

TOWN OF WELLESLEY



MASSACHUSETTS

## BOARD OF SELECTMEN

TOWN HALL • 525 WASHINGTON STREET • WELLESLEY, MA 02482-5992

JACK MORGAN, CHAIR  
MARJORIE R. FREIMAN, VICE CHAIR  
ELLEN F. GIBBS, SECRETARY  
ELIZABETH SULLIVAN WOODS  
THOMAS H. ULFELDER

FACSIMILE: (781) 239-1043  
TELEPHONE: (781) 431-1019 x2201  
[WWW.WELLESLEYMA.GOV](http://WWW.WELLESLEYMA.GOV)  
BLYTHE C. ROBINSON  
EXECUTIVE DIRECTOR OF GENERAL GOVERNMENT

### SELECTMEN'S MEETING

### *TENTATIVE AGENDA*

Wellesley Town Hall – Juliani Room

**7:00 P.M. Tuesday, September 11, 2018**

1. 7:00 Citizen Speak
2. 7:05 Executive Director's Report
  - Approval of Minutes
  - Babson One Day License Requests
  - Natick Organic Farm – Charity Wine License
  - Approve SPED Stabilization Fund Expenditures
3. 7:10 Update from MassBay Community College
4. 7:30 Review of Town Financial Position
5. 7:50 Approve Public Comment Policy
6. 8:05 Discuss Draft Housing Production Plan
7. 8:30 Discussion of Tailby/RR Working Group Recommendation
8. 9:15 New Business and Correspondence

Next Meeting Dates: Monday, September 17, 2018 7:00 pm

Monday, September 24, 2018 7:00 pm



**Board of Selectmen Calendar – FY19**

<b>Date</b>	<b>Selectmen Meeting Items</b>	<b>Other Meeting Items</b>
<i>9/17 Monday</i>	<b>Meeting</b> HPP Discussion Great Plain Avenue Design Contract Boston Marathon Policy Adopt FY20 Budget guideline & first read of budget prep manual?	
<i>9/24 Monday</i>	<b>Meeting</b> Middle School Study Results Presentation w/School Comm. Joint Mtg with Planning Board to adopt HPP Joint Election - Recreation Commission Member Set Budget Guidelines for FY20 October planning month proclamation?	
<i>10/1 Monday</i>	<b>No Meeting - Wellesley Club</b>	
<i>10/2 Tuesday</i>	<b>Meeting – 5pm</b> <b>STM</b>	
<i>10/3 Wednesday</i>	<b>STM</b>	
<i>10/8 Monday</i>	<b>TOWN HALL CLOSED (COLUMBUS DAY)</b>	
<i>10/9 Tuesday</i>	<b>No Meeting</b>	
<i>10/15 Monday</i>	<b>Meeting</b>	
<i>10/22 Monday</i>	<b>Meeting</b>	
<i>10/29 Monday</i>	<b>Meeting</b>	
<i>11/5 Monday</i>	<b>No Meeting – Wellesley Club</b>	
<i>11/6 Tuesday</i>	<b>Election Day</b>	
<i>11/12 Monday</i>	<b>TOWN HALL CLOSED – Veterans Day</b>	
<i>11/13 Tuesday</i>	<b>Meeting</b>	
<i>11/19 Monday</i>	<b>Meeting</b>	
<i>11/22 Thursday</i>	<b>TOWN HALL CLOSED - Thanksgiving Day</b>	
<i>11/26 Monday</i>	<b>Meeting</b>	
<i>Saturday 12/1</i>	<b>Meeting</b> <b>BOS Operating Budget Meeting</b>	

<i>Date</i>	<i>Selectmen Meeting Items</i>	<i>Other Meeting Items</i>
<i>12/3 Monday</i>	<b>Meeting</b>	
<i>12/10 Monday</i>	<b>Meeting</b> Audit Committee	
<i>12/15</i>	<b>900 Worcester Anticipated Rink Completion</b>	
<i>12/17 Monday</i>	<b>Meeting</b>	
<i>12/24 Monday</i>	<b>No Meeting</b>	
<i>12/25 Tuesday</i>	<b>TOWN HALL CLOSED – Christmas Day</b>	
<i>12/28 Friday</i>	<b>Close ATM Warrant</b>	
<i>12/31 Monday</i>	<b>No Meeting</b>	
<i>1/1 Tuesday</i>	<b>TOWN HALL CLOSED – New Year's Day</b>	
<i>1/7 Monday</i>	<b>No Meeting – Wellesley Club</b>	
<i>1/8 Tuesday</i>	<b>Meeting</b> Diversity Program w/WOW?	
<i>1/14 Monday</i>	<b>Review ATM Warrant</b>	
<i>1/21 Monday</i>	<b>MLK – Town Hall Closed</b>	
<i>1/22 Tuesday</i>	<b>Execute ATM Warrant</b>	
<i>1/28 Monday</i>		
<i>2/4 Monday</i>		
<i>2/11 Monday</i>		
<i>2/18 Monday</i>	<b>President's Day – Town Hall Closed</b>	
<i>2/9 Tuesday</i>		
<i>2/25 Monday</i>		
<i>3/4 Monday</i>		
<i>3/11 Monday</i>		
<i>3/18 Monday</i>		

<i>Date</i>	<i>Selectmen Meeting Items</i>	<i>Other Meeting Items</i>
3/25 <i>Monday</i>	<b>Start of ATM</b>	

**Notes**

*Quarterly updates*

- *Traffic Committee (Deputy Chief Pilecki)*
- *Facilities Maintenance (Joe McDonough)*
- *Wellesley Club Dates 10/1/18, 11/5/18, 1/7/19, 3/4/19*



## **SEPTEMBER 11, 2018 MOTIONS**

2. **MOVE** to approve the minutes of August 21, 2018.
2. **MOVE** to approve the one day licenses for Babson College on September 21 and 22, 2018 for all 10 locations identified in the application for Alumni Weekend.
2. **MOVE** to approve the Charity Wine License for Natick Organic Farm at the Wellesley College Club on September 28, 2018.
2. **MOVE** that the Board vote to authorize payment of invoices in the amount of \$ 653.34 to New England Medical Billing for the Town's Medicaid filing from the SPED Stabilization Fund.
5. **MOVE** that the Board vote to adopt the Public Comment Policy.



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As we have planned, the meeting is being held on Tuesday will begin at 7:00 PM.

### 1. Citizen Speak



## **2. Executive Director's Report**

Included in your packet are the minutes of the August 21, 2018 minutes for the Board's review and approval, several Babson One Day Licenses, a charity wine license for Natick Organic Farm, and a request for a SPED Stabilization Fund expenditure.

### Minutes

Cay has prepared the minutes of August 21, 2018 for your review.

**MOVE** to approve the minutes of August 21, 2018.



1      **Approved:**

2  
3      **Board of Selectmen Meeting: August 21, 2018**  
4      **Present: Gibbs, Freiman, Sullivan Woods, Ulfelder, Morgan**  
5      **Also Present: Robinson, Jop**

6  
7      **Warrants approved:**    **2019-004 \$4,291,836.81**  
8                                    **2019-005 \$3,072,431.13**  
9                                    **2019-006 \$8,182,670.11**

10  
11     **Minutes approved: July 31, 2018**

12  
13     **Meeting Documents:**

- 14        1. Agenda
- 15        2. BOS calendar
- 16        3. Motions
- 17        4. Executive Director's Weekly Report
- 18        5. Proposed no parking on Avon Road and 15-minute parking on Denton Road Background
- 19        6. Portion of Selectmen minutes: December 11, 2017 re: Denton Road
- 20        7. Design Proposal from VHB re: Great Plain Avenue Design
- 21        8. Current Traffic & Parking Budget
- 22        9. Recommendation for appointment from Chief Pilecki re: Derek Harris
- 23        10. Resume of Derek Harris
- 24        11. Exhibit F from Linden Street Agreement
- 25        12. Petition for Grant of Location: Schaller Street
- 26        13. Tailby/Railroad Working group notes
- 27        14. RFP Response data worksheet
- 28        15. Memo re: capital policy feedback received from boards & departments
- 29        16. Draft Capital Policy
- 30        17. Draft Warrant for October Special Town Meeting
- 31        18. Draft policy re: Boston Marathon entries
- 32        19. Job description: Veteran's Grave Officer
- 33        20. Draft Annual Report submission
- 34        21. Draft Public Comment policy
- 35        22. Draft BOS meeting minutes: 7/31/18
- 36        23. Council on Aging gift information
- 37        24. FMD Year End Report FY18
- 38        25. Quarterly Cash Analysis
- 39        26. Schedule K at Market Value
- 40        27. LAU Approval – Wellesley Place
- 41        28. Animal Control Report June 2018
- 42        29. Correspondence from Norfolk Registry of Deeds
- 43        30. Thank you note: Scholarship recipient
- 44        31. Correspondence from Lee Humphrey

45  
46     **1.      Call to Order and Citizen Speak**

47  
48     Mr. Morgan, Chairman, called the meeting to order at 6:00 pm

49  
50     Mr. Morgan announced that the Town will begin a Google group based system to facilitate conversations  
51     between Town Meeting Members and the general public regarding issues coming before Town Meeting.

52 The group will be open to Town Meeting Members and the public including non-residents. Group messages  
53 will represent the opinions of the sender and not that of the Town. All communications will be treated as  
54 public records and be available online for at least five years. The group is expected to be available by  
55 August 30. Details will be communicated via the news & announcements section on the Town Clerk's  
56 website. Invitations to join will be mailed to Town Meeting Members with the link information. He added  
57 that Town Meeting Members will continue to receive emails from the Town Clerk's Office regarding Town  
58 Meeting information.

59  
60 Mr. Morgan stated that the agenda item scheduled to discuss the brick crosswalk at Linden Street would  
61 not be discussed as a resolution had been reached. The brick crosswalks will be removed and replaced with  
62 asphalt. He added that the crosswalks at Linden Square will receive a decorative treatment. He thanked  
63 Federal Realty for their understanding and assistance in resolving this matter.

64  
65 **Citizen Speak:** None.

66  
67 **2. Quarterly Traffic Update**

68  
69 Police Chief Pilecki and Lieutenant Showstead joined the Board. Lt. Showstead reviewed the proposed  
70 traffic updates. First he discussed the intersection at Washington Street and Denton Road. The traffic  
71 committee had met with the residents and the school several times. The discussions resulted in 15-minute  
72 parking spaces for parents to drop off or pick up their children from the Montessori School without  
73 impacting the flow of traffic. He added that the corner clearance on both sides of the school will remain in  
74 place. He noted that a trial period during the winter worked well. Ms. Jop noted that one abutter had  
75 informed the committee that there is difficulty pulling out of Denton Road and Cottage Street due to the  
76 parked cars. She added that the area is already marked as "No Parking" and will be regularly enforced.

77  
78 Mr. Meyers of 62 Denton Road came before the Board. He stated his disappointment that there had been  
79 no enforcement of the existing signage and expressed concerns over the proposed changes. He stated he  
80 believed this proposal is being done to serve the school and church and does not address the lack of  
81 enforcement of the signs currently in place. He believed there should only be parking on one side of Denton  
82 Road and would like to see a plan how the proposed parking restrictions would be enforced with  
83 consistency.

84  
85 Chief Pilecki stated he believed that consensus was reached with the neighborhood. He stated that there had  
86 not been regular enforcement in front of the church because there is no other safe place for the children to  
87 be dropped off and picked up. He added that years ago there had been parking allowed in front of the church  
88 and believed the 15-minute parking was good compromise. He noted that the Police will work with the  
89 school to raise awareness of the parking rules. Ms. Jop noted that the traffic committee is working to  
90 address other issues brought forth by the Denton Road residents. The Board discussed the area and the  
91 available parking to the church and the school and enforcement of the proposed parking restrictions.

92  
93 Ms. Larkin, Director of St. Andrew's Montessori School, came before the Board. She stated the school is  
94 hosting a meeting for the parents which is mandatory. The school will be addressing the parking restrictions  
95 and detailing what will be expected during drop off and pick up.

96  
97 Lt. Showstead described the intended location of the "no parking" sign on Avon Road and where it had  
98 previously been located. He noted that the sign was moved when an addition was put on the corner home  
99 and the driveway widened. Currently when a car is parked legally in front of the corner house, the residents  
100 in the home across the street cannot easily back out of their driveway. The traffic committee met with the  
101 residents and came to a decision to move the "no parking" sign 75 feet from the intersection and closer to  
102 its original location.

103  
104 Mr. Bento of 237 Weston Road came before the Board. He stated that he requested moving the sign and  
105 believed the neighborhood was in agreement that parking would become easier and safer for everyone.  
106

107 Ms. Gerbode-Grant of 59 Avon Road came before the Board and stated that the neighbors were in  
108 agreement and thanked the traffic committee for listening to their concerns.  
109

110 Lt. Showstead provided background regarding the request for a flashing pedestrian light on Walnut Street  
111 at Damian Road. The crossing guards brought the suggestion to the traffic committee out of concern for  
112 safety. Ms. Robinson explained that the majority of funding for the light and installation would come from  
113 the money received from State 2017 ride sharing service funds, the remainder of the cost would be paid  
114 from the traffic and parking budget. The Board discussed the need for the crosswalk light at that  
115 intersection.  
116

117 Ms. Sullivan Woods inquired why the funds were being partially used from the ride sharing funds. Ms. Jop  
118 explained that the traffic and parking budget did not have all the funds necessary for this project to be  
119 installed this year. Ms. Robinson noted that these funds were received from the state in May and must be  
120 used before the end of the calendar year. The ride sharing funds would be used differently in the future as  
121 the Town will have more time to plan for allocation of the funding. The Board discussed the funding for  
122 the light and the ride sharing funds in general.  
123

124 Lt. Showstead reviewed the Great Plain Avenue roundabout design phase and the current stage of the  
125 project. He explained the estimated cost to complete the current stage in order to move forward. The  
126 committee has proposed to realign two items within the current capital projects in the traffic and parking  
127 budget to free up funding for this project. Ms. Jop noted that in order to pay for the design of this project,  
128 staff recommends that we forgo both repaving the Tailby commuter lot and replacement some parking lot  
129 light fixtures to LED. The Board discussed the changes to the budget and the realigned projects. Mr. Morgan  
130 expressed his hesitation to vote without fully reviewing the traffic and parking funds. The Board continued  
131 to discuss the appropriation of traffic and parking funds and the Great Plain Avenue project. Mr. Morgan  
132 requested the Board not vote on this agenda item and review the traffic and parking budget and projects at  
133 the Selectmen's meeting on either September 11<sup>th</sup> or 17<sup>th</sup>.  
134

135 **Upon a motion by Ms. Gibbs and seconded by Ms. Freiman, the Board voted (5-0) to**  
136

**Amend Schedule I – Fifteen Minute Parking**

<b>Location</b>	<b>Side</b>	<b>From</b>	<b>To</b>
<b>Washington Street</b>	<b>Southerly</b>	<b>Denton Road Easterly Intersection (excluding 20' corner clearance)</b>	<b>Denton Road Westerly Intersection (excluding 20' corner clearance)</b>

**Amend Schedule I - No Parking**

<b>Location</b>	<b>Side</b>	<b>From</b>	<b>To</b>
<b>Avon Road</b>	<b>Northerly</b>	<b>Weston Road</b>	<b>75 feet</b>

137  
138 **Upon a motion by Ms. Gibbs and seconded by Ms. Freiman, the Board voted (5-0) to authorize the**  
139 **use of the State ride sharing funds in the amount of \$17,500 to install a signalized pedestrian crossing**

140 light (Pilecki Light) on Walnut Street at Damian Road with the remaining balance of \$10,550 coming  
141 from Traffic and Parking.

142

143 **3. Approve Appointment – Police Officer**

144

145 Chief Pilecki introduced Mr. Derek Harris and read his recommendation for appointment to position of  
146 Police Officer. Chief Pilecki noted that Mr. Harris currently works for the Wellesley Police Department as  
147 a dispatcher and many members of the Department expressed their support for this appointment. The Board  
148 asked several questions of Mr. Harris regarding his background.

149

150 **Upon a motion by Ms. Gibbs and seconded by Ms. Freiman, the Board voted (5-0) to appoint Derek**  
151 **Harris effective August 21, 2018 to the position of Police Officer with the Town of Wellesley**  
152 **contingent upon the successful completion of the pre-screening process which includes a physical**  
153 **evaluation, psychological evaluation and physical abilities test as well as the successful completion of**  
154 **the police academy and subsequent one-year probationary period.**

155

156 **4. Approve Schaller Street Grant of Utility Easement**

157

158 Ms. Robinson reviewed where the gas line would be extended to in order to facilitate the provision of gas  
159 service to two homes on Schaller Street. The Natick Board of Selectmen was required to first approve the  
160 extension had done so at its most recent Board meeting.

161

162 Mr. Mark Kish of Eversource joined the Board. He briefly described the process by which Eversource  
163 received a cross territory agreement for installation with National Grid and the approval process.

164

165 Mr. Fred Schaller of 10 Schaller Street spoke before the Board. He informed the Board he would also like  
166 to have gas service installed at his residence and asked if the Board would be required to approve an  
167 extension of the line to his home as it would not be included in this grant of location. Mr. Kish stated that  
168 Eversource would be required to begin the process again for an extension of the line for this home and  
169 explained in detail the steps that would be required.

170

171 The Board discussed the process of extending the line if additional homes on the street desire the gas main  
172 to be extended. Ms. Jop stated that staff will work with residents, National Grid, and Eversource to ensure  
173 the neighborhood has access to natural gas if they would like it.

174

175 **Upon a motion by Ms. Gibbs and seconded by Ms. Freiman, the Board voted (5-0) to approve a grant**  
176 **of location to Eversource to install 70' of two-inch gas main between the Natick Town line and #17**  
177 **Schaller Street as a main extension.**

178

179

180 **5. Discuss Tailby/Railroad Working Group Report**

181

182 Ms. Jop reviewed the latest information gathered from the working group. She noted that while the  
183 interviews were not filmed, extensive notes had been taken and provided to the Board and all of the  
184 PowerPoint presentations are available online. The working group had discussed if a second RFP would be  
185 necessary for the project. Several members were in favor of a second RFP, but the majority felt that given  
186 the quality of the responses the Town received, the Town should move forward under the existing RFP.  
187 She reminded the Board that one of the original respondents had withdrawn their proposal. The working  
188 group will continue the processes of ranking the responses and is working on a report for the Board. The  
189 group is reevaluating the scores based on the interviews and financials of the respondents. She noted that  
190 on many of the evaluation criteria all of the remaining respondents scored equally. The group had been

191 focusing on some items and planned to have a draft report ready for the Board before Labor Day. The  
192 working groups report will review in detail each working group meeting and hopes to be able to provide  
193 the Board a presentation on the report and discuss the rankings at the Board meeting on September 11.  
194

195 Mr. Morgan stated he believed that there would be a point where the working group would discuss if the  
196 Board should hold interviews for some or all of the respondents. Ms. Jop stated that the working group will  
197 likely recommend that the Board interview the top candidates.  
198

199 Ms. Sullivan Woods noted that the working group report will be informative for the Board and will raise  
200 issues that the Board should be aware of before moving forward and assist in determining the focus of the  
201 next step in the process. Ms. Jop noted that the real estate professionals on the working group cautioned  
202 against a second RFP out of concern some of the top respondents would drop out. She added that the project  
203 has to be deliberate and would be required to go before Town Meeting. The Board discussed the possibility  
204 and necessity of a second RFP.  
205

## 206 **6. Discuss Capital Planning Process**

207

208 Ms. Strother, Town Chief Financial Officer joined the Board. Ms. Robinson stated that she and Ms. Strother  
209 received constructive feedback from the sessions held with various departments. She added that the sessions  
210 had been well attended and responses had been thoughtful and provided for good conversations. She  
211 identified three main concerns; the makeup of the committee, timing of projects and when they are  
212 requested, and minimum dollar amount threshold especially for smaller departments. She and Ms. Strother  
213 recognized the concerns that needed to be addressed and that there is more work to be done on the policy.  
214 Ms. Strother stated she believed the single biggest issue was the understanding of limited financial resources  
215 and the impact on operating budgets. She stated there appears to be some departments that will want to  
216 submit as many projects as possible rather than finding an affordable way to achieve longer range goals.  
217

218 Ms. Marla Robinson of the Library Trustees came before the Board. She requested that the Selectmen hold  
219 a roundtable discussion with all elected boards that have capital budgets so the Selectmen can hear all of  
220 the individual concerns. She stated that the Library Trustees would like to reserve the right to add additional  
221 comments for the Selectmen in the future.  
222

223 Mr. Ulfelder stated he had concerns regarding the makeup of the committee and who will make the final  
224 decisions. Ms. Robinson noted that the intent is that every board and committee will follow the criteria  
225 within the policy and express the decision making process for prioritization of their projects to the  
226 committee. She stated that the committee's role would be to review the prioritization and decide and debate  
227 based on the policy criteria. The Board expressed concerns and discussed the committee makeup, the  
228 priorities, and the process of decision making for the capital budget.  
229

230 Mr. Morgan suggested one of the next steps could be to hold a round table discussion with chairs of boards,  
231 and other majority stakeholders before the Selectmen. The Board continued to discuss options for the next  
232 steps in the process and the makeup of the committee. The Board resolved that they will meet with  
233 committees and boards in a roundtable discussion and will work to schedule the meeting date. Mr. Morgan  
234 thanked Ms. Robinson, Ms. Strother, and those who have participated in working on the capital policy.  
235

## 236 **7. Execute Warrant for October Special Town Meeting**

237

238 Ms. Robinson stated that the warrant had been approved by MSBA. Mr. Morgan noted that there had  
239 previously been questions concerning the total dollar amount of the warrant, but that consensus had been  
240 reached with MSBA and the School Building Committee.  
241

242 **Upon a motion by Ms. Gibbs and seconded by Ms. Freiman, the Board voted (5-0) to execute the**  
243 **warrant for the October 2, 2018 special town meeting.**

244  
245 **8. Review Boston Marathon Invitational Entry Policy**

246  
247 Mr. Morgan stated that the Board is awaiting comments on the draft policy from the Fire Chief and Police  
248 Chief and would discuss the policy in the near future.

249  
250 **9. Discuss Veterans Grave Officer position and funding**

251  
252 Ms. Robinson reviewed the changes that had taken place in the Veteran's Department over the past year.  
253 She and Mr. Ulfelder had met previously with one of the individuals that held this position in the past, and  
254 he assisted in providing background of the position and his insight helped draft the job description.

255  
256 **Upon a motion by Ms. Gibbs and seconded by Ms. Freiman, the Board voted (5-0) to approve the**  
257 **position description for the Veterans Graves and Ceremonial Officer.**

258  
259 **10. Review Selectmen FY18 Annual Report**

260  
261 Mr. Morgan stated that edits had been submitted to Ms. Robinson and Ms. Jop prior to the meeting. The  
262 Board reviewed the report and made additional editorial changes.

263  
264 **Upon a motion by Ms. Gibbs and seconded by Ms. Freiman, the Board voted (5-0) to approve the**  
265 **Board's Annual Report for fiscal year 2018.**

266  
267 **11. Discuss Proposed Public Comment Policy**

268  
269 Mr. Morgan reviewed the background of the request for Town Counsel to draft a policy regarding public  
270 comments at Selectmen meetings.

271  
272 Mr. Harrington, Town Counsel, joined the Board to review the policy. He identified the section of laws that  
273 the policy was based upon. He noted that based on law, Selectmen meetings are considered limited public  
274 forums and that speech can be limited provided there is no attempt to regulate individual points of view.  
275 He reviewed the policy and what the Board has a legal authority to regulate during its meetings. The Board  
276 discussed the language used in the policy and the laws that support it. The Board suggested edits to the  
277 policy and discussed how the policy will be made available to the public when it is finalized. Mr. Harrington  
278 agreed to revise the policy based upon the suggested edits and submit another draft for approval.

279  
280 **12. Executive Director's Report**

281  
282 Ms. Gibbs noted she had made minor revisions to the minutes that the Board had not seen. Ms. Robinson  
283 noted the edits would be included in the final version.

284  
285 **Upon a motion by Ms. Gibbs and seconded by Ms. Freiman, the Board voted (5-0) to approve the**  
286 **minutes of the July 31<sup>st</sup> meeting.**

287  
288 **Upon a motion by Ms. Gibbs and seconded by Ms. Freiman, the Board voted (5-0) to approve the**  
289 **following gifts to the Council on Aging:**

290  
291     • **\$1,000 from Maryanne Miller in appreciation of the COA bus**  
292     • **\$722 in donations for the July Senior Lunch Program with Express Gourmet**

293    **13.    New Business and Correspondence**

294

295    Mr. Morgan stated that the next Selectmen meeting will be Tuesday, September 11<sup>th</sup> currently scheduled to  
296    begin at 7pm.

297

298    The meeting was adjourned at 9:27pm.



Babson One Day License Request

The Board has received a request for several One Day Licenses from Babson College for their Alumni Weekend to be held on September 21 and September 22, 2018. There are 10 events throughout the weekend at various locations. The Board has approved this annually, and staff recommends approval.

**MOVE** to approve the one day licenses for Babson College on September 21 and 22, 2018 for all 10 locations identified in the application for Alumni Weekend.





# TOWN OF WELLESLEY

## Application for Special License(s)

Date of Application: 8/13/2018

Date of Event: 9/21/18 - 9/22/18

A special License is a temporary license issued pursuant to Chapter 635 of the Acts of 1982 to the responsible manager of any nonprofit organization conducting any indoor or outdoor activity or enterprise for the sale of alcoholic beverages.

Application fee for one or more applications filed on the same date: **\$25.00**

Fee for each license issued: **\$50.00**

Make checks payable to: Town of Wellesley

The undersigned hereby applies for a Special License for:

All Alcoholic Beverages       Wine and Malt Beverages Only

### APPLICANT INFORMATION

Name of Non-Profit Organization: Babson College

Address: 231 Forest Street, Babson Park, Wellesley, MA 02457-0310

Name of Event Manager: Molly Joyce      Address: Babson College

Assistant Event Manager: \_\_\_\_\_ Address: \_\_\_\_\_

### EVENT INFORMATION

Event Name & Description (If multiple events; See Attachment1): Alumni Weekend

Event Contact: Judy Curley

Event Date: 9/21/18 - 9/22/18

Event Location: Various

Occupancy: \_\_\_\_\_ Estimated Attendance: (varied) 30 - 500 Indoor/Outdoor (circle one)

An 8X11" floor plan of the premises to be licensed must be submitted along with the

Name of catering service responsible for service of alcoholic beverages:

Chartwells \_\_\_\_\_ Babson College Campus \_\_\_\_\_  
Name \_\_\_\_\_ Address \_\_\_\_\_

Describe steps you have taken to ensure that the employees of the catering service or the individuals listed above have completed an alcoholic beverage server-training program or similar in-house training.

All servers must be TIPS trained and certified. Evidence of training must be provided prior to event.

Describe security precautions or police details if any:

Babson College Public Safety Officers are assigned to each event in accordance with the College's long-standing practice. The number of officers assigned to a particular event fluctuates based upon the number of anticipated attendees. Access to event location is controlled consistent with College policies based upon the type of event, the location and the number of anticipated attendees.

