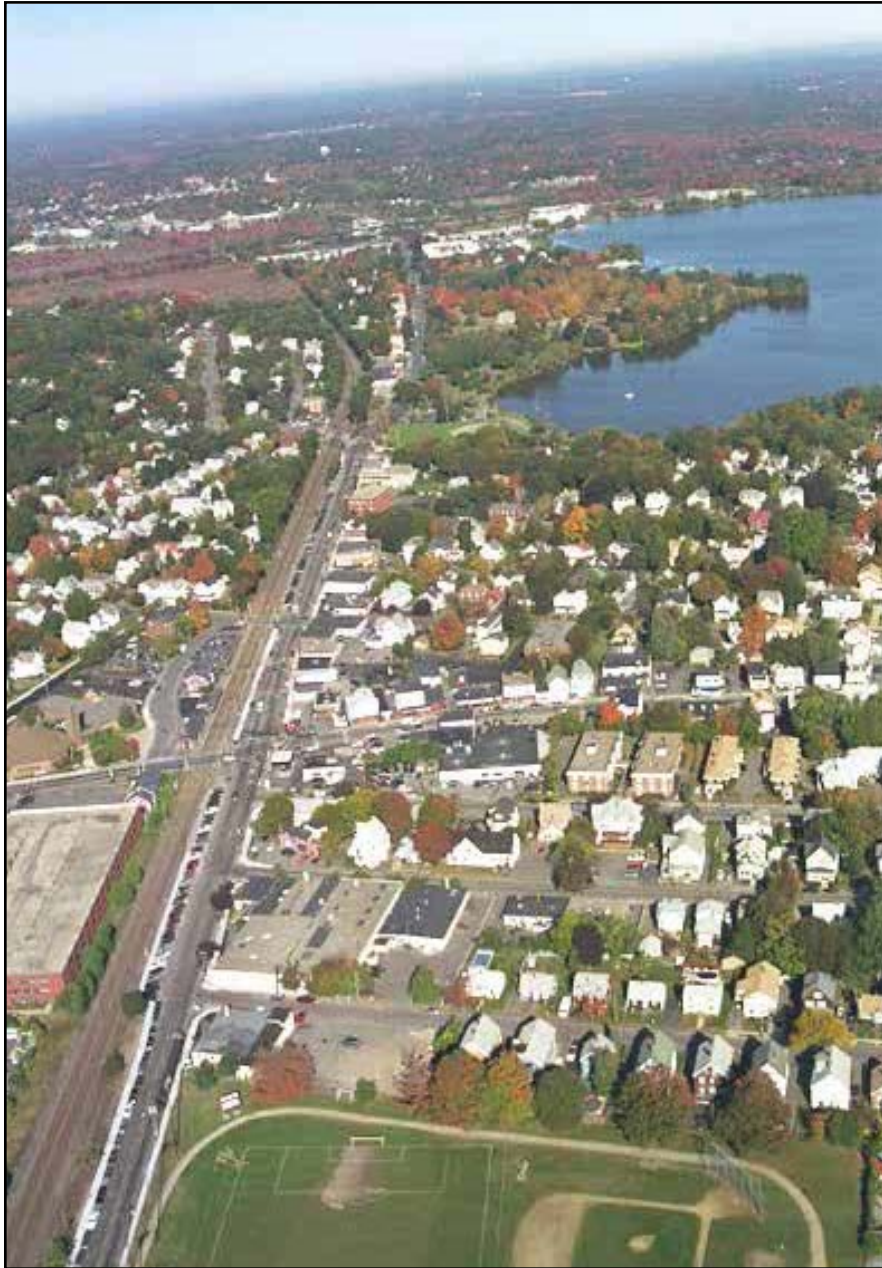
An essential part of the D2 model is that it provides additional affordable housing in Wakefield, both to address the real housing need and to meet the 40B criteria. This should be accomplished through the adoption of an inclusionary zoning provision that would require the inclusion of affordable units in any proposed new housing development.

Many Massachusetts cities and towns have adopted inclusionary zoning provisions in their bylaws in order to safeguard the availability of affordable housing in their communities. The adoption of an inclusionary zoning provision would be a helpful tool in addressing the shortage of affordable housing for seniors and first-time homebuyers. Wakefield may be able to reach 40B's 10% affordability requirement within a few years with the help of inclusionary zoning. After that, as new housing is added

to Wakefield's inventory, an inclusionary zoning requirement would allow the percentage of Wakefield's housing that is affordable to keep pace.

The inclusionary zoning provision will identify a set percentage of the units that will be reserved as affordable or senior housing with deed restrictions meeting the state's requirements for affordable units. This percentage varies from town to town. Twenty percent is a good figure to work with as a starting point in Wakefield's discussions. Some inclusionary zoning provisions require a minimum of one affordable unit in any project that seeks to take advantage of the Type D2 development model while other bylaws establish a minimum project size, such as five units, as the point at which the affordable requirement kicks in.





### EXISTING CONDITIONS

North Avenue is a heavily traveled artery connecting downtown with Route 128 and running parallel to the north-south commuter rail line. From 128 south to downtown it parallels Lake Quannapowitt's western shoreline. The area chosen to illustrate the D3 concept is near downtown adjacent to the Commuter Rail station, centered on the intersection of North Avenue and Albion Street. Albion is lined with shops and businesses and is the connecting street that links the commercial uses centered around the rail station with downtown's primary shopping district on Main Street. Wakefield's historic downtown neighborhood is to the east of the site while the west side of North Avenue is bounded by the railroad line.

This part of North Avenue is defined by:

- Easy access, both by car and by public transportation. The commuter rail station is immediately across the street from the study area.
- Proximity to downtown stores and services.
- Low buildings that do not create the kind of urban street front that would be appropriate for a downtown area opposite a train station.
- Industrial and Service uses that are no longer appropriate for the downtown location in an area developing as a business and residential center.
- An under-utilization of land, given the need for housing and the relative prosperity of nearby Central Business District businesses.

*Aerial view of North Avenue from the South.*





## North Avenue Mixed Use - D3

### SITE DESCRIPTION

Assessors Maps 12 and 13  
Assembled lots – 7.15 acres  
Zone – B Business



*Residences over business uses can revitalize downtown areas, as with these new mixed use buildings in Cambridge.*



### PROPOSAL DESCRIPTION

The D3 Model proposes a mixed-use housing and retail concept based on traditional New England main street development. New 3-4 story buildings along North Avenue would contain apartments over ground floor retail development. Parking is accommodated below ground and/or in surface lots behind street-front buildings. Residential density is similar to D3 residential development along Richardson Street – see Neighborhood Studies, Section 4.

The current zoning for the site – Business Use – allows up to 36 units per acre by Special Permit.

The proposed 2-3 story housing is extended partway down the side streets, stepping down a story from its height along North Avenue to match the existing residential development along Richardson Avenue.

200 units on 3 floors – 27.9 units per acre.  
1,560 square feet of lot area per unit.

### PUBLIC BENEFITS

- Mixed use development – housing over retail – can revitalize urban areas 24 hours a day. Housing sustains commercial establishments; retail allows access to shopping without use of a car and enlivens the street. Together they reinforce the vitality of North Avenue and the entire downtown area.
- New development is near public transit, reducing use of automobiles.
- Currently underutilized industrial properties can be utilized effectively as housing and commercial space benefitting the Town, its citizens, and property owners.
- Dense downtown development can help meet Wakefield's housing needs without building on currently open sites.
- Downtown housing development is appropriate for seniors, singles, and young couples who need low cost housing near central business district services. There is a documented need for small housing units to serve all three of these populations. In addition, the added cost for municipal services associated with this new housing is typically reduced by greater reliance on walking and public transportation as well as lower schools cost (generally fewer school-age children in smaller units).







*North Avenue could accommodate residential development above a continuous row of commercial uses.*

*Residential development near the train station allows travel without automobile use.*



### OPEN SPACE REQUIREMENT

There should be a courtyard requirement to provide open space in Type D3 developments. A modest green common area can tip the scale and encourage homeowners rather than renters to settle in these areas. Good examples of residential buildings with successful courtyards include several of the nearby buildings along Richardson Avenue as well as the Crystal Condominiums on Main Street.

### IMPLEMENTATION REQUIREMENTS – LEGAL

- Multi-family 1 in B zone allowable with Special Permit (currently).
- Allow mixed use development.
- Consider overlay zone to define specific redevelopment goals
- Parking requirement reduction based on shared parking with daytime/nighttime synergy, allowable remote parking provision, and reduced parking requirement within short distance of transit.
- Consider enhanced landscaping requirements.

### IMPLEMENTATION REQUIREMENTS – ECONOMIC

- Community Preservation Act and proposed “greenfield fee” measures could subsidize urban redevelopment paid for by taxes on development of currently open land.
- “Brownfield” redevelopment funds could support environmental remediation if required.
- Other locations for D3 development:
  - Main St. near Downtown and the Junction.
  - Albion St. between North Avenue and Main St.
  - Greenwood along Main St.



*View north along North Avenue*

## North Avenue Conclusions



*Several stories of apartments or condominiums above commercial uses can create a lively streetscape.*

*Businesses benefit from street front exposure while residences enjoy privacy above.*



### NORTH AVENUE DOWNTOWN DEVELOPMENT CONCLUSIONS

Development of housing above stores on North Avenue and other streets that can function as urban centers has advantages for the town and its residents. These include:

- Dense development can be low cost, offering affordable housing for seniors, empty-nesters, young couples and singles who are otherwise priced out of the Wakefield housing market.
- Development near mass transit eliminates or reduces the need for cars, which reduces required parking, paving, and congestion.
- Housing development activates downtown and supports the viability of stores and restaurants in the area.
- Housing development downtown allows the creation of new housing without reducing green space or altering the natural landscape if development pressures are channelled into the town center.
- Changes to zoning to encourage development downtown and discourage development that reduces green space should be pursued by the town.

Unlike many towns that have demolished much of their downtown areas to make way for parking and large scale development, Wakefield has preserved its traditional small-town environment. New development can and should reinforce the urban quality of Main Street, North Avenue, and other streets in the downtown area.





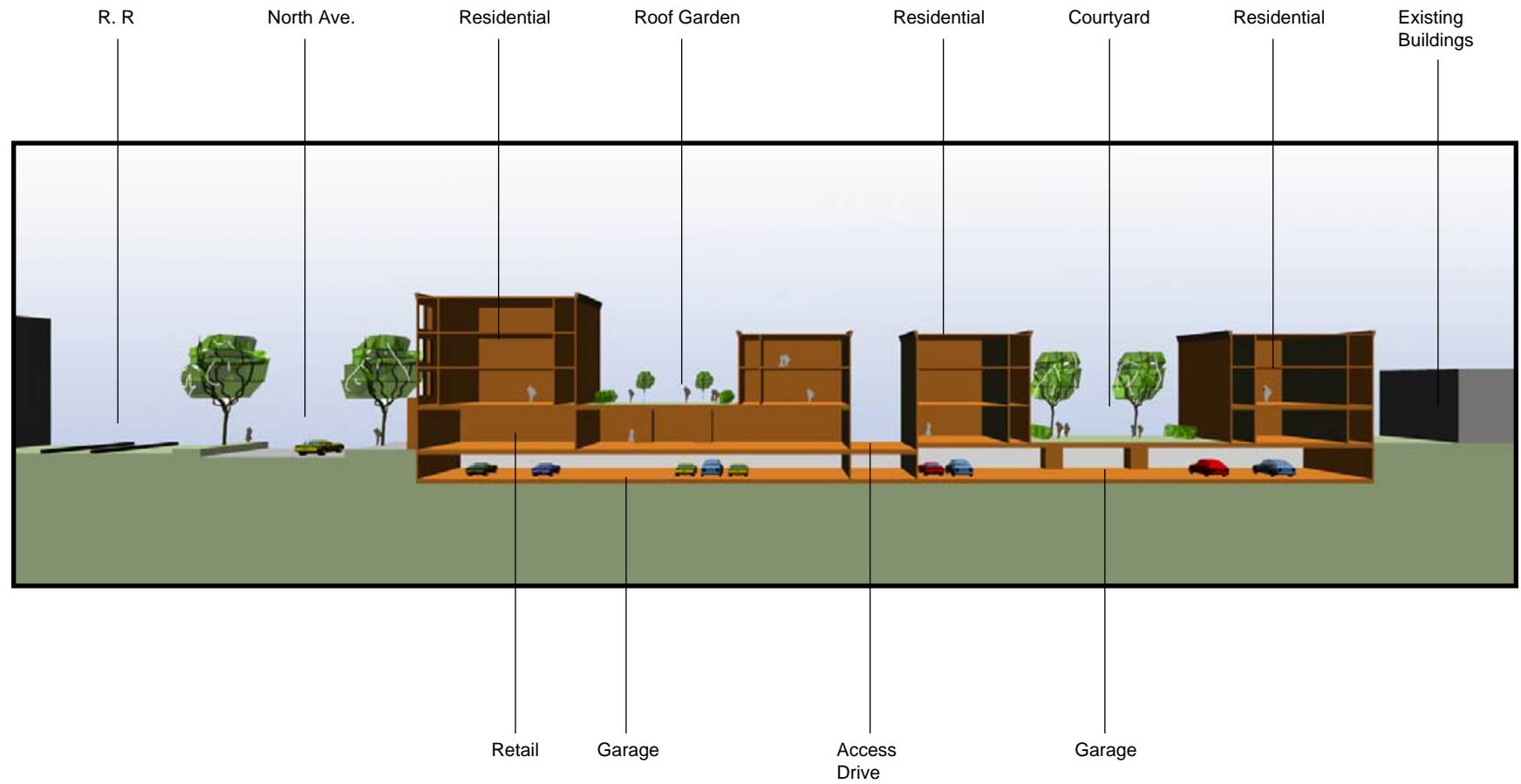
*View north along North Avenue*



## **NORTH AVENUE / D3 DEVELOPMENT**

Type D3 Development requires a careful consideration of parking, greenspace, and building layout requirements to make the best use of land available within the context of zoning requirements.

The conceptual section on the opposite page suggests how ground floor retail space, structured parking below, and residential construction above can create marketable spaces on the interior and public benefits on the exterior while reinforcing the character of the urban environment.





*Existing Colonial Point Residential Tower.*

### EXISTING CONDITIONS

The existing Colonial Point housing is an eleven story tower in the Edgewater Office Park offering both affordable and market rate rental apartments. It is based on a housing model – “the tower in the park” – that is very different from other housing in Wakefield. It is surrounded by office buildings and parking garages with very limited relationship between uses.

More immediately, the tower is surrounded by a sea of parking lots and driveways for its residents with a ring road around the site.

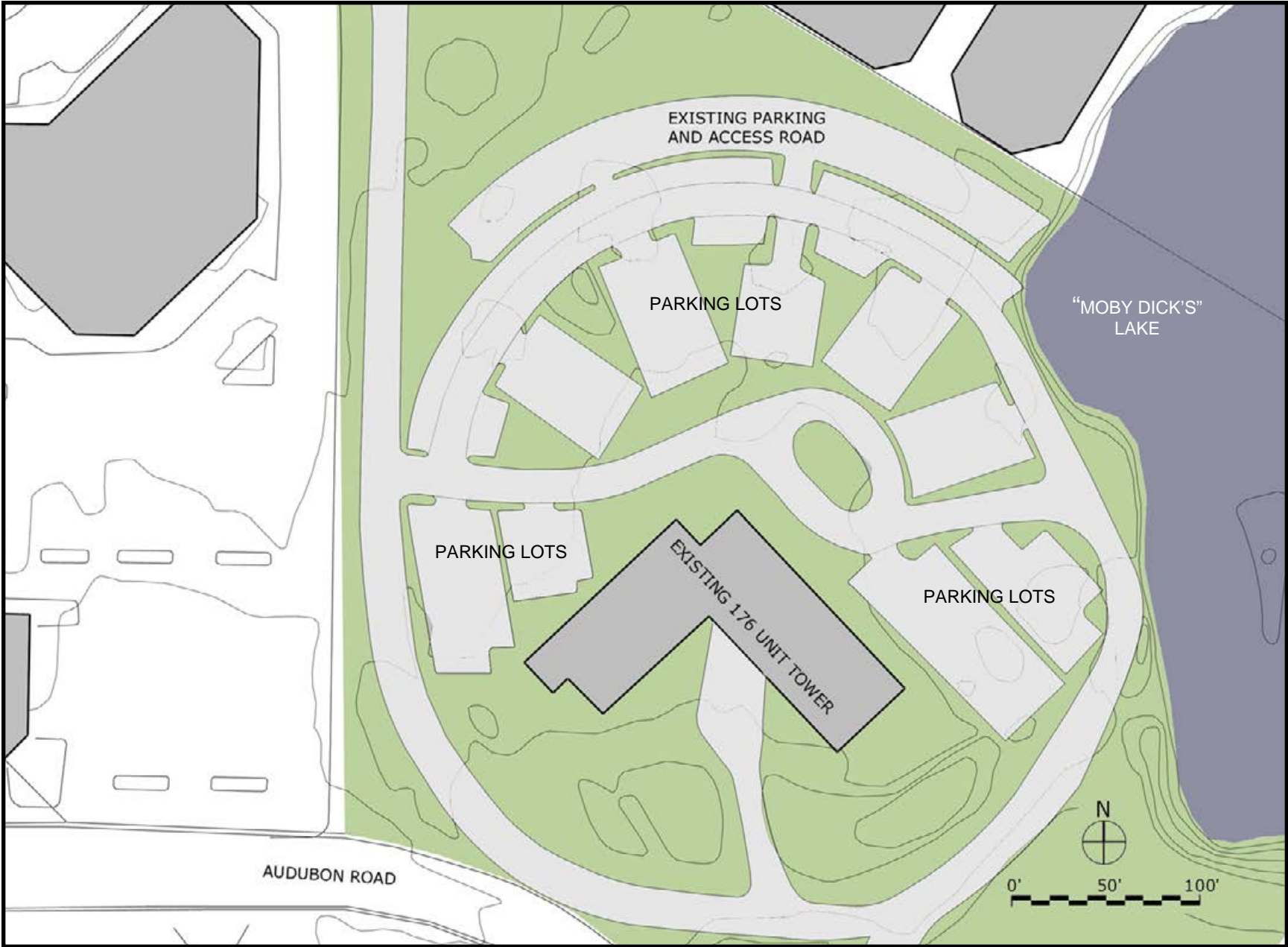
None-the-less, the site offers a spectacular setting, next to Moby Dick’s lake in what was once Pleasure Island Amusement Park, and surrounded by other wetlands and woodlands.

