

# Application for CPA Funding

**Name of Applicant/Contact Person:** Wellesley Housing Authority, Margaret K. Plansky, Exec. Director

**Sponsoring Organization, if applicable:** Wellesley Housing Authority

**Daytime Phone:** 781-235-0223 **Email:** mkplansky@comcast.net

**Name of Proposal:** Barton Road Master Plan **Date:** December 30, 2008

**CPA Category:** Community Housing

**CPA Funding Requested** \$50,000 **Total Cost of Proposed Project** \$100,000

## PROJECT DESCRIPTION:

1. **Goals: What are the goals and purposes of the proposed project?** The goal is to develop a Master Plan that would provide additional affordable housing units and improve the quality of life for Barton Road residents. The Town would also gain additional affordable housing units that would meet objectives of affordable housing in the community.  
**Who will benefit and why?** Residents would benefit from an improved development; Town would meet objectives to create more affordable housing units. **How will success be measured?** Success will be measured when the report clearly identifies the following:
  - a) Type, quality and quantity of housing that the site can support;
  - b) funding sources – both private and public;
  - c) area resources and
  - d) Town's goals for improvement of this area of town and creation of more affordable units.
2. **Community Need: Why is this project needed? Does it address needs identified in existing Town plans?** The Town Comprehensive Plan sets as a goal the maintenance and expansion of affordable housing and this Master Plan study will provide a comprehensive plan for Barton Road that will work with the town's plan for the general area.
3. **Community Support: What is the nature and level of support and/or opposition for this project?**  
The Town supports affordable housing goals.
4. **Budget: What is the total budget for the project and how will CPA funds be spent? All items of expenditure must be clearly identified and back-up documentation provided. Distinguish between hard and soft costs.** The Town will provide \$50,000 in funds for a study to expand affordable housing at Barton Road. This study will provide a comprehensive development plan for Barton Road that will work with the town's plan for the general area. The State provides planning grants to match in the amount of \$50,000 once funding is committed by the Town.
5. **Funding: What funding sources are available, committed or under consideration? Include commitment letters, and describe any other attempts to secure public or private funding for this project.** The State has made Planning Grants available for Local Housing Authorities up to \$50,000 with matching funds to be provided by the Town. Once the Town has committed the \$50,000, then the WHA will make an application to the State for the \$50,000 planning grant.
6. **Timeline: What is the schedule for project implementation, including a timeline for all critical elements? This should include the timeline for expenditures, receipt of other funds and/or other revenues, if any.** Once funding is secured, a Request for Proposals for Master Plan Study will be sent out. It usually takes 90 days from RFP to award of contract. Contract should take 6-9 months to complete. Study should be ready in late 2009 or early 2010.

7. **Implementation:** Who will be responsible for implementing the project? Executive Director of Wellesley Housing Authority. Who will the project manager be? What relevant experience does the proposed project manager have? Current Executive Director has over 25 years of housing authority experience including public development; public/private initiatives and on-going administrative and maintenance responsibilities of a public housing agency. Who else will be involved in project implementation and what arrangements have been made with them? The Consultant will work with the Executive Director and report to the WHA Board of Commissioners.
8. **Maintenance:** If ongoing maintenance is required, who will be responsible and how will it be funded? Please include a detailed five year budget. N/A

**ADDITIONAL INFORMATION:** Provide the following additional information, if applicable.

9. **Further Documentation:** Documentation that you have control over the site, such as a Purchase and Sale Agreement, option or deed. WHA owns site.
10. **Feasibility Reports:** Any feasibility reports, renderings or other relevant studies and materials. See Final Report previously submitted to CPA.
11. **Historical Preservation:** documentation that the proposed project meets at least one of the Wellesley Historical Commission's three conditions for funding. N/A
12. **Zoning Compliance:** Evidence that the project does not violate any zoning by-laws or any other laws or regulations, including environmental, and/or plans to obtain necessary approvals. N/A
13. **Basis of Eligibility for CPA Funds:** By State Statute, the Town may expend Community Preservation funds to:
- Acquire, create, and preserve open space.
  - Acquire, preserve, rehabilitate and restore historic resources.
  - Acquire, create and preserve land for recreational use.
  - Acquire, create, preserve and support community housing, including provide funds for the community's affordable housing trust fund.
  - Rehabilitate and restore open space, land for recreational use and community housing acquired or created with fund monies.