Babson College

Kristin Wood

Printed Name of Applicant

Its Event Coordinator

Kristin Wood

Applicant's Signature

8/13/18

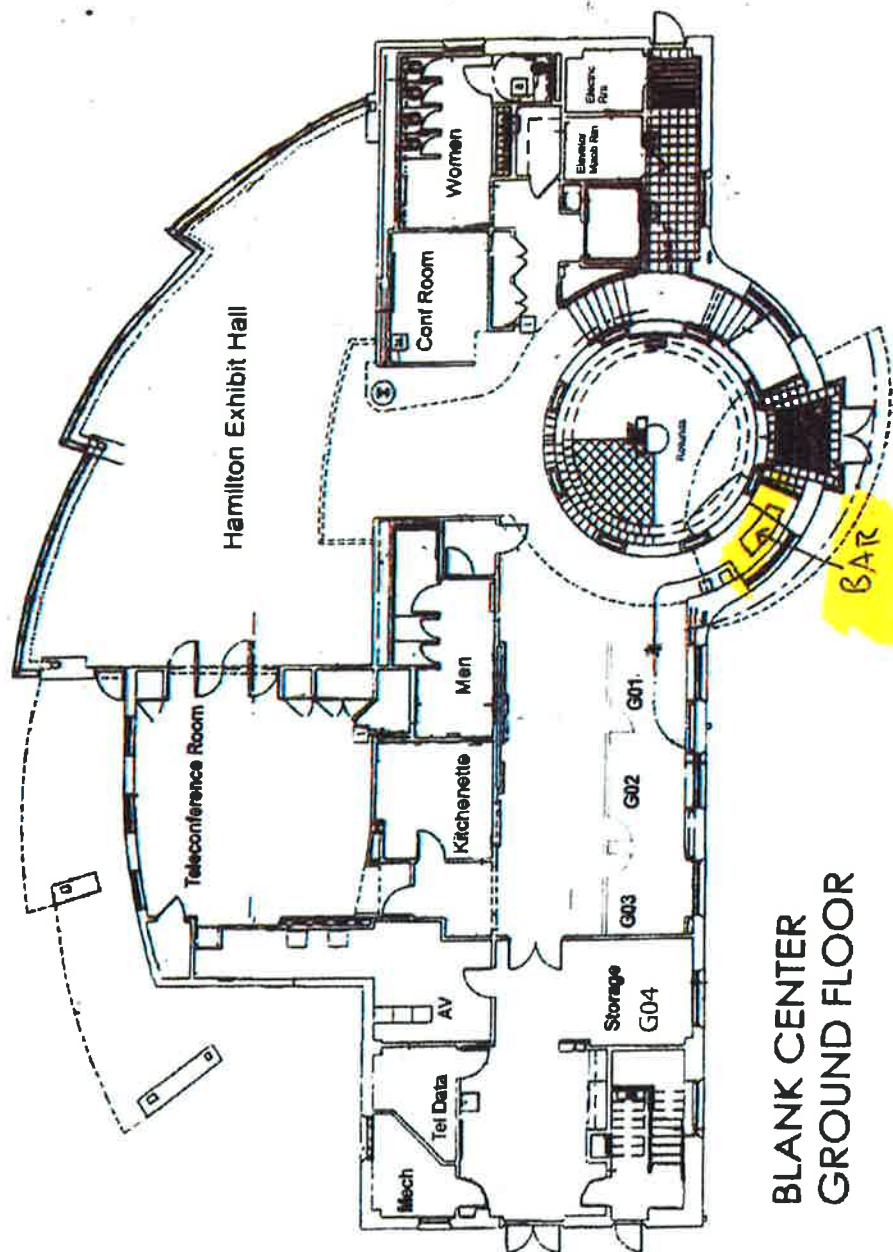
Date

RETURN COMPLETED APPLICATION, FLOOR PLAN AND CHECK FOR FEES TO:

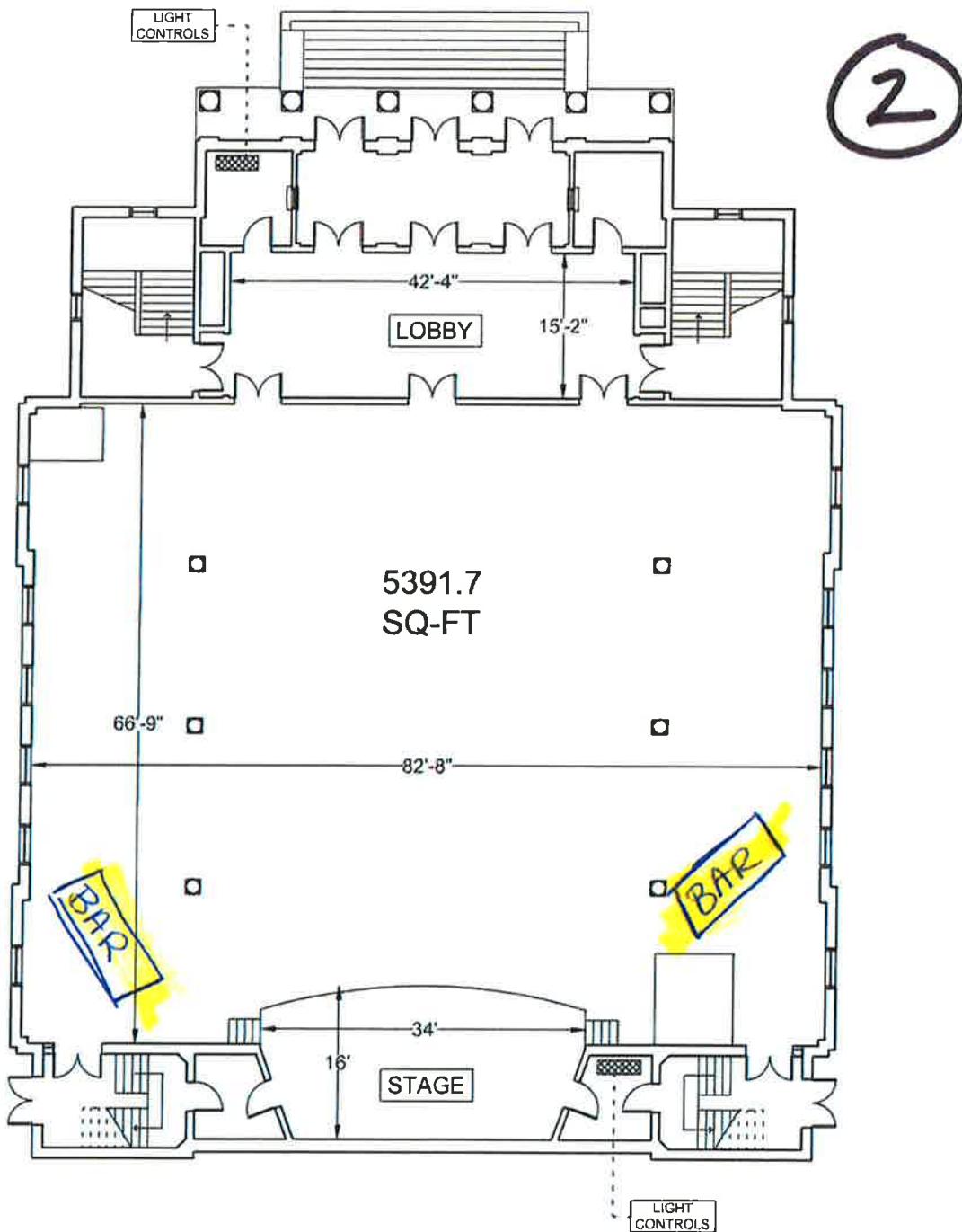
BOARD OF SELECTMEN  
525 Washington Street  
Wellesley, MA 02482  
781-431-1019 ext 2204

ATTACHMENT 1

<u>Name of Event/Date</u>	<u>Location</u>	<u>Floor Plan Number</u>
1. Alumni Entrepreneur Awards VIP Reception	Blank Center Rotunda	1
2. Alumni Entrepreneur Awards	Knight Auditorium	2
3. Cocktails with Coaches Reception	Upper Athletic Fields Tent	3
4. The Tent	Upper Athletic Fields	4
5. Graduate All Class Reunion Party	Olin Hall – Lobby	5
6. Class of 2008 Reunion Party	Reynolds Café	6
7. Class of 1998 Reunion Party	Sorenson Theater	7
8. Class of 1988 Reunion Party	Schlesinger Innovation Center	8
9. Class of 1983 Reunion Party	Lunder Admissions Lobby	9
10. Class of 1978 Reunion Party	Knight Auditorium	10



(-)



 <b>BABSON</b> Babson College Babson Park, MA 02457-0310	BUILDING: KNIGHT AUDITORIUM			REVISIONS		
	PROJECT:	DRAWING TITLE:	1st FLOOR	No:	Date:	Issue:
	SCALE: $\frac{1}{16}$ " = 1'	DRAWN BY: EF	DRAWING NO: 11/2011			

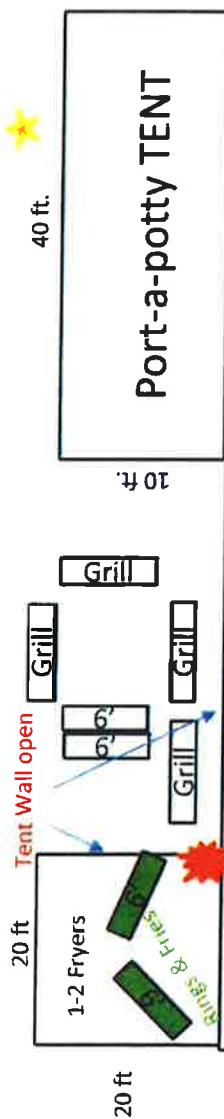


## Upper athletic fields tent



Port-a-potty TENT

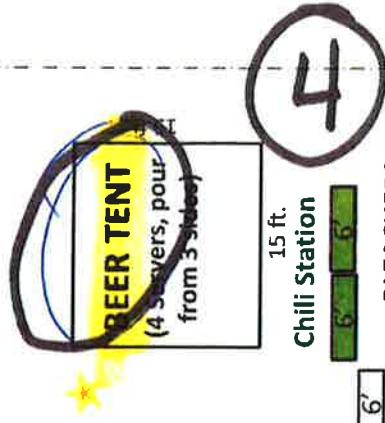
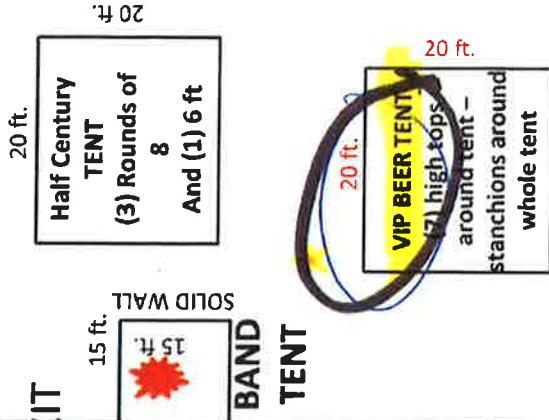
TENT ENTRANCE  
MARQUEE



Climb  
Inflatable  
and Slide  
Baby Bull

Golf Game

Lawn Games



10 x 10 pop up Bookstore Tent OR Mobile space: Needs power, 2 tables and chairs  
Walk-in Registration

(60) Rounds with (8)  
chairs at each

KIDS ACTIVITY AREA  
(2) KIDS PICNIC TABLES  
(3) 6' tables with chairs

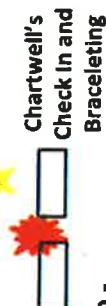
Kids Buffet

6' 6' 6' 6' 6' 6' 6' 6'

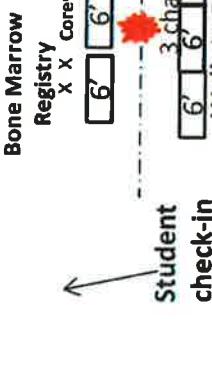
140 ft. 10 ft. TENT ENTRANCE MARQUEE



20 ft.



Check-In -  
stanchions



Set around the  
tent tops

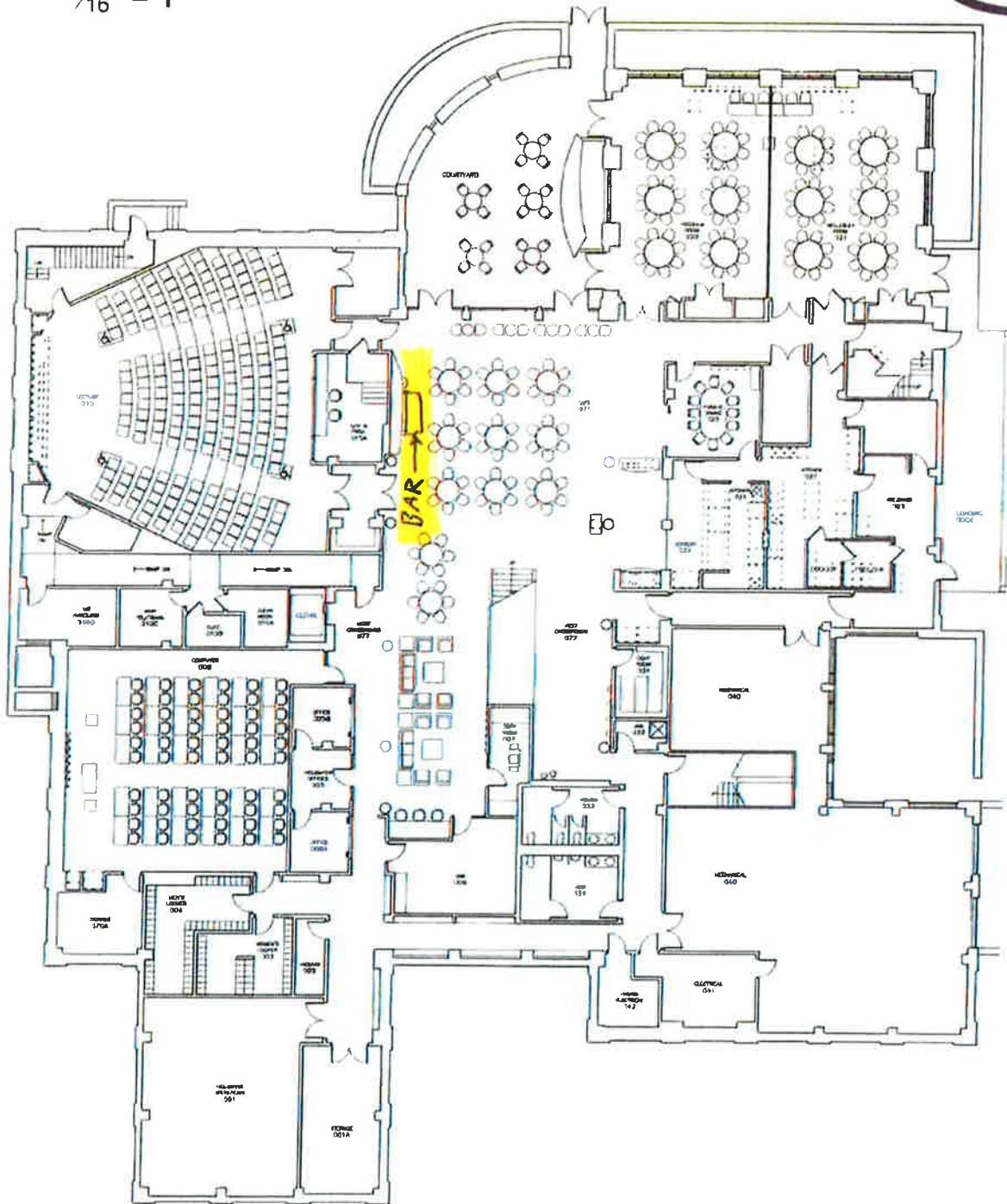
4

# OLIN HALL

## Ground Floor

$$\frac{1}{16}'' = 1'$$

5





**BABSON**

Babson College  
Facilities Management  
& Planning  
Sullivan Building Babson Park, MA  
(617) 339-0310

**Reynolds**  
**Campus Center**  
**First Floor**



Drawing Scale

1/16" = 1'-0" (25mm)

Building Number/Code

2-REY

Carling

Business A

East

Wellness

East

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144 W

1597

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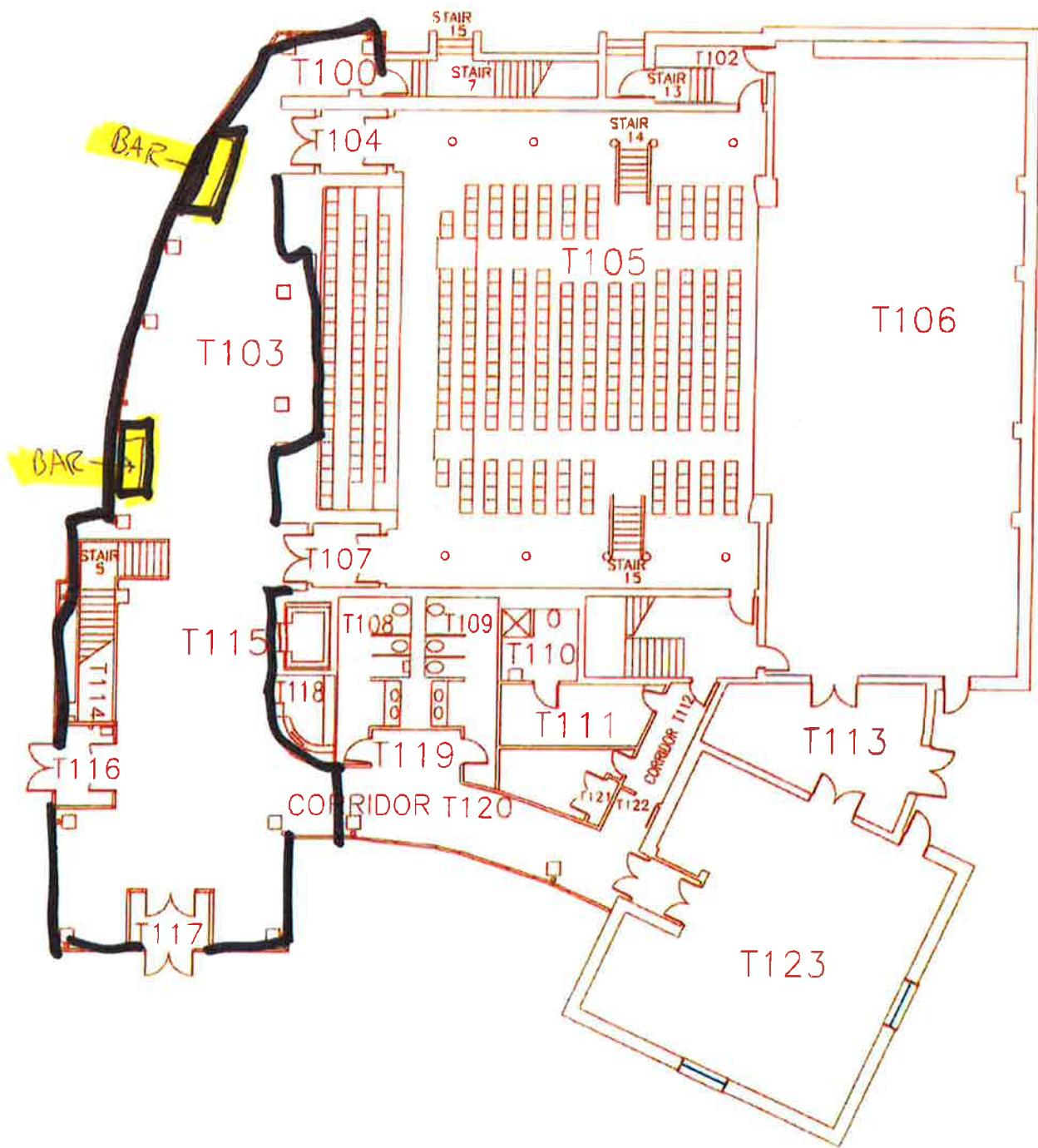
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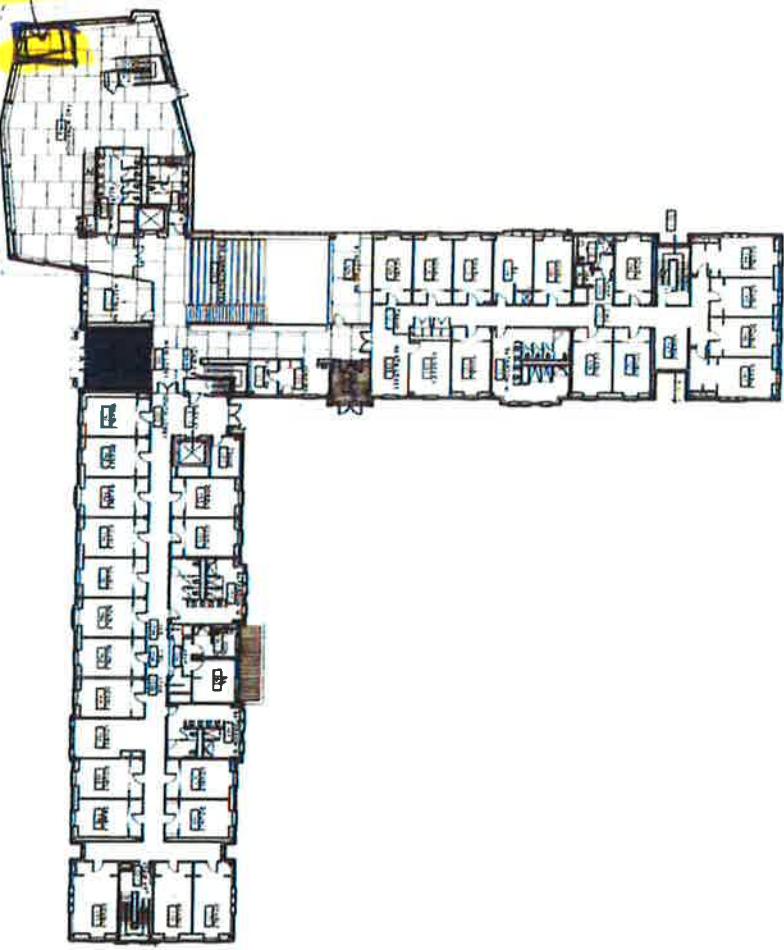




BABSON  
Babson College  
Facilities Management  
& Planning

Sullivan Building Babson Park MA  
02457-0310

Park Manor  
West  
First Floor



Revisions	
Date 5/27/14	Initials NC
Date 6/12/14	
Date 6/13/14	
Date 6/17/14	
Date 6/19/14	
Date 6/20/14	
Date 6/21/14	



Babson College  
Facilities Management  
& Planning  
Sullivan Building Babson Park MA  
02457-0310

**Mustard Hall**  
(Lunder  
Admissions)  
First Floor



Drawing Scale:

1/8" = 1'-0"

Building Number/Code:

201405

Zone 1

Educational

Ind:

WHR105

Area: 1000

Arch.:

Ind:

Revisions:

Date 6/25/14

Ind:

Date 6/25/15

Ind:

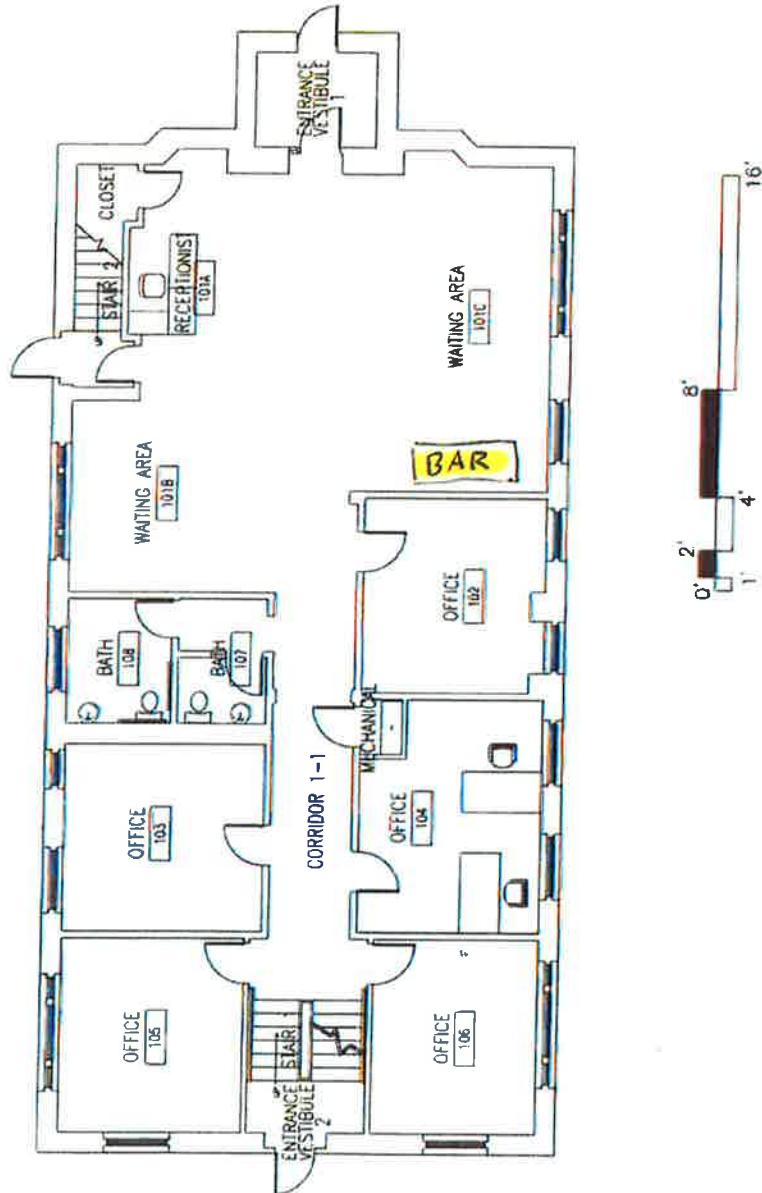
Date 6/25/15

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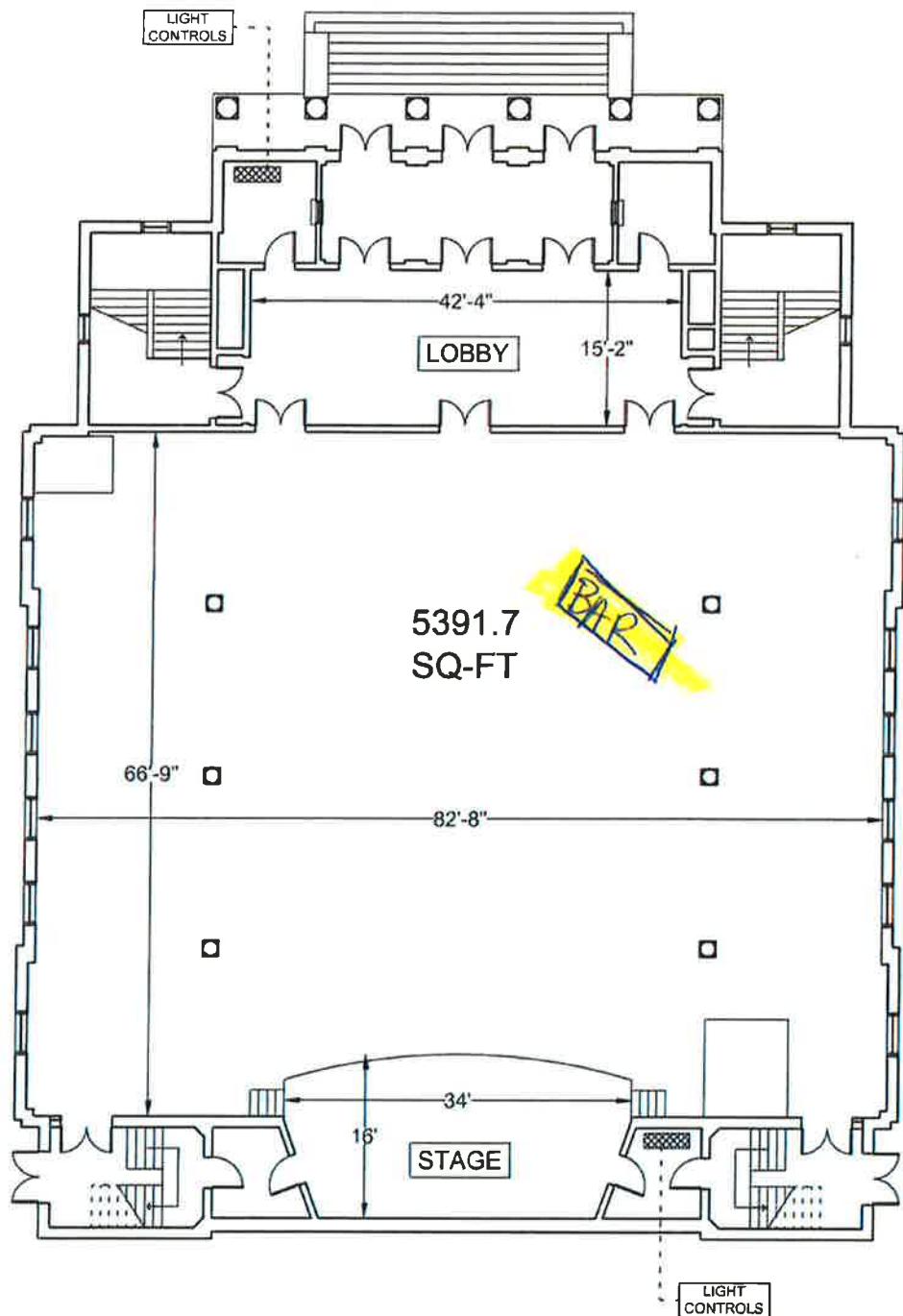
Date 6/25/15

Ind:

9



10



**BABSON**

Babson College  
Babson Park, MA 02447-0000

 <b>BABSON</b> Babson College Babson Park, MA 02457-0310	BUILDING:	KNIGHT AUDITORIUM		REVISIONS		
	PROJECT:			No:	Date:	Issue:
	DRAWING TITLE:					
	1st FLOOR					
SCALE:	1/8" = 1'	DRAWN BY:	EF	DRAWING NO.:	DATE:	11/2011



Natick Organic Farm – Charity Wine License

The Natick Organic Farm is hosting its 17<sup>th</sup> annual charity event at the Wellesley College Club on September 28, 2018. The event auctions off donated wine. The wine is being donated this year by Mary DeBlois Farm. The ABCC requires the host to acquire a Special License- Charity Wine License from the ABCC with Local approval. The Town has authorized this annually, and staff supports the application.