The Colonial Point site is characterized by:

- Easy automobile access to Route 128 and limited public transportation.
- Surrounding buildings that are primarily office and parking, creating a mixed use area with very limited relationship between uses.
- An office park environment that is not within walking distance of services, businesses or other residential areas.
- Nearby wetlands that offer recreational and visual amenities.
- Land immediately surrounding buildings used primarily for parking, both in garages and on grade.
- Few defined spaces that create a sense of neighborhood or a coherent system of streets and open areas that tie the development together.

*Adjacent office building.*







### SITE DESCRIPTION

Parcel 51B, Map 36W

12.53 acres

Zone – I Industrial



*Existing Colonial Point Tower.*

### PROPOSAL DESCRIPTION

The D4 concept development includes a number of five to eight story mid-rise apartment buildings and common greens arranged around the existing tower. Two parking garages would provide spaces for the new housing as well as replace the existing surface lots, opening up land for the new buildings, the public greens, and waterfront recreation.

Buildings would be situated so that, along with the existing tower, they create a series of landscaped open spaces that relate directly to where people live, as in Wakefield's more traditional neighborhoods. These spaces would be planted and connected to the surrounding landscape rather than paved and utilized only for parking.

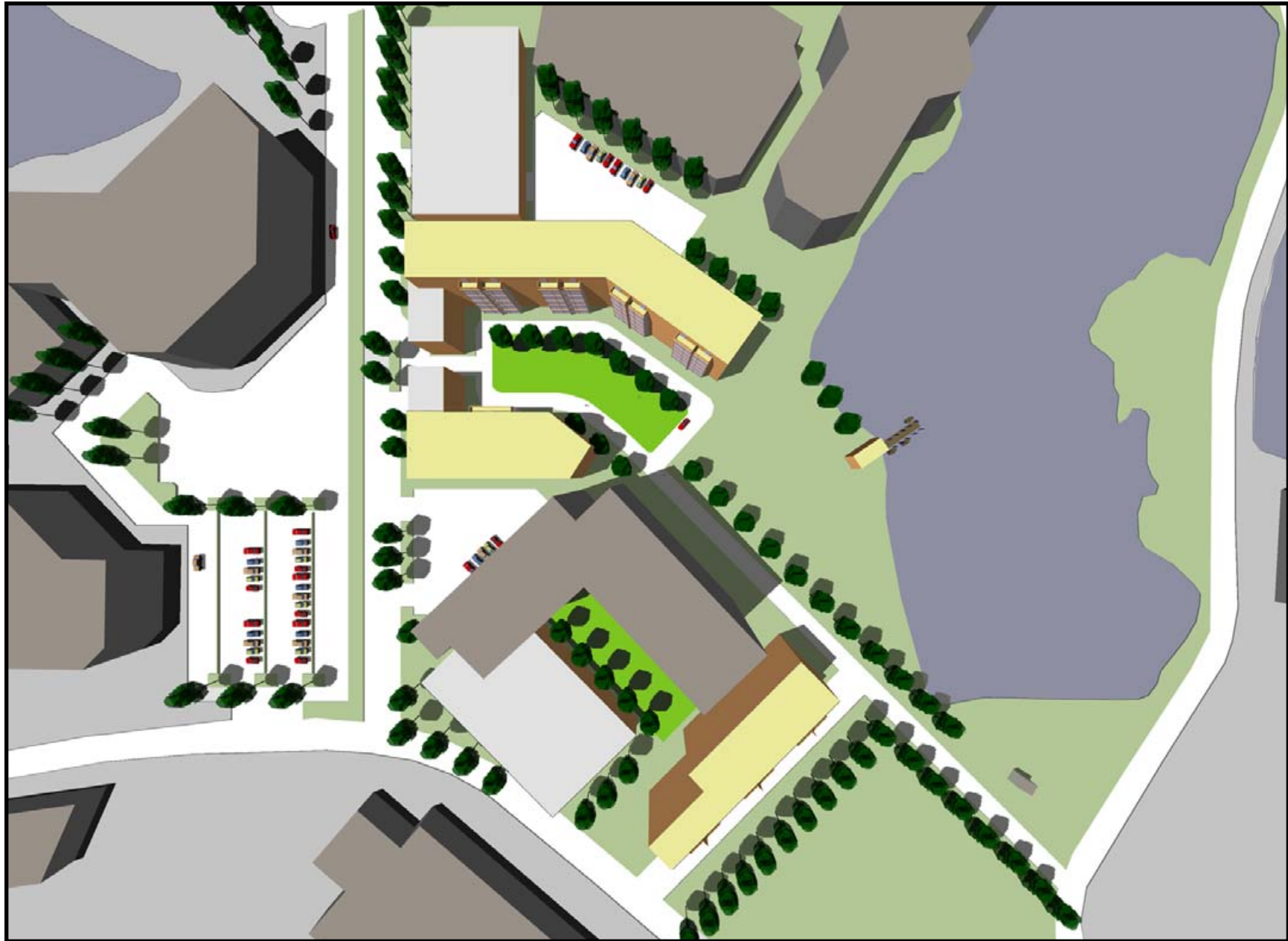
The D4 development should include requirements for courtyards and increased green space, the inclusionary requirement for affordable housing, and structured and/or underground parking. Design guidelines and regulations need to be drafted and enacted for D4 type projects. A more comprehensive design review process should also be established, and integrated with the design guidelines to insure quality site design and architectural design, and that quality materials and finishes are specified for these projects.

200 new units. New units plus 176 existing units = 376 units @ 30 units per acre or 1,452 square feet of lot area per dwelling unit.

### PUBLIC BENEFITS

- Construction of 200 rental apartments with 25% of them affordable will count as 200 additional affordable units in terms of Chapter 40B regulations.
- Mid-rise housing is appropriate for seniors, singles, and young couples whose need for low cost housing is not currently being met.
- The conceptual plans shown create open spaces that are defined by buildings as in more traditional neighborhoods. They are planted and connected to the surrounding landscape rather than being paved and utilized only for parking.
- Housing and office buildings could use parking at staggered hours, lowering required parking for each use.
- Additional residential use can help support retail, public transportation, and other amenities that benefit both office workers and residents and reduce required automobile trips.













*Existing tower is currently surrounded by at-grade parking.*

### IMPLEMENTATION REQUIREMENTS – LEGAL

- Allow additional residential development in Industrial zone by Special Permit.
- Provide new density standards to promote development of affordable housing.
- Treat as a Planned Unit Development with the entire site designed and re-permitted in a single process including all regulatory agencies.

### IMPLEMENTATION REQUIREMENTS – ECONOMIC

- Encourage longest-term retention of Colonial Point's existing units as affordable housing.
- Structured parking is significantly more expensive than at-grade parking. Office/residential sharing of parking costs and benefits to reduce space count required could help subsidize garage construction required to maintain open space.

*Water views create an amenity for residents.*







## DESIGN GUIDELINES

These guidelines are not intended as a prescription that will guarantee the good design of residential and commercial neighborhoods. The nature of every site is different and only a comprehensive assessment of opportunities and constraints and an integrated response to context can insure the best and most appropriate design solutions. More detailed design guidelines, such as those illustrated to the right, are required to define appropriate and inappropriate details, dimensions, and materials.

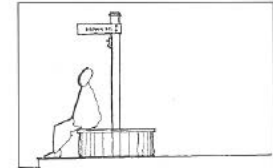
Never-the-less, there are design and planning principles that have structured the historic growth of Wakefield as well as many other American towns, and that are generally considered to result in attractive neighborhoods with a strong sense of community.

Some of these principles are articulated on the pages that follow.

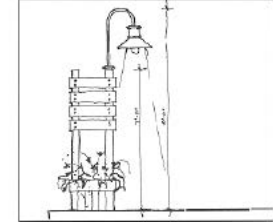
### STREET SIGNAGE

#### Guideline

- \* Signage should be uniform and clear.
- \* Signage can be incorporated with the street lighting.
- \* Notice boards should be incorporated into the overall signage of the village in order to alleviate telephone pole postings.
- \* A distinction should be made between municipal and private enterprise signs.
- \* The marine quality of the village should be emphasized in the design of simple wood constructions as bases for directional signs, street lighting and notice boards.



*Simple wood construction can be used for street signage.*



*Street lighting can be incorporated with the signage and decorative banners can be placed above the notice board below.*

### AWNINGS AND OVERHANGS

#### Guideline

- \* Porches, awnings, arcades and overhangs are encouraged to provide a convenient covered sidewalk zone for pedestrians.
- \* Awnings are retractable fabric covered frames and may extend up to 6 ft. over the sidewalk with a minimum of 9 ft. clear underneath them.
- \* Overhangs may be like awnings but are of fixed construction, generally with a metal standing seam or corrugated surface. They may also be roofed to match the building's principal roof.

#### Discussion

- \* On mixed-use streets awnings and overhangs offer weather protection and an intimate scale for pedestrian activity.



*Awnings are encouraged to provide a covered sidewalk zone for pedestrians.*



*Awnings over individual windows add interest to the streetscape.*





*Consistent building set-backs help define the character of a neighborhood.*

## **DIMENSIONAL REQUIREMENTS THAT BALANCE CONSISTENCY AND VARIETY**

Setbacks and minimum lot requirements are important in determining the character of a residential community, and should be keyed to a comprehensive understanding of the neighborhood. Too often dimensional requirements are excessive, and create relatively useless left over space between buildings. Clustering can make better use of open space, using smaller dimensions in creative ways.

Reductions in dimensional requirements can be keyed to public benefits: affordability, open space, the preservation of existing neighborhood character. Minimizing side yard setbacks on one side, reduced front yard setbacks in some neighborhoods, and requirements that recognize unique site features can lead to a more unified streetscape that still maintains a sense of variety.

In downtown areas setbacks can be reduced even further to produce the kind of street life associated with urban areas.

*In some areas housing can be pushed right up to the street.*



## ALIGNMENT OF BUILDINGS TO REINFORCE THE PERCEPTION OF PUBLIC SPACE

In older, traditional communities houses with front porches line public streets. Consistent setbacks of 30' or less help define streets as outdoor rooms with a perceptible shape and character. The houses relate to one another and focus on the street as a community space. Orientation to a shared open space can help unify the streetscape and give a sense of character.

More recent developments, often on hills or large amorphous lots, scatter houses in seemingly arbitrary locations and orientations, leaving the remaining space feeling left over and poorly defined.



*Aligning house fronts gives character to the street.*

*Varied building types can still create a neighborhood if they have a consistent relationship to the street.*





*Building around existing trees adds value to new housing.*

## **PRESERVATION OF SITE FEATURES**

The unique natural and man-made character of a site should be recognized in new development. Wooded hillsides, wetlands, rock outcroppings, large trees, and distant vistas should be elements around which a site's design is organized.

It is beneficial to make unique natural features part of the public domain. A walking trail along wetlands, a vista kept open off a public street, a rock outcropping marking the entry to a development, or a hilltop that is part of an open space network create value for private property owners while contributing to shared Town goals. Roads sculpted to fit the landscape and houses located so that significant cutting and filling are not required should be part of the planning process. Old houses can often be maintained with new development around them, creating continuity between past and future.

*Wetlands can give character to adjacent development, as at Colonial Point.*



## PUBLIC SPACES

The small town character that attracts people to places like Wakefield comes from its public spaces, many in the older parts of town. New developments can build on these precedents.

Streets can be more than vehicular access ways. Cul-de-sacs can be more than circles of asphalt. Even parking lots can be more than paved wastelands. Both individual property owners and the community at large benefit when attention is paid to creating public spaces.

Streets lined by trees, fences, porches and houses take on a public quality that creates a sense of community. A shared green space can form a focus for a group of houses and then connect them to adjacent neighborhoods. A loop around a central green to provide an emergency vehicle turnaround may utilize less paving than a cul-de-sac. Shorter driveways are possible if front yards are reduced. Land can then be reserved for community space or for recreation. Such places can link together to form a green space network throughout the town.



*Narrow spaces, if well designed, can create an animated streetscape.*

*Trees help turn streets into gracious public spaces.*







*Retaining walls suggest the shape of the natural landscape while defining the street and sidewalk.*

## STREETSCAPE - PUBLIC

The street should be considered as a public outdoor room, with a character that adds to the value of adjoining properties. Streets should have appropriate dimensions that encourage pedestrian movement, and sidewalks along at least one side to connect houses and neighborhoods to each other. Street trees should be planted along the street to screen houses from traffic and make walking more pleasant.

Planting strips characterize older neighborhoods in Wakefield and should be required in newer developments. Stone pylons and retaining walls along the sidewalk, used to define neighborhoods in the Town's West Side, are local landmarks that could be repeated in other locations.

*Street trees screen houses from the street while making attractive places for walking.*



## STREETSCAPE - PRIVATE

Front yards, fences, hedges, and low walls both connect and separate houses from the street, making both public and private areas more usable.

Ideally, a series of zones define increasingly private areas as one approaches the fronts of houses. Sidewalk, gate, yard, steps, porch, bay, door, and windows demarcate transitions from public, to semi-public, to semi-private, to private areas, creating a rich environment. These zones can continue in the rear, with porches, decks, yards, fences, and alleys again connecting families to the community.

In general, these zones should parallel the street. Retaining walls are necessary when sites are regraded and can raise yards above the street and define the sidewalk below. Planting can create a screen lining the sidewalk that continues from one house to the next. Yards should not be designed autonomously, but as part of a larger streetscape and neighborhood.



*Private landscape contributes to the larger community nearby.*





*Winding streets make sense on hillside sites if they follow natural contours.*

*Straight streets on flat sites tie houses to the neighborhood and beyond.*



## STREET LAYOUT

New suburban streets too often try to emulate the picturesque curves of rural roads. In reality, they usually fail to capture the charm of the countryside or the neighborhood character of a town.

For most locations in Wakefield, a grid of streets is likely to be more appropriate for new development than the arbitrary winding of a cul-de-sac. A grid allows multiple entry and exit points connecting a new development to the surrounding community. Streets can be narrower and shorter, avoiding rush hour choke points and encouraging pedestrian traffic. Curves can be located where they make sense in relation to the natural landscape, avoiding a contrived or arbitrary quality.

In general, residential streets should be as narrow as possible while still accommodating traffic and emergency vehicles. Narrow driving lanes and on-street parking slow traffic and improve safety. On-street parking can be provided in widened areas off the street while maintaining narrower, pedestrian oriented dimensions elsewhere.

## DRIVEWAYS AND PARKING

Driveways and parking are a necessary part of residential design, but they should not denigrate the neighborhood character. Thoughtful accommodation of automobiles allows asphalt and curb cuts to be minimized, creating a better walking environment.

Garages beneath, to the side, or behind single family houses allow friendly porches, entries, and windows rather than blank garage doors to define the streetscape. Two garage bays (on the side or back) can be reached by a ten-foot wide curb cut, allowing more green space along the street. Two or more houses can share driveways, leaving more yard space for each house.

Parking can also be in the rear, accessed from an alley or a loop road that circles behind a group of houses. This strategy is especially effective for a row of townhouses or a multi-family grouping, allowing planting rather than asphalt to face the street in front.

On-street parking can also reduce the amount of paving required. Periodic increases in the width of a street can accommodate parking without creating an overly wide street in relation to the anticipated traffic. Landscaping is important, especially where driveways and parking areas abut the street or residences.

Strategies that treat parking areas as carefully developed and landscaped courtyards used for parking rather than barren seas of asphalt should be encouraged.



*Garages tucked behind houses allow porches rather than blank facades to address the street.*

*Parking and garages slipped under and behind multi-family housing prevent paving and garage doors from overwhelming the site.*







## IMPLEMENTATION

### Introduction

Wakefield's overarching objectives in this Master Plan are to strengthen Town character, improve housing quality, sustain affordability, preserve open space, and reassert local control over the Comprehensive Permit process by meeting the Commonwealth's minimum affordable housing criteria. Zoning Law is Wakefield's most powerful tool for pursuing these objectives. The Implementation section of the Housing Master Plan outlines the types of zoning changes that Wakefield should adopt in order to achieve its stated objectives.

The Development Scenarios section of this Master Plan presents four schematic design models for housing development types that will provide significant benefits to Wakefield. They are based on precedents described in the Town Character section and are labeled D1 – D4, paralleling Type D1 – Type D4 development described below. These models should be encouraged, and zoning changes should be enacted that make the development of these models possible. The following discussion takes a step-by-step approach to bringing about the changes needed to allow and encourage the development of these more desirable housing types in Wakefield.

### Type D1 Development

Recent single family developments in Wakefield have all been “large lot” or “one house – one lot” subdivisions and have required extensive clear cutting and blasting for new roads and for building sites that cover the land. As a result, there has been a significant loss of open space in Wakefield. Type D1 developments that conserve open space need to be strongly encouraged as the new standard in Single Residential (SR) and Special Single Residence (SSR) Districts. The following discussion outlines the zoning changes that would need to be made. Specific new guidelines and bylaws would need to be written and adopted before the Type D1 development model could be implemented as discussed.