**Please describe the basis under which the proposed project qualifies.** This Master Plan study leverages State and local funds to provide a plan for expansion of the Town's affordable housing stock on land that is currently owned and managed by the Wellesley Housing Authority. The study will identify the types, quantity and quality of housing that could be constructed on this site. It will also identify the sources of funding that could be used along with different development options.

nonprofit or for profit developer. Inevitably, as the land owner of the existing Barton Road development, the WHA will have overall responsibility for formulating a development program. This sponsorship role can be defined as that of an asset manager or master developer—even if a nonprofit is given the responsibility of developing some of the sub parcels. The WHA as owner, must assure that any new development will be compatible with the existing development in terms of overall management, coordination of utilities (all of which go through the existing development), compatibility of affordable and potentially market rate uses and other interactions of the old with then new.

As the manager of the existing 88 apartments, the WHA may be in the best position to cost effectively and coherently management the old and any new units developed. This might assure coordinated snow plowing, landscaping, and other physical needs. More importantly, perhaps, the WHA is in the best position to coordinate the delivery of community, social services and recreational needs for the entire 20 acre development.

#### 8. The Existing Barton Road Development in Local Neighborhood Context

The Barton Road Development exists on the outskirts of Wellesley, oriented towards 128 more than the town center. As such, it remains outside the physical, cultural and community connections of the wider Wellesley community most critically as follows:

- Isolation from the rest of Wellesley.
- Lack of adequate services such any kind of mass transportation, convenience stores, retail services or places of potential work for residents.
- Physical design that does not support community activities or recreational facilities in a convenient manner. Front yards and back yards lack clarity of use and responsibility. Continuous 1 story elevations unrelieved by height or design differential.



### Recommendations and Next Steps

#### Need for Master Plan Vision

There are six acres potentially available for additional development of mixed income housing at the Barton Road Development. But whether these additional lands will ever be developed hinges on gaining the support of public funders (federal, state and local), neighbors, town officials and many others. The team heard from many that the development of any additional parcels at Barton Road inevitably focuses on the need to address the design deficiencies of the existing complex, perceived management capabilities, quality of tenants and other factors leading to judgments as to whether the

complex is improving or declining. There needs to be a plan dealing with reoccurring problems of vandalism and the lack of jobs, sufficient services, and public transportation as documented.

We recommend a Master Plan for the existing development and the undeveloped lands. The two are too closely intertwined to be addressed separately. Financial and political support will not be gained until a master plan is in place addressing the real needs of the entire 20 acre site—the existing 88 units and any new units. The master plan should include the following critical components:

1. Establish Formal Community Master Planning Process for existing development and potential addition of new units. This will be an opportunity to invite Wellesley residents to understand and help support the needs of Barton Road. The master planning process will start the communication with affected stake holders and help gain needed support in the long run. It should consist of Community task force of key stakeholders including residents, town planning and other staff, elected officials, neighborhood organizations, social service providers, faith based providers and PHA staff. Residents will also need to be very much part of this process and be met with frequently.
2. Design Scope: Assess physical condition, capital needs, opportunities and constraints for development within existing site and at boundaries and generate program alternatives with different housing types, open space treatments, community facilities and recreational areas.
3. Finance: Identify public funding that may be available such as DHCD modernization grants, Low Income Tax Credits, linkage, CPA and other local resources. The funding gap will be quite significant, even with the use of homeownership sales of near market and possibly market units. Any redevelopment plan will need to be phased because of the significant public funding needs and the existing occupancy of the site.
4. Housing Demand: Any new development will need to be based on solid market analysis, whether for true market or affordable—rental or homeownership. The particular housing needs of Wellesley can be identified in this study.
5. Supportive Services: The existing residents need improved services—help with employment opportunities, educational, training and other needs. The master plan should provide real, tangible supportive services for existing and new residents.
6. Existing Residents' Survey: The needs of existing residents and the impact of any new development needs to thoroughly understood. If a survey is too costly, than a number of resident meetings may be used to gain the needed resident input.