**MOVE** to approve the Charity Wine License for Natick Organic Farm at the Wellesley College Club on September 28, 2018.





727 Washington Street, Wellesley, MA 02482  
Tel 781.283.2700 Fax 781.283.2704

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Dear Mr. Sacramone,

This letter is to confirm that the Natick Community Organic Farm is holding its Annual Dinner and Auction at the Wellesley College Club at 727 Washington St, Wellesley, MA 02481 on Friday, September 28 from 6 pm to 10 pm. Please let us know if you require any additional information from us.

Sincerely,

  
Maria Tzigizis

Director of Catering and Sales

**\*Wellesley College Club\***  
**727 Washington Street**  
**Wellesley, MA 02482**

P: 781-283-2706  
F: 781-283-3659

[mtzigizi@wellesley.edu](mailto:mtzigizi@wellesley.edu)  
<http://www.wellesleycollegeclub.com/>

The Commonwealth of Massachusetts  
Alcoholic Beverages Control Commission  
239 Causeway Street  
Boston, MA 02114  
[www.mass.gov/abcc](http://www.mass.gov/abcc)

**RETAIL ALCOHOLIC BEVERAGES LICENSE APPLICATION  
MONETARY TRANSMITTAL FORM**

**APPLICATION SHOULD BE APPROVED BY THE LOCAL LICENSING AUTHORITY BEFORE IT IS SENT  
TO THE ABCC.**

REVENUE CODE: RETA

CHECK PAYABLE TO ABCC OR COMMONWEALTH OF MA: NO FEE

IF USED EPAY, CONFIRMATION NUMBER:

A.B.C.C. LICENSE NUMBER (IF AN EXISTING LICENSEE, CAN BE OBTAINED FROM THE CITY):

CHARITY NAME:

ADDRESS:

CITY/TOWN:

STATE

ZIP CODE

**TRANSACTION TYPE (Please check all relevant transactions):**

- Change of Hours
- Change of DBA
- Charity Wine License

**THE LOCAL LICENSING AUTHORITY MUST MAIL THIS TRANSMITTAL  
FORM ALONG WITH THE COMPLETED APPLICATION, AND SUPPORTING  
DOCUMENTS TO:**

**ALCOHOLIC BEVERAGES CONTROL COMMISSION  
239 CCAUSEWAY STREET  
BOSTON, MA 02241-3396**

**The Commonwealth of Massachusetts  
Alcoholic Beverages Control Commission  
239 Causeway Street  
Boston, MA 02114  
[www.mass.gov/abcc](http://www.mass.gov/abcc)**

**Charity Wine License Application**

**1. Qualified Charity Applicant Information:**

Name of Applicant:

Contact Person

Address of Applicant:  City/Town:  State:  Zip Code:

Phone Number:  Fax Number:

**NOTE: 1. Attach Certificate of Good Standing from the Secretary of the Commonwealth**

**2. Attach a copy of the Certificate of Solicitation from the Public Charities Division of the MA Attorney General's Office (Certificate must be current to the date of the event)**

**2. Type of License Requested:**

Charity Wine Pouring License

Charity Wine Auction License

Charity Wine Partnership License

**\*Donated Wine Only**

**3. Event Information:**

Date(s) of Event:

These events are only permitted at one of the locations specified below. Please check the one that applies.

Address of Applicant's Corporate Headquarters:

Address of Applicant's Usual Place of Business:

Address of Licensee:

Name of Licensee :

ABCC License #

**\*Attach letter of consent from Licensee**

Describe Area to be Licensed:

**\*If additional space is needed, please use the last page\***

**4. Who Donated Wine:**

Name	Donated
<del>We are actively seeking donations now</del>	
My DeBlais Farm number	4 cases wine

I hereby swear under the pains and penalties of perjury that the information I have provided in this application is true and accurate; I hereby acknowledge I have read and understand the attached conditions.

Signature:



Date





THE COMMONWEALTH OF MASSACHUSETTS  
OFFICE OF THE ATTORNEY GENERAL  
ONE ASHBURTON PLACE  
BOSTON, MASSACHUSETTS 02108

MAURA HEALEY  
ATTORNEY GENERAL

(617) 727-2200  
(617) 727-4765 TTY  
[www.mass.gov/ago](http://www.mass.gov/ago)

September 5, 2018

AG #: 013765

NATICK COMMUNITY ORGANIC FARM, INC.  
117 Eliot Street  
Natick, MA 01760

To Whom It May Concern:

Massachusetts General Laws Chapter 12, Sections 8E and 8F requires all non-profit charitable organizations to initially register and file annual reports with the Non-Profit Organizations / Public Charities Division ("Division") of the Office of the Attorney General. Massachusetts General Laws Chapter 68, Section 19, requires a Certificate of Solicitation from the Division prior to engaging in charitable solicitations.

Please be advised that the NATICK COMMUNITY ORGANIC FARM, INC. is registered with the Division as a public charity and assigned AG # 013765, is up to date with its annual filings, and has a Certificate of Solicitation valid through 11/15/2018.

Please feel free to contact me if you have any questions or concerns.

Sincerely,

Amy Bryson  
Compliance Officer  
Non-Profit/Public Charities Division  
Business and Labor Bureau  
(617) 963-2113  
[Amy.Bryson@state.ma.us](mailto:Amy.Bryson@state.ma.us)



Commonwealth of Massachusetts  
Department of Revenue  
Christopher C. Harding, Commissioner

[mass.gov/dor](http://mass.gov/dor)

Letter ID: L1926282368  
Notice Date: August 30, 2018  
Case ID: 0-000-374-966



## CERTIFICATE OF GOOD STANDING AND/OR TAX COMPLIANCE



NATICK COMMUNITY ORGANIC FARM INC  
117 ELIOT ST  
NATICK MA 01760-5506

000025

### ***Why did I receive this notice?***

The Commissioner of Revenue certifies that, as of the date of this certificate, NATICK COMMUNITY ORGANIC FARM INC is in compliance with its tax obligations under Chapter 62C of the Massachusetts General Laws.

This certificate doesn't certify that the taxpayer is compliant in taxes such as unemployment insurance administered by agencies other than the Department of Revenue, or taxes under any other provisions of law.

**This is not a waiver of lien issued under Chapter 62C, section 52 of the Massachusetts General Laws.**

### ***What if I have questions?***

If you have questions, call us at (617) 887-6367 or toll-free in Massachusetts at (800) 392-6089, Monday through Friday, 8:30 a.m. to 4:30 p.m..

### ***Visit us online!***

Visit [mass.gov/dor](http://mass.gov/dor) to learn more about Massachusetts tax laws and DOR policies and procedures, including your Taxpayer Bill of Rights, and MassTaxConnect for easy access to your account:

- Review or update your account
- Contact us using e-message
- Sign up for e-billing to save paper
- Make payments or set up autopay

Edward W. Coyle, Jr., Chief  
Collections Bureau

Approve SPED Stabilization Fund Expenditures

As you may recall expenditures from the SPED stabilization fund requires approval of both the Board of Selectmen and the School Committee. In April the School Committee approved a reimbursement payment for \$653.34, however the Selectmen did not vote on this particular invoice. Staff is seeking approval to pay New England billing in this amount.

**MOVE** that the Board vote to authorize payment of invoices in the amount of \$ 653.34 to New England Medical Billing for the Town's Medicaid filing from the SPED Stabilization Fund.





N • E • M • B  
NEW ENGLAND MEDICAL BILLING  
19 Norfolk Avenue  
South Easton, MA 02375

# Invoice

DATE	INVOICE NO.
4/6/2018	WELLS1712

## BILL TO

Wellesley Public Schools  
40 Kingsbury ST  
Wellesley, MA 02481  
Attn: Judith Belliveau  
Asst Superintendent

## TERMS

Due on receipt

DESCRIPTION	NET RECEIPTS	RATE	AMOUNT
School Administrative Medicaid Claiming Fees submitted in qtr ending 12/31/17; pmt date 4/3/18	12,854.95	0.045	578.47
School Medicaid Direct Service submitted for qtr ending 12/31/17; pmt date 4/3/18	1,663.71	0.045	74.87
Thank you for your business.			Total \$653.34
For questions - call Nancy Dolgin at (508)297-2068 x232			\$653.34



# WELLESLEY SCHOOL COMMITTEE

Michael D'Ortenzio Jr., Chair  
Matt Kelley, Vice Chair  
Melissa Martin, Secretary



Linda Chow, Member  
Sharon Gray, Member

40 Kingsbury Street • Wellesley • Massachusetts • 02481  
[school\\_committee@wellesleyps.org](mailto:school_committee@wellesleyps.org)  
[www.wellesleyps.org](http://www.wellesleyps.org)

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School Committee Meeting  
May 8, 2018, 6:30 pm  
Felix Juliani Room, Town Hall  
525 Washington Street

6:30 pm **Gas Leaks Update**

6:45 pm **Citizens Speak**

6:50 pm **Recognitions**

7:00 pm **Public Hearing/Vote: School Choice**

7:10 pm **Reports**

- School Committee
- Superintendent
- Student Advisory

7:30 pm **Consent Agenda**

- Approval of Minutes: 04/04, 04/25, 04/30/2018 (day)
- Approval of High School Field Trip to Spain
- New England Medical Billing Invoices (2) in the amounts of \$1,866.76 and \$653.34

7:35 pm **Action/Discussion Items**

7:35 pm Last Day of School Announcement

7:37 pm WHS Annual Assessment Update

8:00 pm Spanish FLES Update

8:30 pm Elementary Schedule Update

8:50 pm 3<sup>rd</sup> Quarterly Financial Report

9:05 pm HHU Update

- Discussion/Vote: HHU Position Paper

9:25 pm **Citizens Speak**

9:30 pm **Adjournment**

Pursuant to MGL Chapter 30A, §§ 18-25 All public bodies must provide the public with notice of its meeting 48 hours in advance, excluding Saturdays, Sundays and legal holidays. Notices must be filed with the Town Clerk sufficiently in advance of the meeting to permit posting before the 48-hour window. Click below for School Committee minutes and presentations

<https://wellesleyps.org/schoolcommittee/minutes-archive/>

**Wellesley Public Schools  
School Committee Meeting  
May 8, 2018  
Juliani Hall, Town Hall**

The Open Session meeting of the School Committee convened at 6:47 pm. Those present included Committee Chair Michael D'Ortenzio Jr., Vice Chair Matt Kelley, Secretary Melissa Martin, members Sharon Gray and Linda Chow; Superintendent David Lussier, and Assistant Superintendents Judy Belliveau and Joan Dabrowski. Mr. D'Ortenzio Jr. informed the group that the meeting is being recorded by local media.

**NRC/GREEN SCHOOLS GAS LEAKS UPDATE**

The Committee was joined by NRC members Lise Olney and Regina LaRocque, and Bob Ackley of Gas Safety Incorporated, to address concerns with the number of gas leaks that have been identified near schools, both public and private, within the Town. They are concerned for a number of reasons including the potential for explosions, leaks are potentially harmful to human health, they kill trees by suffocating the roots, and the release of methane which is a potent greenhouse gas. Leaks identified within about 100 feet of a school zone were reviewed.

The Committee was asked to approve and sign a letter prepared by the NRC and Green Schools to National Grid outlining its concerns with the number of gas leaks around school zones and encourage the speedy repairs of such leaks.

After a discussion, upon a motion made by Mr. Kelley and seconded by Ms. Gray, School Committee ***unanimously VOTED*** to approve the draft letter to National Grid and authorized the Chair to sign it.

**CITIZEN SPEAK** – No one present wished to speak

**RECOGNITIONS**

In light of Teacher Appreciation Week, Dr. Lussier recognized **all WPS teachers** for their important work each and every day with students. He also recognized **all school nurses** for their work, noting that May 9<sup>th</sup> is Nurse Appreciation Day.

From Bates Principal Toni Jolley and Fiske Principal Rachel McGregor, congratulations to **Irene Gruenfeld**, 4th grade teacher at Bates, and **Annie Gayner**, 4th grade teacher at Fiske, for their work on the 4th grade Morses Pond Erosion project. This is a Project Based Learning unit the teachers designed together and implemented in the fall. The teachers were selected for a 2018 Excellence in Energy and Environmental Education Award and will be recognized at the State House on May 14<sup>th</sup>. Thank you to **Stephanie Hawkinson** and **Brandon Schmitt** of the NRC for their tremendous support and collaboration on this project.

From Director of Early Childhood Rebecca Zieminski, thank you to PK3 teacher **Danielle Lange**, to the **P.A.W.S., Fiske and Schofield Cares Team**, and to all of the **P.A.W.S. families** who came to the Barton Road Playground on Friday evening. It was a beautiful night for pizza, friends, and playing in the park.

Also, thank you to **Mr. Chute** and his homeroom class of awesome **8th graders!** On May 2nd, these students took time to spruce up the P.A.W.S garden beds. The 8th graders were volunteering at P.A.W.S for their "8th Grade Day of Service". They worked for several hours edging, raking, removing expired plants, and applying mulch to the garden beds.

Also, thank you to P.A.W.S. Parents - **Nicole Meyers (and her son Benjamin), Felicity Dupal and Rose Nolan** (P.A.W.S Garden Coordinator) for working along side the students. We are so grateful for all their hard work in improving the beauty of P.A.W.S.

#### **PUBLIC HEARING – SCHOOL CHOICE**

The public hearing was open for comment. No one present wished to speak. The hearing closed.

#### **SCHOOL COMMITTEE REPORTS**

Ms. Chow reported she participated in the second session of **POG Task Force**. She also attended a meeting with potential candidates for the **WMS building systems project** which had approximately 12 firms represented. Mr. D'Ortenzio Jr. attended a great fundraising event sponsored by **WEF** at the TCAN in Natick.

#### **SUPERINTENDENT'S REPORT**

Dr. Lussier announced the World of Wellesley will be hosting a **Multicultural Festival** on Thursday, May 10<sup>th</sup>, from 5:30 to 8 pm at the Middle School.

Dr. Lussier reported on the passing of **Cynthia Goodhue**, a long term substitute in WPS and recently appointed Teaching Assistant at Fiske School. He expressed condolences to Ms. Goodhue's family.

#### **CONSENT AGENDA**

- Approval of Minutes: April 4, 25, 30(day) Open Session
- WHS Trip to Spain 2019
- New England Medical Invoices (2) in the amounts of \$1,866.76 and \$653.34

With regard to the New England Medical invoices, Ms. Belliveau explained that the Committee previously authorized payment of the NE Medical invoices through this fiscal year. The Town has requested that, since the Selectmen must also approve payment, the invoices be submitted for approval individually and then forwarded to the Selectmen for a vote as well. Although a formal overall vote to pay New England Medical was taken, the invoices will now be listed on the Consent Agenda for approval on an individual basis. It was also confirmed that funds to pay for these invoices will come from the Special Education Stabilization Fund.

After a discussion, upon a motion made by Mr. Kelley and Ms. Chow, the Committee **unanimously VOTED** to approve the Consent Agenda.

**ACTION/DISCUSSION ITEMS****LAST DAY OF SCHOOL ANNOUNCEMENT**

Dr. Lussier announced the last day for students is Wednesday, June 20, 2018, a half day; the last day for teachers is Thursday, June 21, 2018.

**WHS ANNUAL ASSESSMENT**

The Committee was joined by WHS Principal Jamie Chisum, Department Head of Guidance Dana Plunkett, and Instructional Data Coordinator Karen Archambault who presented the annual update on several standardized assessments at the high school. Participation and achievement data were presented from the following exams: PSAT, SAT, Pre-ACT, ACT and Advanced Placements (APs). Data was presented by race/ethnicity, as compared with other districts in the state, as well as nationwide.

The results are positive overall for most students in Wellesley, however the data also indicates a need to consider areas for further analysis and improvement in order to ensure all students can access these exams and courses, and score well on them. Staff continues to work on narrowing the achievement gap that persists both in the areas of participation and achievement.

Ongoing and future actions include continuation of METCO SAT prep classes funded by the Friends of Wellesley METCO; Cultural Proficiency Training for teachers and students, which is now being conducted by staff for staff; inclusion of a unit on cultural proficiency as part of the Modern World History course starting in school year 2018-19; and the implementation of the General Academic Support Center at the high school. This work will be addressed within the NEASC process at the high school. In addition, Kingston Bay Group's findings and recommendations from the racial and climate assessment will be reviewed by the Diversity and Equity Leadership Council for future action.

Next steps involve a wider view of assessments through the shift in the final exam experience which will vary by teacher, but provides the opportunity to ask students to apply their knowledge more, reflect more, and are given more of a voice to show what they know. The Evolutions capstone projects and Buck Institute Project based learning professional development is being expanded from elementary to the middle and high schools staff. Additional work will be done on Profile of a Graduate as it relates to the new strategic plan, and there will be continued focus on social emotional learning, and 21<sup>st</sup> Century skills.

Clarifying questions were raised throughout the presentation. School Committee expressed its appreciation for the thorough presentation and analysis.

**SPANISH FLES UPDATE**

The Committee was joined by Department Head for Classical and Modern Languages Tim Eagan and K-5 Department Head for World Language Barbara Barnett who provided an update on the implementation of Spanish FLES in grades K-4. Prior to the presentation, Ms. Barnett recognized five of the seven elementary Spanish teachers who were present. Ms. Barnett reviewed the results of the parent and faculty surveys regarding the FLES

Program, which indicated an overall 92.13 percent satisfaction rate amongst parents, and 87.60 percent satisfaction rate amongst the faculty surveyed.

Ms. Barnett discussed current staffing and the program, noting that 1,539 students are now learning Spanish in the elementary schools. She reviewed the various learning methods used in the Spanish FLES curriculum, instruction and the process of progress assessment.

Plans for moving Spanish FLES into grades 4 and 5, and launching World Languages in Grade 6 were also reviewed.

Mr. Eagan addressed the progression of implementation of World Language in the Middle School in SY2019-20, beginning with a language choice year in 6<sup>th</sup> grade. He discussed the proposed time on learning and content for the Middle School transition, as well as staffing needs for the expansion which will require approximately 2.5 FTEs. He also reviewed the language proficiency of a novice, intermediate and advanced student at each level, addressing how student proficiency assessment correlates to real life experiences.

Committee members asked questions throughout the presentation. Mr. Eagan and Ms. Barnett were thanked for their excellent presentation.

#### **ELEMENTARY SCHEDULES UPDATE**

Dr. Dabrowski provided an update on the Elementary Schedule, the review process and future plans. She reminded the Committee that changes were made to the SY17-18 schedule to provide better continuity and support for students. The presentation included an assessment of the current year's changes and plans for next year.

Dr. Dabrowski reviewed the process used to monitor the implementation of the Elementary Schedule including the meetings and timeline, process and norms used, analysis of survey results, identification of focus areas and next steps for SY18-19. Based on the information and review of SY17-18 schedule, she informed the Committee that there are no changes in time and frequency in next year's schedule. Work will continue on building-based scheduling, with the Elementary Leadership Team beginning its work on identified Focus Areas for SY18-19; and annual feedback on the schedule will continue for SY18-19.

#### **THIRD QUARTERLY FINANCIAL REPORT**

Ms. Belliveau presented the District's FY18 Third Quarter Budget Report, which reflects the FY18 supplemental appropriation of \$776,000 voted at Town Meeting, posted expenses to date, funds encumbered for purchases in process as of March 31, 2018, and the projected Circuit Breaker supplemental reimbursement. The net result projected for the end of the year, factoring in the supplemental appropriation, is a turnback to the Town of \$173,183.

#### **SCHOOL CHOICE VOTE**

Ms. Belliveau explained that the School Choice Program allows parents to send their children to school in another district that is a School Choice district and tuition is paid by the sending district to the receiving district through a Cherry Sheet assessment, which has a maximum of \$5,000 per student. Every year the school committee in each district

must decide whether it will accept new enrollments under this program and, if so, in which grades. The DESE considers a district as School Choice unless the school committee opts out by June 1<sup>st</sup> of each year. Given the challenges the District is facing regarding enrollment and the space constraints and facility conditions, it is recommended that the Committee vote to opt out of the School Choice Program for Wellesley Public Schools for the 2018-19 school year.

After a discussion and clarifying questions, upon a motion made by Mr. Kelley and seconded by Ms. Martin, School Committee ***unanimously VOTED*** that, in accordance with MGL Chapter 76, Section 12B, it withdraw from the School Choice obligation in the school year beginning September 2018 through June 2019, based on enrollment fluctuations within the District and space constraints at specific schools.

#### **Hardy, Hunnewell, Upham Projects Update**

With reference to SBC work, Ms. Gray reported that there is significant interest in the Hunnewell RFQ for an Owner's Program Manager (OPM). A tour of Hunnewell was conducted last week for the OPM candidates, with proposals due on May 16<sup>th</sup>. She also reported there appears to be significant interest in the architects RFQ.

Ms. Chow provided additional clarity on her recusal from discussions on the Hardy/Upham project, noting that MGL Chapter 40A Section 11 applies to her situation because they are owners of land that is within 150 feet of Hardy School. The State Ethics Commission considers her to have a financial interest in matters related to the use of the Hardy School parcel which is not shared by a substantial portion (at least 10 percent) of town residents. As a result, Ms. Chow must recuse herself from the Hardy/Upham discussions moving forward, however, she has full confidence in her colleagues on the Committee, as well as those on the SBC and members of the community involved in this work. She will be available for all discussions relative to the Hunnewell project.

Ms. Chow recused herself from the meeting at 9:45 pm.

Ms. Gray reported on last week's Advisory Committee public hearing for the Special Town Meeting to request funding of the Hardy/Upham feasibility study and schematic design work, and Hunnewell's feasibility study. Questions were raised primarily about whether or not the MSBA process will allow the Town to examine the feasibility of building on either the Upham or Hardy sites, since the MSBA's invitation to Wellesley names only Upham. In addition, there was concern that the Warrant language voted by the Selectmen does not mention Hardy School.

Ms. Gray noted that the School Committee has never wavered from its belief that whether Upham or Hardy was invited into the MSBA eligibility process, the Town would require the flexibility to examine feasibility at both sites. She informed the group that over the past several weeks, Town officials have worked closely with the MSBA to clarify this important point of concern. She announced that the MSBA confirmed this week a shared understanding that proceeding with the named Upham project will still allow the Town to conduct feasibility studies at both the Upham and Hardy sites.

Ms. Gray read the MSBA's email confirming this shared understanding.

Dr. Lussier has drafted a statement for Town Meeting members and the community reflecting the information in the MSBA's email. There is also consideration to amend the Warrant language to add clarity on the intent of the Warrant article.

Questions were raised relative to timing and process for redistricting, as referenced in the MSBA email. This will be addressed within the various options as they are developed for consideration.

The Committee reviewed the draft statement prepared for the community and provided comments. It was decided that the statement will be sent to Town Meeting members and will also be posted on the District website.

Regarding the previously voted Position Statement on the Hardy, Hunnewell and Upham Facilities voted on May 23, 2017, the Committee discussed at length proposed revisions to the statement.

After the discussion, upon a motion made by Mr. D'Ortenzio, Jr., and seconded by Ms. Martin, the Committee ***unanimously VOTED*** to approve the HHU Facilities Project Position Statement as amended. The revised Position Statement will be posted on the website, and will be included as a link to the statement prepared relative to the MSBA's position on examining the Hardy School as well as the Upham School for feasibility.

Ms. Chow rejoined the meeting at 10:28 pm

**CITIZENS SPEAK** – No one present wished to speak.

**ADJOURNMENT**

At approximately 10:30 pm, upon a motion made by Mr. Kelley and seconded by Ms. Martin, the Committee ***unanimously VOTED*** to adjourn.

Respectfully submitted,

Melissa Martin  
Secretary

**Documents and Exhibits Used:**

Gas Leaks Presentation and Letter to National Grid  
WHS Assessment Memo and Presentation  
FLES Memo and Presentation  
Elementary Schedules Update  
FY18 Third Quarter Financial Report and Slide  
Revised HHU Position Statement 5/8/18  
HHU Statement for TMM – 5/9/18

# Invoice



N • E • M • B  
NEW ENGLAND MEDICAL BILLING  
19 Norfolk Avenue  
South Easton, MA 02375

DATE	INVOICE NO.
4/6/2018	WELLS1712

**BILL TO**

Wellesley Public Schools  
40 Kingsbury ST  
Wellesley, MA 02481  
Attn: Judith Belliveau  
Asst Superintendent

**TERMS**

Due on receipt

DESCRIPTION	NET RECEIPTS	RATE	AMOUNT
School Administrative Medicaid Claiming Fees submitted in qtr ending 12/31/17; pmt date 4/3/18	12,854.95	0.045	578.47
School Medicaid Direct Service submitted for qtr ending 12/31/17; pmt date 4/3/18	1,663.71	0.045	74.87

Thank you for your business.

Total \$653.34

For questions - call Nancy Dolgin at (508)297-2068 x232

4/17

### **3. Update from MassBay Community College**

Dr. David Podell, President and the MassBay Board Chair, Tom Peisch, will be joining the Board to give the annual update on events that will be taking place at MassBay this year.