#### *The Conservation Subdivision Design (CSD) Approach*

The concept for Type D1 developments will follow the precepts of a Conservation Subdivision Design (CSD) bylaw. The CSD approach does an excellent job of balancing public and landowner interests. As summarized by the Metropolitan Area Planning Commission, “Conservation Subdivision Design enables land conservation and preservation of resources while still accommodating the full development potential of a parcel. The CSD process ensures that property rights are protected, the community protects critical resources, the development benefits with a high quality product, and the environmental impacts of development are minimized.”

There are many good examples of working CSD bylaws in Massachusetts, some in neighboring towns. There are also a number of “model” bylaws available, including those developed by The Metropolitan Area Planning Commission (MAPC) (included as an appendix to this Master Plan) and the Cape Cod Commission. CSD developments provide the following benefits:

- Open space conservation, wildlife habitat preservation, and water quality protection;
- Neighborhood enhancements including more pedestrian friendly neighborhoods, more places to walk, common open spaces for community activities and recreation;
- Protection of cultural heritage resources;
- Reduced long-term municipal costs for maintenance and repair of more limited infrastructure;
- Reduced developer cost through savings from shorter roads and utility systems and smaller storm water detention basin requirements;

A new Wakefield CSD bylaw would replace the current Cluster provision that has never been utilized since its enactment. CSD is an improvement over traditional cluster approaches (including Wakefield’s) in several key ways: it is based on a design approach that optimizes the quality and layout of both the open space and the developed land; it structures in a greater degree of community influence in the design; and it seeks to create an interconnected network of open space throughout the community by linking resources and coordinating projects with other aspects of Town planning.

### ***Design of a Type D1 Development***

A conventional design approach starts with the lots and roads. A CSD utilizes a four step process that starts by identifying the conservation lands, then locates the house sites, then aligns the roads and trails, and finally draws the lot lines.

A critical step in the CSD process is the calculation of the “yield” or “density” of the parcel. There are a number of methodologies that are used in CSD bylaws to determine the yield. These generally utilize some combination of formulas and “as of right” sketch plans. In any case, the purpose of a CSD is to improve the arrangement of the roads and structures, and not to either punish or reward the developer by decreasing allowable density or providing a bonus.

Yield calculations can be based on number of lots, housing units, bedrooms or other measures. Many communities have found that structuring more flexible development limits that are based on the town’s specific concerns can result in better and more successful projects. The Town of Lexington passed its Cluster Subdivision, Special Residential Development Bylaw in 1996 by a more than 3-to-1 margin in Town Meeting. It replaced a cluster provision that, like Wakefield’s, had never been used. Their current bylaw uses five Impact Factors (gross floor area, living area, site coverage, total number of occupants, and vehicular trip generation) rather than one simple density count to both limit and guide development.

A new Cluster bylaw will have to establish a minimum project size that is smaller than the current 10 acre minimum. The Town of Reading’s

bylaw specifically states a cluster can be approved for a 60,000 sq. ft. plot. Many other towns have no minimum project size and rely on other design standards of the cluster bylaw to assure appropriateness. Lot size provisions will also have to be rewritten. Many of Wakefield's traditional neighborhoods have lots in the 6,000 s.f. range. The Town Character studies included in this report may be used as a starting point for choosing appropriate standards for new cluster development.

### ***Open Space in Type D1 Developments***

New standards will need to be established for the quality, quantity and disposition of open space in Type D1 developments. These standards need to be coordinated with other components of Wakefield's Master Plan, including those concerned with conservation, open space planning, wildlife protection and watershed protection.

Type D1 developments should include two types of protected open space, natural undisturbed land and a green common or commons. Initial discussions of a zoning change could require *a minimum* of 30% of the land remain in a natural, undeveloped condition and *a minimum* of 10% be developed as a common, possibly a green. (A total of 40% of the land is preserved). There are a range of options for the design and purpose of this common. These should be developed and documented in design standards for Type D1 developments and coordinated with §190-4B, the definition of "OPEN SPACE, USABLE," and §190-33 B (7) of Wakefield's bylaw. The referenced CSD model bylaws (MAPC and Cape Cod Commission) include extensive standards for preserves.

A critical consideration in the requirements for the quality of open space is the relative proportions of wetland and upland that are allowed. On the one hand, the protection of wetlands is in the Town's highest interest. On the other hand, it is already protected and the open space requirement in the bylaw should be satisfied by land that is otherwise developable, thereby preserving land that might otherwise be lost. There are a number of approaches to this challenge. First, of course, is the requirement that the yield calculation take into consideration the wetland/upland makeup of the site. One compromise is to allow wetlands to be included within the open space but to allow only a certain percentage to count toward the open space requirement.

There are a number of options for the disposition of open space in Type D1 developments. In certain cases it may be in the Town's interest to accept ownership of these lands. However, in most cases it is more likely that it will not necessarily be in the Town's interest, and these lands should be conveyed to a Trust.

### ***Type D1 Development Permitting Process***

The town may create an expedited special permit process to encourage Type D1 Development in SR zoning districts. Alternatively, recent revisions to the state code, M.G.L. ch. 40A, §9, ¶5, encourage the adoption of as-of-right bylaws allowing cluster development in single-family zones without a special permit (Massachusetts Zoning Manual, Section 8.5 Cluster Developments, page 8-14, 2002 Supplement by Martin R. Healy, et.al. and published by Massachusetts Continuing Legal Education). As Type D1 is essentially a residential cluster, the town could adopt such



a revision to the town's bylaws; however, guidelines and standards will need to be crafted that are acceptable to the town. If the town adopted a special permit process as an interim solution, the Planning Board could work with developers to establish standards and new bylaws to allow Type D1 as-of-right in residential zones.

The reviewing and permitting process needs to be carefully considered and revised so as to encourage developers to propose Type D1 developments. The MAPC has developed a set of recommendations that outline a process where the Planning Board would review a developer's Concept Plan for approval or denial of the Special Permit. The special permit would be granted with a series of attached conditions, including number of lots/units/bedrooms, requirement for approvals from the Conservation Commission, Board of Health, Definitive Subdivision Approval, and compliance with the rest of the CSD bylaw. The details of the MAPC's procedural recommendations can be found in their "[Booklet for Developing a Local Bylaw](#)."

The Town of Hopkinton has been incredibly successful using the two-step "Concept Plan" approval process. As of May 1999, twenty one Open Space and Landscape Preservation Development (OSLPD) projects had been approved totaling 1099 acres of which approximately 600 acres (or 54%) were open space.

***The Type D1 Development Model will require revisions to sections of the existing zoning text***

§190-33. The title should be changed to: Cluster Development in Residential Zones.

§190-33 will have to be significantly restructured in its particulars as outlined above, including changes to many of the Specific Requirements and the permitting process.

***Where will the Type D1 Development Model be allowed? Revisions to the zoning map***

Type D1 Development is to be strongly encouraged as the new standard in Single Residential (SR) Districts. While Type D1 Development could be allowed in Special Single Residential (SSR) zones, SSR zones may need to be reconsidered. A change back to SR zoning standards may be more in keeping with the town's character.

The Type D1 Development should not be permitted in General Residential (GR) districts. The areas where the General Residential (GR) districts have been mapped include some of Wakefield's oldest neighborhoods. Attention needs to be given to preserving the buildings in these neighborhoods. It is unlikely that the building types and rich detailing of these period structures will ever be replicated. Adapting these older structures to the needs of modern family life will require skillful design solutions and great attention to historic detailing. The density of GR districts is slightly higher than the density permitted by the Type D1 model. A special permit process that allowed Type D1 Development in the GR zones could unfortunately lead to an unwanted outcome: redevelopment of these areas. A reevaluation of the Use Table and the uses allowed in SR districts needs to be considered.

The Type D1 Development should not be allowed in business and industrial zones; other development models described below would be more appropriate.

### **Type D2 Development**

The Type D2 development is a multi-family model of a cluster design similar to the Type D1 development. Like Type D1, a Type D2 Development will follow the precepts of Conservation Subdivision Design bylaws. A greater density will be allowed because a special inclusionary zoning restriction will be added for a Type D2 Development. Unlike many communities, Wakefield has not discussed the adoption of an inclusionary bylaw. It would be a helpful tool in addressing the shortage of affordable housing for seniors and first-time home buyers.

The following discussion outlines the zoning changes that would need to be made. Specific new guidelines and bylaws would need to be written and adopted before the Type D2 development model could be implemented as discussed.

#### ***Background for the Type D2 Development Model***

In recent years, the only multifamily developments built in Wakefield have been the result of a special state law, M.G.L. ch. 40B, §§20-23, that allows developers of affordable housing (as defined by 760 CMR 30.02) to completely set aside the town's zoning bylaw. These completed developments may be the easiest and most profitable for developers to

build given the current building codes. The building types include:

1. Garden apartment style condominium units with attached dwellings (Heron Pond),
2. Townhouses with garages on the first level (Meadowview I & II)
3. Low-rise condominium (Millbrook Estates).

The Type D2 Development model is intended to bridge the gap between the traditional subdivisions that the Planning Board is required to approve and 40B projects, such as Heron Pond, that are submitted to the Zoning Board. Recognizing that these are the building types that developers understand and are willing to build, the design concept of the Type D2 model allows the construction of garden-style units, attached dwellings and townhouses. (In the Type D2 Model, townhouse units are oriented with the garage door facing a rear parking area or a common driveway at the side of the unit, rather than toward the street or other public areas.) The Type D3 Development Model (discussed below) further expands the possibilities for creative townhouses and mid-rise development. Better standards are needed for the review of 40B projects; guidelines and dimensional regulations describing a Type D2 Development can provide the review standards needed for 40B projects.

Each of the building types identified for 40B projects above are different in many ways from the residential building forms found throughout Wakefield: 1) the extended New England farmhouse, 2) the detached Cape Cod, salt-box, or 3) the detached small gable-ended, wood-frame

Victorian with a front porch. However, many of these traditional home types serve as multi-family dwellings. Some have an accessory unit and are now legal, nonconforming two-family dwellings. If designed with care, building types that are appropriate for a type D2 development can resemble an extended form of these New England classics.

### **Inclusionary Zoning**

Many Massachusetts cities and towns have adopted what are called “inclusionary” zoning provisions in their bylaws in order to safeguard the availability of affordable housing in their communities. An inclusionary zoning provision requires new housing developments to include a certain percentage of affordable units within the total number of units constructed. The adoption of an inclusionary zoning provision would be a helpful tool in addressing the shortage of affordable housing for seniors and first-time homebuyers. New housing developments increase the total number of housing units in Wakefield. An inclusionary zoning requirement would allow the percentage of Wakefield’s housing that is affordable to keep pace. This is important for two reasons. First, the inflation in housing values continues to price many Wakefield residents right out of town. Second, Wakefield can only control Chapter 40B development and enforce its local zoning bylaws if it achieves and maintains a minimum percentage of affordable housing. Strategies for achieving this percentage have been laid out earlier in this report. Once the required percentage is achieved, an inclusionary zoning requirement may be the only way for Wakefield to maintain that minimum percentage and continue to safeguard local control of development.

The inclusionary zoning provision will identify a set percentage of the units that will be reserved as affordable or senior housing with deed restrictions meeting the state’s requirements for affordable units. This percentage varies from town to town. Twenty percent is a good figure to work with as a starting point for discussions. Some inclusionary zoning provisions require a minimum of one affordable unit in any development that seeks to take advantage of the Type D2 development model while other bylaws establish a minimum project size, such as five units, as the point at which the affordable requirement kicks in.

There are many precedents for Wakefield to use in the development of its inclusionary zoning provision. The Reading Bylaw, §4.10.4.2 may be a good model.

### **Design of a Type D2 Development**

Most of the discussion above relating to Type D1 developments is also applicable to the Type D2 model. Dimensional requirements including yield formulas and minimum site size will need to be established. The minimum lot size under current zoning is 12,000 s.f. in the SR District and 8,000 s.f. in the GR district. These overall density standards would be appropriate starting points in the development of a yield formula for Type D2 development.

Many towns have found that when the design guidelines and yield formula are constructed so as to meet the town’s objectives there is no need to establish a minimum site size. Minimum lot area, setbacks, and other

dimensional requirements can provide the necessary controls. Row houses with appropriate setbacks would be permitted.

***The Type D2 Development will require drafting new sections of zoning text***

§190-32. While the Use Table and §190-32 set forth standards for the uses in Multiple Residential (MR-1 and MR-2) districts, these districts do not appear on the zoning map. The Use Table and §190-32, however, do allow various multifamily building types in business zones by special permit, and this provision appears to have generated most of the townhouse and low-rise multifamily developments found near the downtown. A text amendment at the November 2001 Town Meeting provided greater flexibility by adding industrial zones to the special permit process. While accomplishing several worthy goals, the 2001 amendment did not describe a building envelope or model. A full set of straight-forward text amendments is needed to describe various multifamily building types (duplex, triplex, triple-decker, attached townhouses, low-rise multifamily and mid-rise multifamily); the building types need to be linked to zoning districts, and map amendments are needed that establish the districts.

§190-32. A. Under Wakefield's Bylaw the responsibility for reviewing projects bounces back and forth between the Planning Board and the Zoning Board of Appeals. Currently, a Type D2 Development would be sent to the Zoning Board, merely because it includes attached dwellings. The Type D2 development model, however, includes a new roadway, the creation of new lots, and typical subdivision landscaping – all topics where

the Planning Board has the greatest expertise. The Planning Board is the appropriate board to be the special permit granting authority. A review of M.G.L. Chapter 40A, §9, ¶5 also suggests that the Planning Board is the appropriate board to review all “§9 clusters.”

§190-33. The title change, Cluster Development in Residential Zones, may be sufficient to address both Type D1 & D2 developments.

§190-33 A. The Town of Reading's zoning ordinance manages to address both a standard cluster and an inclusionary cluster in the same section through simple charts. Perhaps the revision to Wakefield's ordinance could follow the Reading model.

§190-33 B. The Specific Requirements relating to Type D2 developments need to be carefully established so that these new developments will maintain Wakefield's community character. Unit density, open space/green space requirements and location and configuration of drives and parking are of particular importance.

***Where will the Type D2 Development Model be allowed? Revisions to the zoning map***

Locating appropriate areas for Type D2 development will be a challenging task. Type D2 developments that are carefully and appropriately designed and that keep to the overall density limits that pertain to the underlying zoning district could fit in well in many areas throughout the town. On the one hand, Wakefield prizes its single-family character that exists throughout most of the neighborhoods. On the other hand, Chapter 40B allows developers to propose inappropriately designed and much higher density projects on virtually any site in town. Wakefield currently allows



multi-family development in M1 and M2 districts but has created no M1 or M2 districts in which to place them.

The Town of Reading uses a two-step method to locate cluster projects. Reading has a zoning overlay district that allows projects by special permit approved by their version of a planning board. The location of the district is first approved at town meeting, then the applicant submits a request for a special permit to the planning board. This is one approach that Wakefield should consider. Possibly all the uses listed for M-1 and M-2 under the Use Table could be changed to special permit uses, and these two districts could be redefined as overlay districts. Identifying areas where these districts are to be mapped remains a difficult task. A Type D2 is out of character with the downtown, North Avenue, and Albion Street. A Type D2 Development should not be allowed in areas where Type D3 and D4 Development will be encouraged.

As a starting point, Wakefield should consider mapping Type D2 Development for the two sites investigated in this report: the Montrose School site and Fitch Court extension. These sites are: 3.65 acres and 1.05 acres respectively.

**Type D3 Development**

The Type D3 development model is a mixed use development made up of a building or buildings with ground floor commercial use and residential use on the upper floors. Parking is either behind the building or underground. The following discussion outlines the zoning changes

that would need to be made. Specific new guidelines and bylaws would need to be written and adopted before the Type D3 development model could be implemented as discussed.

***Design of a Type D3 Development***

The current zoning bylaw defines a maximum overall density of 14 units/acre in the MR-1 district and 36 units /acre in the MR-2 district and Business district. These standards offer a starting point for the development of density standards for Type D3 developments. There could be some flexibility in the maximum density based on providing a higher number of affordable units under special provisions of an inclusionary zoning bylaw. A desirable density standard might be on the order of 20 units/acre (2250 sq. ft. of lot area per unit) and not greater than 24 units/acre (1800 sq. ft. of lot area per unit).

There should be a courtyard requirement to provide open space in Type D3 developments. Even a modest green common area can provide an amenity that would encourage homeowners rather than renters to settle in these areas. Good examples of residential buildings with successful courtyards include the Crystal Condominiums on Main Street and several of the multi-family buildings on Richardson Avenue.

The following are proposed initial guidelines for minimum courtyard sizes:

Lot widths of 80 ft. or less	15% of the total lot area
Lot widths between 80 ft. and 160 ft.	17% of the total area
Lot widths of more than 160 ft.	20% of the total area

Courtyards must have a coherent shape, rectangular or otherwise. This could be controlled by a combination of maximum length to width ratio and design guidelines. The courtyard could be behind the building, with the requirement that an archway or portal providing a vista is needed. A requirement for perimeter walls should be included (preferably not a stockade fence from Home Depot) with design guidelines that specify height, location, and construction.

A height limit and number of stories for Type D3 projects needs to be established. It is possible that this would vary depending on location with a limit of ground floor commercial plus two floors of housing on lower intensity streets and ground floor commercial plus three floors of housing on North Avenue, Main Street, and possibly other places.

Business uses should be required for the ground floor.

Underground parking is very desirable for Type D3 projects, particularly if combined with a greater amount of green space designed into the project. Wakefield should consider offering incentives for projects that put parking underground and include increased green open space.

Design guidelines need to be drafted and enacted for Type D3 projects. A more comprehensive design review process for Type D3 projects should be established and integrated with the design guidelines to insure quality site design and architectural design, and that quality materials and finishes are specified for the projects.