7. **Further Due Diligence:** Will need to further examine title, conduct 21e environmental site assessments, wetland impacts and other potential factors effecting any future development.

This master planning process should yield actionable program and design alternatives that can gain the required political and financial support. A master plan for the entire complex should form the basis for rezoning. It is unlikely that local officials would allow a piecemeal approach without seeing a plan for the entire effort development.

Funding of this master plan effort could possibly be obtained from a new program of feasibility grants of up to \$50,000 for public housing authorities that are sponsored by DHCD and the Massachusetts Housing Partnership. DHCD staff has indicated that they would entertain a proposal for \$50,000 in predevelopment funding as long as the focus is on developing new units at Barton Road. The total estimated cost for the complete master plan described above is more like \$100,000. Agreement on funding the total master plan may take some local Wellesley financial or in kind contribution plus negotiation on the final details of the master plan scope.

### **Working Principles for Master Plan Efforts**

We recommend a number of working principles for the master planning effort:

1. **Integrated approach:** Any new development should support and enhance the existing 88 units.
2. **Connections to community:** Improved services, transportation, shopping opportunities, trails, recreational connections, educational programs and other connections need to be solidified and improved.
3. **Mix of incomes and range of housing types are important:** The current population at Barton Road is very low income with the majority of residents earning less than \$20,000. Only one third of the current residents are employed. Residents of the new homes, rental and homeownership could have incomes starting at \$30,000 and ranging up to \$90,000 if homeownership homes are developed. The new residents will need to be working and have solid credit and good landlord references. With a strong mixed income program, the current residents will have expanded opportunities and a stronger connection to the larger community.
4. **Provide additional sources to Wellesley Housing Authority.** Any new development or redevelopment should provide additional development and management fees to further strengthen WHA financially.
5. **No displacement of current residents:** This is a required program goal.

6. Public Participation: Strongly recommend active and meaningful resident and community participation through the planning and implementation process.
7. Strong Design: Make the most of attractive and stimulating designs for new housing on the edges and add new two story structures along the existing Barton Road. The Area 1 prototype elevation on the Winslow site plan shows the handsome addition of a new building that defines a courtyard. Improvements should also include landscaping that will help clarify private yards and public spaces which are now not clear. There is not true public space or true private yard space and needless to say this created much confusion/hostility among existing residents. Well defined recreational areas for public use, a centralized community building and other community amenities are needed which can be much better defined in the master plan process
8. Financing Plan Possibilities. It is too early for a precise financing plan as new funding sources are in the works, but the Barton Road site represents unusual opportunities. 1) Housing authorities may now obtain \$50,000 grants for feasibility assessments from DHCD and the Mass Housing Partnership. 2) Locally, linkage funds could be directed to this program. Most likely, developers in Wellesley are having a difficult time accommodating affordable housing requirements or finding sites for affordable housing development at acceptable prices. Barton Road may represent a very good opportunity as receptor for linkage fund for affordable housing. 3) Parcels may be sold at Barton Road (subject to DHCD approval) to help fund the development of affordable units. 4) The Commonwealth of Massachusetts is working hard to provide funds for new developments or redevelopment efforts at state public housing sites. 5) As part of a redevelopment or new development effort, DHCD could possibly allow for \$0 acquisition cost,
9. Master Developer: New units could be developed by private developer, town non profit or Housing Authority. There are numerous financial, procurement and administrative considerations with the proper choice. In the development process, the WHA will need to be the master developer and perhaps the manager of all the units.

In sum, this is a start. The advice and input of many will be needed to help solidify the direction and methods for future development at the WHA Barton Road Development.

Yankee Division Highway

Barton Road

6 Barton Rd, Wellesley, MA 02481

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Pointer 42°19'05.70"N 71°14'37.08"W elev 63ft

Streaming 100%