**NO MOTION**

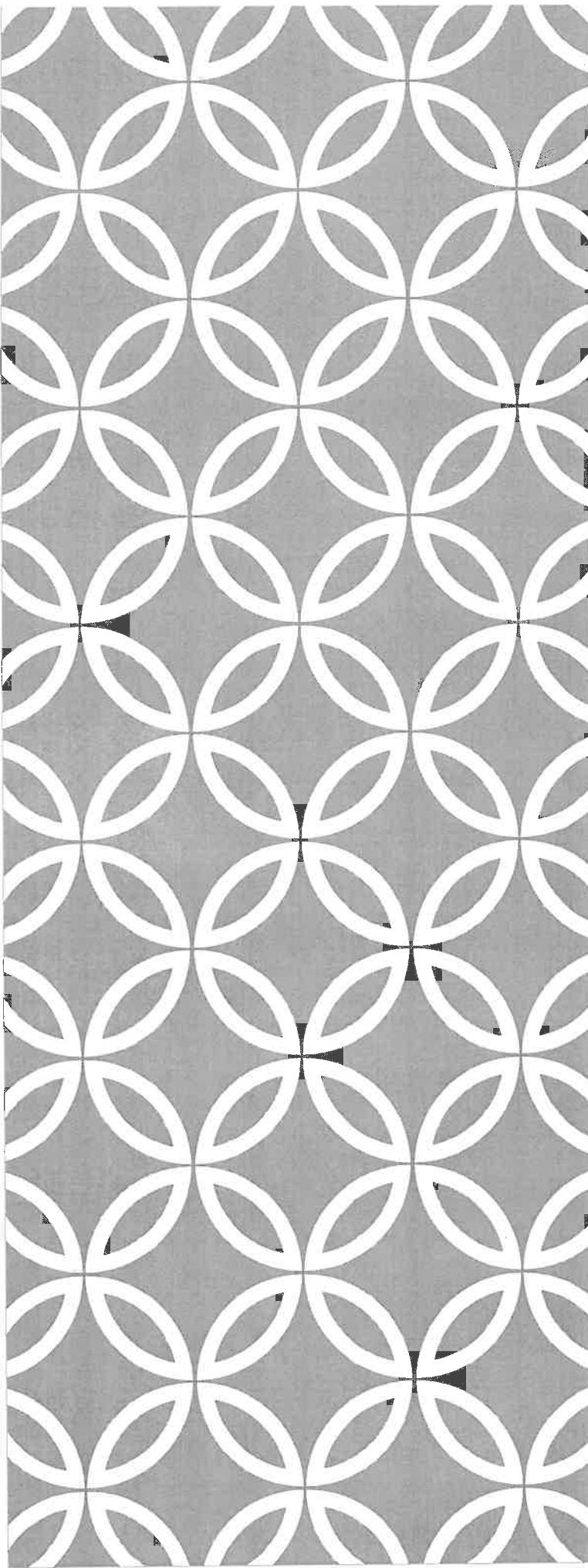


**4. Review of Town Financial Position**

Sheryl Strother, Finance Director will be joining the Board to give the recap on the FY18 Fiscal Year and to begin discussions on the outlook for the FY20 budget. Ms. Strother has put together an overview for the Board, which is in your packets. This meeting will be the start of the Town budget process, and is intended to assist with the Board's deliberation on establishing budget guidelines for the FY20 budget cycle.

**NO MOTION**





# FY20 DRAFT BUDGET DISCUSSION BOARD OF SELECTMEN

9-11-18

# GOOD NEWS FROM 2018

---

## Revenue

- Strong Local Receipts
- State Receipts on target
- Revenues exceed budget

## Expense Turn back

- Lead by Schools turning back significant funds from 2017 (+ \$500K) and 2018 (+ \$900K). Town turnback consistent with prior years

Reserves remain in the 8-12% policy range, but have grown more than 1%

# REVENUE DETAILS

	Actual <u>FY14</u>	Actual <u>FY15</u>	Actual <u>FY16</u>	Actual <u>FY17</u>	Actual <u>FY18</u>	Budget <u>FY19</u>	Budget <u>FY20</u>
<b>Local Receipts</b>							
Motor Vehicle Excise	\$ 4,755,333	\$ 4,897,256	\$ 5,527,721	\$ 5,451,064	\$ 5,749,176	\$ 5,270,000	\$ 5,500,000
Investment Income	162,784	181,182	408,006	425,952	760,311	450,000	750,000
Licenses and permits	2,709,085	2,536,758	2,711,607	2,426,546	4,049,311	2,500,000	2,700,000
RDF	608,577	612,425	697,654	765,451	817,862	625,000	750,000
Pilot payments	226,439	76,442	76,475	76,470	76,490	76,000	76,000
Parking Fines & Forfeits	527,202	568,136	567,584	467,378	466,684	570,000	450,000
Meals tax, hotel/motel	626,821	660,509	709,348	730,044	752,908	700,000	750,000
Recreation transfer	65,947	109,792	48,606	68,503	79,227	50,000	75,000
Penalties, Interest on Taxes	258,566	323,879	362,831	480,896	248,217	300,000	300,000
Rentals	129,948	162,172	211,299	217,421	169,038	77,003	100,000
Fees	80,024	110,087	103,969	127,764	116,737	105,000	125,000
Departmental	165,098	169,754	158,346	218,238	164,646	65,000	100,000
Medicare part D	-	-	-	-	-	-	-
All other	103,011	36,174	198,154	-	54,884	-	-
<b>Total</b>	<b>\$10,418,835</b>	<b>\$10,444,566</b>	<b>\$11,781,600</b>	<b>\$11,455,727</b>	<b>\$ 13,505,491</b>	<b>\$ 10,788,003</b>	<b>\$ 11,676,000</b>

# STATE RECEIPTS

		Final <u>2015</u>	Final <u>2016</u>	Final <u>2017</u>	Final <u>2018</u>	Budget <u>2019</u>	Budget <u>2019</u>	Conference
<b>State Aid</b>								
Chapter 70		\$ 7,789,132	\$ 7,916,157	\$ 8,198,827	\$ 8,399,961	\$ 8,509,961	\$ 8,955,295	
		\$ 7,789,132	\$ 7,916,157	\$ 8,198,827	\$ 8,399,961	\$ 8,509,961	\$ 8,955,295	
other school		\$ 2,591	\$ 1,469	\$ -	\$ -	\$ -	\$ -	
		\$ 7,791,723	\$ 7,917,626	\$ 8,198,827	\$ 8,399,961	\$ 8,509,961	\$ 8,955,295	
Lottery, General, Supplemental		\$ 1,152,722	\$ 1,194,220	\$ 1,245,571	\$ 1,294,148	\$ 1,294,148	\$ 1,339,443	
Quinn Bill		\$ 81,197	\$ 89,518	\$ 68,904	\$ 65,540	\$ 65,540	\$ 53,236	
All other		\$ 9,025,642	\$ 9,201,364	\$ 9,513,302	\$ 9,759,649	\$ 9,869,649	\$ 10,347,974	
Total								
Assessments		\$ 1,170,049	\$ 1,220,044	\$ 1,226,317	\$ 1,239,371	\$ 1,270,356	\$ 1,260,154	
Net		\$ 7,855,593	\$ 7,981,320	\$ 8,286,985	\$ 8,520,278	\$ 8,599,293	\$ 9,087,820	

## OUTLOOK FOR FY19

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- ❖ Local receipts expected to exceed budget
- ❖ State receipts will exceed budget (election year)
- ❖ New Growth trend?
- ❖ Too early to measure FY19 impact of Health Insurance changes
- ❖ Turn back is always influenced by unforeseen issues

# FACTORS IMPACTING FY20

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- ❖ Local receipts – adjust for trend, remaining conservative
- ❖ New Growth - continuing or slowing? Review this at Tax RECAP time
- ❖ State budget – adjust to current levels, but remain conservative
- ❖ Health Insurance – Continue to review the impact of the recent changes
- ❖ Ongoing Special Education cost uncertainty
- ❖ Recent legislation
- ❖ 40Bs?
- ❖ Continued increases in capital requests – implementation of capital policy?
  - ❖ 6.2% - 6.8% corridor will help, but process to prioritize still being discussed
  - ❖ What about the Unified Plan?
- ❖ Timing of debt excluded projects

# CASH CAPITAL TREND

Department	<u>FY14</u>	<u>FY15</u>	<u>FY16</u>	<u>FY17</u>	<u>FY18</u>	<u>FY19</u>	<u>FY20</u>
Selectman	206,457	262,238	334,486	349,913	364,009	240,679	496,109
Public Works	1,524,000	1,611,000	1,528,000	1,954,000	2,173,000	2,026,000	2,794,000
Facilities Town	330,000	570,600	785,000	676,500	322,000	691,000	1,253,500
Facilities School	811,200	929,400	790,000	1,073,500	1,553,000	1,159,000	746,500
Schools	803,134	791,030	856,066	784,920	2,009,253	947,629	1,196,843
Library	43,000	46,000	115,700	131,300	100,612	76,800	229,300
Natural Resources	75,000	65,500	55,500	77,000	141,500	99,000	194,000
Morses Pond	-	-	-	-	40,000	40,000	35,000
Health	-	-	-	8,561	-	-	-
Planning		-	30,000	80,000	-	25,000	-
Town Clerk	79,550	7,000	7,000	16,385	-	-	-
<b>Grand Total</b>	<b>3,872,341</b>	<b>4,282,768</b>	<b>4,501,752</b>	<b>5,152,079</b>	<b>6,703,374</b>	<b>5,305,108</b>	<b>6,945,252</b>

## PENDING DEBT EXCLUSION REQUESTS - TIMING

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- ❖ HHU
- ❖ Middle School Bundle
- ❖ Town Hall Interior / ADA
- ❖ Paws

## NEW ISSUES

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- ❖ Continued SPED uncertainty – Time to add funds to the SPED Stabilization Reserve?
- ❖ New 111F legislation regarding Cancer Presumption just signed by the Governor
- ❖ Does it make sense to add to reserves to provide a buffer against these issues?

# PRELIMINARY GUIDELINE MODEL

## **5. Approve Public Comment Policy**

The Board had an initial review and discussion with Town Counsel on this draft policy at the August 21, 2018 meeting. As a reminder, the intent of the policy is to clarify the procedures for citizens making public comment, the different points during the meeting at which public comment takes place, the types of behavior that would be unacceptable at a public meeting, as well as how the Chair should handle noncompliance with the policy. Since the last review of the policy, Town Counsel has suggested several modifications. Please find a clean and redlined version of the draft policy for your review. Should the Board be ready to adopt the policy at this meeting, a motion has been proposed.

**MOVE** that the Board vote to adopt the Public Comment Policy.



Administrative  
Policy and  
Procedure

Board of Selectmen  
Public Comment Policy

Approved \_\_\_\_\_, 2018

**PURPOSE:**

To ~~clarify establish the a~~ policy of the Board of Selectmen (Board) with regard to those persons wishing to ~~comment speak~~ at meetings of the Board.

**POLICY:**

The Board welcomes information, concerns, and opinions from those attending Board meetings that ~~concern are related to~~ matters within the Board's ~~responsibility jurisdiction~~. The Board ~~therefore hereby~~ adopts this policy ~~to: to give those wishing to comment provide members of the public~~ a fair opportunity to speak; ~~to ensure compliance with the Open Meeting Law and other legal obligations; and to avoid comments and other actions facilitate the orderly conduct of that disrupt~~ the Board's meetings.

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**APPLICABILITY**

This policy applies to all persons wishing to speak at a Board meeting. The Board, ~~within the discretion of its Chair at the chair's discretion~~, may provide ~~the following the opportunities to speak speak at various points in during the meeting, including during: (i) at a "Citizen speak Speak" period generally held scheduled at the beginning of a meeting; and (ii) at designated periods for comment on topics identified on the Board's meeting notice agenda.~~

**PROCEDURES:**

- a. The Board will ~~generally typically designate schedule~~ time for a "Citizen Speak" comment period at or near the beginning of its meetings. ~~"Citizen Speak" periods are is~~ a limited forum to comment on topics ~~related to the Board's areas of responsibility not otherwise listed on the Board's agenda and within the Board's jurisdiction~~. To ensure compliance with the *Open Meeting Law*, ~~privacy laws, and other legal obligations, the Board~~ ~~Board members~~ will rarely engage with a speaker or with ~~one each other~~ another in deliberation on comments as they are presented during "Citizen Speak" periods.
- b. The Board may also ~~designate provide~~ time for public comment on topics identified on the Board's ~~meeting notice agenda, as those topics are deliberated on by the Board~~. Comments during such periods ~~are~~ are limited to those related to the specific topic under deliberation.
- c. ~~Any person Persons~~ wishing to ~~provide~~ comments to the Board shall ~~first sign in on the sign-in sheet provided by the Board and identify themselves themselves~~ by name and address ~~before prior to~~ commenting.

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Administrative  
Policy and  
Procedure

Board of Selectmen  
Public Comment Policy

Approved \_\_\_\_\_, 2018

- d. The Board welcomes comments expressing any viewpoint ~~on-related to the~~ topics ~~designated for of comment during anyany particular~~ comment period.
- e. All comments shall be addressed ~~to or~~ through the ~~Chair-chair or acting chair of the meetingBoard.~~
- f. ~~Unless otherwise determined by the Chair, e~~Each comment period shall not exceed 15 minutes and each speaker shall not exceed three minutes.~~unless otherwise determined by the chair.~~
- g. Disruptive comments and conduct are not allowed. Disruptive comments and conduct includes~~, but are not limited to:~~ the use of profanity; discriminatory statements; vulgarity; comments or conduct that violate the law; comments outside of the dedicated topics for comment; and other comments or conduct that interfere with ~~the orderly conduct of the Board conducting its businessmeetings.~~

~~g.~~ The ~~Chair-chair~~ shall provide at least one verbal warning to a speaker if he or she makes ~~a~~disruptive comments or engages in disruptive conduct. If, after at least one verbal warning, the speaker persists in making disruptive comments or engaging in disruptive conduct, the ~~Chair-chair~~ may end that person's privilege of address ~~for that meeting.~~

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**DEFINITION:**

None.

**REGULATORY / STATUTORY REFERENCES**

Massachusetts G.L. c.30A, §20.

**APPROVED BY:**

*Board of Selectmen, Chair*      Jack Morgan      \_\_\_\_\_

*Board of Selectmen*      Marjorie R. Freiman      \_\_\_\_\_

*Board of Selectmen*      Ellen F. Gibbs      \_\_\_\_\_

Administrative  
Policy and  
Procedure

Board of Selectmen  
Public Comment Policy

Approved \_\_\_\_\_, 2018

*Board of Selectmen*

Thomas H. Ulfelder

\_\_\_\_\_

*Board of Selectmen*

Beth Sullivan Woods

\_\_\_\_\_

Original date: .....

Revised dates: .....



**PURPOSE:**

To establish a policy of the Board of Selectmen (Board) with regard to those persons wishing to speak at meetings of the Board.

**POLICY:**

The Board welcomes information, concerns, and opinions from those attending Board meetings that are related to matters within the Board's jurisdiction. The Board hereby adopts this policy: to provide members of the public a fair opportunity to speak; to ensure compliance with the *Open Meeting Law* and other legal obligations; and to facilitate the orderly conduct of the Board's meetings.

**APPLICABILITY**

This policy applies to all persons wishing to speak at a Board meeting. The Board, at the chair's discretion, may provide the following opportunities to speak during the meeting: (i) at a "Citizen Speak" period generally scheduled at the beginning of a meeting; and (ii) at designated periods for comment on topics identified on the Board's agenda.

**PROCEDURES:**

- a. The Board will typically schedule time for a "Citizen Speak" comment period at or near the beginning of its meetings. "Citizen Speak" is a limited forum to comment on topics not otherwise listed on the Board's agenda and within the Board's jurisdiction. To ensure compliance with the *Open Meeting Law*, privacy laws, and other legal obligations, Board members will rarely engage with a speaker or with each other during "Citizen Speak" periods.
- b. The Board may also provide time for public comment on topics identified on the Board's agenda. Comments during such periods are limited to those related to the specific topic under deliberation.
- c. Persons wishing to provide comments to the Board shall first sign the sign-in sheet provided by the Board and identify themselves by name and address prior to commenting.
- d. The Board welcomes comments expressing any viewpoint related to the topics of any particular comment period.
- e. All comments shall be addressed to or through the chair or acting chair of the Board.

Approved \_\_\_\_\_, 2018

- f. Each comment period shall not exceed 15 minutes and each speaker shall not exceed three minutes, unless otherwise determined by the chair.
- g. Disruptive comments and conduct are not allowed. Disruptive comments and conduct include, but are not limited to: the use of profanity; discriminatory statements; vulgarity; comments or conduct that violate the law; comments outside of the dedicated topics for comment; and other comments or conduct that interfere with the orderly conduct of Board meetings.

The chair shall provide at least one verbal warning to a speaker if he or she makes a disruptive comment or engages in disruptive conduct. If, after at least one verbal warning, the speaker persists in making disruptive comments or engaging in disruptive conduct, the chair may end that person's privilege of address for that meeting.

**DEFINITION:**

None.

**REGULATORY / STATUTORY REFERENCES**

Massachusetts G.L. c.30A, §20.

**APPROVED BY:**

<i>Board of Selectmen, Chair</i>	Jack Morgan	_____
<i>Board of Selectmen</i>	Marjorie R. Freiman	_____
<i>Board of Selectmen</i>	Ellen F. Gibbs	_____
<i>Board of Selectmen</i>	Thomas H. Ulfelder	_____
<i>Board of Selectmen</i>	Beth Sullivan Woods	_____

Original date: .....

Revised dates: .....

## **6. Discuss Draft Housing Production Plan**

The Housing Production Plan (HPP) has been underway since January 2018. The HPP working group which consists of two Selectmen, two Planning Board members, a WHDC representatives, a Wellesley Housing Authority representative, Executive Director, Asst. Exec. Director, Planning Director, and Senior Planner has met regularly with the consultants Judi Barrett and Jen Goldson to prepare the draft attached. Three public forums were conducted to solicit public input, and the draft HPP has been made available for public comment from August 13, 2018 to August 31, 2018. Attached for your review are public comments received on the plan. This is the first public deliberation on the HPP by the Selectmen. The hope is to have feedback on this first read by the Board to be incorporated with Planning Board comments that were made at their September 4, 2018 meeting. The HPP working group has scheduled meetings next week to review all comments received and to produce a final HPP document that is to be considered at a joint meeting with the Planning Board and Wellesley Housing Development Corporation at the September 24, 2018 Selectmen meeting.

**NO MOTION**



----- DRAFT FOR PUBLIC REVIEW & COMMENT -----

Town of Wellesley

# Housing Production Plan

2018 - 2023



**Prepared for:**  
Town of Wellesley  
525 Washington Street  
Wellesley, MA 02482

**Prepared by:**  
Barrett Planning Group LLC  
JM Goldson community preservation + planning



**DRAFT**  
**WELLESLEY HOUSING PRODUCTION PLAN**  
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## 1. Introduction

In 2016, Wellesley embarked on a unique community planning process known as the Unified Plan. Serving both as an update of the 2007 Wellesley Comprehensive Plan and a strategic plan for the Town, the Unified Plan is a plan for Wellesley's physical evolution and economic well-being and a vision to cohere local government decision-making. The Unified Plan came at the heels of a contentious process that called upon Wellesley voters to decide whether to change their form of government to a modern town manager framework. In many ways, residual tension from defeat of the town manager proposal persists today. Against the backdrop of deep divisions about how the Town would operate in the future, Wellesley suddenly found itself with plans for several Chapter 40B developments all within a matter of weeks. What would have been hard for a peaceful town to manage became very challenging for Wellesley officials, staff, and residents. Today, the Zoning Board of Appeals is considering three comprehensive permit applications with a combined total of 189 mixed-income housing units, including 48 affordable units and 156 units eligible for the Chapter 40B Subsidized Housing Inventory (SHI).<sup>1</sup> Four more projects have either received Project Eligibility (PE) determinations or are anticipated to receive them soon.

Housing in Wellesley is coveted real estate. The monthly rents for homes and apartments in Wellesley exceed what landlords charge in most of Greater Boston, except perhaps in Downtown Boston or the Seaport District. Norfolk County ranks forty-second out of the top 100 wealthy counties in the country, and Middlesex County is not far behind. Throughout the Boston Metro area, the housing wage necessary to afford a modest two-bedroom apartment is \$33.46 per hour.<sup>2</sup> That may seem manageable to many Wellesley residents, but it represents far more than the earnings of employees in Wellesley's retail, food service, or health care establishments. It is little wonder that 65 percent of the people who work in Wellesley each day commute from some other town.<sup>3</sup>

### WHAT HAS WELLESLEY DONE TO CREATE MORE AFFORDABLE HOUSING?

Despite Wellesley's exceptionally high housing costs, the limited inventory of affordable units in Wellesley is not because the town has ignored its obligations to provide affordable housing. The opposite is true. Of the 575 units on the Chapter 40B Subsidized Housing Inventory (SHI) today, most have come about because of efforts by the Wellesley Housing Authority, Wellesley Housing Development Corporation (WHDC), Town boards and commissions, and Town staff. The WHDC's very existence owes to a home rule petition filed with the General Court in 1998.<sup>4</sup>

<sup>1</sup> This includes 90 rental units proposed at Delanson Circle; 55 rental units at 148 Weston Road; and 44 homeownership units (11 affordable) at 135 Great Plain Avenue.

<sup>2</sup> National Low-Income Housing Coalition, *Out of Reach 2018*, 119.

<sup>3</sup> U.S. Census Bureau, Commuting (Journey to Work), 2009-2013 5-Year American Community Survey Commuting Flows (2013).

<sup>4</sup> Secretary of the Commonwealth, Acts and Resolves by the General Court. Chapter 311 of the Acts of 1998: An Act Establishing the Wellesley Housing Development Corporation.

- 1998: The Town of Wellesley submitted a home rule petition to the General Court to establish the WHDC.
- 2004: The Community Preservation Committee provided \$65,000, in addition to HUD funds, to create a group home for people with disabilities at 4 Marshall Road.
- 2004: Town Meeting adopted an Inclusionary Zoning Bylaw (IZB), requiring residential projects in commercial districts to provide 20 percent affordable housing, and commercial projects over 10,000 square feet to provide 2 percent affordable housing (1 unit for every 50,000 square feet constructed).
- 2005: Town Meeting amended the IZB to apply to subdivisions with more than five new lots, thereby making new subdivisions include 20 percent affordable housing.
- 2007-2008: Permitting began for projects at 978 Washington Street and the former Wellesley Inn site at 576 Washington Street in Wellesley Square. Though delayed by the recession, these projects have been completed, resulting in seven SHI-eligible units at 978 Worcester and five SHI-eligible units at 576 Washington Street. Both projects were developed under the Town's IZB bylaw. The 978 Worcester St. project also provided a payment in-lieu for one unit.
- 2007: The Linden Square project was completed, including seven affordable housing units created under the IZB. (The Town recently discovered that these units are not listed on the SHI. They are being added at this time.)<sup>5</sup>
- 2007: Town Meeting amended the definition of Floor Area Ratio in the Zoning Bylaw to exempt affordable units created under the IZB from the maximum FAR. This change provides for the necessary increase in density to produce affordable housing in commercial districts.
- 2007: Wellesley adopted an award-winning Comprehensive Plan in 2007 with numerous recommended actions for affordable housing.
- 2009: Permitting for the CVS resulted in a payment of in-lieu under the IZB.
- 2011: The ZBA approved a comprehensive permit for Wellesley Commons at 65-71 Washington Street, resulting in one new SHI-eligible homeownership unit.
- 2012: The Town approved Waterstone at Wellesley, 27 Washington Street, under the Residential Incentive Overlay (RIO) district in Wellesley Lower Falls. This project created 82 independent living units for seniors, all listed on the SHI. It also includes seven affordable assisted living units not listed on the SHI because of DHCD policies, but they are permanently deed restricted to be affordable.
- 2012: The Wellesley Housing Development Corporation purchased and renovated a two-family dwelling at Peck Ave and a single-family dwelling at 6 Mellon Road, creating three

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<sup>5</sup> Do you know the current SHI status of these units? The SHI we received from DHCD reports two units on Linden Street, not seven.

affordable units. At the same time, the Town also purchased 9 Highland Road for affordable housing. It is omitted from the SHI because the deed restriction does not meet DHCD requirements. This problem will be cured when the unit is resold.

- 2013/2014: The ZBA approved a comprehensive permit for 139 Linden Street, which added two units to the SHI.
- 2013: Town Meeting amended the Wellesley Square Zoning District to create a special permit to provide for density. This action benefited and allowed the previously stalled Wellesley Inn project to proceed.
- 2016: The Planning Board approved a definitive subdivision plan for 135 Great Plain Ave. that included a payment in-lieu for 2.4 units. (This site is now the subject of a 44-unit comprehensive permit application.)
- 2016: The Town began work on the first Unified Plan in the Commonwealth. This planning process brings together the Town's strategic plan and comprehensive plan. The Board of Selectmen and Planning Board are expected to adopt the final plan in 2018. It includes a housing strategy with a variety of mechanisms to increase housing type and affordability.
- 2018: Actions by the Town:
  - March 2018: The Board of Selectmen released a Request for Proposals (RFP) to develop the Tailby and Railroad Parking Lots near the Wellesley Square MBTA station for affordable housing and parking.
  - March 2018: The Planning Board sought FY19 funds to develop a sub-area study and plan to support the development of additional affordable housing. (CPA funds were also requested for this project.)
  - April 2018: With the Community Preservation Committee's recommendation, Town Meeting approved \$200,000 to the Wellesley Housing Authority to study the redevelopment potential of the Barton Road public housing property.
  - June 2018, John Hancock announced plans to redevelop the Wellesley Office Park and wants to partner with the Town to construct 350 rental housing units.

Unfortunately, even with all of these initiatives, the housing needs, constraints, and challenges that existed when Wellesley completed the Comprehensive Plan in 2007 remain true today. The description of Wellesley in 2018 is not much different than it was eleven years ago.

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## WHAT CAN THIS PLAN DO FOR WELLESLEY?

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The main purpose of this Housing Production Plan is to help Wellesley implement the new Unified Plan and make steady progress toward the 10 percent statutory minimum. In doing so, the HPP creates an opportunity to:

- Assess demographic and housing data;
- Identify local housing needs;
- Recognize a community's ongoing efforts;
- Identify housing development barriers;
- Identify specific locations and sites that would be appropriate for affordable and mixed-income housing development; and
- Potentially guide future mixed-income housing development to these optimal sites and locations.

With a DHCD approved HPP in place, Wellesley may be able to manage the flow of new Chapter 40B proposals. However, the HPP will be effective for this purpose *only* if the Town implements it. Implementation of this plan and the new Unified Plan will be critical for Wellesley if a comprehensive permit were denied based on conflicts with local plans. Two recent Housing Appeals Committee (HAC) cases lay out the issues and requirements associated with planning for affordable housing. Excerpts from these decisions, shown on the next page, could assist present and future readers to understand what the Town needs to do to help the Board of Appeals if an objectionable comprehensive permit is denied in the near future. These excerpts speak to the vital importance of *consistent* plan implementation. *Having a plan is not enough.*

It is very unlikely that Wellesley's desire to protect the character of its single-family neighborhoods would rise to the level of a local planning concern that outweighs the regional need for affordable housing. If the Town wants to direct higher-density housing to locations other than established neighborhoods, it needs to carry out strategies that will be effective toward that end. It also needs to work on ways to introduce modestly scaled affordable units in the established neighborhoods. Doing so will create a track record that illustrates how Wellesley has both protected the single-family neighborhoods *and* provided affordable housing choices within them.

Since at least 1989, when the Town adopted an affordable housing policy, Wellesley has made a public commitment to increasing its inventory of affordable housing. While some progress toward the state goal of 10% has been made, certain potential and obvious opportunities for affordable housing development have become perennials, repeatedly recommended and studied but not acted upon.

In the words of the 2008 Town of Wellesley Community Preservation Plan: "in the final analysis, what is most important at this point in time is for the Town to signal a willingness to get beyond talk and to demonstrate a clear and viable plan addressing its shortage of community housing units in Wellesley."