***The Type D3 Development is allowed under the current bylaw, but additional guidelines and straight-forward text describing the building type need to be drafted and enacted.***

The Type D3 Development will require drafting entirely new sections and perhaps reordering the zoning text. Developments similar to Type D3 projects could be proposed under the current ordinance but, without better regulations and guidelines, the projects proposed may yield unexpected results.

§190-32 A. The special permit granting authority for residential-over-retail development should be changed to the Planning Board. Type D3 Developments will not be appropriate for all business and industrial sites. Type D3 projects will be dense, compact, and a different building type. One possible approach would be to designate an overlay district that specifically maps the areas where Type D3 projects would be allowed. These sites might include North Avenue, Albion and Main Street (downtown), and Greenwood Center.

§190-32 B (1). The 40,000 sq. ft. minimum lot (the current M-1 minimum) for a Type D3 Development is probably too restrictive. For comparison the four-story residential development at 10 Foster Street is on a 21,672 sq. ft. site. The ground floor is only an elevator lobby and exposed surface parking; not the ideal for Type D3 Development. A 20,000 sq. ft. site or perhaps even smaller could be considered as a minimum at this stage. Even a 15,000 sq. ft. site may be difficult to assemble on North Avenue.

***Where will the Type D3 Development Model be allowed? Revisions to the zoning map***

Initially, a map revision could be proposed with an overlay district on sections of North Avenue. After one or two projects are approved and found acceptable, the district could then be mapped along Albion Street. There are a few important historic buildings on Albion Street; the district should be scribed around the Wakefield Gas Building (13-15 Albion Street) and others. The district could later be mapped on sections of Main Street. Incentives could encourage preservation of historic structures.

**Type D4 Development**

The Type D4 development model is a higher density, mid-rise project that adheres to design guidelines relating to site design, green space/open space, and the organization of roads and parking. The following discussion outlines the zoning changes that would need to be made. Specific new guidelines and bylaws would need to be written and adopted before the Type D4 development model could be implemented as discussed.

***Design of a Type D4 Development***

Some of the discussion of Type D3 developments also pertains to Type D4 developments, including the need for courtyards and increased green space/open space, the inclusionary requirement for affordable housing, and the desirability of underground parking.

§190-32 currently includes dimensional and other limits for multi-family projects. These need to be reviewed and revised for Type D4

developments. The density limit for Type D4 developments should remain 36 units per acre as presently stated in the bylaw. On certain sites the height and number of story limits might be reconsidered.

There should be courtyard and open space requirements. The current bylaw requires 30% of the total area remain open area (§190-32 C (2)) and this could be increased. Courtyards should be contiguous and connected spaces.

There should be a 20% inclusionary requirement for all Type D4 developments. (See the discussion above related to models and precedents for drafting the inclusionary bylaw.) Units will be reserved as affordable or senior housing with deed restrictions meeting the state's requirements.

***The Type D4 Development is allowed under the current bylaw, but additional guidelines and straight-forward text describing the building type is needed.***

Design guidelines and regulations need to be drafted and enacted for Type D4 projects. A more comprehensive design review process for Type D4 projects should be established and integrated with the design guidelines to insure quality site design and architectural design, and that quality materials and finishes are specified for the projects.

§190-32 D. Currently, mid-rise buildings are reviewed by the Planning Board if taller than 35 ft. A future committee, charged with redrafting the zoning bylaw, should reexamine the dimensional table.

***Where will the Type D4 Development Model be allowed? Revisions to the zoning map***

Initially a map amendment should be recommended for Colonial Point and the Hopkins Street sites, TM # 4 – 2A2B, 2A2C, 2A2D, and 3B. Other areas for further consideration are the Junction and Foundry Street areas.

**A SECTION BY SECTION REVIEW OF WAKEFIELD'S ZONING BYLAWS**

The following discussion is a Section-by-Section analysis of areas in the current Zoning Bylaw that relate to housing issues. The commentary addresses the Consultant's view of strengths and weaknesses in the current Zoning language and offers broad suggestions as to how the By-laws might better fulfill the stated goals. This is followed by a discussion of zoning tools currently being used by other Massachusetts cities and towns, with an emphasis on how and why these other tools might offer important opportunities for consideration by the Town of Wakefield. Ultimately, the recommendations in this report must be considered and developed by the Town and specific guidelines and bylaws must be drafted and adopted before any of the recommendations can be implemented.

**Existing text:**

***§ 190-3. Purpose***

"The purpose of this chapter is to promote the health, safety, convenience and general welfare of the inhabitants of the Town

of Wakefield; to lessen the danger from fire and congestion and from the hazards of floodwater inundation; to protect and conserve the value of property; to preserve and increase the amenities of the town; to conserve natural conditions; to promote educational, cultural and economic welfare of the public; to encourage an orderly expansion of the tax base; to encourage housing for all income and age levels; and to improve and beautify the town by encouraging the most appropriate use of land in accordance with the town-wide Master Plan and this chapter."

**Commentary:**

The statement of purpose sets out many of the same objectives and concerns that have been included in the mandate for the Housing Component of the Long-range Master Plan.

***§ 190-4. Definitions and word usage.***

Wakefield's primary objectives as laid out in § 190-3. ***Purpose*** can be undermined or strengthened by the definition of terms. The following definitions reinforce this point and in certain cases identify definitions that should be rewritten to better serve Wakefield's objectives:

**Existing text:**

**BUILDING AREA** – *The aggregate of the maximum horizontal footprint area of all buildings on a lot, exclusive of cornices, eaves, gutters, chimneys, steps, unenclosed porches, balconies and terraces. Such cornices, eaves, gutters, chimneys, steps, unenclosed and uncovered porches, balconies*



*and terraces may extend beyond the minimum yard requirements as established in Article VI, but in no case shall such extension be in excess of five (5) feet beyond the minimum yard requirements.*

**Commentary:**

Building Area provides an example of a strong positive effect deriving from a definition. By excluding porches, balconies and terraces as well as cornices and eaves from the calculation of allowable building size limit, the By-law encourages the construction of these elements and details that enrich the visual and social character of the built environment.

**Existing text:**

**GROSS FLOOR AREA** – *The sum of the floor areas of all parts of the building(s) on a lot, measured from the outer faces of the walls, excluding basement areas whose interior height is more than fifty percent (50%) below finished grade and excluding enclosed parking garages.*

**Commentary:**

Gross Floor Area is used in the calculation of Floor Area Ratio (FAR), which limits the size of a building in relation to the size of its lot. The exclusion of enclosed parking garages from this calculation encourages both the construction of garages and the construction of *large* garages because these areas are outside the FAR limits. Residential garages have some positive effect in that they moves parked cars off the street and out of view. However, residential garages, and particularly the three and even

four car garages that are a part of many new homes, can greatly decrease neighborhood green space/open space and increase the perception of overbuilding. Zoning By-laws adopted by most Towns *include* garages in Gross Floor Area definition.

**Recommendation:**

Rewrite definition of Gross Floor Area to include enclosed garages.

**Existing text:**

**HEIGHT OF BUILDING** – *The vertical distance of the highest point of the roof above the average finished grade of the ground immediately adjoining the building, as computed before the building is actually erected. This definition excludes chimneys, ventilators, skylights, water tanks, bulkheads, elevator penthouses and other accessory structures which are required or are customarily carried above the roofs of buildings and towers, spires, domes, cupolas and similar parts of buildings if such areas are not used for living or storage purposes and if such structures are not equal to more than twenty percent (20%) of the space occupied by the ground floor of the building. Such accessory structures shall not exceed required height limits by more than twenty (20) feet. Any berm or earth structure changing the grade of the ground shall be added to the elevation of the building to determine its height under this chapter.*

**Commentary:**

By defining Building Height as the distance to the highest point on the

roof, the By-law encourages the design of flat-roofed buildings because these provide the largest usable floor area within the allowable limit. Discouraging gables, hips, turrets, towers, and other roof forms works against the development of a rich and pleasing visual character. This definition undermines the desire to have new buildings carry on the traditional building forms found in Wakefield's neighborhood and town character.

**Recommendation:**

Redefine building height so that it encourages residential roofscapes that exhibit scale and massing interest. There can be two measures – one up to the highest wall or eave, or an average wall height to eave and rake – and a second that limits the maximum height. Height can be measured to the midpoint between eave and peak, thereby encouraging a sloping roof because it allows additional space over a flat roof. Limiting one and two family dwellings to 2 ½ stories also encourages sloping roofs and dormers rather than flat roofed buildings.

**Existing text:**

**§ 190-13. Mixed Uses.**

*In case of mixed occupancy, the regulation for each use shall apply to the portion of the building or land so used. Combinations of permitted uses within a single building are permitted, provided that health and safety regulations are followed. Proposed new buildings that mix residential and nonresidential uses shall obtain a special permit from the Board of Appeals.*

**Commentary:**

The broad assertion of an allowance for mixed occupancy (with a special permit) provides a setting for many possible beneficial development proposals to the Town. The Type D3 development proposal presents one scenario for beneficial mixed use projects. The language stating that “the regulation for each use shall apply to the portion of the building or land so used” is insufficient to the task of regulating even relatively simple mixed use projects such as the Type D3 model.

**Recommendation:**

Draft specific guidelines and regulations for Type D3 projects and other types of mixed use projects that clearly state the way in which these projects should be designed.

**Existing text:**

**§ 190-22.A(1)(f): Accessory apartments.**

*[1] Purpose and intent. It is the specific purpose and intent of allowing accessory apartments within one family properties, except where enforceable deed covenants prohibit the same, in all one-family residence districts to meet the special housing needs of families. To help achieve these goals and to promote the other objectives of this chapter, specific standards are set forth below for such accessory apartment uses.*

### **Commentary:**

Accessory apartments, many or most of them undocumented, make up a significant part of Wakefield's stock of affordable housing. Accessory apartments increase the stock of low cost rental apartments and support and stabilize home-ownership while making home ownership more accessible to moderate income households. Accessory apartments generally blend well into residential neighborhoods and are well maintained in the context of owner occupancy of the primary unit.

### **Existing text:**

#### **§ 190-22.A(1)(f): Accessory apartments.**

*[2] Accessory apartments may be created only within single-family dwellings which are located on lots meeting the minimum lot area and width requirements of the applicable zone."*

*[3] Owner occupancy required. The owner(s) of the one-family lot upon which the accessory apartment is located shall occupy at least one (1) of the dwelling units on the premises. The special permit shall be issued to the owner of the property. Should there be a change in ownership, a change in the residence of the owner or the death or removal of the surviving parent or family member occupying the accessory apartment, the special permit use and the certificate of occupancy for the accessory apartment shall become null and void. Within ninety (90) days of the death or removal of the surviving parent or family member, or prior to a change in ownership or residence, the second kitchen shall be removed*

*and the house shall revert to a single-family status. Should the new owner decide to live in the structure and desire to continue the use of the second dwelling unit, he shall apply to the Zoning Board of Appeals for a special permit. The owner-applicant shall be required to file on the subject property a declaration of covenants prior to the issuance of a special permit for an accessory apartment. This declaration shall be in favor of the Town of Wakefield and state that:*

*[a] The special permit for an accessory apartment or any renewal of said special permit shall terminate upon the death of the undersigned and the spouse of the undersigned or upon the transfer of title to said premises or upon the undersigned no longer occupying the premises as his principal residence.*

*[b] The new owner of the premises shall have to apply to the Zoning Board of Appeals for a special permit to continue the accessory apartment.*

### **Commentary:**

The requirement for zoning dimension-compliant lots is a reasonable standard. The requirement for continuous owner occupancy of one of the units is a good mechanism for maintaining quality, upkeep and control of accessory apartments. However, the additional requirements restricting the permitting of accessory apartments should be carefully reconsidered. By limiting occupancy exclusively to a "surviving parent or family member", Wakefield severely limits the capacity of accessory apartments to address the real housing need. Furthermore, the temporary

nature of these apartments discourages their construction because of the requirement that the owners incur the expense of taking out the kitchens and other costs when there is no longer a family member occupying the unit. Finally, their status as temporary units makes it difficult to count these apartments against the 40-B affordable unit requirement.

**Existing text:**

***§ 190-22.A(1)(f): Accessory apartments.***

*[4] The special permit shall be issued on a year-to-year basis, and the Board of Appeals shall not renew any such permit where the need for such accessory uses no longer exists. The Board shall require a bond or surety to insure that any improvements made shall be removed at the expiration of such special permit or the sale of the premises, whichever occurs first."*

**Commentary:**

The requirements that any homeowner provides a bond to the town before a permit is issued and keeps this bond paid discourages unit development and drives it underground. The annual renewal requirement also burdens the homeowner and the town with paperwork.

**Existing text:**

***§ 190-22.A(1)(f): Accessory apartments.***

*[5] An accessory apartment must be located in the principal dwelling,*

*provided that such principal dwelling conforms to the other requirements of this chapter, unless a variance therefor shall have been granted by the Zoning Board of Appeals.*

*[7] The accessory apartment shall not involve the extension or enlargement of the principal dwelling, except to provide access or egress, nor shall it change the single-family characteristic of the dwelling.*

**Commentary:**

Restrictions [5] and [7] further limit and discourage the development of accessory apartments. Numerous building options that can be attractive and fit in well with existing neighborhoods are prohibited. These include the "granny flat", carriage house, apartment over garage, and first floor addition.

It is a reality that there are many undocumented accessory apartments currently in use in Wakefield. Illegal accessory apartments are tolerated and ignored, and so they are effectively unregulated. Furthermore, these accessory apartments are uncounuted. If a mechanism were developed for acknowledging and allowing accessory apartments, then they could be counted toward the 40-B 10% requirement, providing a dramatic advantage in the Town's effort to regain unchallenged local control of development.

**Recommendation:**

Revamp the Accessory Apartment provisions so that they are much easier to build, use and maintain. Reframe the "Purpose and Intent" section of



§ 190-22.A(1)(f) to also include meeting the Town’s need for affordable housing. Accessory apartments promote home ownership. Consider making their status permanent rather than temporary. Structure the law so that people don’t have to hide these units, thereby allowing them to be regulated and also counted on the rolls of affordable units against the 10% Chapter 40B goal. Develop a program, perhaps utilizing an amnesty period, for getting existing undocumented accessory apartments listed. Maintain the requirement for owner occupancy of the primary unit.

**Existing text:**

*§ 190-31.C (1) No front yard shall be used for the open storage of boats, vehicles, travel trailers or any other equipment. In residential districts, parking of vehicles is prohibited in the front yard, except for automobiles parked in the driveway. A driveway in any residential district shall not serve more than one (1) lot. Driveways shall not exceed a width of twenty (20) feet in residential districts without a special permit from the Board of Appeals, and sixty percent (60%) of the front yard shall be maintained as open area, without parking. In business and industrial districts, parking is permitted in the front yard area, provided that a fifteen-foot landscaped strip is provided adjacent to the street right-of-way line.*

**Commentary:**

The blanket prohibition of shared driveways encourages asphaltting over the landscape and limits a useful land-use tool in residential planning, particularly in cluster, small lot, and “in-town” development. At the same time, the Zoning Bylaws inadequately prevent extensive paving over of front and side yards and do nothing to discourage or prohibit front facing

garages with large asphalt aprons, and oversized garage doors rather than more neighborhood oriented windows and porches facing the street.

**Recommendation:**

Allow shared driveways that serve rear parking and encourage garage doors that do not face the street or that are significantly recessed behind building fronts. Develop guidelines or restrictions that move garage doors away from the street and reduce extensive paving of residential front and side yards.

**Existing text:**

*§ 190-31.I Gradient of driveways. No driveway shall have an average gradient of more than ten percent (10%) over the forty (40) feet thereof adjacent to the point where such driveway meets the street.*

**Commentary:**

Many of the recently developed residential lots in Wakefield have been developed on steeply sloping land. The driveway gradient restriction may prohibit the most inappropriate ways of utilizing land or re-grading sites but still allows new houses to have imposing garages sitting on or carved into hillsides. The houses that are built on sloping lots were often originally designed for flat sites, and are poorly suited to steeply sloping topography. Massive retaining walls or the remains of blasted bedrock mar the landscape into which many of these houses have been inserted. Not only do they present a visual blight in areas of natural beauty, they make it hard for houses to align with one another to define a coherent neighborhood.

**Recommendation:**

Enact new guidelines and regulations that require a less destructive approach to site development and encourage buildings designed to better suit the existing landscape. These new bylaws should include a slope ordinance.

**Existing text:**

*§ 190-32. Multifamily dwellings.*

**Commentary:**

In general, see discussion under Type D2, Type D3, and Type D4 developments above.

Multi-Residence Districts are enabled under the Zoning Bylaws but not designated on the Zoning Map. The resulting situation is that multi-family dwellings are allowed in certain districts with a Special Permit but encouraged in none. This, combined with the somewhat intimidating structure of the Special Permit (with no certainty of success), discourages the development of multi-family housing throughout the town.

**Recommendation:**

Wakefield has a significant demonstrated housing need at all levels of low and moderate income. In light of this, the role of multi-family housing should be carefully considered in relation to other housing types and uses in the town.

**Existing text:**

*§ 190-32.B (1) “The minimum lot size for multi-family dwellings, where permitted, shall be forty thousand (40,000) square feet in the M-1 District or Business District and sixty thousand (60,000) square feet in the M-2 District.”*

**Commentary:**

These minimum lot sizes are too restrictive and rule out many slightly smaller lots that would provide viable opportunities for developing multi-family projects that would significantly address the affordable housing need. The 40,000 s.f. lot size combined with the maximum allowable density of 14 units/acre for M-1 projects means that current zoning really only allows multifamily projects on sites that would yield about 14 units or larger. It is unlikely that a developer would build fewer units on such a lot, while smaller sized projects might well fit in better in many of the areas where multifamily development is currently allowable (Business District) or might be permitted in the future.

**Recommendation:**

Reduce the minimum lots size for multi-family housing development in order to encourage the production of more affordable housing units. Alternately, enact a new section of the code with guidelines for small multifamily projects. Well structured guidelines (as discussed in the D-2, D-3, and D-4 models above) may eliminate the need for a minimum lot size.

### **Existing text:**

#### ***§ 190-32.G Conversion to Apartments.***

- (1) A single-family dwelling in the Single Residence District may be converted to a two-family dwelling, provided that the dwelling contains nine (9) or more rooms, was originally constructed prior to 1935 and is located on a lot of twelve thousand (12,000) square feet or more. In the Single Residence District, a special permit shall be required from the Board of Appeals.*
- (2) A single- or two-family dwelling in the General Residence District or Business District may be converted to a three- or four-family dwelling, provided that:*
  - (a) The dwelling is located on a lot of thirteen thousand (13,000) square feet or more.*
  - (b) There shall be a minimum lot area of three thousand five hundred (3,500) square feet for each dwelling unit provided.*
  - (c) There shall be a minimum floor area of six hundred fifty (650) square feet for each dwelling unit provided.*
  - (d) A special permit shall be obtained from the Board of Appeals. Conversions in the Business District shall be granted only if the Board of Appeals determines that the proposed residential use will not be detrimental to the economic health of the Business District and that the proposed location is a suitable residential environment.*
  - (e) The conversion shall meet all building codes, fire, safety, and health regulations and other sections of this chapter.*

### **Commentary:**

Current zoning allows the conversion of large single family houses in SR Districts to two-family. The working sessions conducted during the October, 2001 Public Forum resulted in a recommendation to allow limited conversion of large houses on large lots to two-three-four-family units. The ongoing trend to add houses to these neighborhoods by subdividing large home sites into smaller lots, then building on the side yards and thus removing open space was decried because it changes the character of the neighborhoods. Citizens felt that it would be preferable to encourage building additional units within/onto the back of these houses in order to save side yards, protect open space, preserve community character and promote affordable housing.

### **Recommendation:**

Develop guidelines for the conversion of large houses on large lots into several homes in order to protect community character and promote affordable housing. The current language for conversions in the General Residence and Business District is a good starting point for project limits. In addition, parking restrictions and green space/open space restrictions need to be developed. Inclusionary requirement of an affordable unit should be considered as well.

An additional recommendation from the working sessions conducted during the October, 2001 Public Forum was to allow three family houses under some circumstances as a strategy for promoting affordable housing.

**Existing text:**

***§ 190-33. – Cluster development.***

**Commentary:**

The entire § 190-33, starting with its title, needs to be reconsidered. See discussion and recommendations under Type D2 Developments above.

**Existing text:**

***§ 190-37.E Landscaping of parking lot.***

*(1) Required setbacks. The surfaced areas of off-street parking areas shall be set back a minimum of seven and five tenths (7.5) feet from all buildings and lot lines, except that front yards in business and industrial districts shall provide a fifteen-foot landscaped strip adjacent to the right-of-way line.*

**Recommendation:**

Where desirable, and certainly where consistent with nearby properties, require the construction/continuation of sidewalks.

**Existing text:**

***§ 190-40 Protection of residence districts.***

*Except for parking accessory to dwellings, all parking and loading, including outdoor storage, sales or service to automobiles or to their occupants, shall meet the following requirements:*

*C. Illumination. All illumination of such parking and loading areas*

*shall be continuous light installed and shielded in such a manner that will prevent direct light from shining upon an other property in a residence district.*

**Commentary:**

The illumination provision prevents parking lot illumination from spilling onto adjacent and nearby residential property. Parking lot illumination should also be designed so that it does not spill needlessly into the sky, wasting energy and degrading nighttime visibility.

**Recommendation:**

Consider adding a “dark sky” provision requiring energy efficient, shielded lighting fixtures that only light narrowly defined areas. This will promote energy conservation and protect residential neighborhood character.

**Existing text:**

***§ 190-41.A.(2) Required off-street parking.*** *Joint parking lot. The aggregate number of spaces required for each of several uses separately may be provided on a common parking lot serving all of these uses, and, where it can be demonstrated that the combined peak parking needs of all the uses sharing the lot will, because of differences in peak hours or days, be less than the aggregate normally required for each use separately, the number of parking spaces to be provided may be reduced accordingly.*



**Recommendation:**

This is an excellent provision, allowing flexibility while placing responsibility on the property owner to demonstrate the adequacy of the parking design. This provision protects green open space and is “downtown friendly.” It is particularly applicable to mixed-use commercial/residential projects (where the residents use the parking on nights and weekends and leave it available for day workers), and to development well served by public transit.

**Existing text:**

*§ 190-41B. Table 3 – Table of Required Off-Street Parking.*

**Recommendation:**

Consider a reduction in required number of parking spaces for new housing or businesses (as appropriate) developed within some maximum walking distance to the commuter rail stations. For businesses this could require a study demonstrating the reduced need, as in § 190-41.A.(2).

**Existing text:**

*§ 190-45. Site plan review in conjunction with special permit application:*

**Commentary:**

**Article VIII – Special Permits and Site Plan Review** provides the critical mechanism for maintaining Town control over complex development proposals submitted by land owners while simultaneously allowing the flexibility to steer these projects toward the greatest public good. The review and permitting process provides for both “the carrot and the stick”, and should be carefully reviewed as to how it encourages and discourages different types of projects. The process presents a somewhat intimidating hurdle to any applicant. If there are certain types of projects that the Town would like to promote because these projects make a particular contribution to the public good, language should be added to Article VIII that encourages the bringing forward of those projects and helps them to more easily make their way to and through the Special Permit process. On the other hand, large development projects can be extremely complicated and the review of such projects can pose problems to planning boards without adequate expertise or staffing. One way of addressing this issue is to incorporate peer review of large project proposals into the permitting process. This would bring outside design professionals (selected by the Planning Board or with their consultation, and paid for by the developer) into the review process. While this would add to project cost, it would potentially provide an added measure of speed and certainty to developers while giving the Planning Board the support that it needs. See also additional discussion on this subject under the discussion and recommendations for the Type D1-D4 development models and the excellent discussion of the Special Permit process included in the MAPC

publication The Conservation Subdivision Design Project: Booklet for Developing a Local Bylaw.

**Recommendation:**

Review and revise the Special Permit process to remove unnecessary provisions and encourage desirable new development in Wakefield. Consider a “peer review” requirement for large projects.

**OTHER TOPICS FOR CONSIDERATION IN THE REVIEW OF HOUSING ISSUES RELATED TO THE ZONING BYLAWS**

The following issues should be considered in a review of the Zoning Bylaws.

**Overlay Zoning Districts:** Wakefield has a number of discreet areas that are being considered for significant change, including promoting new construction and possibly change of use. The development of overlay zoning districts to both control and encourage appropriate development is a powerful tool for shaping these areas and accelerating appropriate change. Special zoning districts can also be combined with economic incentive districts to further encourage desired change.

**Recommendation:**

Carefully consider the possible use of zoning overlay district regulation for targeted development areas and/or special cultural, social, and ecological zones deserving of particular special treatment.

**Land clearing, grading and/or protection of specimen tree bylaw:**

Many Wakefield residents have expressed concern about what they perceive as inappropriate land clearing and grading development methods. Many communities have adopted bylaws that limit land clearing, grading and specimen tree removal in ways that protect and enhance town character and result in new developments that more closely resemble the town’s best streets and neighborhoods, preserve open space, and better control run-off and protect critical watersheds.

**Recommendation:**

Consider adopting a Land clearing, grading and/or protection of specimen tree By-law.

**Other Regulatory Tools and Strategies: The Community Preservation Act**

A number of Massachusetts cities and towns have passed a local implementation of the Community Preservation Act, and it is being considered by many more. The following description is taken from the State’s CPA website:

*“The Community Preservation Act is statewide enabling legislation to allow cities and towns to exercise control over local planning decisions. This legislation strengthens and empowers Massachusetts communities:*

- *All decisions are local.*
- *Local people must vote by ballot to adopt this.*
- *Local legislatures must appoint a committee of local people to draw up plans for use of the funds.*
- *These plans are subject to local comment and approval.*
- *If they don't feel it is working as they expected, local people can vote it out.*

*The Community Preservation Act provides new funding sources which can be used to address three core community concerns:*

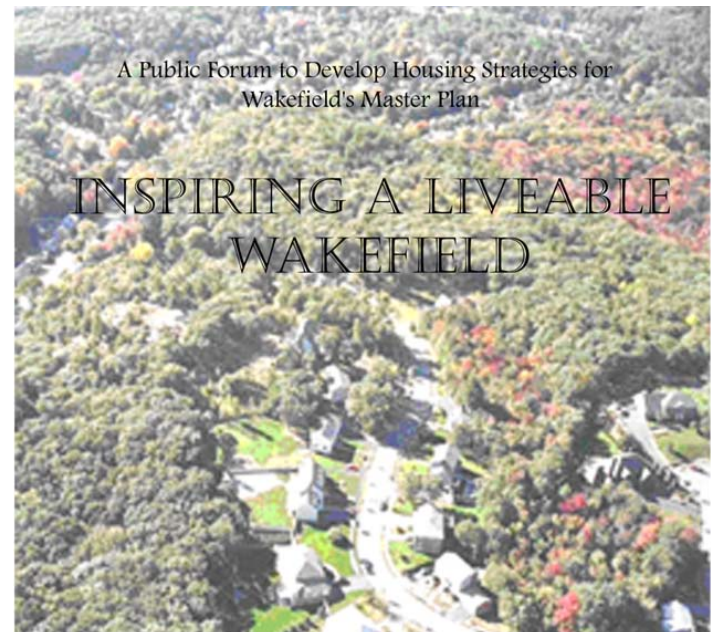
- *Acquisition and preservation of open space*
- *Creation and support of affordable housing*
- *Acquisition and preservation of historic buildings and landscapes*

*A minimum of 10% of the annual revenues of the fund must be used for each three core community concerns. The remaining 70% can be allocated for any combination of the allowed uses. This gives each community the opportunity to determine its priorities, plan for its future, and have the funds to make those plans happen.*

*Property taxes traditionally fund the day-to-day operating needs of safety, health, schools, roads, maintenance. - and more. But, currently, there does not exist a steady funding source for preserving and improving a community's infrastructure. The Community Preservation Act can give a community the funds needed to control its future.”*

**Recommendation:**

Wakefield should consider the benefits of adopting a local implementation of the Community Preservation Act in order to promote affordable housing and address other local needs supported by this legislation.



A Public Forum to Develop Housing Strategies for  
Wakefield's Master Plan

## INSPIRING A LIVEABLE WAKEFIELD

Saturday, October 20, 2001, 9:30 AM to 3:30 PM  
Fellowship Hall, First Baptist Church, 8 Lafayette St.

9:00 AM Coffee and refreshments available

Morning Session: 9:30 - 12:00

- Presentation by Abacus of Preferred Housing Strategies
- Discussion of Wakefield's Housing Issues

12:00 - 1:00 Lunch -- Continued Discussion of the Morning Session

Afternoon Session: 1:00 - 3:30

- Formulating Strategies for Wakefield

Join your fellow residents, elected officials and planning experts for  
the morning and/or afternoon sessions.

For more information on the Forum, call 781-246-6397



On Saturday, October 20, 2001 Wakefield's Town Planner, Master Plan Committee, and their consultants, Abacus Architects & Planners, organized a full day public forum to discuss Wakefield's housing issues.

The event was organized to solicit citizens' ideas on housing needs and strategies for fulfilling those needs that would reinforce the character of Wakefield.

The morning session began with a presentation on Wakefield's neighborhoods and their defining characteristics. Attendees then broke up into groups organized by neighborhood and discussed ways of meeting housing needs appropriate for each community.

The afternoon session began with a presentation on four proposed housing development strategies. Four strategy-based groups were formed to suggest sites for these types of development.

Suggestions offered by those in attendance are noted on the following pages.

## **SUMMARY OF PRESENTATIONS, DISCUSSIONS, AND CITIZEN WORKING GROUP REPORTS**

### **I. INTRODUCTIONS AND MORNING PRESENTATIONS**

Introductions to the Forum were made by the Chairman of the Planning Board's Master Plan Committee, **Bob McLaughlin**, and by the Town Planner, **Paul Reavis**.

Short presentations were made by each of Abacus Architects & Planners Principals:

**Anne Tate** opened the floor to the public, asking citizens to identify housing issues of greatest concern to the people of Wakefield. A number of citizens spoke, identifying several key issues including:

- Loss of affordability for everybody. Rapidly rising housing costs are driving Wakefield residents out of their own market
- Need for more senior housing, as well as more options in senior housing
- Desire for housing development as a driver for revitalization
- Need to "expand the mix" — rising prices challenge community diversity
- Desire to promote cluster development (and a better cluster ordinance) as a tool for preserving open space
- Need to balance need for new housing and need for open space

**David Eisen** presented a brief summary documentation of Wakefield's housing need, including a number of charts showing who can and can't afford to live in Wakefield. This information is more completely documented in the *Housing Needs Assessment* section of the Report.

**David Pollak** made a slide presentation of Wakefield neighborhood character and housing types. This information is more completely documented in the *Town Character* section of the Master Plan.

### **II. MORNING NEIGHBORHOOD WORKING SESSIONS**

Morning working groups were formed based on where attendees lived within the town, and were asked to talk about housing issues in their neighborhood. They were instructed





to provide specific ideas for ways to address Wakefield's housing needs that would most positively reinforce neighborhood character. Given that development is occurring and will continue to occur in all neighborhoods, they were asked to make recommendations as to what kind, how much, and where.

## **WEST SIDE**

The West Side group presented recommendations for three different neighborhood conditions: the predominant fabric of single-family homes on residential streets; development opportunity sites in the single family areas; and housing conversion or redevelopment sites in the industrial areas.

### **NEIGHBORHOOD RESIDENTIAL STREETS**

- The group felt that their part of town was almost fully developed with large older homes.
- They supported the construction of new homes on empty lots to fill in the residential neighborhoods.
- Conversely, they decried the subdivision of lots with existing homes, where the side lot is sold off and another large house is wedged in, because it changes the character of the street.
- They proposed allowing subdivision of "some" of the large houses into condominiums as an alternative to selling side yards. The houses would need to continue to present themselves to the neighborhood (outwardly) as single-family, with appropriate treatment of parking (screening, parking around back).
- There was concern about the loss of open space that is currently occurring, and a desire to preserve school sites and other Town-owned land for recreational use. Particularly, they were interested in the development of small "pocket parks" for neighborhood use.



### **NEIGHBORHOOD DEVELOPMENT OPPORTUNITY SITES**

- The group identified a range of sites throughout the West Side that they felt would be appropriate for new housing development, including:
- Near the Senior Center. The upper floors of the Senior Center have not been programmed and could be developed for housing. In addition, at the end of Stedman Street is town-owned land that could be senior housing near the Senior Center.

- They identified a “cluster site” on Prospect Street near the Westward School.
- They identified the Walton School site as viable for either new housing or conversion of the school to housing, although they also felt that at least part of the site should be maintained for recreational use.

#### **INDUSTRIAL CONVERSION AND REDEVELOPMENT**

- The group was very supportive of conversion of the Spir-it complex to multi-family housing.
- In general, the group supported the redevelopment of the Foundry Street industrial area as new housing.

#### **GREENWOOD**

The Greenwood group began by listing the positive and negative aspects of their neighborhood.

- Positive:** *Their own distinct neighborhood identity as a second “town center”; Two neighborhood elementary schools; their own little “downtown” on Main Street with train station, post office, and shops; churches; playgrounds; small lots and homes.*
- Negative:** *Drainage issues; inadequate parking for businesses; commuter rail parking; Main St and Pitman St; affordable housing is too high-end; many people are detached from the community.*

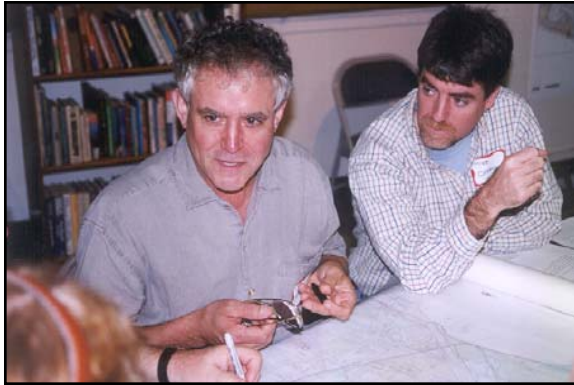
The group’s recommendations fell into three categories: preserving the neighborhoods; Main Street development; and open space and environmental issues.

#### **PRESERVING NEIGHBORHOOD CHARACTER**

- They like the small house/small lot feel of the neighborhood streets and would like to stop teardowns and the construction of much larger houses on the existing lots.
- They propose working with developers to make small homes (perhaps on smaller lots) in new developments, to keep with the character of the area
- They propose working with developers to prevent blasting in sites.







#### **MAIN STREET DEVELOPMENT**

- They propose working with developers to focus most new housing development efforts on Main Street.
- They wanted to intensify Main St. by building housing above shops, planting street trees, creating a string of squares, bury utilities, and do more to maintain the historic buildings.
- They were very excited about new housing above commercial on Main Street, and identified several good existing sites:
  - Housing above Billie's Roast Beef
  - Housing above Dance Track
  - Housing above Dutton Family Care
  - Housing above Wells Fargo

#### **OPEN SPACE AND ENVIRONMENTAL ISSUES**

- They were very concerned about blasting and the wholesale development of woodlands.
- The expressed interest in increasing open space, identifying open space with signage, and adding trails and pedestrian paths connecting to areas such as Main St., the Town forest, and Crystal Lake.
- They wanted to keep the schools as schools, bring businesses into the neighborhoods, protect areas near wetlands, and get all the Town's boards to work together to better coordinate their actions.