*Wellesley Unified Plan, 7-3*

[In an appeal, the Board's] first burden is to show that there is a "valid local [planning] concern" that could support the denial. To carry that threshold burden, the Board must produce the planning document or documents in effect at the time of the comprehensive permit application, and show:

1. First, that the plans are "bona fide," meaning that they were legitimately adopted, and continue to function as viable planning tools in the town;
2. Second, that the plans promote the creation of affordable housing; and
3. Third, that the plans have been implemented in the area of the site.

In weighing the local planning concern, we [the Housing Appeals Committee] consider:

1. The importance of the planning interest to the town;
2. The extent to which the proposed housing undermines the local planning interest;
3. The overall quality of the master plan and extent to which it has been implemented; and
4. The amount of affordable housing that has resulted from the implementation of the town's planning efforts.

The . . . evidence must cumulatively establish that the local planning concern is important enough to outweigh the regional need for affordable housing. As we consider the weight of the town's planning interest, we must keep in mind that its failure to meet its statutory minimum 10 percent housing obligation "provide[s] compelling evidence that the regional need for housing does in fact outweigh the objections to the proposal."

*Hanover R.S. Limited Partnership v. Andover Zoning Board of Appeals, No. 12-04 (2014)*

*Hanover Woods, LLC v. Hanover Zoning Board of Appeals, No. 11-04 (2014).*

## COMMUNITY ENGAGEMENT

As part of the HPP process, the Town sought public involvement to include a variety of opinions on the production and retention of affordable housing in Wellesley. Public workshops were designed to be interactive, encouraging residents to talk and collaborate in some "hands-on" activities and to help the consultants understand the town. Input provided by participants in these workshops has been used to direct the plan in several key ways. Wellesley's HPP has benefited from thoughtful input from the participants in three community workshops – April 7, May 3, and June 12, 2018 - and guidance from representatives of the Board of Selectmen, Planning Board, and Wellesley Housing Development Corporation. The consulting team also interviewed residents and others with knowledge of the housing situation in Wellesley.

### COMMUNITY MEETING #1: APRIL 7, 2018

The first of three community-wide meetings for the Wellesley Housing Production Plan (HPP) took place on Saturday, April 7, at 9:30. Approximately 45 people attended, including two who did not sign the attendance sheet.

The meeting included informal small-group discussion time during registration, a presentation by the consultants, and an hour-long discussion period designed to enlist ideas about two topics: the ideal vision of housing in Wellesley, and an assessment of opportunities for and barriers to achieving the vision. Each table had a volunteer from the HPP working group whose job was to facilitate and record the group's discussion (about five to seven participants per table and a total of seven tables). At the end of the one-hour discussion period, each facilitator summarized what group members had said. The following summarizes key ideas and concerns that emerged during the first community meeting.

### ■ **Housing Vision for Wellesley**

- Protect the character of established neighborhoods
- Strategically locate affordable housing near public transportation, goods and services, and schools, and in walkable locations
- Site more densely developed housing in and near the business districts, e.g., mixed-use buildings or multifamily buildings adjacent to commercial buildings
- Geographically distribute affordable housing throughout the town so that no neighborhood is overburdened
- Allow more housing choices in established neighborhoods, such as the ability to convert existing single-family homes to two-family or small multi-family dwellings
- Develop Town-owned property, e.g., the North 40 parcel or the Tailby Lot as a preferred way to create more housing
- Provide for additional development, infill, or reuse of existing properties in office park settings, e.g., Harvard Pilgrim or Sun Life, or the public housing on Barton Road (Wellesley Housing Authority)
- Remove the value of land from the cost of housing: consider a community land trust approach

### ■ **Housing Opportunities**

- Pursue development of Town-owned property, e.g., North 40, Tailby Lot, Wellesley Middle School, Morton Circle
- Create more housing for employees at major institutions, e.g., Babson, Wellesley, Dana Hall, Tenacre
- Develop housing on surplus land at MassBay Community College or the Sisters of Charity/Seton Residence
- Allow accessory dwelling units and "age friendly" multifamily use of existing residences
- Identify redevelopment possibilities along Worcester Street/Route 9

- Zone for more diverse housing with overlay districts or reducing regulatory barriers, e.g., multifamily conversions
- Preserve existing small homes

## ■ **Housing Barriers or Constraints**

- Conservation restrictions limit the amount of Town-owned land that can be developed for housing
- Tension between the desire to avoid, isolated large developments, preserve the character of existing single-family neighborhoods, and accommodate 400+ additional Chapter 40B units into those neighborhoods without scale and density
- The Town's zoning substantially restricts what developers can do: use regulations, maximum density, maximum height, parking
- Wellesley's high income/high household wealth profile, prestige, very high land values, and the economics of teardowns contribute to loss of smaller, relatively affordable homes
- Lack of opportunities for seniors to downsize interferes with "natural" turnover in housing stock and forces them to sell to a developer or let the house fall into disrepair because they cannot maintain it
- Lack of funding for affordable housing
- Lack of public awareness or understanding of Chapter 40B and affordable housing needs
- Perceptions of affordable housing
- Lack of public consensus and public commitment to housing
- Traffic, parking, limited in-town public transportation all contribute to mobility constraints

### **COMMUNITY MEETING #2: MAY 3, 2018**

The second of three community-wide meetings for the Wellesley Housing Production Plan (HPP) took place on Thursday, May 3, at 7 PM. Approximately 30 people attended the meeting, including Planning Board members.

The purpose of the meeting was to get community feedback on a set of goals for the HPP. It included a presentation by the consultants, followed by an open house-style activity designed to inform participants of the purpose of each goal and gather public opinion on the importance of incorporating the goal into the HPP. The results from this exercise and additional feedback from participants are summarized below.

## ■ Main Conclusions

- Participants feel strongly that Wellesley should strive to reach the affordable housing goal of 10 percent to maintain local control.
- Many participants were in favor of at least slightly increased density, more housing choice, and increased racial and socio-economic diversity.
- The most major concerns were increased traffic with the increase in density, the lack of public transportation access that some new developments might face, and the potential change in the character of Wellesley with new housing development.
- Participants favored creating more housing through redevelopment of existing buildings, as long as those units allowed for residents to be a part of the community and have access to town services and resources.

## ■ Comments on Draft Housing goals

*Goal 1: Create a variety of affordable and mixed-income housing that helps to make Wellesley a welcoming community for people with diverse socio-economic backgrounds.*

Twenty-two participants marked this goal as “very important”, and three marked it as “somewhat important”. Many commenters saw the benefits of having a more diverse community, and some asked how to best educate the public on these benefits. Some suggested developing support systems for the socio-economically diverse population and to promote diverse businesses to help integrate the community. Several comments mentioned MassBay as an opportunity to meet this goal. Others expressed concerns about neighborhood resistance to any housing other than single-family and they worried about how to meet this goal.

*Goal 2: Provide more housing options, including affordable and market-rate housing options, for low- and middle-income families, seniors, and individuals with disabilities, through a variety of mechanisms to increase housing choice.*

Twenty-one people marked this goal “very important”, and four marked it “somewhat important”. Some strengths of this goal were that it would enable people who work in town (i.e. teachers, police officers) to live in town, it would diversify talents and skills sets in town, and it would offer more opportunities for intergenerational interaction by helping young families and elderly residents. Some participants noted opportunities, including promoting smaller projects in residential neighborhoods, creating higher density zoning on upper floors in commercial business districts, and creating cluster developments on larger parcels. Some concerns regarding this goal were that the increase in density would increase traffic and have the potential to change the character of the town, and that while the focus on low- and middle-income families is important, families with 80-120 percent AMI also need affordable housing in Wellesley.

*Goal 3: Actively strive to incrementally achieve state's MGL c.40B 10% goal for affordable housing by producing at least 45 units annually that count on the state's subsidized housing inventory, through local actions and approval of private development, especially development of rental housing units. Create at least 400 housing units that are permanently affordable to income-eligible households by 2028.*

Twenty-three people marked this goal as “very important”, three people marked it as “somewhat important”, and one person marked it as “not important”. Most commenters emphasized the importance of Wellesley being able to control its own destiny by striving not just for safe harbor but for the full 10 percent. Some commenters felt that this goal could help to meet other goals, but others expressed concern that if meeting this goal is not done in a thoughtful way, other goals, such as housing choice and diversity, could be at risk.

*Goal 4: Encourage new development and repurposing of existing buildings to create affordable and mixed income housing that:*

- *Reinforces the development patterns of Wellesley's residential neighborhoods and maintains a predominantly single-family character in established single-family neighborhoods*
- *Strengthens the vitality of business districts and commercial corridors with diverse housing types*
- *Promotes housing development in walkable areas with convenient access to shops, services, public transportation, parks, schools, and other neighborhood destinations*

Every participant rated this goal as “very important” (25 people). Participants emphasized the repurposing of existing buildings to be an important aspect of the goal, and they feel that walkability and access to public transportation and town services is essential when considering placement of affordable housing. Some opportunities discussed were selling and developing St. Paul's or Sisters of Charity, or creating more mixed-use housing in Wellesley Square. A couple of concerns residents had were the availability of parking and the question on whether development that isn't necessarily walkable but has easy access to highways should also be prioritized. One comment suggested that this type of development might not be good for the community aspect of residents living there.

*Goal 5: Promote the development of surplus institutional and town-owned land as well as the redevelopment of office parks and existing affordable housing complexes to create desirable mixed-income and mixed-use neighborhoods, where feasible.*

Twenty-three participants rated this goal as “very important”, and two rated it as “somewhat important”. Commenters mostly wanted to focus on redevelopment rather than new development to preserve as much open space as possible. It was emphasized that it was important for these developments, whether they were new or redevelopments, to be close to services and able to connect to town life. One concern was regarding the potential decrease in parking in town. Another commenter was enthusiastic about redevelopment but acknowledged that a large amount of development projects would have to take place to

realistically maintain SHI growth.

## ■ Strategies

A final station asked participants what their ideas were for addressing housing needs in Wellesley, and what they think should be further explored in the planning process. Here are some of the responses.

- Talk to people who live in affordable housing
- Share what other towns are doing across the country
- Improve access to public transportation
- More community education about the benefits to children and families of a diverse community
- More accessory apartments in limited areas
- Change zoning to create slightly denser development
- Engage the neighborhoods to consider how to integrate new residents before they come, to be welcoming and integrate into the community.
- Local incentives to support affordable housing
- Mixed-use properties in places such as Wellesley Square
- Mass Bay rental units to allow students to live nearby; could also support Mass Bay faculty and staff

## COMMUNITY MEETING #3: JUNE 12, 2018

The final community meeting occurred on June 12, 2018. Approximately 40 people attended the meeting, including Planning Board members. The meeting's purpose was to solicit opinions from community members on transformation areas in Wellesley and what types of development would be suitable for the town. Consultants presented information about housing needs in Wellesley, participants gave comments and suggestions in an open house exercise, and a final group exercise allowed participants to discuss with one another and choose what types of housing would be suitable in which areas of town.

## ■ Main Conclusions

- Participants are open to increased density if it is done wisely and tastefully.
- A main priority of housing development is to meet the 10 percent goal for affordable housing, and community members want this to be the focus for any new development.
- Key transformation areas that participants were generally in favor of included Wellesley Square, North 40, and sites in the east part of town.

## ■ Open House Stations

*Where are Wellesley's key transformation areas? Where is change most likely to occur in Wellesley? Where could change accommodate multifamily housing? Mixed-use developments?*

The first station presented a map of Wellesley showing potential development sites and asked participants to leave comments answering the question above and responding to the suggested sites on the map. Participants left check marks by each development site, shown in the image below. The most popular sites were **North 40**, with ten check marks and two X marks, **Office Park** with 12 check marks, and **Wellesley Square & Neighborhoods**, with 14 check marks and one X mark. The area in the east part of town on the Newton line, which includes the office park, the **National Guard Site**, and **WHA Barton Rd**, received a good deal of support on the map, though one commenter noted that there are already many projects there that are affecting traffic, and suggested more projects in areas where there is less density.

Some key transformation areas that participants noted were Barton Road, Wellesley Square, North 40, and areas that had access to public transportation. These areas would be suitable for mixed-use or multifamily development. However, there were participants who disagreed that any of those would be good options, citing congestion and 40B projects that are already in the area. One area that a couple of commenters did not think was a good location for development was the Linden Street neighborhood, as there is already traffic congestion in the area and it is not ideal for access to public transportation.

*What is the ONE most important step Wellesley should take to work toward or reach the 10 percent affordable housing goal under Chapter 40B?*

Some ideas participants had to answer this question included the following:

- Zoning for multifamily
- Make a dent in the SHI gap by approving development that will count completely towards the affordable housing goal
- Repurpose currently developed areas for more housing
- Pursue affordable elderly and disabled housing
- Create mixed-income housing areas
- Public housing in areas that are central to public transportation, have access to shopping areas, and encourage walkability
- Ensure that housing units complement rather than overwhelm the existing neighborhood (in terms of density and design)

### GROUP EXERCISE

Following the open house, participants returned to their tables to partake in a group exercise. Each group had sets of Lego bricks in different sizes, where each size pertained to a different housing type: single-family, duplex, three- or four-unit building, larger multi-family, etc. The consultants asked participants to use all of the Legos on a large map of Wellesley, placing them in areas where they believe development of that type of housing would be suitable.



Group A



Group A

As shown above on the left, Group A concentrated some larger developments (black and orange Legos) in the Barton Road area and the Office Park. There is also high density in the Wellesley Square area. They chose to scatter some smaller units (blue and yellow) across town. Group B (above right) chose similar areas for their large developments, but added a large building near the Needham town line and another just north of Route 9, near the Hardy School.

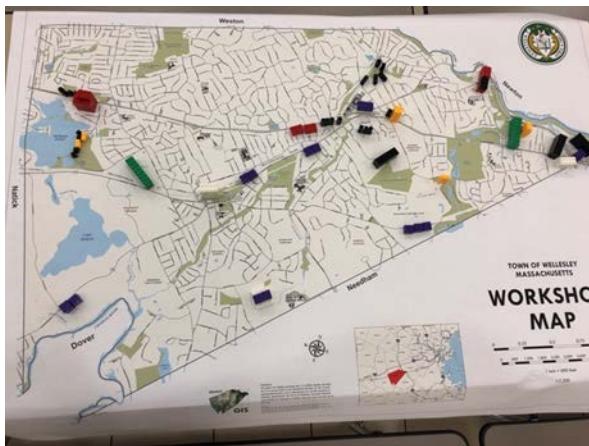


Group C

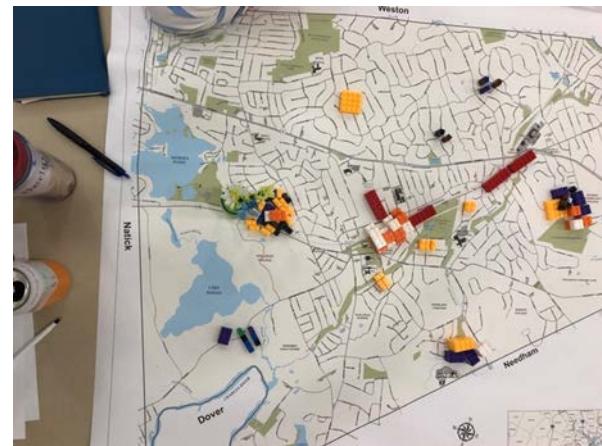


Group D

Group C (above left) concentrated density (red, black, and orange blocks) in a few areas: on the Needham line near Babson College, in Wellesley Square, in the Lower Falls vicinity of Walnut Street, and in the east part of town where Barton Road and the office park are. They combined some of the smaller two- to four-family units to create multi-family, and they scattered single-family houses evenly across town. Group D (above right), while keeping density in Wellesley Square and the eastern part of town, scattered their two- to four-family units (red and orange blocks) along the main streets of town. One unique choice this group made was to add some single-family units on the western side of Lake Waban.



Group E



Group F

Group E (above left) stacked some of their larger development blocks (green, red, and black blocks) and clustered some of their smaller development blocks to create high density in less space. Many of their proposed developments are along main roads in Wellesley and include the Fells Road area, the Wellesley Hills T station area, and the eastern part of town. Lastly, Group F (above right) clustered their developments more so than any other group. They chose to stack multi-family blocks in the Wellesley Square area and added more units in the MassBay Community College/Sisters of Charity area than the other groups. The group clustered some smaller units in the North 40 area as well.

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## DATA SOURCES

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Information for the Wellesley HPP comes from a variety of sources, including the Town, previous plans and studies, the Metropolitan Area Planning Council (MAPC), state agencies, proprietary data, the U.S. Department of Housing and Urban Development, and Bureau of the Census. The most frequently used sources of data are as follows:

- The **Census of Population and Housing** (decennial census): mainly Census 2010, though some tables from Census 2000 were relied upon as well.
- The **American Community Survey (ACS)**: The ACS provides demographic and housing estimates for large and small geographic areas every year. Although the estimates are based on a small population sample, a new survey is collected each month, and the results

are aggregated to provide a similar, “rolling” dataset on a wide variety of topics. In most cases, data labeled “ACS” in this plan are taken from the most recent five-year tabulation: 2011-2016 inclusive. Note: population and household estimates from the ACS may not align as well as one would like with local census data collected by the Town. However, to allow for a consistent basis of comparison between Wellesley and other communities, this HPP relies on ACS estimates.

- **HUD Consolidated Planning/Comprehensive Housing Affordability Strategy (CHAS) Data.** Created through a combined effort of the U.S. Department of Housing and Urban Development (HUD) and the Census Bureau, this dataset is a “special tabulation” of ACS. According to the HUD guidance, “these special tabulation data provide counts of the numbers of households that fit certain combinations of HUD-specified criteria such as housing needs, HUD-defined income limits (primarily 30, 50, and 80 percent of median income) and household types of particular interest to planners and policy-makers.” The most recent CHAS Data are based on the ACS 2008-2012 estimates.
- **Wellesley GIS:** The Town’s Geographic Information System (GIS) provided numerous GIS databases for use in this plan. The databases were used to map existing land uses, recent housing sales, recent single-family teardown/rebuild projects, zoning, infrastructure, natural resources, and other factors.
- **The Warren Group/Real Estate Records Search:** The consulting team tapped the Warren Group’s extensive real estate transaction databases to sample sales volume and sale prices in various parts of Wellesley.
- **UMass Amherst/Donohue Institute:** This source was relied upon for population projections and trends, and building permit trends.

Many other publications were also reviewed during the development of this plan as well. Extensive and invaluable guidance was received throughout from the Wellesley Planning Department.

## 2. Housing Needs Assessment



### KEY FINDINGS

- Wellesley is a town of homeowners. Over 82 percent of Wellesley households own their residence.
- Out of 7,111 homeowners, 6,699 – or 94 percent – live in detached single-family dwellings.
- Wellesley has the third highest median household income in Massachusetts.
- Wellesley has very little racial, ethnic, or class diversity. Black or African Americans make up a much smaller percentage of the total population in Wellesley than in the Boston Metro area as a whole. Moreover, federal census data indicate that over half the blacks counted as part of Wellesley's total population are students and faculty at Wellesley and Babson.
- In 2017, Wellesley ranked tenth in the Boston Metro area for total number of housing sales. Since 2010, some 2,600 homes have sold in Wellesley.
- According to the Town's recently completed Unified Plan, the total number of housing units in Wellesley rose by just 218 units between 2000 and 2017. In 2017, the median single-family sale price in Wellesley was \$1.3 million.
- Wellesley is redeveloping. Most new housing construction in Wellesley occurs due to teardowns. Since 2009, the Wellesley building department has issued 575 residential demolition permits. Redevelopment of older housing stock brings higher asset value to the community, but in most cases, it does not produce a net increase in housing units.

## POPULATION CHARACTERISTICS

Wellesley and the surrounding communities have absorbed modest population growth over the past few decades. Echoing Greater Boston trends, Wellesley's population growth rate accelerated with the "Baby Boom," only to reverse with a slight population decline from 1970-1990 as household sizes fell throughout the U.S. Since 1990, however, Wellesley has been gaining residents again, narrowly outpacing the rate of growth in Norfolk County. Today, the Census Bureau estimates Wellesley's total population at 29,215.<sup>6</sup> Citing projections from the Metropolitan Area Planning Council (MAPC) and the University of Massachusetts Donohue Institute, Wellesley's *Unified Plan* anticipates another cycle of population decreases through 2035, yet at the same time, modest growth in total households.<sup>7</sup> This is generally consistent with conditions throughout Boston's west suburbs, where household formation rates continue to rise while household sizes drop.

### POPULATION AGE

Wellesley's population age characteristics come as no surprise. Like virtually all communities in the Northeast, Wellesley has a "graying" population and a shrinking supply of younger adults. And, while available population projections point to a gradual decline in dependent children as well, Wellesley has a large share of people under 19 years compared with other Boston suburbs. Its prestigious school district has an undeniable impact on the homebuying choices made by wealthy families in the Greater Boston area. According to the Census Bureau, over half of all families in Wellesley (and 43 percent of all households) have children under 18.<sup>8</sup> The size of the under-19 and over-65 population combined produces a staggering **age dependency ratio** of 0.93. These are not ordinary statistics.

### RACE, ETHNICITY, CULTURE, AND GEOGRAPHIC MOBILITY

Wellesley has limited racial and ethnic diversity. Minorities comprise about 17 percent of the town's total population (see Table 2.1), with Asians making up a larger percentage than all other racial groups combined and half of all foreign-born residents as well. The Latino community, which is primarily white, represents less than 5 percent of the total population.<sup>9</sup> By contrast, the black or African American population in Wellesley is quite small – under 3 percent of the total – a fact not lost on many of the town's affordable housing organizations and supporters. During an interview for this housing plan, one commenter said she often wonders

Table 2-1. Population by Race

Race	Wellesley	Boston Metro
White	82.5%	77.3%
Black	2.4%	8.0%
American Indian or Alaskan Native	0.1%	0.2%
Asian	11.0%	7.3%
Native Hawaiian or Other Pacific Islander	0.1%	0.0%
Other Race (Unspecified)	0.9%	4.1%
2+ Races	3.0%	3.1%

Source: ACS 2012-2016, B03002.

<sup>6</sup> U.S. Census Bureau, American Community Survey (ACS) Five-Year Estimates, 2012-2016, B01003. "Total population" includes people in group quarters, e.g., college dormitories.

<sup>7</sup> Wellesley *Unified Plan* (Draft), "Understanding Wellesley Today," 8.

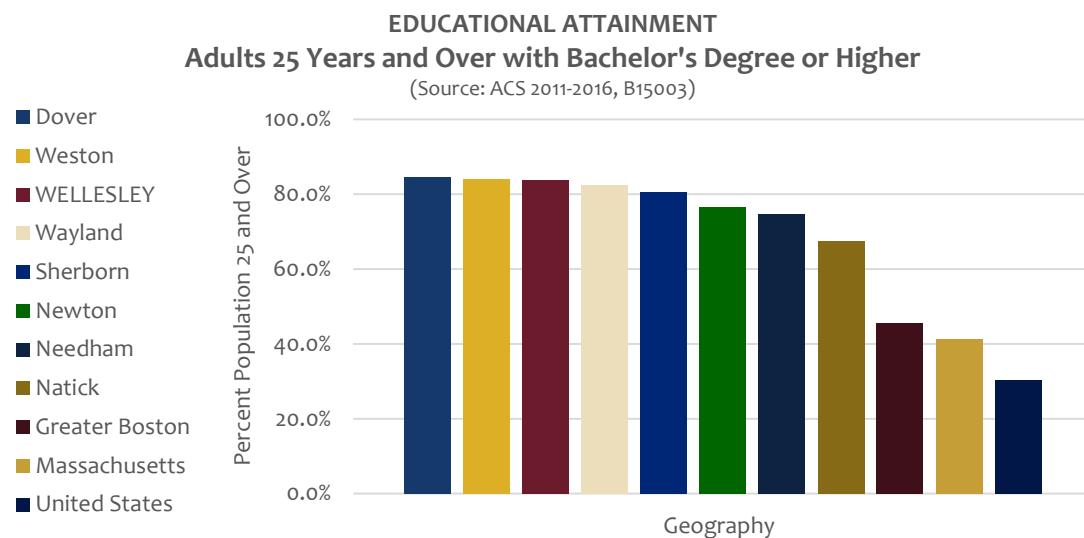
<sup>8</sup> ACS 2012-2016, B11003, and Barrett Planning Group.

<sup>9</sup> ACS 2012-2016, B03002, and Barrett Planning Group.

what residents mean when they say they want to maintain Wellesley as a town that welcomes diversity. Faculty and students at Wellesley College and Babson College represent over 50 percent of the town's entire black population.<sup>10</sup> The unusually small percentage of blacks in Wellesley matters because throughout the Boston Metro area and nationally, the largest racial and ethnic disparities in wealth occur among blacks born in the U.S. and Latino blacks.<sup>11</sup> Achieving housing equity for very low-income households can be very challenging in an affluent suburb because the gap between what they can afford and prevailing market values invariably requires deep subsidies.

## EDUCATION

Wellesley residents are extraordinarily well educated, and so are their counterparts in the surrounding towns. Educational attainment is one of several measures that separates Greater Boston suburbs from the rest of the state and even more from the rest of the nation. Over 80 percent of Wellesley adults 25 years and over hold at least a bachelor's degree and over 50 percent hold a graduate or professional degree. Wellesley residents value and benefit from living in a region with many colleges and universities in addition to those within their own town.



## LABOR FORCE AND EMPLOYMENT

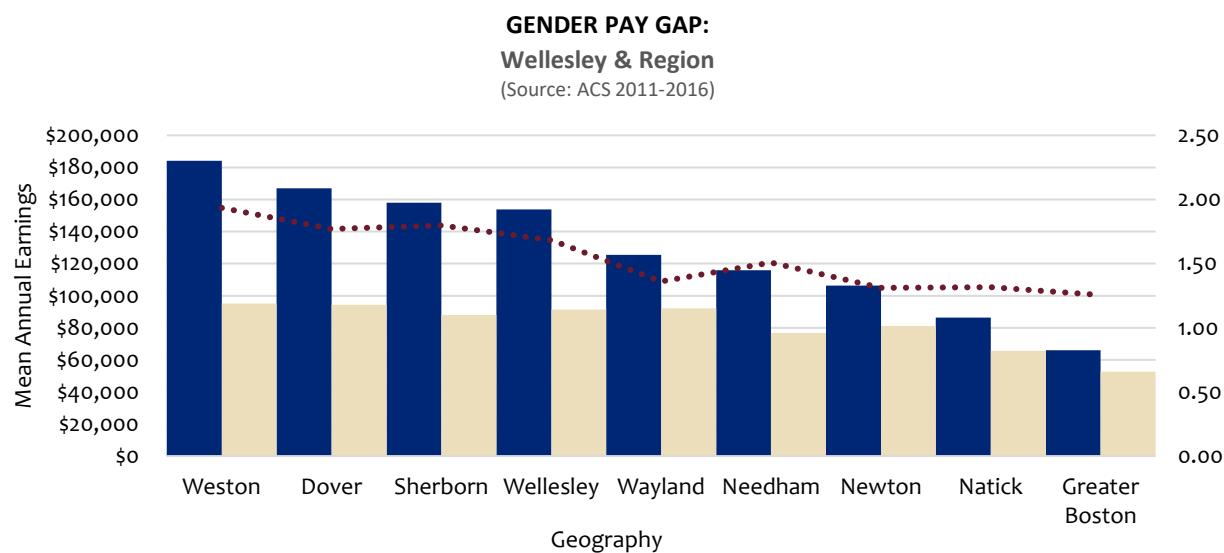
A community's **labor force** includes all civilian residents 16 years and over with a job or in the market for one. Wellesley's labor force includes approximately 13,000 people, 95 percent of whom are employed. The town is fortunate to have some large institutions and other private employers because they offer desirable employment for highly skilled and highly educated workers. As a result, Wellesley has a large percentage of residents 16 years and over working locally - about 35 percent (4,246 people) - and many residents who walk or bike to

<sup>10</sup> ACS 2012-2016, B02001 (calculated by census block group), and Barrett Planning Group.