#### **WOODVILLE / EAST SIDE**

The Woodville/East Side group also began by listing the positive and negative aspects of their neighborhood.

**Positive:** *Town schools; vocational school; Breakheart Reservation, accessibility; Hart's Hill; town-owned land; JJ Round; and Main St.*

**Negative:** *Traffic; water and drainage concerns; lack of stores in neighborhoods*

- This group was very interested in the idea of developing an extended recreational-use greenbelt connecting town-owned lands, Breakheart, and other significant open

space. They suggested developing new housing to border and provide access to the green belt. They proposed cluster housing as a good model to preserve open space, possibly even to add infill parcels to complete the green belt.

- They also wanted to bring businesses into the neighborhood so people do not need to drive everywhere.
- The group proposed several specific sites for new housing development:
  - Housing in “the Pit”
  - Housing adjacent to (or in) town forest
  - Infill sites.
  - On large parcel(s) of Vocational-Technical High School land adjacent to Breakheart Reservation.



## **MONTROSE / LAKESIDE**

- The Montrose / Lakeside group had concerns about open space and blasting into hillsides.
- They like the working class character of lakeside and feel that ultimately there should be some historic districts in the neighborhood.
- Most development suggestions were in the “new town” area of Montrose and the Edgewater Office Park.
- The group would like to see businesses brought to the Salem St corridor.
- The group would like to see a greenbelt ending in the Edgewater Office Park with a possible nature center.
- The group would prefer new development in the form of cluster zoning and building conversions.
- They also felt that the Town Boards must band together and collaborate with developers.

### **SPECIFIC SITES:**

- Mixed use opportunity near bowl-a-rama
- Melrose School conversion to housing
- Expansion of Colonial Point development
- Conversion of industrial to housing in office area
- Identify pockets of land for development that would keep with neighborhood character





## **DOWNTOWN**

- The Downtown group was in love with living downtown.
- They felt that the walkability, historic character and amenities made it a desirable place to live.
- They were concerned about civic buildings and functions moving out of the downtown, such as the YMCA and the post office, as well as the erosion at the end of blocks by parking and defunct buildings.
- Strategies they would like to see employed are to restrict parking in front of houses, encourage porches, keep buildings close to the street, build at high densities, plant street trees, build aesthetic parking garages, and anchor the ends of blocks and vistas with civic scale buildings.

### **SPECIFIC SITES:**

- Fleet Bank site to be parking and condos behind a historic re-creation of the Miller Piano Factory
- Housing to be built above stores on North Ave.
- Convert old Rattan Co. to housing
- Infill parking lots with townhouses
- Housing and mixed-use development at Mike's Gym and the Junction.
- Verizon truck facility on Main Street.

## **III. AFTERNOON PRESENTATION**

**Anne Tate** gave a slide presentation outlining a range of contemporary strategies for making good neighborhoods and good housing.



## **IV. AFTERNOON STRATEGY-BASED WORKING SESSIONS**

Groups were formed based on four different development strategies:

### **A. Main Street Development**

Building housing over ground floor commercial along Main Street(s), and filling in the street fabric (missing buildings).

### **B. Brownfield Development**

Building or rebuilding on previously developed or contaminated sites.

### **C. Neighborhood Infill Development**

Building on open lots, decommissioned school sites, other undeveloped sites.

#### **D. Open Land Development/Preservation**

Developing open land as well as setting aside, preserving, acquiring, or gaining (through cluster development or other means) land for the public realm.

The groups were to talk about how they would use these strategies throughout Wakefield to address the housing need while strengthening Town character. Their assigned tasks included evaluating sites for both utilization and preservation, and setting model criteria for development.

#### **MAIN STREET DEVELOPMENT**

- **The group identified several general areas as being appropriate for main street development, including:**
  - Main Street
  - North Avenue
  - Lowell Street
  - Vernon Street
  - Main Street in Greenwood at Greenwood Street/Oak Street
- **The group identified several issues of concern, including:**
  - Lack of parking
  - Affordability
  - Elevators
  - Adequate size of apartments/housing for flexibility.
- **Tools for development that they would like to see used include:**
  - Keep parking behind buildings
  - Set a height limit/requirement of 2-6 stories
  - Develop 2-3 bedroom apartments so families can grow
  - Maintain and follow historic preservation guidelines
  - Create roof gardens.
- **They also wanted to move Greenwood Train Station to give it more room and presence on Main St.**

#### **SPECIFIC SITES:**

- Reuse Mike's Gym as multi-story mixed use development with a "green pocket park" on top
- 2-3 stories of housing to be built above stores on North Ave.
- Four Corners (Lowell St. at Vernon St.) to build housing over shops







## **BROWNFIELD DEVELOPMENT**

The Brownfield group wanted to create community-oriented developments with their own amenities (in areas of Town where amenities were not readily accessible). In the spirit of cleaning up contaminated sites, they were also interested in some sort of environmental incentives for solar power, energy-efficient designs, etc.

### **SPECIFIC SITES:**

- Auto dealerships on North Ave. good locations for housing
- Industrial uses on North Avenue near train station for housing over commercial.
- Convert Lakeside offices to a mixed-use community development
- Convert Robie Industrial Park to 6 story mixed-use, mixed-income development with basketball courts, tot-lots, and accessible to adjacent park.
- Kytron building to be converted to housing or parking garage.
- Create mixed use community development with amenities on Foundry St. next to Crystal View Apartments.
- Convert Spir-it complex on Lake Street to housing
- The Hudson Bus site (Salem St. and Montrose Ave.) to become a mixed-use area.

## **NEIGHBORHOOD INFILL**

- The Neighborhood Infill group felt that neighborhood schooling may come back into favor, and that decommissioned school sites should remain open and public. They proposed using them as parks, leasing the buildings, or developing housing at the edges of these sites.
- They felt it would be appropriate to allow multi-family and condo development in single family zones along thoroughfares, but not in neighborhoods on single-family streets.
- They supported allowing more accessory apartments as long as they were accessory to owner-occupied houses, followed design guidelines, and accommodated parking.

## OPEN SPACE PRESERVATION

The Open Space group identified areas to be preserved and existing open space to be developed. They also identified tax title sites for land swaps.

### SPECIFIC SITES:

- National Garden to be developed as open space with possible buffer housing.
- Preserve next to Saugus River
- Greenbelt/ walking path from town forest, along Mill River, and up to Edgewater Office Park
- Oak and Holland could be a node and access point on the greenbelt
- Development behind Hudson Bus
- Development at Salem and Vernon streets
- Development next to Walden
- Development near Hopkins St
- Development adjacent to Edgewater High Rise



## FORUM OUTCOME

This forum served as an important resource for the proposals and implementation strategies that are outlined in the Housing Master Plan Document.



**OPEN SPACE RESIDENTIAL DEVELOPMENT  
OR CONSERVATION SUBDIVISION DESIGN (CSD)  
MODEL BYLAW**

Produced by the Metropolitan Area Planning Council  
Boston, Massachusetts  
August 2000

Funding for the development of this model bylaw was provided by the Planning for Growth Program of the Executive Office of Environmental Affairs (EOEA).

Legal assistance in the development and drafting of this bylaw was provided by Mark Bobrowski, Esq.

Technical review in the development of this model bylaw was provided by Donald Schmidt, Principal Land Use Planner, Department of Housing and Community Development.

Assistance in the development of this bylaw was provided by the Green Neighborhoods Alliance.

Individuals and communities are encouraged and hereby permitted to produce copies of this model bylaw, amended as appropriate for their individual needs; provided, however, that subsequent public printings of this model bylaw (in its original form or amended) shall include the above noted information crediting the production of the original model bylaw to MAPC and its funding source, EOEA.

*This Open Space Residential Development or Conservation Subdivision Design (CSD) Bylaw<sup>1</sup> promotes an alternative to the conventional subdivision of land. CSD augments the choices available to the development community. CSD cannot be used to mandate the “clustering” of lots within a subdivision. In order to find a receptive audience with developers, CSD must be carefully tailored to fit the landscape, The town’s regulatory capacities, and the requirements of the development community.*

*This model tries to anticipate the many issues that face a community interested in adopting a CSD Bylaw. Where substantive requirements are set forth, they are intended only to provide an example. The numbers ultimately chosen for your CSD Bylaw should reflect careful planning beforehand. Where procedural choices are available, this model annotates the options to provide guidance in the drafting of a local bylaw. **All of the options and annotations are in italics and are meant for the users education only. They are not meant to be included as bylaw text.***

*Before adopting and implementing a CSD bylaw, municipalities should have in place a mechanism to receive and disburse funds for the technical review of the project by a civil engineer, traffic engineer, wetlands scientist, attorney, and/or other experts. The complex nature of a CSD proposal necessitates some help from professionals. Typically, towns use the provisions of G.L. c. 44, s. 53G to require the applicant to provide such funds with the application for special permit or subdivision review. Among the many towns that have adopted technical review fees pursuant to G.L. c. 44, s. 53G are Groton, Chelmsford, Dighton, and Clinton.*

## **I. PURPOSE AND INTENT**

*The model bylaw identifies those purposes that are common to all towns as primary purposes. Those purposes unique to a town are set forth as secondary purposes. Towns should incorporate, at a minimum, the primary purposes and select from appropriate secondary purposes in any proposed article for Town Meeting vote.*

1. The Primary Purposes for CSD are the following:
  - (a) To allow for greater flexibility and creativity in the design of residential developments;
  - (b) To encourage the permanent preservation of [choose] open space, agricultural land, forestry land, wildlife habitat, other natural resources including aquifers, waterbodies and wetlands, and historical and archeological resources in a manner that is consistent with amunicipality’s comprehensive and open space plan, if any;
  - (c) To encourage a less sprawling and more efficient form of development that consumes less open land and conforms to existing topography and natural features better than a conventional or grid subdivision;
  - (d) To minimize the total amount of disturbance on the site;
  - (e) To further the goals and policies of the [choose] comprehensive, master, and/or open space plans;
  - (f) To facilitate the construction and maintenance of housing, streets, utilities, and public service in a more economical and efficient manner.



As stated above, these secondary purposes are intended as suggestions, from which communities should choose relevant items.

2. The Secondary Purposes for CSD are the following:
  - (a) To preserve and enhance the community character; Metropolitan Area Planning Council Model Bylaw, August 2000 3
  - (b) To preserve and protect agriculturally significant land;
  - (c) To protect the value of real property;
  - (d) To protect community water supplies;
  - (e) To provide for a diversified housing stock;
  - (f) To provide affordable housing to persons of low and moderate income.

## II. ELIGIBILITY

*The options available to towns in establishing eligibility criteria are quite extensive. Some towns limit CSD to the residentially zoned district with larger minimum lot sizes; others allow CSD town-wide. Some towns set a minimum tract size or minimum number of lots to qualify; others consider any tract eligible.*

*Obviously, towns would prefer to see CSD-style development proposals over conventional “cookie cutters.” In most instances, such applications result from a combination of factors, some “carrots,” some “sticks.” Several towns make cluster mandatory within select districts. For example, Amherst requires developers to cluster in several resource protection districts. However, the legality of this mandatory approach has not been tested in the courts. The Subdivision Control Law, G.L. c. 41, ss. 81K-81GG, permits developers to subdivide as of right, as long as the project complies with local standards. Towns are therefore advised to proceed cautiously until the Courts balance these competing interests.*

*The following specific provisions attempt to set eligibility thresholds for CSD. Towns are encouraged to set these standards as low as possible in order to maximize the applicability of the CSD approach. In communities promoting a diversified housing stock consideration should be given to allow a mix of housing types. Furthermore, communities can specifically define contiguous to include parcels physically divided by a street. This would make a greater number of parcels eligible. Applicability of cluster/CSD to non contiguous parcels held in common ownership is significantly underutilized considering that it does not require the adoption of additional administrative procedures. Although relatively unused at this time, enabling CSD to apply to non-contiguous parcels under non-common ownership should be given serious consideration.*

- 1A. Minimum Size of Tract.** To be eligible for consideration as a CSD, the tract shall contain a minimum of \_\_\_\_ acres. Where the tract is located in the [specify name of special district] the minimum tract area shall be \_\_\_\_ acres.

*Alternatively, the threshold can be the number of lots to be created:*

- 1B. Minimum Number of Lots.** To be eligible for consideration as a CSD, the tract shall contain not less than \_\_\_\_ lots.

Or, if a mandatory approach to CSD is favored, this option would be appropriate:

- 1C. Any development that [will create more than \_\_\_\_ lots] and/or [is on a parcel of \_\_\_\_ acres or more] shall submit an application for CSD to the Planning Board.
2. **Zoning Classification.** Only those tracts located in the \_\_\_\_ Districts shall be eligible for consideration as a CSD.
3. **Contiguous Parcels.** To be eligible for consideration as a CSD, the tract shall consist of a parcel or set of contiguous parcels.
4. **Land Division.** To be eligible for consideration as a CSD, the tract may be a subdivision or a division of land pursuant to G.L. c. 41, s. 81P. *If condominium ownership is to be allowed (with a zero lot line approach), add the following:* provided, however, that CSD may also be permitted where intended as a condominium on land not so divided or subdivided.

### III. SPECIAL PERMIT REQUIRED

*The model makes it clear that a CSD requires the issuance of a special permit from the Planning Board. The Planning Board is the logical choice to serve as the Special Permit Granting Authority (SPGA) because it will invariably be involved in the subdivision of the tract. To force the developer into two forums (such as to the Planning Board for subdivision determinations, and to the Zoning Board of Appeals for zoning determinations) is a strong disincentive.*

The Planning Board may authorize a CSD pursuant to the grant of a special permit. Such special permits shall be acted upon in accordance with the following provisions:

### IV. PRE-APPLICATION

*The developer should be encouraged, in the strongest possible terms, to work with the Planning Board before a formal application has been filed. Some towns go so far as to give a density bonus when a developer requests pre-application review of a CSD. Pre-application negotiations allow the developer to get feedback from the Planning Board before extensive engineering work has been done. The primary purpose of this meeting is to introduce the potential applicant to the standards and procedures of the bylaw and initiate dialogue up front. The Planning Board can signal its concerns for resource areas, affordable housing, aesthetics, and other matters. In fact, it is probably advisable to have the Planning Board's technical experts involved at the pre-application stage to maximize communication between the parties. If a town and developer, upon mutual agreement, choose to engage technical experts at the pre-application stage to help review these submittals, the developer should enter into a "Memorandum of Agreement" with the Planning Board to establish an escrow account to house the funds to pay the consultant(s).*

1. **Conference.** The applicant is very strongly encouraged to request a pre-application review at a regular business meeting of the Planning Board. If one is requested, the Planning Board shall invite the Conservation Commission, Board of Health, and [list other appropriate

committees/Boards]. The purpose of a pre-application review is to minimize the applicant's costs of engineering and other technical experts, and to commence negotiations with the Planning Board at the earliest possible stage in the development. At the pre-application review, the applicant may outline the proposed CSD, seek preliminary feedback from the Planning Board and/or its technical experts, and set a timetable for submittal of a formal application. At the request of the applicant, and at the expense of the applicant, the Planning Board may engage technical experts to review the informal plans of the applicant and to facilitate submittal of a formal application for a CSD special permit.

2. **Submittals.** In order to facilitate review of the CSD at the pre-application stage, applicants are strongly encouraged to submit the following information:
  - A. **Site Context Map** - This map illustrates the parcel in connection to its surrounding neighborhood. Based upon existing data sources and field inspections, it should show various kinds of major natural resource areas or features that cross parcel lines or that are located on adjoining lands. This map enables the Planning Board to understand the site in relation to what is occurring on adjacent properties.
  - B. **Existing Conditions/Site Analysis Map** - This map familiarizes officials with existing conditions on the property. Based upon existing data sources and field inspections, this base map locates and describes noteworthy resources that should be left protected through sensitive subdivision layouts. These resources include wetlands, riverfront areas, floodplains and steep slopes, but may also include mature ungraded woodlands, hedge rows, farmland, unique or special wildlife habitats, historic or cultural features (such as old structures or stone walls), unusual geologic formations and scenic views into and out from the property. By overlaying this plan onto a development plan the parties involved can clearly see where conservation priorities and desired development overlap/conflict.
  - C. **Other Information** - In addition, applicants are invited to submit the information set forth in Section VI.1 in a form acceptable to the Planning Board.
3. **Site Visit.** Applicants are encouraged to request a site visit by the Planning Board and/or its agents in order to facilitate pre-application review of the CSD. If one is requested, the Planning Board shall invite the Conservation Commission, Board of Health, and [list other appropriate committees/Boards].
4. **Design Criteria.** The design process and criteria set forth below in Section V should be discussed by the parties at the pre-application conference and site visit.

## V. DESIGN PROCESS

*The conservation of land is the focus of this CSD Model. The design process makes the placement of house lots and streets sensitive to this objective. The design process identifies historical, cultural and natural resources, potential open space corridors, views, etc. that should be preserved. This process excludes these areas from development and targets construction on the rest of the parcel. The process consists of four steps: (1) Identifying Conservation Areas; (2) Locating House Sites; (3) Aligning Streets and Trails; and, (4) Drawing in the Lot Lines. This process may use pre-existing data sources, such as the Existing Conditions/Site Analysis Map discussed above, USGS topographical maps, FEMA floodplain maps, tax assessors maps, any wetland maps or orthophotographs, and NRSC soil maps.*

At the time of the application for a special permit for CSD in conformance with Section VI.1, applicants are required to demonstrate to the Planning Board that the following Design Process was performed by a certified Landscape Architect and considered in determining the layout of proposed streets, house lots, and open space.

1. **Step One:** Identifying Conservation Areas. Identify preservation land by two steps. First, Primary Conservation Areas (such as wetlands, riverfront areas, and floodplains regulated by state or federal law) and Secondary Conservation Areas (including unprotected elements of the natural landscape such as steep slopes, mature woodlands, prime farmland, meadows, wildlife habitats and cultural features such as historic and archeological sites and scenic views) shall be identified and delineated. Second, the Potentially Developable Area will be identified and delineated. To the maximum extent feasible, the Potentially Developable Area shall consist of land outside identified Primary and Secondary Conservation Areas.

*Because the design process intends to maximize the intrinsic value of a parcel of land, the house sites are located before the roads are laid out, ensuring that the former will dictate the later and not vice versa. Therefore emphasis is placed on principles of good landscape design and not solely engineering.*

2. **Step Two:** Locating House Sites. Locate the approximate sites of individual houses within the Potentially Developable Area and include the delineation of private yards and shared amenities, so as to reflect an integrated community, with emphasis on consistency with the Town's historical development patterns. The number of homes enjoying the amenities of the development should be maximized.
3. **Step Three:** Aligning the Streets and Trails. Align streets in order to access the house lots. Additionally, new trails should be laid out to create internal and external connections to existing and/or potential future streets, sidewalks, and trails.

*Lot lines may not be applicable in a CSD utilizing condominium ownership.*

4. **Step Four:** Lot Lines. Draw in the lot lines.



## VI. PROCEDURES

*Approval of a CSD must proceed in accordance with the provisions of G.L. c. 40A, s. 9. Accordingly, the application for a CSD is subject to the standard procedures for issuance of a special permit: publication of notice, certified mail of notice to parties in interest, and a public hearing before the SPGA. If the Zoning Bylaw already contains these details, they should be incorporated by reference. This model bylaw describes two procedural approaches to CSD special permits, both of which must acknowledge two legal constraints. First, when special permits are approved subject to a plan, the plan becomes a condition of the special permit. Any significant deviation from the plan requires a modification of the special permit. DiGiovanni v. Board of Appeals of Rockport, 19 Mass. App. Ct. 339, 346-47 (1985). Second, a Planning Board is without authority to issue a special permit where “a further determination of substance” must be made after the close of the public hearing. Weld v. Board of Appeals of Gloucester, 345 Mass. 376, 378 (1963).<sup>2</sup>*

### **Option One: Concept Plan**

*In the first procedural model, the special permit is approved on the basis of a Concept Plan. A Concept Plan contains a Sketch Plan and a Yield Plan (see Section VII). The Sketch Plan is generally defined to require less information than a standard preliminary subdivision plan, but enough information to make the requisite findings set forth in Section XI, below. The Sketch Plan shows the dimensional features of the proposal - lot sizes, lot frontage, and open space - in general terms and not in exact detail. Similarly, the technical aspects of the proposal, including stormwater management appurtenances, building design, and wastewater disposal, are not engineered in the Sketch Plan, however they are discussed in narrative form. The final details are reviewed and approved by the Planning Board under Definitive Subdivision Approval.*

*Based upon the Concept Plan, the Planning Board establishes a Basic Maximum Number of lots/units (see section VII) and either approves or denies the special permit. The special permit, if granted, invariably has a series of attached conditions, including the maximum number of units/bedrooms, conformance with the requirements of the Conservation Commission and/or Board of Health, and compliance with the remaining standards of the CSD bylaw. Once the special permit is granted, the applicant proceeds with Definitive Subdivision Plan Approval.*

*The Concept Plan approach has many advantages. Developers receive an answer on the special permit application in a shorter period of time. They spend significantly less in engineering and legal cost before the vote. These are powerful incentives to choose the CSD option. On the other hand, due to the innate characteristics of a Concept Plan, specifically the absence of construction specifications at the public hearing and review process, the decision might be challenged in court as being “arbitrary and capricious.” Essentially the Planning Board is walking a “fine legal line.” However, this bylaw has been carefully crafted to address this potential issue by ensuring that all of the information typically reviewed for a Preliminary Plan is in fact “at the table” during the public hearings for review and consideration. The key to creating this alternative procedure while successfully walking that “fine legal line” was accomplished by changing both the format and level of detail of the information required for submittal (see Section VI Concept Plan). Specifically, this bylaw requires detailed narratives regarding the various elements for which construction specifications are not required (such as stormwater, water supply and wastewater systems), requires the submittal of a Site Context Map and Existing*

Conditions / Site Analysis Map, and requires copies of existing contour and soil maps. This information is necessary for the Planning Board to make an informed decision. Furthermore, to provide additional security and to further strengthen the legality of the decision, communities are advised to require a description of the “outer limits” or the most severe impacts of the proposed CSD, specifically on abutting properties and the community.

### **Option Two: Preliminary Plan**

*In the second procedural model, the special permit is approved on the basis of a Preliminary Plan, consisting of a Preliminary Plan as defined in the Planning Board’s Subdivision Rules and Regulations and a Yield Plan (see Section VII). Applicants are required to submit all of the construction specifications and engineering detail required for a preliminary subdivision plan before the special permit vote is taken. Where this level of detail is required up front, applicants may choose to apply for the special permit and for definitive subdivision plan review at the same time. The Planning Board may hold the required public hearings concurrently in such cases. Only when the special permit and definitive subdivision plans have been coordinated and finalized are the hearings terminated.*

*Again, there are advantages and disadvantages to this approach. Developers typically complain about Option Two because the costs associated with the preparation of the Preliminary Plan are more than the cost of a Concept Plan. This makes the special permit more of a speculative venture. However, a Planning Board sensitive to this concern can signal the applicant that the CSD will be approved if the details can be worked out; mixed messages are both costly and grating for the developer. A community that has predetermined CSD as favorable to conventional development should not create a bylaw that provides disincentives for the use of CSD. The advantage of procedural Option Two is that the likelihood of any substantial variation between the Preliminary Plan, approved as a condition of the special permit, and the Definitive Subdivision Plan is unlikely due to the level of detailed engineering that is provided.*

### **1. Application.**

An application for a special permit for a CSD shall be submitted on the form(s) provided by the Planning Board in accordance with the rules and regulations of the Board. Applicants for CSD shall also file with the Planning Board \_\_\_\_ copies of the following: ***[Choose either Option One or Two]***

### **OPTION ONE: Concept Plan**

The Concept Plan shall include a Sketch Plan and a Yield Plan (see Section VII). The applicant shall submit both the Site Context Map and Existing Conditions/Site Analysis Map prepared according to Section IV.2 above. Additional information reasonably necessary to make the determinations and assessments cited herein shall be provided, including existing site contour maps and existing current soil maps.

#### **A. Sketch Plan.**

The Sketch Plan shall be prepared by a certified Landscape Architect, or by a multidisciplinary team of which one member must be a certified Landscape Architect, and shall address the general features of the land, and give approximate configurations of the lots, open space, and

roadways. The Sketch Plan shall incorporate the Four-Step Design Process, according to Section V above, and the Design Standards according to Section X below, when determining a proposed design for the development.

(1) Quality Standards.

*This Model does not define the quality and quantity of materials to be submitted to satisfy this filing. Communities should examine their existing bylaws for quality standards such as scale, number of copies, and sheet size and incorporate them within this section.*

(2) Required Content.

The Sketch Plan shall include the following:

- a. The subdivision name, boundaries, north point, date, legend, title “Concept Plan,” and scale.
- b. The names of the record owner and the applicant, and the name of the Landscape Architect that prepared the plan.
- c. The names, approximate location, and widths of adjacent streets.
- d. The proposed topography of the land shown at a contour interval no greater than \_\_\_\_ (\_\_\_) feet. Elevations shall be referred to mean sea level.
- e. The location of existing landscape features including forests, farm fields, meadows, wetlands, riverfront areas, waterbodies, archeological and historic structures or points of interest, rock outcrops, boulder fields, stone walls, cliffs, high points, major long views, forest glades, major tree groupings, noteworthy tree specimens, and habitats of endangered or threatened wildlife, as identified as primary and secondary resources according to Section V.1. Proposals for all site features to be preserved, demolished, or moved shall be noted on the Sketch Plan.

*Note that as part of Section XI, Decision of the Planning Board, the special permit decision will include several conditions. Resource areas and their buffer zone boundaries will be shown on the Sketch Plan (as well as later in Option Two), however a condition of the special permit will be the approval of the delineation by an Order of Conditions/Request for Determination of Applicability by the local Conservation Commission. It is recommended that at the preapplication conference, the developer is strongly encouraged to seek this official determination during the Concept stage rather than accepting the risk of a triggering a “substantial variation” later on, after they have invested significant time and money.*

- f. All on-site local, state, and federal regulatory resource boundaries and buffer zones shall be clearly identified and all wetland flag locations shall be numbered and placed upon the Sketch Plan.
- g. Lines showing proposed private residential lots, as located during Step-Four, Section V.4, with approximate areas and frontage dimensions.
- h. All existing and proposed features and amenities including trails, recreation areas, pedestrian and bicycle paths, communities buildings, off-street parking areas, [list any others] shall be shown on the plan and described in a brief narrative explanation where appropriate.

- i. The existing and proposed lines of streets, ways, common driveways, easements and any parcel of land intended to be dedicated for public use or to be reserved by deed covenant for use of all property owners in the subdivision, or parcels of land or lots to be used for any purpose other than private residential shall be so designated within the subdivision in a general manner.
- j. Proposed roadway grades.
- k. Official soil percolation tests for the purpose of siting wastewater treatment options are not required for the Concept Plan. However, a narrative explanation shall be prepared by a certified Professional Engineer detailing the proposed wastewater systems that will be utilized by the development and its likely impacts on-site and to any abutting parcels of land. For example, the narrative will specify whether individual on-site or off-site systems, shared systems, alternative to Title V systems, or any combination of these or other methods will be utilized.
- l. A narrative explanation prepared by a certified Professional Engineer proposing systems for stormwater drainage and its likely impacts on-site and to any abutting parcels of land. For example, the narrative will specify whether soft or hard engineering methods will be used and the number of any detention/retention basins or infiltrating catch basins, it is not intended to include specific pipe sizes. Any information needed to justify this proposal should be included in the narrative. The approximate location of any stormwater management detention/retention basins shall be shown on the plan and accompanied by a conceptual landscaping plan.
- m. A narrative explanation prepared by a certified Professional Engineer, detailing the proposed drinking water supply system.
- n. A narrative explanation of the proposed quality, quantity, use and ownership of the open space. Open space parcels shall be clearly shown on the plan.
- o. All proposed landscaped and buffer areas shall be noted on the plan and generally explained in a narrative.
- p. A list of all legal documents necessary for implementation of the proposed development, including any Conservation Restrictions, land transfers, and Master Deeds, with an accompanying narrative explaining their general purpose.
- q. A narrative indicating all requested waivers, reductions, and/or modifications as permitted within the requirements of this bylaw.

**B. Yield Plan.** Applicant shall submit a narrative explanation detailing the results of the determination of any proposed allocation of yield determined according to Section VII, Basic Maximum Number (of lots/units/bedrooms).

**C. Relationship between Concept Plan and Definitive Subdivision Plan.** *Changes may occur between the Concept Plan and the Definitive Plan due to site-specific engineering. Each community must determine the types of changes that it considers substantial enough to warrant a re-opening of the special permit hearing. The following items 1 – 6 are the most common items that result in a substantial variation. Communities can administer changes to these items in one of three ways:*

1. *Provide specific thresholds to define each substantial variation.*
2. *Provide a list of minor variations to be exempt, and then leave the determination of all other changes to the discretion of the Planning Board.*
3. *Provide a list of substantial variations (without defined thresholds) and leave the determination to the discretion of the Planning Board.*



The Concept Plan special permit shall be reconsidered if there is substantial variation between the Definitive Subdivision Plan and the Concept Plan. If the Planning Board finds that a substantial variation exists, it shall hold a public hearing on the modifications to the Concept Plan. A substantial variation shall be any of the following:

- (1) an increase in the number of building lots;
- (2) a significant decrease in the open space acreage;
- (3) a significant change in the lot layout;
- (4) a significant change in the general development pattern which adversely affects natural landscape features and open space preservation;
- (5) significant changes to the stormwater management facilities; and/or
- (6) significant changes in the wastewater management systems.

—OR—

#### **OPTION TWO: Preliminary Plan**

Preliminary Plans shall include a Preliminary Plan and a Yield Plan (see Section G) and any additional information reasonably necessary to make the determinations and assessments cited herein. The applicant shall submit both the Site Context Map and Existing Conditions/Site Analysis Map prepared according to Section IV.2. Additional information reasonably necessary to make the determinations and assessments cited herein shall be provided, including existing site contour maps and existing current soil maps.

- A. Preliminary Plan.** Preliminary Plans shall use the Four-Step Design Process (see Section V) to demonstrate how the parcel was designed and shall comply with the Design Standards according to Section X below. The Preliminary Plan shall contain the following information:
- (1) A Preliminary Plan conforming to the requirements for a preliminary plan as set forth in the Subdivision Rules and Regulations of the Planning Board.
  - (2) All on-site local, state, and federal regulatory resource boundaries and buffer zones shall be clearly identified and all wetland flag locations shall be numbered and placed upon the Sketch Plan.
  - (3) Data on proposed wastewater disposal, which shall be referred to the Planning Board's consulting engineer for review and recommendation.
- B. Yield Plan.** Applicant shall submit a narrative explanation detailing the results of the determination of any proposed allocation of yield determined according to Section VII, Basic Maximum Number (of lots/units/bedrooms).

*[The remaining provisions 2,3, and 4, of Section VI, apply to either Option One or Two]*

2. Procedures.

Whenever an application for a CSD special permit is filed with the Planning Board, the applicant shall also file, within five (5) working days of the filing of the completed application, copies of the application, accompanying development plan, and other documentation, to the Board of Health, Conservation Commission, Building Inspector, Department of Public Works, Police Chief, Fire Chief, Town Engineer and \_\_\_\_\_ for their consideration, review, and report. The applicant shall furnish the copies necessary to fulfill this requirement. Reports from other boards and officials shall be submitted to the Planning Board within thirty-five (35) days of receipt of the reviewing party of all of the required materials; failure of these reviewing parties to make recommendations after having received copies of all such required materials shall be deemed a lack of opposition thereto. In the event that the public hearing by the Planning Board is held prior to the expiration of the 35 day period, the Planning Board shall continue the public hearing to permit the formal submission of reports and recommendations within that 35 day period. The Decision/Findings of the Planning Board shall contain, in writing, an explanation for any departures from the recommendations of any reviewing party.

3. Site Visit.

Whether or not conducted during the pre-application stage, the Planning Board shall conduct a site visit during the public hearing. At the site visit, the Planning Board and/or its agents shall be accompanied by the applicant and/or its agents.

4. Other Information.

The submittals and permits of this section shall be in addition to any other requirements of the Subdivision Control Law or any other provisions of this Zoning Bylaw. To the extent permitted by law, the Planning Board shall coordinate the public hearing required for any application for a special permit for a CSD with the public hearing required for approval of a definitive subdivision plan.

## VII. BASIC MAXIMUM NUMBER (OF LOTS/UNITS/BEDROOMS)

*The CSD should prescribe a limit on the number of lots, dwelling units, or bedrooms that may be constructed therein. Generally, this number is derived after calculating the density available on the tract under an orthodox development proposal. The CSD Bylaw may use either lots, dwelling units or bedrooms as the standard for the Basic Maximum Number. Where the CSD Bylaw limits development exclusively to single-family homes, lots or dwelling units are an acceptable standard. Where the CSD Bylaw contemplates multifamily structures, bedrooms may be a better choice. It is particularly important to focus on the standard where the CSD is proposed in an area without sewer service. If the area falls calculate the appropriate size of an on-site wastewater system. The Massachusetts Department of Environmental Protection assigns a baseline wastewater generation of 110 gallons per day (gpd) per bedroom. Industry standards also assume that the average single family house contains four bedrooms, resulting in wastewater generation of 440 gpd per single family house. There are two methods of generating the Yield Plan to calculate the Basic Maximum Number: formula or picture. Each are discussed, in turn, below.*

***[Choose either Option One or Two]***

### Determination of Yield, OPTION ONE: Formula

The Basic Maximum Number shall be derived after the preparation of a Yield Plan. The Yield Plan shall be the following calculation to determine the total number of lots (or dwelling units):

$$\text{Total Number of Lots} = \frac{\text{TA} - (0.5 \times \text{WA}) - (0.1 \times \text{TA})}{\text{district minimum lot area}}$$

TA = Total Area of Parcel

WA = Wetlands and Riverfront Areas of Parcel

*In this simple example, half of the wetlands and any riverfront area are subtracted from the total area of the parcel. Additionally, one tenth of the total area is subtracted and assumed to be consumed by infrastructure. The remaining area is then divided by the minimum square-footage for a lot in the underlying zoning district. This will yield the Total Number of Lots or Basic Maximum Number of lots or units.*

*Any formula used should account for all other regulatory requirements in the zoning bylaw, such as the deduction of other sensitive land - in flood plains, steep slopes (more than 25%), land under high-tension power lines, etc. - from the total tract area. A formula option has advantages and disadvantages. The results are predictable, and there is seldom an argument once the computation is done. However, the formula may not result in neutral density (density equal with conventional zoning). Each site is different, and ledge, wetlands, steep slope, and other factors can skew the formula. Towns are advised to take several conventional subdivisions in the files and apply any formula to check results before adopting this approach.*

— OR —

### Determination of Yield, OPTION TWO: Sketch Plan

*Since the CSD is subject to special permit approval, the determination of a Basic Maximum Number is just one aspect of a negotiated resolution. It is better to require less detail in the Yield Plan than to make the process too costly for the average developer. Accordingly, this definition of a Sketch Plan of the conventional subdivision requires only a modicum of engineering details to demonstrate the maximum number of lots (or units) that could reasonably be achieved through a conventional layout. If the proponent is determined to argue the point, the burden of proof places the obligation to provide more details on the applicant. A Sketch Plan may require more details where marginal lands are involved, such as the location of wetlands, floodplains, and steep slopes.*

The Basic Maximum Number shall be derived from a Yield Plan. The Yield Plan shall show the maximum number of lots (or dwelling units) that could be placed upon the site under a conventional subdivision. The Yield Plan shall contain the information required for a [choose either Sketch Plan

or Preliminary Plan accordingly], as set forth above in Section VI. The proponent shall have the burden of proof with regard to the Basic Maximum Number of lots (or dwelling units) resulting from the design and engineering specifications shown on the Yield Plan.