<sup>11</sup> Tatjana Meschede, et al. *Wealth Inequalities in Greater Boston: Do Race and Ethnicity Matter?* CDP 2016-02. (Federal Reserve Bank of Boston, 2016).

work – about 12 percent.<sup>12</sup> The town also has a sizeable group of telecommuters and self-employed people working at home, which is not uncommon in affluent communities.

Consistent with the town’s educational profile, Wellesley residents tend to work in fields requiring advanced degrees and in high-wage occupations. Higher education, health care, science and technology, professional services, finance, and management dominate the list of industries that employ Wellesley residents.<sup>13</sup> On average, Wellesley men with full-time employment earn \$153,836 per year, which is very high for the Greater Boston region overall but consistent with other west suburbs. Still, the gender pay gap persists in Wellesley and so many affluent towns, with men earning almost 1.7 times the annual salaries of women – a ratio dramatically higher than that of Greater Boston as a whole.<sup>14</sup> Without substantial child support, a single woman with children and a full-time job would find it very difficult to live in Wellesley. As illustrated later in this chapter, it can even be harder for single women without children, especially older women.



## THE JOBS-HOUSING (IM)BALANCE

The Executive Office of Labor and Workforce Development (EOLWD) reports that Wellesley has about 1,500 employer establishments with a combined total of 18,000 average monthly payroll jobs and an average weekly wage of \$1,576.<sup>15</sup> The employment base (payroll jobs) is much larger than Wellesley’s total housing inventory, currently estimated at 9,023 year-round units. The **sustainability** goal for a local economy is 1.0-1.5 jobs per housing unit: enough jobs to give residents meaningful opportunities to work locally and enough housing units to give local workers meaningful options to live in the town. The **jobs-to-housing ratio** in Wellesley is

<sup>12</sup> ACS 2012-2016, B08301, and Barrett Planning Group.

<sup>13</sup> ACS 2011-2016, C24050, and Wellesley Unified Plan (Draft), Chapter 9 (2018), 3.

<sup>14</sup> ACS 2011-2016, DP-03.

<sup>15</sup> EOLWD, ES-202, Town of Wellesley, 2016 Annual Report, All NAISC Codes.

1.99, which means there are nearly two jobs for every one housing unit, i.e., potential demand that substantially exceeds the supply.

The jobs-to-housing ratio in Wellesley may be skewed slightly by the presence of college campuses with some of their workforce housed on site. For example, Wellesley College owns approximately 60 homes that serve as faculty housing. However, even with a reasonable estimate of the on-campus live/work population, the difference is not large enough to have a material impact on the ratio. Most people working in Wellesley commute from other towns every day, and this can be seen in the estimated size of its “workplace” or daytime population: 23,220 workers, which includes 4,246 who live in Wellesley.<sup>16</sup>

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## HOUSEHOLD CHARACTERISTICS

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Housing is a product, and households can be thought of as consumers. The housing needs and preferences of households vary by age group, household size, commuting distances, access to goods and services, and clearly, what people can afford for rent or a mortgage payment. The size and composition of a community’s households often indicate how well suited the existing housing inventory is to residents. In turn, the number and type of households and their spending power influence overall demand for housing.

### HOUSEHOLDS AND FAMILIES

The Census Bureau divides households into two broad classes: families and non-families. A **family household** includes two or more related people living together in the same housing unit, and a **non-family household** can be a single person living alone or two or more unrelated people living together.<sup>17</sup> Town-wide, non-families comprise about 23 percent of all households in Wellesley.<sup>18</sup> Compared with surrounding cities and towns, Wellesley’s family household rate of 77 percent is on the lower end, but much higher than the state average. As for family type, married couples make up an exceptionally high 91 percent of all families in Wellesley (and 70 percent of all households).<sup>19</sup>

### HOUSEHOLD SIZE & COMPOSITION

Wellesley may not have the region’s largest percentage of family households, but it ranks near the top of the Greater Boston area for family size. Over 34 percent of its households include four or more people, and since 1990 Wellesley’s average family size has gradually increased even as household sizes overall have dipped. Today, the Census Bureau estimates that Wellesley’s average household includes 2.84 people and the average family, 3.32. This seems consistent with findings in the Unified Plan that the primary group of households moving into Wellesley are “adults in the 35- to 44-year-old range in households with their children”

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<sup>16</sup> Census Bureau, Journey to Work Tables.

<sup>17</sup> People not counted as members of a household are counted in the group quarters population, i.e., college students or nursing home residents. See also, Appendix A, Glossary. For zoning and federal Fair Housing Act purposes, the definition of “family” differs from that used by the Census Bureau.

<sup>18</sup> ACS 2012-2016, B11001, “Household Type (Including Living Alone),” and Barrett Planning Group.

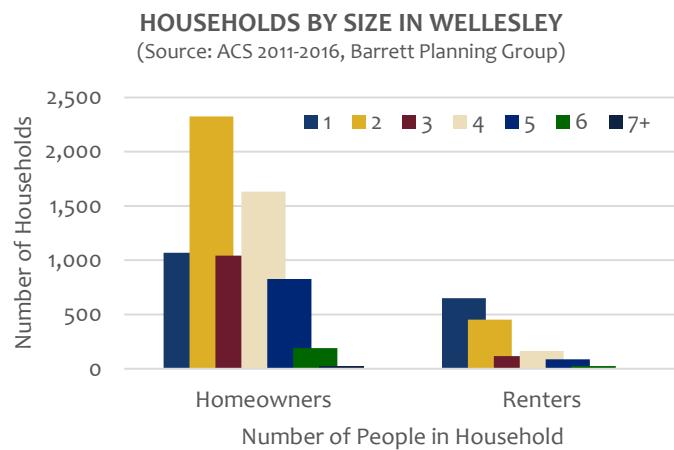
<sup>19</sup> Ibid.

while those moving out include young people leaving Wellesley to attend college or moving to job centers in other parts of the country and people in their seventies and older.<sup>20</sup>

The fact that Wellesley has a large percentage of families with dependent children seems widely understood in the town, but the characteristics of other types of families and nonfamily households matter as well. Single people living alone comprise some 20 percent of all Wellesley households and 87 percent of all nonfamily households. An unusual feature of Wellesley's one-person households is that about 60 percent are senior citizens: low compared with many suburbs and small towns.

## HOUSEHOLD WEALTH

Household income influences where people live, their health care and quality of life, and the opportunities they can offer their children. Wellesley's prestige is inextricably tied to the wealth of its households, and this has been true for a long time. Table 2.2 offers a snapshot of three median income indicators – all households, family households, and non-family households – that have an important place in any conversation about housing affordability. As seen below, Wellesley is the third wealthiest town in the immediate area, behind Weston and Dover, in terms of median household and median family income. However, the nonfamily median income in Wellesley exceeds that of all the surrounding communities and ranks third for the state.<sup>21</sup> This reflects, at least in part, the fact that Wellesley's one-person households include a broader mix of people than elderly seniors (75 years and over), whose incomes tend to be very low, especially among women. Single people living alone in Wellesley cover all age groups of owners and renters 24 years and over.



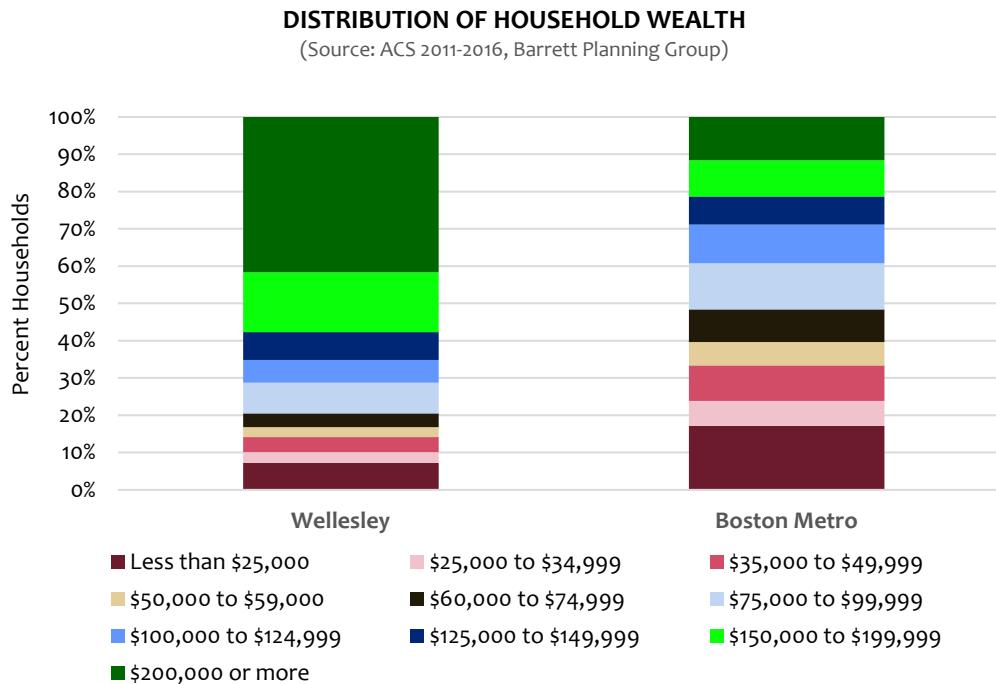
**Table 2.2. Household Income Summary**

Town	Median Household Income	Median Family Income	Median Nonfamily Income
Dover	\$189,265	\$205,139	Not Reported
Natick	\$104,372	\$135,824	\$51,932
Needham	\$139,477	\$166,931	\$54,919
Newton	\$127,402	\$170,639	\$56,907
Sherborn	\$158,250	\$168,036	\$63,125
Wayland	\$157,500	\$191,134	\$44,448
WELLESLEY	\$171,719	\$200,817	\$74,000
Weston	\$191,744	\$235,766	Not Reported
Greater Boston	\$77,809	\$98,431	\$45,866

Source: ACS 2011-2016.

<sup>20</sup> Wellesley Unified Plan, (Draft, 2018), 7-5.

<sup>21</sup> ACS 2012-2016, B19202.

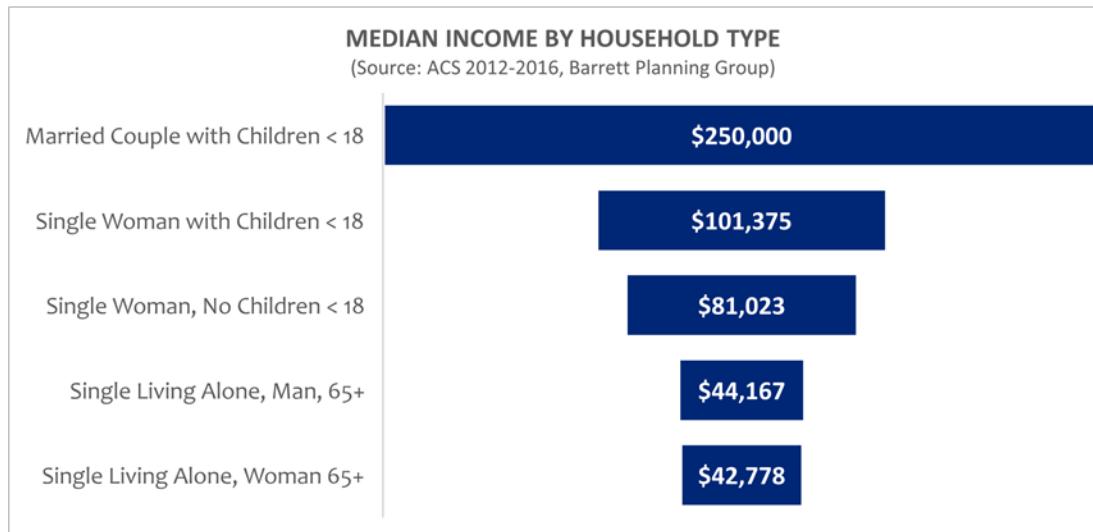


Median income statistics shed light on a community's relative economic position, but they also can mask extreme differences in household wealth. The chart above compares Wellesley and the Boston Metro area by the percentage of households in a range of incomes. The chart reinforces that Wellesley has a disproportionate concentration of households in the highest income band, i.e., there is greater income inequality in Wellesley than in surrounding region. As shown later in this section, statistics from the U.S. Department of Housing and Urban Development (HUD) show that 17 percent of Wellesley's households have incomes that fall within the meaning of **low or moderate income**, and about 72 percent of these households spend more of their monthly income on housing than is generally considered affordable. (See "Housing Cost Burden").

Comparing household incomes by household type or age offers another way to explore household income advantages and limitations. It is not uncommon for seniors to have lower incomes than young families, and this applies to Wellesley, too. However, Wellesley stands out for the degree of difference between the incomes of its young families (householders between 25 and 44 years) and their Boston Metro counterparts. In Wellesley, the median income for this group is \$217,222: 2.5 times more than the Boston Metro median income for the same group of householders, \$88,000. Furthermore, both regionally and nationally, the highest-income householders are between 45 and 64 years, but this is not the case in Wellesley, where their median income is 90 percent of the median for the younger cohort. And, the younger cohort represents most movers into Wellesley.<sup>22</sup> Single women without children and

<sup>22</sup> ACS 2012-2016, B19049.

single retirees (people 65 and over) have the lowest incomes in Wellesley, as depicted in the chart below.



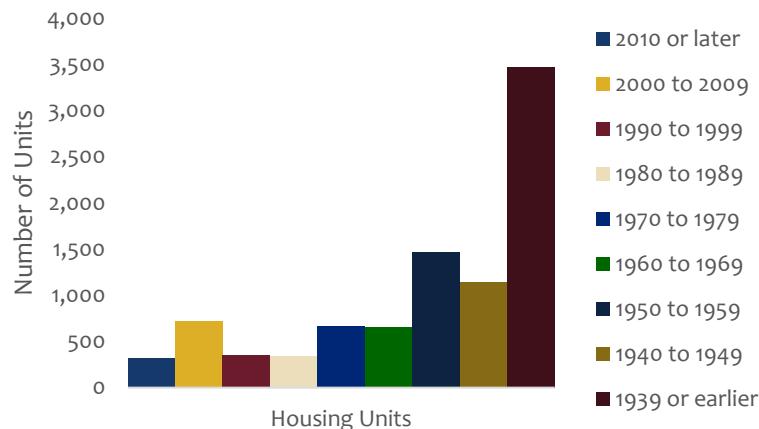
## HOUSING CHARACTERISTICS & TRENDS

### WELLESLEY'S HOUSING SUPPLY

Wellesley has approximately 9,134 housing units. The overwhelming majority are detached single-family homes, and while many are older homes built before 1940, about 11 percent (over 1,000 units) have been constructed since 2000. Most of these did not add to the town's housing supply. Instead, they replaced older homes that were torn down to make way for new, larger residences.

### HOUSING AGE IN WELLESLEY

**Est. Year of Construction**  
(Source: ACS 2012-2016)

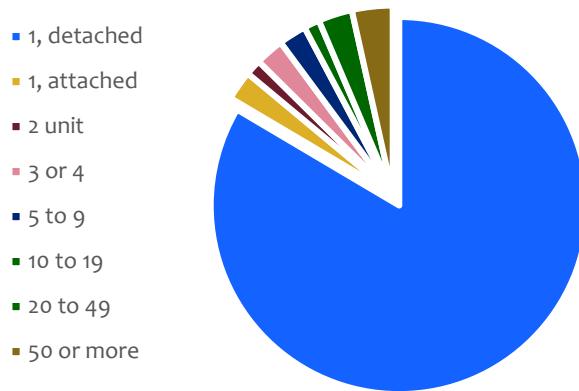


Since 2009, Wellesley's building department has issued 575 residential demolition permits. Some of the town's neighborhood streets have been virtually transformed by the prevalence

of teardown activity, such as Westgate, Wynnewood Road, Patton Road, or Benvenue Street, and several interconnected streets north of Route 9, or Livingston Road and Ridge Hill Farm Road near the Dover/Needham line.<sup>23</sup> While words like “redevelopment” sometimes make people cringe, Wellesley is obviously redeveloping. The effects can be seen in just about every neighborhood in town. Nearly all the replacement housing consists of large single-family dwellings, though near Wellesley Square, two-unit residential condominiums have been built as well.<sup>24</sup>

#### TYPES OF HOUSING UNITS IN WELLESLEY

(Source: ACS 2012-2016)



#### HOUSING TYPES AND SIZES

Wellesley's homes are large, and the process of **mansionization**<sup>25</sup> has made them even larger. Assessor's data reveal not only useful information about housing values and types, but also sizes – in residential floor area – and number of rooms, and a host of other information about style and structure trends, including housing age. Over time, the houses in Wellesley have increased in living area, or the floor area occupied as living space, as well as rooms, and most likely accessory features as well (such as garages, barns, and so on). While facts about the latter were not available for this housing plan, the amount of residential floor space, building age, and value statistics can be gleaned from the assessor's database.

Table 2.3. Change in Size and Values in Wellesley's Single-Family Home Inventory

Age of Dwelling (Year Built)	Average Lot (Sq. Ft.)	Average Residential Floor Area (Sq. Ft.)	Average No. Rooms	Land Value to Building Value Ratio
2000 to Present	21,418	4,651	10	0.578
1980-1999	21,166	3,715	9	0.927
1960-1979	22,126	2,654	8	1.465
1945-1960	16,900	2,275	8	2.618
1920-1944	15,871	2,475	8	2.387
1900-1919	16,061	2,681	8	2.772
1865-1899	17,579	2,789	8	2.746
Pre-1865	24,855	2,592	9	3.248

Source: Wellesley's Assessor's Parcel Database (2014) and Barrett Planning Group LLC.

<sup>23</sup> Wellesley Planning Department, “SFR Demo Permits 1-1-2009 to 2-18-2018” (Excel).

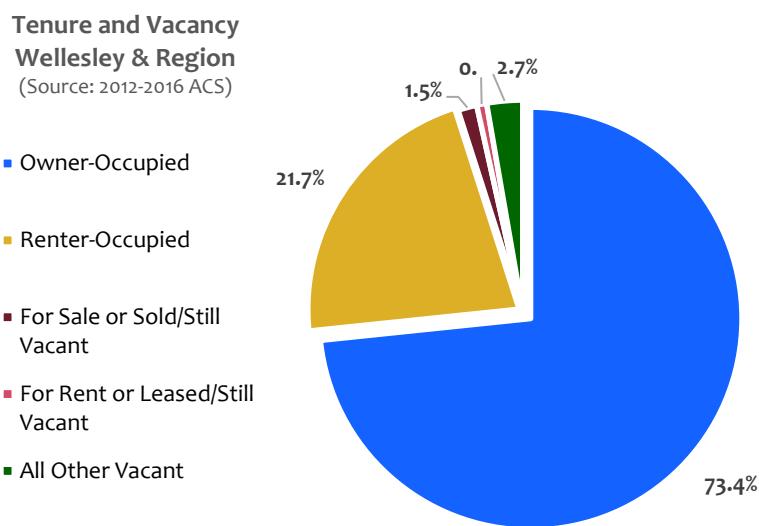
<sup>24</sup> Wellesley Planning Department, “SFR New Permits 1-1-2009 to 2-18-2018” and “2-Family New Permits” (Excel).

<sup>25</sup> Mansionization involves tearing down existing single-family homes and replacing them with larger residences.

As shown in Table 2.3, suburban redevelopment has ushered into Wellesley a generation of larger, very valuable homes. Demolition and rebuild projects will continue in Wellesley in neighborhoods with homes approximately 50 years old and older because the land is worth more than the existing residences (expressed in this table as a **land-value ratio**).

## HOUSING OCCUPANCY

The prevalence of single-family homes goes together with high homeownership rates in just about every town, and Wellesley is no exception. Over 82 percent of all units in Wellesley are owner-occupied, and census tract data indicate that some of the renter-occupied units are housing for employees of Wellesley College or Babson College, and to a more limited extent at Dana Hall. There are very few vacancies in Wellesley, where the homeownership vacancy rate hovers around 1 percent and the rental vacancy rate, 5 percent. Both statistics point to a tight housing market. For the past seven years, Wellesley has placed in the top 20 Greater Boston communities for number of single-family housing sales, ranking tenth for the entire region in 2017.<sup>26</sup>



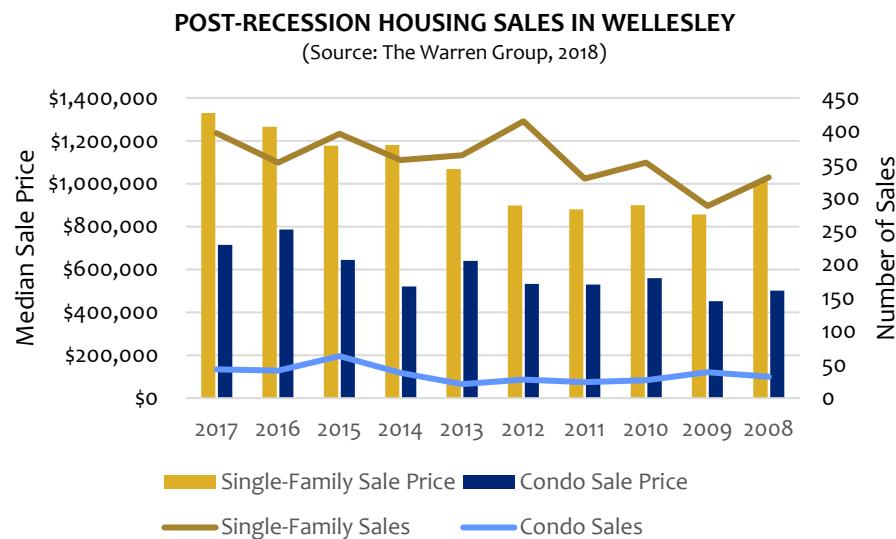
The competition for a home of one's own in Wellesley drives the value of land and the cost of housing. Moreover, the homeownership vacancy rate in all the towns around Wellesley is less than 3 percent, so there are remarkably few opportunities for young wage earners to choose one of these communities. Out of the 61,000 units in the inventory of owner-occupied and for-sale homes in Wellesley and the surrounding towns, only 450 are for sale and just over 700 have sold but have not yet closed. Vacant and available rental units are very hard to find, as indicated in the chart above. This has contributed to the uptick in applications to build rental housing in so many of Boston's west suburbs.

## HOUSING SALE PRICES

Homes for sale in Wellesley cater to homebuyers with the means to "buy up" in Greater Boston and, quite often, homebuyers with children under 18. The chart below tracks median sale prices and sales volume statistics for Wellesley since 2008, covering the period of contraction and recovery in the region's residential real estate market. Current real estate sales data from *Banker & Tradesman* show that Wellesley's housing market remains highly competitive and its home sellers can command top dollar for a single-family residence. The median sale price for all of 2017 was \$1.3 million, but in 2018, the median sale price had

<sup>26</sup> The Boston Foundation, *Greater Boston Housing Report Card 2017, Ideas from the Urban Core: Responsive Development as a Model for Regional Growth*, 21.

already reached \$1.3 million by the end of January alone – at a time when sales volume tends to be at the lowest point of the year. None of these sales involved first-time homebuyers. The average mortgage loan for homes recently purchased in Wellesley is anywhere from 60 to 70 percent of the sale price.<sup>27</sup>



Estimates published by the Census Bureau indicate that about 20 percent of Wellesley's homeowners moved into their present residence after 2009. This seems consistent with findings in the *Greater Boston Housing Report Card 2017*, which ranks Wellesley (and Newton) among the top Greater Boston communities for housing sales volume since 2011.<sup>28</sup>

### MARKET RENTS

Like home prices, market rents run very high in Wellesley, and there are only a few units available at any given time. An informal survey conducted for this plan produced a limited list of available properties, many of which are not apartments, as shown below.

**Table 2.4. Rental Listings in Wellesley, February 2018 (Sample)**

Location	Unit Size	Asking Rent
Hastings Village (Apartment)	2 BR	\$2,600
Worcester Street (House)	5 BR	\$4,750
Apartment (Location Undisclosed)	2 BR	\$3,600
Longfellow Road (House)	4 BR	\$3,950
Cedar Street (Condo)	3 BR	\$2,300
Cedar Street (Apartment)	2 BR	\$2,500
Lawrence Road (Condo)	3 BR	\$3,600
Washington Street (Apartment)	2 BR	\$1,850
Lathrop Road (House)	4 BR	\$5,000
Worcester Street (Apartment)	2 BR	\$2,900
Central Street (Apartment)	1 BR	\$1,800
Linden Street (Apartment)	2 BR	\$2,100
Westwood Road (House)	5 BR	\$7,400
Wareland Road	2 BR	\$2,590

Source: Trulia, Zillow, and Apartment Guide.

<sup>27</sup> *Banker & Tradesman*, Real Estate Records (Online), YTD January 2018.

<sup>28</sup> ACS 2012-2016, B07001, B25038, and Barrett Planning Group.

Wellesley is like many single-family suburbs where most of the rental supply consists of detached single-family homes and small attached or multi-unit buildings. In fact, 54 percent of Wellesley's renter-occupied housing units are one- to four-unit residences, many of which are condominiums not occupied by the owners. Excluding single-family homes, Wellesley's rental housing is dominated by small units. The multifamily apartment and condo-for-rent inventory consists almost entirely of 1- or 2-bedroom units designed for small households, yet the monthly rents clearly exceed what most single people can afford and, in many cases, they also exceed what a young employed couple could afford. In the table above, the rents would require an annual household income of anywhere from \$74,000 to \$144,000, not including the single-family houses.<sup>29</sup>

## HOUSING AFFORDABILITY & HOUSING NEEDS

Under a 1969 Massachusetts law, all communities are supposed to have housing that is affordable to **low-income households** and remains affordable to them even when home values appreciate under robust market conditions. Another type of affordable housing - generally older, moderately priced dwellings without deed restrictions, and which lack the features and amenities of new, high-end homes - can help to meet housing needs, too, but only if the market allows. There are other differences, too. For example, any household - regardless of income - may purchase or rent an unrestricted affordable unit, but only a low- or moderate-income household qualifies to purchase or rent a deed restricted unit. Both types of affordable housing meet a variety of housing needs and both are important. The difference is that the market determines the price of unrestricted affordable units while a legally enforceable deed restriction determines the price of restricted units. Today, Wellesley has very few affordable units, unrestricted or deed restricted. Furthermore, unrestricted units that may have offered a pathway to owning a home in the past have been a key target of teardown/rebuild projects in Wellesley's older neighborhoods.

### CHAPTER 40B SUBSIDIZED HOUSING INVENTORY

When people refer to "Chapter 40B," they usually mean the state law that provides for low- and moderate-income housing development by lifting local zoning restrictions. However, G.L. c. 40B – Chapter 40B proper – is actually the Commonwealth's regional planning law and the parent legislation for agencies like MAPC. The four short sections that make up the affordable housing provision were added in 1969, and they are called "Chapter 40B" in this plan to be consistent with affordable housing nomenclature in Massachusetts. Nevertheless, remembering the regional planning umbrella for affordable housing can help local officials and residents understand the premise of the law and reduce confusion and misinformation.

Chapter 40B's purpose is to provide for a regionally fair distribution of affordable housing for people with low or moderate incomes (see Table 2.7). Affordable units created under Chapter 40B remain affordable over time because a deed restriction limits resale prices and rents for many years, if not in perpetuity. The law establishes a statewide goal that at least 10 percent of the housing units in every city and town will be deed restricted affordable housing. This

<sup>29</sup> ACS 2012-2016, B25024, and Barrett Planning Group.

10 percent minimum represents each community's "regional fair share" of low- or moderate-income housing. It is not a measure of housing needs.