## **VIII. REDUCTION OF DIMENSIONAL REQUIREMENTS**

*In order to make the concept work, the CSD Bylaw must allow for reduced lot size, particularly with regard to area, width, and frontage. While it is typical for zoning to require lots with reduced area and frontage not to be located on existing public ways where the new development patterns will be out of place, it is critical to remember that CSD is intended to achieve certain conservation values and should not be driven solely by aesthetics or what has been commonly accepted to date. This model provides two options. The first, and preferred, option recommends a flexible (“zero lot line”) approach, leaving the lot size to be governed by Title 5 (State Sanitary Code) and the marketplace. Title 5 has been revamped to allow alternative wastewater systems; as a result, large lots need no longer be tied to wastewater disposal. The second option establishes a sliding scale for minimum lot area, depending on the amount of open space required in the tract (See Section IX): more open space equals a smaller minimum lot size.*

### **OPTION ONE: Flexible (Zero-Lot Line)**

The Planning Board encourages applicants to modify lot size, shape, and other dimensional requirements for lots within a CSD, subject to the following limitations:

1. Lots having reduced area or frontage shall not have frontage on a street other than a street created by the CSD; provided, however, that the Planning Board may waive this requirement where it is determined that such reduced lot(s) will further the goals of this bylaw.
2. At least 50% of the required setbacks for the district shall be maintained in the CSD unless a reduction is otherwise authorized by the Planning Board.

— OR —

### **OPTION TWO: Sliding Scale**

The Planning Board may authorize modification of lot size, shape, and other bulk requirements for lots within a CSD, subject to the following limitations:

1. Lots having reduced area or frontage shall not have frontage on a street other than a street created by a subdivision involved, provided, however, that the Planning Board may waive this requirement where it is determined that such reduced lot(s) are consistent with existing development patterns in the neighborhood.
2. Lot frontage shall not be less than 50 feet. The Planning Board may waive this requirement where it is determined that such reduced frontage will further the goals of this bylaw.



3. Each lot shall have at least 50% of the required setbacks for the district unless a reduction is otherwise authorized by the Planning Board.
4. Lots may be reduced in area according to the following schedule<sub>3</sub>:

Minimum Open Space (%)	District Minimum Lot Area (sq. ft.)	CSD Minimum Lot Area (sq. ft.)
50	80,000	20,000
50	60,000	15,000
50	40,000	10,000
50	30,000	7,500

Minimum Open Space (%)	District Minimum Lot Area (sq. ft.)	CSD Minimum Lot Area (sq. ft.)
50	20,000	5,000
50	10,000	5,000
70	80,000	10,000
70	60,000	7,500
70	40,000	5,000
70	30,000	5,000
70	20,000	5,000
70	10,000	5,000

## IX. OPEN SPACE REQUIREMENTS

*The most important decision in adopting a CSD Bylaw will be the minimum amount of required open space to qualify for consideration by the Planning Board. In existing open space and cluster bylaws some set the required open space figure quite low - 10% is the entry level - to attract as many developers as possible. Others set the required open space high - up to 70% - to make sure that the project yields appropriate benefits to the town. This model chooses 50% as the minimum requirement.*

*The open space on the site should be valuable. It may also be usable. It should not be just the “fingers” of land between houses, nor land that was unsuitable for development anyway. The open space should not be disproportionately wet; not more than the overall percentage of wetlands on the tract should be wet in the required open space.*

*Permissible uses (if any) on the open space should also be set forth. If a zero lot line approach is used, the open space will probably be essential for on-site wastewater and stormwater attenuation. The open space might also provide an area for recreational opportunities, including swimming pools, basketball or all instances, that the open space is dedicated exclusively to conservation or passive uses. There is no requirement that the open space*

is used for recreation or other active uses. Uses permitted should reflect the value of the open space as determined by the Four-Step Design Process. For example, the primary and secondary resources identified may have delineated sensitive wildlife habitat with intrinsic conservation value and therefore should be “used” for conservation only, not even for passive recreation.

Finally, the ownership of the open space should be regulated in conformance with G.L. c. 40A, s. 9, which authorizes the Town, a nonprofit land trust, or a homeowners’ association to manage the open space.

1. **Open Space.** A minimum of fifty percent (50%) of the tract shown on the development plan shall be open space. Any proposed open space, unless conveyed to the Town or its Conservation Commission, shall be subject to a recorded restriction enforceable by the Town, providing that such land shall be perpetually kept in an open state, that it shall be preserved exclusively for the purposes set forth herein, and that it shall be maintained in a manner which will ensure its suitability for its intended purposes.
  - A. The percentage of the open space that is wetlands shall not normally exceed the percentage of the tract which is wetlands; provided, however, that the applicant may include a greater percentage of wetlands in such open space upon a demonstration that such inclusion promotes the purposes of this bylaw.
  - B. The open space shall be contiguous. Contiguous shall be defined as being connected. Open Space will still be considered connected if it is separated by a roadway or an accessory amenity. The Planning Board may waive this requirement for all or part of the required open space where it is determined that allowing non-contiguous open space will promote the goals of this bylaw and/or protect identified primary and secondary conservation areas.
  - C. The open space shall be used for wildlife habitat and conservation.

*If other uses of the open space are desirable, choose the following subsection C. In an attempt to legitimize this bylaw and remain true to the original purpose of CSD and the 4 step design process, particularly the conservation of primary and secondary resources, communities are strongly cautioned to permit a low percentage of impervious surfaces within the required open space (insert % below). While other uses may be allowed, and will likely be desirable, these should not and need not occur at the expense of basic principles of CSD.*

- C. The open space shall be used for wildlife habitat and conservation and the following additional purposes [choose]: historic preservation, education, outdoor education, recreation, park purposes, agriculture, horticulture, forestry, a combination of these uses, and shall be served by suitable access for such purposes. The Planning Board may permit up to \_\_\_\_ % of the open space to be paved or built upon for structures accessory to the dedicated use or uses of such open space (i.e., pedestrian walks and bike paths).

*The minimum open space requirement of 50% means that wastewater systems and other utilities will likely require location on the open space.*

- D. Wastewater and stormwater management systems serving the CSD may be located within the open space. Surface systems, such as retention and detention ponds, shall not qualify towards the minimum open space required.

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2. Ownership of the Open Space. The open space shall, at the Planning Board's election, be conveyed to:
    - (a) the Town or its Conservation Commission;
    - (b) a nonprofit organization, the principal purpose of which is the conservation of open space and any of the purposes for such open space set forth above;
    - (c) a corporation or trust owned jointly or in common by the owners of lots within the CSD. If such corporation or trust is utilized, ownership thereof shall pass with conveyance of the lots in perpetuity. Maintenance of such open space and facilities shall be permanently guaranteed by such corporation or trust which shall provide for mandatory assessments for maintenance expenses to each lot. Each such trust or corporation shall be deemed to have assented to allow the Town to perform maintenance of such open space and facilities, if the trust or corporation fails to provide adequate maintenance, and shall grant the town an easement for this purpose. In such event, the town shall first provide fourteen (14) days written notice to the trust or corporation as to the inadequate maintenance, and, if the trust or corporation fails to complete such maintenance, the town may perform it. Each individual deed, and the deed or trust or articles of incorporation, shall include provisions designed to effect these provisions. Documents creating such trust or corporation shall be submitted to the Planning Board for approval, and shall thereafter be recorded.

## **X. DESIGN STANDARDS**

*Design guidelines are intended to establish the aesthetics and design principles of a CSD. The design standards address all of the remaining issues, from the types of permissible buildings to landscaping. The standards provided below are divided into Generic and Site Specific and represent a checklist of issues for consideration to adopt as part of a zoning bylaw. Communities that have Residential Design Manuals may already regulate several of these design issues, and including them in this bylaw would be redundant. In that case applicants should be directed to any such existing manual or bylaw provision by reference in this bylaw.*

The following Generic and Site Specific Design Standards shall apply to all CSD's and shall govern the development and design process:

### **1. Generic Design Standards**

- (a) The landscape shall be preserved in its natural state, insofar as practicable, by minimizing tree and soil removal. Any grade changes shall be in keeping with the general appearance of the neighboring developed areas. The orientation of individual building sites shall be such as to maintain maximum natural topography and cover. Topography, tree cover, and natural drainage ways shall be treated as fixed determinants of road and lot configuration rather than as malleable elements that can be changed to follow a preferred development scheme.
- (b) Streets shall be designed and located in such a manner as to maintain and preserve natural topography, significant landmarks, and trees; to minimize cut and fill; and to preserve and enhance views and vistas on or off the subject parcel.
- (c) Mixed-use development shall be related harmoniously to the terrain and the use, scale, and architecture of existing buildings in the vicinity that have functional or visual relationship to the proposed buildings. Proposed buildings shall be related to their surroundings.

- (d) All open space (landscaped and usable) shall be designed to add to the visual amenities of the area by maximizing its visibility for persons passing the site or overlooking it from nearby properties.
- (e) The removal or disruption of historic, traditional or significant uses, structures, or architectural elements shall be minimized insofar as practicable, whether these exist on the site or on adjacent properties.

## **2. Site Specific Design Standards**

- (a) Mix of Housing Types. The CSD may consist of any combination of single-family, two-family and multifamily residential structures. A multifamily structure shall not contain more than \_\_\_\_ dwelling units. Residential structures shall be oriented toward the street serving the premises and not the required parking area.

*If a community does not want to enable “any combination” of housing as suggested above, the following may be used:*

- (a) Maximum Percentage of Housing Type. The CSD shall consist of \_\_ % single family, \_\_ % two family and \_\_% multifamily structures.

*The bylaw may also provide specific guidelines regarding what percent of single family units may be attached and detached. The bylaw may also provide guidelines for the size, scale, massing, and maximum number of units within each multifamily structure.*

- (b) Parking. Each dwelling unit shall be served by two (2) off-street parking spaces. Parking spaces in front of garages may count in this computation. All parking areas with greater than \_\_\_\_ spaces shall be screened from view.
- (c) Buffer Areas. A buffer area of \_\_\_\_ feet may be provided at the following locations: *[choose from:]* (a) perimeter of the property where it abuts residentially zoned and occupied properties; (b) certain resource areas on or adjacent to the tract like ponds, wetlands, streams and riverfront areas, rock outcrops, ledge, agricultural or recreational fields, and land held for conservation purposes; and (c) existing public ways. Driveways necessary for access and egress to and from the tract may cross such buffer areas. No vegetation in this buffer area will be disturbed, destroyed or removed, except for normal maintenance of structures and landscapes approved as part of the project. The Planning Board may waive the buffer requirement in these locations when it determines that a smaller buffer (or no buffer) will suffice to accomplish the objectives set forth herein.
- (d) Drainage. The Planning Board shall encourage the use of “soft” (non-structural) stormwater management techniques (such as swales) and other drainage techniques that reduce impervious surface and enable infiltration where appropriate.
- (e) Common/Shared Driveways. A common or shared driveway may serve a maximum number of \_\_\_\_ single family units.
- (f) Screening and Landscaping. All structural surface stormwater management facilities shall be accompanied by a conceptual landscape plan.
- (g) On-site Pedestrian and Bicycle Circulation. Walkways and bicycle paths shall be provided to link residences with parking areas, recreation facilities (including parkland and open space) and adjacent land uses where appropriate.
- (h) Disturbed Areas. Not more than \_\_\_\_% of the total tract shall be disturbed areas. A disturbed area is any land not left in its natural vegetated state.



## XI. DECISION OF THE PLANNING BOARD

The Planning Board may grant a special permit for a CSD if it determines that the proposed CSD has less detrimental impact on the tract than a conventional development proposed for the tract, after considering the following factors:

1. Whether the CSD achieves greater flexibility and creativity in the design of residential developments than a conventional plan;
2. Whether the CSD promotes permanent preservation of open space, agricultural land forestry land, other natural resources including waterbodies and wetlands, and historical and archeological resources;
3. Whether the CSD promotes a less sprawling and more efficient form of development that consumes less open land and conforms to existing topography and natural features better than a conventional subdivision;
4. Whether the CSD reduces the total amount of disturbance on the site;
5. Whether the CSD furthers the goals and policies of the [choose] open space/ master/ comprehensive plan(s);
6. Whether the CSD facilitates the construction and maintenance of streets, utilities, and public service in a more economical and efficient manner.
7. Whether the Concept Plan and its supporting narrative documentation complies with all sections of this zoning bylaw.

*When using either procedural option the Planning Board will need to condition the findings/decision of the special permit. Due to variations between the Concept Plan, approved under zoning, and the Definitive Subdivision Plan, approved under Subdivision Rules and Regulations, there may be a need for the Planning Board to re-open the special permit hearing. Upon completion of several of these conditions the final design may change, therefore resulting in either minor or substantial variations (for definitions, see Section VI.1.C.).*

*The following are several boilerplate conditions that will be applicable in all permits and should be part of the Decision by the Board:*

1. The Basic Maximum Number of [lots, units, bedrooms] granted by the special permit is \_\_\_\_, conditioned upon Definitive Subdivision Approval. (Due to the fact that official soil percolation tests are not required during the special permit process the permit indicates a maximum potential number of lots/units/bedrooms that the developer must then substantiate during Definitive Subdivision Approval.)
2. The design specifications and engineering drawings of the proposed street layouts, wastewater management, water supply systems, stormwater drainage appurtenances, and other site infrastructure of the proposed development will be determined during the forthcoming Definitive Plan approvals.
3. The [Sketch Plan or Preliminary Plan] is conditioned upon Conservation Commission approval of resource delineation and an Order of Conditions/Request for Determination of Applicability.
4. The [Sketch Plan or Preliminary Plan] is conditioned upon Board of Health approval needed for Title 5, if applicable.
5. The [Sketch Plan or Preliminary Plan] is conditioned upon Planning Board approval for Definitive Subdivision Approval.
6. All other case-specific conditions deemed necessary by the Planning Board to provide safeguards, including bonding, to secure the objectives of this bylaw, and to protect health, safety, and welfare of the inhabitants of the neighborhood and the Town
7. The [Sketch Plan or Preliminary Plan] is conditioned upon compliance with all other required local, state, and federal permits.

## **XII. INCREASES IN PERMISSIBLE DENSITY**

*G.L. c. 40A, s. 9 specifically authorizes an increase in otherwise permissible density (“density bonus”) by special permit. The choice to offer a density bonus lies entirely with the town meeting. An alternative residential bylaw has significant incentives without a density bonus. Reduced lot sizes ought to reduce infrastructure costs associated with shorter and narrower roads, less pipe, and less cut and fill. Groton, for example, has found most developers willing to use its alternative bylaw without density bonuses. Westford, on the other hand, has offered an increase of up to 50% for the provision of certain amenities. Some examples are set forth, below:*

The Planning Board may award a density bonus to increase the number of dwelling units beyond the Basic Maximum Number. The density bonus for the CSD shall not, in the aggregate, exceed fifty percent (50%) of the Basic Maximum Number. Computations shall be rounded to the lowest number. A density bonus may be awarded in the following circumstances:

1. For each additional ten percent (10%) of the site (over and above the required 50%) set aside as open space, a bonus of five percent (5%) of the Basic Maximum Number may be awarded; provided, however, that this density bonus shall not exceed 25% of the Basic Maximum Number.
2. For every two (2) dwelling units restricted to occupancy by persons over the age of fifty-five, one (1) dwelling unit may be added as a density bonus; provided, however, that this density bonus shall not exceed 10% of the Basic Maximum Number.

*Where the town has adopted a design manual for alternative residential development, a density bonus may be offered for consistency with the manual.*

3. Where the Planning Board determines that the development is in substantial conformance with the document entitled “Town of \_\_\_\_\_, Residential Design Guidelines,” a bonus of up to fifteen (15%) percent of the Basic Maximum Number may be awarded.

*The provision of affordable housing can also be tied to a density bonus:*

4. For every two (2) dwelling units restricted to occupancy for a period of not less than fifteen (15) years by persons or families who qualify as low or moderate income, as those terms are defined for the area by the Commonwealth’s Department of Housing and Community Development, one (1) dwelling unit may be added as a density bonus; provided, however, that this density bonus shall not exceed 10% of the Basic Maximum Number.

*Other towns award a density bonus for diversification of housing types, architectural consistency, and resource protection. In order to minimize impacts on the school system, a bylaw may require all dwelling units awarded as a density bonus to be one or two bedroom units.*

## FOOTNOTES

<sup>1</sup> There are many names for conservation development techniques that each refers to an alternative to conventional subdivision of land, including cluster development, open space preservation, and landscape preservation. This model will primarily use Conservation Subdivision Design, or CSD, to represent these possible names. A community needs to select the term most meaningful to it.

<sup>2</sup> For example, in *Tebo v. Board of Appeals of Shrewsbury*, 22 Mass. App. Ct. 618, 624 (1986), the issuance of a special permit for gravel removal was accompanied by this condition: “Before commencing any operation, a detailed plan of dust control must be submitted to the Board for approval.” Abutters complained that this condition “postpones for future action a determination of substance, the fatal weakness of the special permit in *Weld*.” *Id.* at 623-624. The court annulled the special permit and remanded the matter to the board.

<sup>3</sup> It should be noted that this table is for conceptual purposes only. Lot areas subject to 50% open space requirements were reduced by three-quarters; areas subject to 70% open space requirements were reduced by seven-eighths.