Chapter 40B authorizes the Zoning Board of Appeals (ZBA) to grant a **comprehensive permit** to pre-qualified developers to build affordable housing. "Pre-qualified developer" means a developer that has a "Project Eligibility" letter from a state housing agency. A comprehensive permit covers all the approvals required under *local* bylaws and regulations. Under Chapter 40B, the ZBA can waive local requirements and approve, conditionally approve, or deny a comprehensive permit, but in communities that do not meet the 10 percent minimum, developers may appeal to the state Housing Appeals Committee (HAC). During its deliberations, the ZBA must balance the **regional need for affordable housing** against valid local concerns such as public health and safety, environmental resources, traffic, or design. In towns that fall below 10 percent, Chapter 40B tips the balance in favor of housing needs. In addition, ZBAs cannot subject a comprehensive permit project to requirements that "by-right" developments do not have to meet, e.g., conventional subdivisions.

The 10 percent statutory minimum is based on the total number of year-round housing units in the most recent federal census. For Wellesley, the 10 percent minimum is currently 909 units. At 6.33 percent, Wellesley falls short of the 10 percent minimum by 334 units.

**Table 2.5. Wellesley Subsidized Housing Inventory**

Development	Location	Type	Units
Barton Road Development	190 Barton Rd.	Rental	90
Dean House/List House	41 River St./315 Weston Rd.	Rental	57
Kilmain House	505-513 Washington St.	Rental	40
Morton Circle Development	487-503 Washington Street	Rental	36
Linden Street Development	Waldo Ct./Linden	Rental	12
Ardemore at Wellesley	4 Cedar Street	Rental	36
Jubilee House	10 Cross St	Rental	4
Glen Grove	50 & 60 Grove Street	Rental	125
Townhouses at Edgemoor Circle	Edgemoor Ave and Overbrook Drive	Ownership	3
DDS Group Homes	Confidential	Rental	12
Walnut Street Fire Station	182 Walnut Street	Ownership	1
Hastings Village	54-66 Hastings St	Rental	52
Wellesley Manor	874-878 Worcester St	Ownership	7
Peck Avenue & Mellon Road	Peck Avenue & Mellon Road	Ownership	3
Waterstone at Wellesley	27 Washington St	Rental	82
Wellesley Commons	65 Washington Street	Ownership	1
The Belclare Condominium	580 Washington & 53 Grove	Ownership	5
Wellesley Place	978 Worcester Ave	Rental	7
Linden Street	Linden Street	Rental	2
		Total	575
		10% Minimum	909
		Shortfall	334

Source: Massachusetts Department of Housing and Community Development, 2018,  
Note: The Town of Wellesley's records differ slightly from DHCD's. This plan reports the official SHI from DHCD, as of January 26, 2018.

Due to its prestige, extraordinarily high market prices, high land values, and zoning policies that are out of alignment with regional housing demand, Wellesley has become vulnerable to applications for comprehensive permits. What is happening in Wellesley now echoes conditions in Brookline, Newton, and Wayland, where the ZBAs have faced multiple comprehensive permits filed very close together. By contrast, Needham and Natick no longer face the threat of unwanted comprehensive permits because they meet the 10 percent minimum, at least until the Census Bureau publishes new housing statistics with Census 2020. At that time, the denominator (total year-round housing units) will change and some towns that currently exceed 10 percent could fall below the statutory minimum.

Table 2.6 shows that as of August 2018, the Wellesley ZBA has received five comprehensive permit applications, most of which involve developments that received Project Eligibility from MassHousing, the largest state subsidizing agency. Although MassHousing originally denied Project Eligibility for two projects (680 Worcester Street and 16 Stearns Road), both were subsequently approved with only *de minimis* changes to the first set of plans. Even if all of the proposed developments eventually received a comprehensive permit, the combined increase in the Subsidized Housing Inventory would be 185 units – still 149 short of the 10 percent minimum. With a DHCD-approved Housing Production Plan, however, either Delanson Circle or 148 Weston Road would make the Town eligible for a “safe harbor” one-year plan certification (see Section 1 and Appendix). These properties, together with the Town’s existing affordable housing locations, are shown in Map 2.1.<sup>30</sup>

**Table 2.6. Recent Chapter 40B Activity in Wellesley (August 2018)**

Address	Type	Total Units	Units Eligible for SHI	Actually Affordable Units	Status
1-8 Delanson Circle	Rental	90	90	18	Comp. Permit Application
148 Weston Road	Rental	55	55	11	Comp. Permit Application
135 Great Plain Ave.	Owner	44	11	11	Comp. Permit Application
680 Worcester St.	Rental	20	20	5	Comp. Permit Application
16 Stearns Road	Owner	36	9	9	Comp. Permit Application
<b>Total</b>		<b>245</b>	<b>185</b>	<b>54</b>	

Source: Town of Wellesley “40B Development Projects” and Barrett Planning Group.

## MEASURING HOUSING NEEDS

One measure of housing needs is the shortfall of Chapter 40B units. However, Chapter 40B developments usually respond to the strength of a regional housing market, so comprehensive permits do not always address the affordable housing needs of a community or region. Furthermore, low-and moderate-income households make up a significantly larger percentage of all households than 10 percent. This can be seen in Wellesley, where 17 percent of the town’s households have incomes that would qualify for a Chapter 40B unit. Understanding housing needs requires a more nuanced approach than can be gleaned from

<sup>30</sup> Maps will be inserted in the final draft report.

a community's Chapter 40B "gap." It involves an assessment of needs and barriers that exist within individual communities and the region of which they are part.

Housing needs are not limited to low- or moderate-income people, but often, other needs overlap with economic need. Accessible homes for people with disabilities, small housing units for older people who do not want the maintenance responsibilities of a single-family home, and a base of modestly priced apartments for young citizens entering the workforce are common needs throughout Massachusetts. About 10.5 percent of Wellesley's population has a disability, but except for senior housing and a very small inventory of group home units, Wellesley has very little barrier-free housing. The same populations – seniors, young workers, and people with disabilities – have needs for housing near goods and services, yet there are not many affordably priced housing units near any of Wellesley's village centers. Furthermore, while there are "over-55" age-restricted developments in and around Wellesley, many of the units are expensive condominiums or townhouses. Meanwhile, housing that would meet the needs of lower-income seniors has become increasingly difficult to build due to a shortage of federal and state housing subsidies.

### HOUSING COST BURDEN

A disparity between growth in housing prices and household incomes contributes to a housing affordability problem known as **housing cost burden**. The U.S. Department of Housing and Urban Development (HUD) defines housing cost burden as the condition in which low- or moderate-income households spend more than 30 percent of their monthly gross income on housing. When they spend more than half their income on housing, they are said to have a **severe housing cost burden**. Housing cost burden – not Chapter 40B – is the key indicator of affordable housing need in cities and towns. Table 2.7 reports HUD's current housing program income limits by family size for the Boston Metro Area and the maximum housing payment that is affordable in each tier. "Low" and "moderate" incomes are based on percentages of the HUD Area Median Family Income (HAMFI), adjusted for household size. What low- and moderate-income households can afford is far less than prevailing market rents in Wellesley.

**Table 2.7. Low & Moderate Income Limits and Affordable Housing Costs**

Household Size (# People)	Low Income		Moderate Income	
	HUD Income Limit	Maximum Affordable Housing Payment	HUD Income Limit	Maximum Affordable Housing Payment
1	\$37,750	\$944	\$56,800	\$1,420
2	\$43,150	\$1,079	\$64,900	\$1,623
3	\$48,550	\$1,214	\$73,000	\$1,825
4	\$53,900	\$1,348	\$81,100	\$2,028
5	\$58,250	\$1,456	\$87,600	\$2,190
6	\$62,550	\$1,564	\$94,100	\$2,353

Source: U.S. Department of Housing and Urban Development, FY 2018 Boston Metro Income Limits.

In Wellesley, 1,055 low- or moderate-income households are housing cost burdened (71 percent) and 745 are severely cost burdened (51 percent).<sup>31</sup> Table 2.8 reports the total number of low- or moderate-income households and the incidence of housing cost burden in Wellesley by tenure and income range. Low- or moderate-income households are eligible to purchase or rent Chapter 40B affordable units.

**Table 2.8. Low- and Moderate-Income Households and Housing Cost Burden in Wellesley**

Household Income Group	Total	% Cost Burdened	% Severely Cost Burdened
Low-Income Households	1,060	75.5%	58.5%
Owners	550	91.8%	68.2%
Renters	510	56.9%	48.0%
Moderate-Income Households	410	62.2%	30.5%
Owners	310	61.3%	29.0%
Renters	100	70.0%	40.0%

Source: HUD, Comprehensive Housing Affordability Strategy (CHAS) Data. Low and moderate income limits are shown in Table 2.7.

## WELLESLEY'S HOUSING AFFORDABILITY GAP

There is an enormous **affordability gap** in Wellesley. In addition to market-rate rents that far exceed the maximum affordable housing payment for low- or moderate-income people, the for-sale market is out of reach for low- or moderate-income and middle-income homebuyers. For example, a three-bedroom condominium with an asking price of \$216,800 (rounded) would be affordable to a moderate-income purchaser, but in 2017, the median condominium sale price in Wellesley was \$715,000. Moreover, while a moderate-income homebuyer could afford to purchase a \$248,300 single-family home, last year's median sale price was \$1.3 million – that is, a price roughly 5.5 times greater than the maximum affordable purchase price for a Chapter 40B homeownership unit.<sup>32</sup> The \$216,800 per-unit gap for a condominium and \$1+ million per unit gap for a single-family home far exceeds the maximum per-unit subsidies available from most state and federal housing programs, and this is a key reason for the very high density found in many Chapter 40B developments in Boston's west suburbs.

<sup>31</sup> CHAS 2010-2014.

<sup>32</sup> Maximum affordable purchase prices calculated with DHCD "Local Initiative Program" affordability assumptions: 30% FRM, interest rate @ 4.4 percent based on most recent Freddie Mac Mortgage Market Survey, 5% downpayment, and household income for pricing purposes at 70% of the Boston Metro HUD median income for a family of four. Wellesley FY 2018 tax rate of \$11.95 per thousand.

### 3. Potential Barriers to Affordable Housing Development

This section describes Wellesley's natural and built environment, focusing on conditions that limit housing growth in Wellesley. The information presented here is largely based on other planning documents, including the 2015 *Wellesley Open Space and Recreation Plan* and the Draft *Unified Plan*. Specific environmental elements that can affect housing development include land and water resources, wildlife habitat, scenic features, and contaminated sites. Local regulations also limit the amount of housing development and types of housing that can be built. In most cases, these local regulations form the basis for the waivers that comprehensive permit developers ask the ZBA to grant in order for them to build affordable housing.

#### KEY FINDINGS

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- Wellesley relies on groundwater for much of its public water supply, and the town contains two major aquifers. Additional water is provided by the MWRA as needed.
- The vegetated wetlands in Wellesley are some of the most important natural resources in the Town because of the unique habitat they offer for endangered or threatened species.
- Wellesley has two areas designated as Priority Habitat: along the northern shore of the Charles River at Elm Bank and an area in the Cochituate Aqueduct. Priority Habitats are not protected by law, but the species that may use these habitats are protected.
- Wellesley has the basic municipal infrastructure and utilities required for land development: public water and sewer service, adequate roads, and some public transportation facilities. Its schools have entered a period of declining K-12 enrollment, so there is some room to accommodate more students.
- Wellesley's zoning does little to encourage a range of housing types or the density required to support affordable housing development on privately owned land. Taken together, the zoning and non-zoning requirements Wellesley imposes on housing construction effectively encourage developers to pursue Chapter 40B comprehensive permits.
- The potential for conflicts exists between some of the housing and residential development goals in Wellesley's new *Unified Plan* and the realities of affordable and mixed-income housing development. The potential conflicts involve scale, density, housing types, and settings. As the *Unified Plan* makes clear, the Town will need to use strategic redevelopment to achieve multiple goals and identify development opportunities that solve more than one challenge at a time.

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## ENVIRONMENTAL LIMITATIONS

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### TOPOGRAPHY AND SOILS

Wellesley's rolling hills are the legacy of the continental glacier that once extended beyond Cape Cod. Maugus Hill is the largest of six drumlins in the Town. Kames dot Wellesley College's Nehoiden and Wellesley Country Club golf courses, while eskers snake around Morses Pond, Longfellow Pond, and Town Forest along Rosemary Brook. Lake Waban and Morse's Pond are depressions left by melted blocks of ice as the land took on its present appearance. Glacial erratics are scattered throughout the town. These large boulders were transported by the glacier to their present sites. Boulder Brook Reservation is named for its collection of erratics, including one aptly named Elephant Rock. "Problem Rock" is found at Grove and Dover Streets. Isolated round ponds are kettle holes left when great blocks of ice melted.

Like Wellesley's topography, its soil patterns vary from north to south. On the north side of town, the soils are generally well suited for development. However, other conditions constrain development in this part of Wellesley, notably steep slopes near the Weston town line and wet soils associated with Bogle, Boulder and Cold Stream Brooks. In addition, a large area stretching from Rocky Ledges to Cliff Road consists of soils with severe development limitations because of shallow depth to bedrock. Even here, though, there are pockets of moderately deep, well-drained soils, that can accommodate development, and much of this area has been developed for lots close to the minimum allowed by zoning (20,000 sq. ft.).

South of the railroad line, there are several soil groupings that can support development and woodland production. The southernmost part of Wellesley contains large areas of soils that have severe restrictions for development because of either topography or wetness.

### WATER RESOURCES (MAP 3.1)

Wellesley is in the middle of the Charles River Watershed, one of three watersheds to flow into Boston Harbor. Six stream systems flow through the Town to the main stream of the Charles River on the north and south borders. They include the Waban Brook, Fuller Brook, and Pollock Brook, which drain the westerly two-thirds of the Town, and four stream systems that drain the easterly third of Wellesley toward the Charles River, opposite Newton: Cold Stream Brook, Rosemary Brook, Academy Brook, and Hurd Brook.

Wellesley's ponds and lakes range from Morses Pond and Lake Waban to small ponds scattered throughout Town. Lake Waban and Morses Pond are "Great Ponds" because they cover ten or more acres, which makes them subject to state environmental regulations. Many of Wellesley's ponds have algal blooms caused by fertilizer pollutants and high amounts of sedimentation. In 1998, Wellesley began implementing the Pond Restoration Master Plan, which set priorities for improving and restoring the town's smaller ponds. The plan has resulted in the dredging and restoration of Rockridge Pond through removal of 6,000 yards of sediment and replacement of the pond outlet structure and drain; restoration of Bezanson Pond and Reeds Pond; and a feasibility study of the Town Hall Duck Pond.

Because of the extensive urbanization, Wellesley's streams and ponds are susceptible to degradation of water quality. Morses Pond, on the Wellesley-Natick town line, serves multiple uses. Several areas along its shores are densely developed for housing. Wellesley has two public water supply wells and a swimming beach on the easterly side of the pond, and a major open space corridor (Cochituate Aqueduct) passes along the north and east sides. Morses Pond is also vulnerable to the pressures of urbanization, for Worcester Street (Route 9) crosses two of the pond's tributaries, and there is extensive commercial strip development both in Natick and Wellesley.

Wellesley obtains most of its public water from groundwater, which is drawn from municipal wells at five locations throughout the Town with a total yield of 3.0 million gallons per day (mgd). Additional water is provided by the Massachusetts Water Resources Authority (MWRA), which when needed delivers 3.5 mgd to the Town, for a total potential supply of 6.5 mgd. Since 1980, the Town has encouraged water conservation through increased rates during the summer season. In 2003, Town Meeting adopted a Restriction on the Use of Water Supply Bylaw that empowers the Town to restrict or ban outside watering.

Wellesley lies over two major aquifers, portions of which are protected by the Water Supply Protection District that Town Meeting instituted in 1987.

- The Waban Brook Alluvial Aquifer begins in Weston and Natick and extends to the Charles River through the westerly part of Wellesley. Natick and Wellesley have water supply wells in this aquifer adjacent to Morses Pond, and Wellesley College's wells are located on its campus on the easterly side of Lake Waban. Of all the Town wells, those at Morses Pond are known to be the most influenced by surface water quality. Approximately 35 percent of the Waban Brook basin lies within Wellesley. In 1987, Wellesley created a Water Supply Protection District and based the Waban Brook portion of the district on the basin boundary.
- The second major aquifer in Wellesley, the Rosemary Brook Valley Aquifer, extends from downtown Needham to the easterly part of Wellesley. Wellesley has four municipal wells in the Rosemary basin, and the Wellesley Country Club has two private wells that are used solely for irrigation of the golf course. As in the case of the Waban Brook aquifer and basin, the Rosemary Brook basin demarcation is used to denote the overall recharge area for this aquifer. About 40 percent of the Rosemary Brook basin, or 982 acres, is in Wellesley, with the remaining 60 percent (1450 acres) in Needham.

A significant potential water supply source is the Elm Bank area, located alongside the Charles River in Dover adjacent to Wellesley and Natick. The site is currently owned by the Commonwealth of Massachusetts, which allows three uses: a riverfront park, water supply for the Towns of Dover, Natick, Needham and Wellesley, and affordable housing.

## **FLOOD HAZARD AREAS**

Floodplains are land areas that are likely to flood during a storm event and are classified according to the average frequency of flooding. For example, the "100- year floodplain" is that area of land that will be flooded, on average, once in every 100 years. Floodplains are

delineated by topographical, hydrological, and development characteristics of a particular area. In Wellesley's case, the Federal Emergency Management Agency (FEMA) last mapped the 100-year and 500-year floodplains in 2012. The FEMA study found that most of Wellesley's flooding problems stem from water backup caused by culverts, bridge crossings, and dams.

The widest floodplains occur on Fuller Brook near the Needham town line and the Town's Recycling and Disposal Facility, along Fuller and Caroline Brooks upstream of their confluence (including Wellesley High School and much of Smith Street), and on the Charles River near William Street. Smaller floodplains are located adjacent to Boulder Brook at Worcester Street (Route 9) and Lexington Road; in the Boulder Brook Reservation; on Fuller and Waban Brooks near the Charles River; on Rosemary Brook in the Town Forest upstream of the Oakland Street crossing; and on the Charles River near Livingston Road and Winding River Circle.

#### **WETLANDS AND WILDLIFE HABITAT**

The vegetated wetlands in Wellesley are some of the most important natural resources, offering unique habitat for locally threatened species of amphibians and the ecosystems in which they thrive. The west side of Sabrina Lake is held in trust by the Wellesley Conservation Council, Inc. as the Guernsey Sanctuary. Wetlands on private land are protected by the state's Wetlands Protection Act and local regulations.

Wellesley also has several certified vernal pools. Vernal pools are wet depressions in the land that flood only part of the year. Many rare and valuable species depend on them. The Natural Heritage and Endangered Species Program (NHESP) identifies twelve certified vernal pools within Wellesley which include the north shore of Sabrina Lake in the Guernsey Sanctuary, the northerly corner of the Wellesley College "North 40" on Weston Road, two in the Boulder Brook Reservation, Boulder Brook where it crosses Route 9, and near Cold Stream Brook in the Farms area. By analyzing aerial photographs, state environmental scientists have identified thirty-two additional potential vernal pools in Wellesley.

Wellesley has two small areas designated as Priority Habitat under the Massachusetts Endangered Species Act (MESA): along the northern shore of the Charles River at Elm Bank and a small area in the Cochituate Aqueduct between Forest Street and Laurel Avenue. Priority Habitat Areas indicate where the NHESP estimates the existence of habitat for state-listed rare species. These estimates are based on species population records, habitat requirement, and landscape information. Priority Habitats per se are not protected by law, but the rare species that may use these habitats are protected.

#### **SCENIC ROADS**

Wellesley's streets and parks have been planned and are maintained to high standards, allowing for many otherwise average suburban landscapes to be deemed "scenic." Wellesley has a variety of scenic roads – that is, roads the Town has designated as scenic under the Massachusetts Scenic Roads Act. These roads are protected by special regulations so that trees and stone walls within the right-of-way will be protected and will not be altered except after

a public hearing and after consideration of the work by the Planning Board and Natural Resources Commission. They include Benvenue Street, Brookside Road, Cartwright Road, Cheney Drive, Pond Road, Squirrel Road, and The Waterway/Brookway.

### **ENVIRONMENTAL HAZARDS**

According to the Massachusetts Department of Environmental Protection (DEP), Wellesley has two "Tier I" hazardous waste sites: The old Paint Shop site adjacent to Paint Shop Pond and Alumnae Valley west of College Road. Paint Shop Pond had one of the most serious chemical contaminations in the state until it was remediated by Wellesley College in 2003-2004. Arsenic and chromium-laden waste was dumped from a large paint pigment factory that operated east of the pond from the 1880s to 1930s. The toxic waste had affected nearly 40 acres of former wildlife habitat, killed amphibians, and rendered soils too toxic for plant growth. This property is in a high-yield aquifer recharge area.

A Groundwater Protection Study prepared by MAPC in 1982 identified several sites in the Waban Brook and Rosemary Brook basins that had been used in the past to dump solid waste. They include:

- An area east of the Morses Pond pumping station was used for a brief period in 1980 to dump ballast from the railroad. Materials were removed within one month of disposal, and test results indicated no evidence of pollution of the Morses Pond wells.
- A portion of the "North 40" off Turner Road was used as a temporary dump-and-cover landfill for household wastes during the late 1950s and early 1960s.
- The old Paint Shop site described above.
- Ash was formerly dumped at Nehoiden Golf Course off Washington Street. Wellesley College has built an equipment shed on the site of the original incinerator. Studies have shown no leachate problems in the nearby Fuller Brook and Lower Waban Brook.
- Closed landfills are at the playing fields between the Middle School on Linden Street and the Sprague Elementary School, were remediated as required by the Mass DEP and now a fully functional playing field.

The Department of Public Works facility off Woodlawn Avenue is also a closed landfill.

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### **PRESERVATION PRIORITIES**

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#### **OPEN SPACE**

Wellesley has identified about 30 properties as priority candidates for land conservation, many of which occur along Washington Street, Pond Street, and the Aqueduct. While some of these properties may be poor candidates for new housing development, others may have potential for open space-residential development.

## HISTORIC PRESERVATION

Wellesley has a rich inventory of historic resources and the character of many of its neighborhoods and commercial areas are defined by historic buildings, structures, landscapes, and objects. Over 1,100 buildings, one cemetery, and 125 objects and structures are listed on the Massachusetts Cultural Resources Information System (MACRIS). Among these historic resources are 63 properties in Wellesley's five districts listed on the National Register of Historic Places:

- Hunnewell Estates Historic District
- Cochituate Aqueduct Linear District
- Sudbury Aqueduct Linear District
- Elm Bank
- Fuller Brook Park

MACRIS also identifies 47 properties listed individually on the National Register of Historic Places. A National Register district does not restrict private use or changes to properties. However, it facilitates rehabilitation tax incentives for owners of income-producing properties and provides limited protection from adverse effects of federal and state projects.

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## INFRASTRUCTURE AND PUBLIC FACILITIES

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### INFRASTRUCTURE

**Wastewater Capacity.** The sewer system in Wellesley discharges to the Massachusetts Water Resources Authority (MWRA) Deer Island Sewer Treatment Plant, which serves 43 Greater Boston communities. While most properties in Wellesley are connected to the public sewer system, 203 properties still rely on septic systems for wastewater disposal. The Deer Island plant in Boston Harbor treats approximately 3.85 MGD (million gallons per day) of sewage per day from Wellesley and sends the treated effluent nine miles out into the Gulf of Maine. The Deer Island plant has a peak capacity of 1.2 billion gallons per day, with average flows of 380 million gallons per day.

**Stormwater.** Wellesley has begun to address discharges into stormwater drains by adopting Municipal Stormwater Drainage System Rules and Regulations in 2005. Through these rules, Wellesley complies with the Environmental Protection Agency's Phase II Stormwater Regulations.

**Drinking Water.** According to the Wellesley Department of Public Works (DPW), 61 percent of Wellesley's drinking water is from local well supplies and 39 percent from the MWRA. The MWRA transmits water to many Greater Boston cities and towns from the Quabbin and Wachusett Reservoirs and the Ware River and other surface water supplies in Central Massachusetts. Wellesley's local water supplies consist of ten wells located within the Town. Water pumped from the wells is treated at the DPW's three corrosion control and

iron/manganese removal facilities and distributed to customers through a 140-mile network of street mains. The distribution system also includes two large storage facilities with a combined capacity of nearly six million gallons.

### TRANSPORTATION FACILITIES & SERVICES

Wellesley has three Massachusetts Bay Transit Authority (MBTA) commuter rail stations: Wellesley Square, Wellesley Hills, and Wellesley Farms on the Framingham/Worcester Line. The MetroWest Regional Transit Authority's #1 and #8 busses also serve Wellesley, making connections from Natick to Wellesley College, Wellesley Square, Wellesley Hills, MassBay Community College, Babson College, Lower Falls, and the Woodland MBTA Station. The colleges also provide shuttles for their students, staff and faculty.

Wellesley has one marked bicycle lane on a limited segment of Washington Street. The DPW is creating new bicycle markings on Cliff Road and Kingsbury Street.

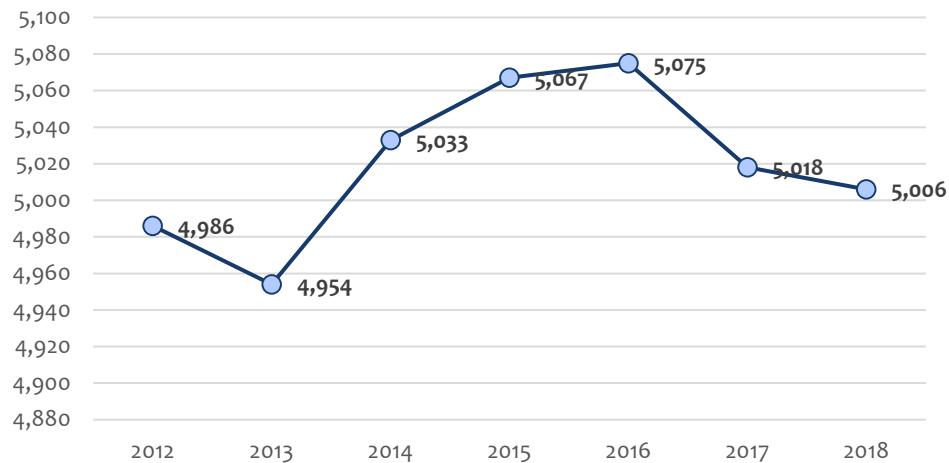
### SCHOOLS

Wellesley has 10 public schools (Preschool at Wellesley Schools, seven elementary schools, one middle school, and one high school) and enrolls approximately 5,000 students each year. In addition to the public schools, there are six private elementary, middle and/or high schools in Wellesley with a total enrollment of 1,166 students, the largest of which is Dana Hall School.

Enrollment in the Wellesley Public Schools increased from 2012 to 2016 but has decreased in the last two years. Per enrollment projections from FutureThink, K-12 enrollment in Wellesley is expected to decline about 7 percent from 2017 to 2027. In March 2017, the Wellesley School Committee considered a recommendation from the Hardy, Hunnewell, and Upham (HHU) Master Plan Committee to rebuild schools at all three HHU sites to meet better standards of education and to plan for elementary enrollment changes. The School Committee agreed to rebuild at least two schools with 19 classrooms in each, with the third under consideration based on enrollment.

#### WELLESLEY PUBLIC SCHOOLS TOTAL ENROLLMENT (PK-12)

(Source: Mass. Department of Elementary & Secondary Education)



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## REGULATORY FRAMEWORK

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### ZONING

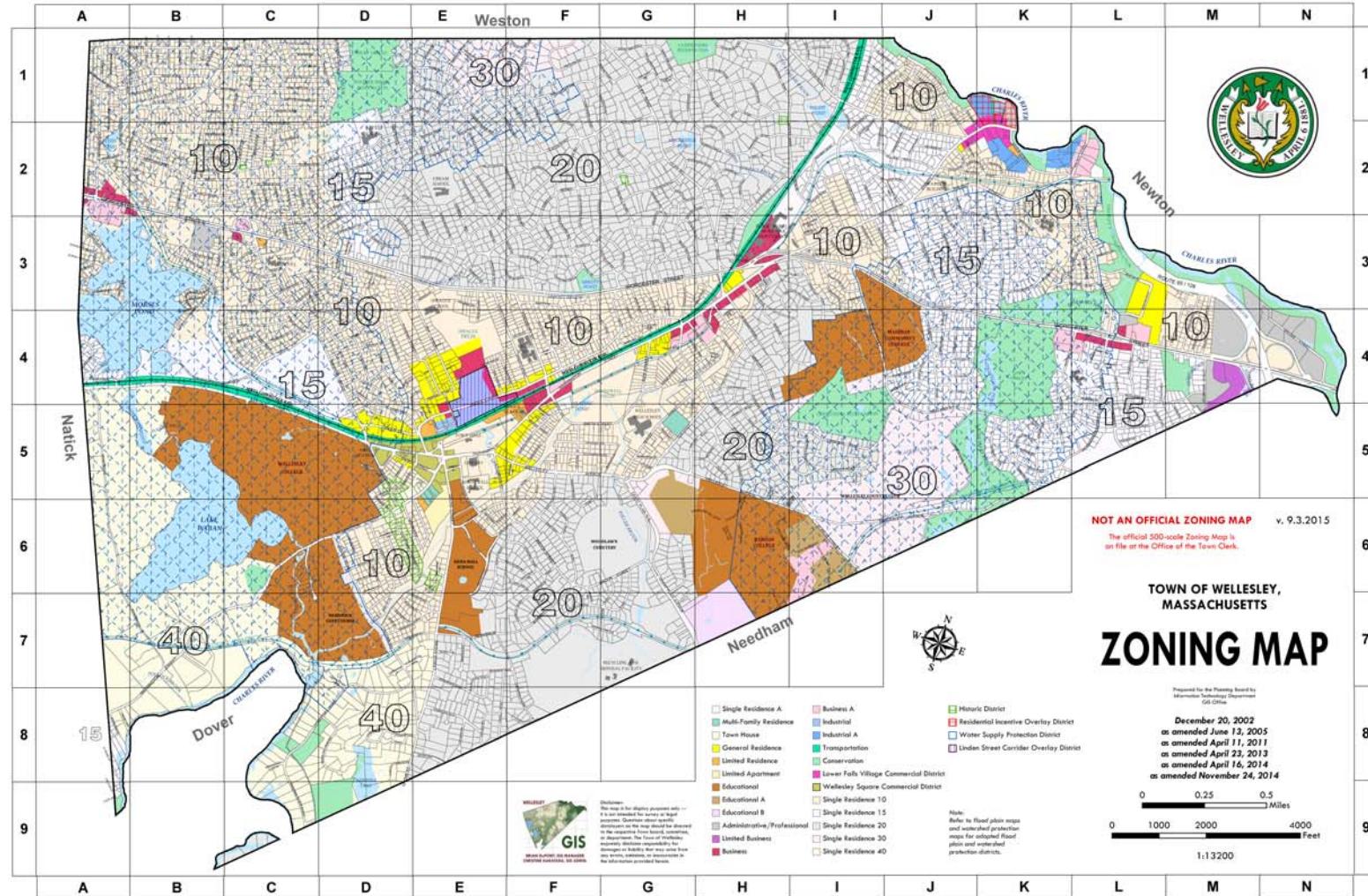
Wellesley's Zoning Bylaw (ZBL) reflects practices and policies that have not kept pace with changes in modern land use regulation. Updated incrementally over time, the ZBL today contains 24 use districts and six overlay districts (Map 3.1), and some unusual project review requirements. It is a difficult bylaw to follow and understand, in part because it has so many districts and in part because it lacks the graphics, illustrations, and use of color that make contemporary bylaws and ordinances much easier to interpret. As Wellesley's *Unified Plan* notes, the town faces several significant land use and zoning challenges due in part to the following conditions:

- Wellesley's mostly built-out character;
- Wellesley has relatively few sites suitable for redevelopment or development;
- There are continuing "character" concerns about tear downs and replacement houses;
- There are concerns about traffic and other potential impacts of additional housing development;
- Wellesley lacks clear design standards and guidelines for impacts on the public realm of private development; and
- Wellesley does not have a consistent venue for boards, commissions, and departmental staff to collaborate about development and preservation issues.

These conditions, coupled with Wellesley's hard-to-navigate zoning, very high land costs, and potential for highly profitable market-rate sales and rents, have contributed to the recent arrival of several Chapter 40B comprehensive permits.

The ZBL in Wellesley is what planners typically describe as "pyramid" or "cumulative" zoning, i.e., a framework that builds from a set of most restrictive districts to less restrictive districts with successively fewer requirements. In Wellesley, the single residence districts are the most restrictive areas and the foundation of the "pyramid." As the permitted density or intensity of use increases in other residential zones and then as commercial and industrial uses are allowed in as well, the uses permitted in more restrictive districts are still allowed. However, single-family or two-family developments would create land use conflicts if they were constructed in the Industrial or Administrative and Professional Districts.

Wellesley has an **inclusionary zoning** provision that applies to developments requiring "Project of Significant Impact" (PSI) approval in the Business Districts, Business Districts A, Industrial Districts, Industrial Districts A, and Wellesley Square Commercial District, and to





any single-family residential development with five or more units.<sup>33</sup> In a given development, the minimum affordable housing requirement is one affordable unit for every five residential units or, in a mixed-use project, one affordable unit per five units plus one per 50,000 sq. ft. of nonresidential floor space. There is no specific density incentive or other cost offset for providing affordable units. Wellesley allows “in-lieu” payments to the Wellesley Affordable Housing Corporation’s trust fund. The amount of the fee per unit approximates the affordability gap described in the previous section.

Wellesley has had a Large House Review (LHR) bylaw since 2008, but the bylaw was recently updated and strengthened. LHR reflects the Town’s concerns about the impact of teardowns and “mansionization” on Wellesley neighborhoods, so the bylaw is triggered by size (floor area) increases. It applies to any proposed residence (new construction or alterations) that will exceed the floor area limit for the single-family district in which it is located, excluding changes to non-conforming properties (handled by the ZBA) or alterations that increase living space within an existing building without any exterior change to the structure, e.g., converting an attic to living space. In Wellesley and most towns with this type of zoning, LHR is a design review process, not a prohibition against large houses. The purpose is to ensure design compatibility and mitigate impacts on neighboring properties. While the Planning Board has final approval powers, the first required step in the permitting process involves the Design Review Board.

Wellesley recently adopted a Natural Resource Protection Development (NRPD) bylaw, too. Apparently inspired by the Natural Resource Protection Zoning (NRPZ) in the Commonwealth’s Smart Growth Toolkit, Wellesley’s NRPD applies to the development of any property that can be divided into five or more lots. It requires at least half the site to be set aside as open space, and through a complicated formula the allowable number of lots can be determined. Unlike most NRPZ bylaws, however, Wellesley sets a floor on the reduced lot size allowed in a covered project, and it does not provide flexibility to mix housing types. All units must be detached single-family residences. The bylaw allows the Planning Board to grant a special permit for relief from NRPD requirements, but only if a different approach to the site would provide as much natural resource protection as a conforming development.

### LOCAL HISTORIC DISTRICTS

There are 67 properties in Wellesley’s Local Historic District, The Cottage Street Historic District. This district contains multiple properties located on Cottage Street, Washington Street, Abbott Street, Waban Street, and Weston Road outside of Wellesley Square.

Four other historic districts are single properties. Wellesley created its first two single building historic districts in 2011: the Methodist Meeting House Historic District and the Tufts House Historic District. The 2014 Annual Town Meeting voted unanimously to approve the creation of two additional single building Historic Districts: the Sylvia Plath House Historic District and the Fiske House Historic District.

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<sup>33</sup> A Project of Significant Impact (PSI) is any development of 10,000 or more sq. ft. or renovation of 15,000 or more sq. ft. in a building of at least 15,000 sq. ft. of existing space, if the proposed use will be different from the existing use. The PSI is a special permit review and approval process.

Towns may establish Local Historic Districts per G.L. c. 40C to protect historic resources. Property owners must submit any exterior changes that are visible from a public way, park, or body of water to a local district commission for approval. A variety of exterior features are often exempt such as air conditioning units, storm doors, storm windows, paint color, and temporary structures. The decision on which features are exempt from review depends on the specifics of the local bylaw. In Wellesley, the Town-appointed Historic District Commission (HDC) oversees the review process, which consists primarily of an application by the property owner, a public hearing, and a written decision by the HDC.

### **NEIGHBORHOOD CONSERVATION DISTRICTS**

Wellesley has one Neighborhood Conservation District (NCD): the Denton Road NCD. NCDs were authorized by vote at Town Meeting in 2007 in response to the increasing pace of home demolitions starting in the early 2000s. An NCD is a legally designated area that can protect property owners in distinctive neighborhoods that may not be eligible for protection as Historic Districts. Unlike Historic Districts that focus on architectural details of individual buildings, an NCD addresses neighborhood characteristics. NCD bylaws set design guidelines that are tailored to the needs of the neighborhood and administered by each NCD's own commission. The NCD commission encourages construction and alterations consistent with neighborhood character.

### **DEMOLITION REVIEW BYLAW**

Adopted in August 2017, the Historic Preservation Demolition Review Bylaw applies to any building used as a dwelling (as defined in the State Building Code) that was built on or prior to December 31, 1949. Under the Bylaw, if an owner intends to demolish such a building, entirely or by removing or enveloping 50 percent or more of the existing exterior structure, then additional review by the Wellesley Historical Commission is required. The Historical Commission may determine if the dwelling should be "preferably preserved." If so, a 12-month delay would be imposed on any permits by the Building Department to demolish the dwelling.

### **LOCAL WETLANDS BYLAW**

Wellesley has a local wetlands protection bylaw that requires varying levels of permitting for activities the Wetlands Protection Committee deems to have an impact on wetland interests and values, including public or private water supply, groundwater, flood control, erosion and sedimentation control, storm damage prevention, water pollution prevention, fisheries, wildlife habitat, and recreation. The Massachusetts Wetlands Protection Act, G.L. c. 131, § 40, and the Wellesley Wetlands Protection Bylaw prohibit altering land, water, or vegetation in lakes, streams, wetlands, floodplains, or areas within 100 feet of wetlands and 200 feet of perennial streams without a permit from the Wellesley Wetlands Protection Committee. Some Bylaw Resource Areas are different from or are not identified in the state wetlands law. An applicant whose project triggers both the state act and local bylaw must comply with the bylaw's more restrictive requirements.

## 4. Housing Goals

### THE CHALLENGE

The 2018 Unified Plan describes the community's vision of Wellesley as a place that welcomes diversity, fosters a sense of community and community building, and preserves the character of the town's residential neighborhoods, commercial centers, and open spaces.

Yet, today Wellesley . . .

- Has little racial, ethnic, or class diversity
- Lacks adequate housing options to support a population with diverse housing needs, including single-person households, 60 percent of which are seniors living alone
- Has little housing that is affordable to households with low or moderate or middle incomes, despite an estimated 17 percent (about 1,445 households) of the town's total households having incomes in the low- or moderate-income range

By preparing this Housing Production Plan and increasing its supply of low- or moderate-income units, Wellesley could become eligible for a flexible approach to managing the comprehensive permit process. To qualify for the flexibility that a DHCD-approved Housing Production Plan offers, Wellesley needs to meet an affordable housing production standard - a minimum numerical target - and obtain certification from DHCD that standard had been met. The minimum target is 0.5 percent of the Town's year-round housing inventory - 45 units - as reported in the most recent decennial census, and the target must be met within a single calendar year. If DHCD finds that Wellesley has met the annual standard, the one-year certification will take effect as of the date that Wellesley achieved the numerical target for that calendar year. If the Town's new affordable housing production is equal to or greater than the 1 percent of its year-round housing inventory (91 or more units), the certification will remain in effect for two years.

### GOAL-SETTING PROCESS

To develop the goals of this Housing Production Plan, the Wellesley Planning Board, Board of Selectmen, and Wellesley Housing Development Corporation sponsored workshops-style public meetings on April 7, May 3, and June 12, 2018. The purpose of these workshops was to engage residents and community members in an interactive process that served to provide information about housing needs, solicit the participants' ideas, and obtain their feedback on draft goals.

Participants had to grapple with an important challenge: How can Wellesley provide for more housing options, including affordable housing to achieve the state's goal under Chapter 40B, while preserving and enhancing the character of the town's residential neighborhoods,

commercial centers, and open spaces? With this core challenge in view, Wellesley's HPP is guided by the following five goals.

**GOAL 1: CREATE A VARIETY OF AFFORDABLE AND MIXED-INCOME HOUSING THAT HELPS TO MAKE WELLESLEY A WELCOMING COMMUNITY FOR PEOPLE WITH DIVERSE SOCIO-ECONOMIC BACKGROUNDS.**

This goal recognizes that an adequate housing supply can help stabilize prices and enhance affordability. Wellesley can promote this goal by overcoming barriers to creating multi-family housing, rental housing, town homes, modest-sized single-family houses on small lots, and accessory dwelling units.

**GOAL 2: PROVIDE MORE HOUSING OPTIONS, INCLUDING AFFORDABLE AND MARKET-RATE HOUSING OPTIONS, FOR LOW- AND MIDDLE-INCOME FAMILIES, SENIORS, AND INDIVIDUALS WITH DISABILITIES, THROUGH A VARIETY OF MECHANISMS TO INCREASE HOUSING CHOICE.**

Similar to the first goal, this goal promotes creating more housing options, but for the purpose of creating more affordable and accessible options, including two-family housing, multi-family housing, conversion of single-family houses to multifamily, accessory apartments and detached accessory dwelling units, mixed-use housing, mansion-style condos, and the community land trust model.

**GOAL 3: ACTIVELY STRIVE TO ACHIEVE STATE'S CHAPTER 40B 10 PERCENT MINIMUM FOR AFFORDABLE HOUSING BY ANNUALLY PRODUCING AT LEAST 45 UNITS THAT COUNT ON THE SUBSIDIZED HOUSING INVENTORY, THROUGH LOCAL ACTIONS AND APPROVAL OF PRIVATE DEVELOPMENT, ESPECIALLY DEVELOPMENT OF RENTAL HOUSING UNITS.**

This goal aligns with a goal of the Unified Housing Plan to create at least 400 housing units that are permanently affordable to income-eligible households by 2028 and would enable the town to achieve "safe harbor" through certification of this Housing Production Plan, once approved locally and by the state. Achieving safe harbor allows the Zoning Board of Appeals (ZBA) more flexibility to deny a Comprehensive Permit application. Per the Massachusetts Department of Housing and Community Development (DHCD) Comprehensive Permit Regulations (760 CMR 56), there are three conditions under which a denial of a Comprehensive Permit will be upheld:

1. The municipality achieves one or more of the Statutory Minima, e.g., the 10 percent minimum;
2. DHCD certifies the municipality's compliance with the goals of its approved Housing Production Plan; or
3. The municipality has made recent progress toward the Statutory Minima (i.e., large project or related application previously received). This goal can be accomplished by permitting one or more developments within one calendar year that increase the SHI by at least 45 units.

**GOAL 4: ENCOURAGE NEW DEVELOPMENT AND REPURPOSING OF EXISTING BUILDINGS TO CREATE AFFORDABLE AND MIXED INCOME HOUSING THAT:**

- Reinforces the development patterns of Wellesley's residential neighborhoods and maintains a predominantly single-family character in established single-family neighborhoods
- Strengthens the vitality of business districts and commercial corridors with diverse housing types
- Promotes housing development in walkable areas with convenient access to shops, services, public transportation, parks, schools, and other neighborhood destinations

Although many residents view Wellesley as largely built-out, there are opportunities to repurpose existing buildings, redevelop underutilized properties, and create infill development in existing residential neighborhoods. Workshop participants expressed the desire for smart, secondary growth that maintains the character of what people want in Wellesley while increasing the value and livability in the town, and they want to move forward in a planned, thoughtful way.

**GOAL 5: PROMOTE THE DEVELOPMENT OF SURPLUS INSTITUTIONAL AND TOWN-OWNED LAND AS WELL AS THE REDEVELOPMENT OF OFFICE PARKS AND EXISTING AFFORDABLE HOUSING COMPLEXES TO CREATE DESIRABLE MIXED-INCOME AND MIXED-USE NEIGHBORHOODS, WHERE FEASIBLE.**

Wellesley has a variety of key transformation areas that could be appropriate opportunities for redevelopment to create mixed-income, multi-family, and/or mixed-use residential developments including properties in commercial areas, office parks, municipal property, and institutional properties.

Wherever possible, it will be important for affordable units produced under this HPP to be eligible for listing in the Chapter 40B Subsidized Housing Inventory (SHI). For non-comprehensive permit units, this means making sure the units meet the requirements of DHCD's Local Initiative Program (LIP) by virtue of a qualifying local action, such as:

1. Zoning approval, such as "by right" or special permits for affordable housing;
2. Funding assistance, such as CPA;
3. Provision of land or buildings that are owned or acquired by the Town and conveyed at a price that is substantially below-market value.

In order to be counted as part of the Subsidized Housing Inventory, the units must meet the following criteria:

1. A result of municipal action or approval;
2. Sold or rented based on procedures articulated in an affirmative fair marketing and lottery plan approved by DHCD;

3. Sales prices and rents must be affordable to households earning at or below 80 percent of area median income; and
4. Long-term affordability is enforced through affordability restrictions, approved by DHCD.
5. Additionally, a Subsidized Housing Inventory New Units Request Form must be submitted to DHCD.

## 5. Housing Development Strategies and Action Plan

### OVERVIEW

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DHCD encourages cities and towns to prepare, adopt, and implement a Housing Production Plan that demonstrates an annual increase in Chapter 40B units equal to or greater than 0.50 percent of the community's year-round housing units. By systematically increasing its low- and moderate-income housing inventory, Wellesley could gain more control over when, where, and how much affordable housing should be built and to encourage Chapter 40B comprehensive permits in the most appropriate locations.

As noted elsewhere in this plan, however, Wellesley's housing needs go beyond Chapter 40B. Just as the town has needs, it also has many options available to address them. Implementing the Unified Plan, removing regulatory barriers to housing production, providing leadership from the Board of Selectmen, Planning Board, and others, making public land available for housing development, and informing the public about Wellesley's varied housing needs will be critical components of a successful housing program. The strategies outlined in this plan fall into four groups, and all the strategies relate in one or more ways to the types of actions this Housing Production Plan is required to address.

- **Regulatory Reform:** These strategies have significant potential in Wellesley and they could be coordinated with implementing the Unified Plan. Policies and techniques to make permitting more efficient, allow more housing and more types of housing in Wellesley, and capitalize on existing assets are all within the Town's reach.
- **Assets:** The focus of these strategies is to protect and improve the quality of existing affordable housing, expand the Town's funding commitments to affordable housing development, and use Town-owned land to increase the affordable housing supply.
- **Leadership, Education, and Advocacy:** Wellesley can combine several approaches into an education program that reaches key decision makers, property owners, neighbors, and people most at risk from the effects of limited housing choices. There is a tendency in Wellesley to view affordable housing as primarily an urban problem more than a matter that affects affluent suburbs, yet this kind of thinking is exactly why Chapter 40B was enacted 49 years ago.
- **Planning and Public Policy:** The Town could become an effective partner with developers and other housing organizations and create a more welcoming environment for housing development. Strategies such as establishing guidelines for "friendly" comprehensive permits could help Wellesley communicate to developers what types of projects are most likely to address local concerns and move quickly through the permitting process. In addition, the Town should move forward with implementing the housing and land use recommendations of the Unified Plan because they will help Wellesley expand affordable housing opportunities in a variety of settings.

## REQUIRED ACTION PLAN ELEMENTS

**760 CMR 56.03(d)(1) Identification of zoning districts or geographic areas in which the municipality proposes to modify current regulations for the purposes of creating SHI Eligible Housing developments to meet its housing production goal.**

### ZONING DISTRICTS<sup>34</sup>

There are at least four zoning districts in Wellesley where the Town could encourage or require affordable units in new development, infill, or redevelopment. These exemplify opportunities for **regulatory reform**. (For district locations, see Map 3.1)

<i>Administration/Professional</i>	
Add multifamily to district's allowed uses	<input checked="" type="checkbox"/>
Put some/all of district in RIO district	<input checked="" type="checkbox"/>
Create Chapter 40R district	<input checked="" type="checkbox"/>
<i>Residential Incentive Overlay</i>	
Apply in more areas than Lower Falls	<input checked="" type="checkbox"/>
Update/make RIO more effective	<input checked="" type="checkbox"/>
<i>Wellesley Square, Linden Street</i>	
Allow upper-story apartments	<input checked="" type="checkbox"/>
<i>General Residence</i>	
Amend to allow "missing middle" housing types	<input checked="" type="checkbox"/>

- The **Administration/Professional (AP) District** covers land in the vicinity of Route 128/I-95 and Route 9. It includes the 22-acre Wellesley Office Park, situated between Route 128 and the Charles River and owned by John Hancock Real Estate. Wellesley has been approached by representatives of the office park and a national multifamily developer with an interest in developing 300 or more apartments in this location. Currently multifamily housing is not allowed in the AP district, but the Town could consider strategies such as:
  - Amending the AP use and dimensional regulations to pave the way for multifamily and mixed-use development, either by special permit or as-of-right, subject to the Project of Significant Impact (PSI) review process;
  - Adding all or a portion of the AP district to the Residential Incentive Overlay (RIO) district, which provides for multifamily development in underlying nonresidential areas, also subject to the PSI review process; or
  - Creating a Chapter 40R overlay district to accommodate multifamily development as-of-right in a specific portion of the AP district. This option can include special site plan review and design review procedures, but since Wellesley's PSI process requires a

<sup>34</sup> We will include map inserts for each of these areas in the public version of the draft plan.

special permit, it could not apply to the Chapter 40R district. At least 20 percent of the units in Chapter 40R developments must be affordable to lower-income households, though many towns have set the minimum affordability requirement at 25 percent (so that all rental units will count on the Subsidized Housing Inventory).

A potential advantage to allowing multifamily and mixed-use development in this location – at densities that can support mixed-income apartments with appropriate amenities – is that the office park can accommodate large buildings without creating an inherent use conflict with abutting single-family neighborhoods. Support for this concept can be found in Wellesley's new Unified Plan, too.

- **Residential Incentive Overlay (RIO) District.** Wellesley created the RIO in 1998 following completion of the Wellesley Lower Falls planning and zoning study (Goody Clancy and Connery; 1997). It applies to portions of the Business, Industrial and AO districts north of Washington Street in the Lower Falls area and allows multifamily development in what are otherwise non-residentially zoned locations. To date, only one developer has used it: National Development, for construction of the Waterstone at Wellesley senior residential community. In addition to considering other locations where the RIO could apply, the Town should evaluate the provisions of this district to determine whether it needs to be updated to make it a more usable tool.
- The **Wellesley Square Commercial (WSC) District** includes the compact commercial village around Central Street, Church Street, Grove Street, Linden Street, and Weston Road. It is a civic, social, and governmental center for the town. This district should be amended to provide for upper-story dwelling units over storefronts. Similar amendments could be introduced in the **Linden Street Corridor (LSCO) District** as well.
- Wellesley's **General Residence (GR) District** needs to be overhauled. It includes neighborhoods around Wellesley Square and Linden Street, along Washington Street by Wellesley Avenue, and in the vicinity of the Wellesley Hills train station. Though zoned for townhouses, this district is governed by density parameters that are quite low for infill and reinvestment. The use regulations would need to be updated, too. The GR district is a classic example of a zone that could encourage so-called "**missing middle**" housing, but the zoning that makes "missing middle" feasible does not exist in Wellesley.



Years ago, the prevailing practice in Wellesley involved codifying development that already existed on the ground and creating new provisions in small, very precise physical units to

accommodate proposed projects. The Zoning Map attests to this history. Innovations such as the Linden Street Corridor Overlay District (LSCOD) came later, but the Euclidean roots of Wellesley's zoning are unmistakable. This practice has led to a proliferation of small, finely tuned districts, a few of which are virtually identical. Moreover, split lots abound in Wellesley – a problem the town has addressed, incrementally, in overlay districts, but most of the town lies in districts with lots that are complicated by more than one set of rules.

## AREAS

As Wellesley looks to implement both this Housing Production Plan and the new Unified Plan, consideration should be given to new zoning innovations in the following areas. Under existing conditions, what the Town actually wants to see in many areas will not be possible without updated zoning and a policy framework that welcomes town-developer partnerships.

Areas	
Route 9 / Cedar Street	
Worcester Street / Route 128	
Walnut Street, Lower Falls	
Wellesley Hills Train Station	
Worcester Street / Fells Road	
Worcester Street / Overbrook	
Wellesley Square Neighborhoods	
Nonconforming Lot Bylaw	

- **Worcester Street (Route 9) and Cedar Street**, which currently consists of several zones, all in small doses: the Business District, Business A, Single Residence 10, AO, and GR.
- **Worcester Street/Route 128**, which includes not only the AO district, but also Single Residence 10 and Limited Business.
- Any of the following areas could be appropriate settings for some “missing middle” housing innovations: land along **Walnut Street in Wellesley Lower Falls**; the vicinity of the **Wellesley Hills train station**; **Worcester Street around Fells Road/Fells Circle/Weston Road** toward the west, or **Worcester and Overbrook** near the Natick town line. Currently, the Worcester Street/Fells Road area includes a mix of Single Residence, Business, and Business A zoning, and Worcester/Overbrook contains some larger Business/Business A properties.
- The **neighborhoods adjacent to Wellesley Square**, which include – in addition to the GR district – the Limited Residence and Multifamily Residence districts. Multifamily Residence exists in only two locations in Wellesley: four small contiguous lots on Washington Street near Wellesley Square and a parcel that extends between Seaver and Park Streets.
- In any of the single-family neighborhoods, the potential may exist to create **small affordable units on nonconforming lots** that are otherwise unbuildable. The units will

probably require some form of subsidy. Still, making additional land available could support production of scattered-site units by mission-based organizations like Wellesley Housing Development Corporation or Habitat for Humanity.

**760 CMR 56.03(d)(2) Identification of specific sites for which the municipality will encourage the filing of Comprehensive Permit applications.<sup>35</sup>**

Wellesley has four opportunity areas where Chapter 40B comprehensive permits would be an appropriate vehicle for providing higher-density multifamily development. Any of these options will require the Town to embrace new ideas about housing **policy** and most likely a commitment of Town funding. Wellesley will need to work in partnership with developers and private property owners, and in some cases the Commonwealth of Massachusetts. Appropriate locations for comprehensive permit applications include the following. Municipally owned sites are discussed in a later section of this chapter.

MassBay Community College	
Sisters of Charity	
Army National Guard	
Barton Road	

- The **MassBay Community College** campus along Worcester Street and Oakland Street clearly has surplus land – that is, land the college does not use and is unlikely to ever need for educational purposes. The Town and Commonwealth should work collaboratively on a disposition plan for surplus property in this location. It is ideally located with direct access to a regional highway and close to the Wellesley Hills train station. Mixed-income housing here could provide options for students, faculty, and others seeking the opportunity to live and work in Wellesley.
- The **Sisters of Charity** property, also off Oakland Street, includes a retirement residence and a considerable amount of vacant land. This property is also close to a community park and single-family residential neighborhoods.
- The former **Army National Guard Reserve** property at the end of Minuteman Lane (off Worcester Street) is another opportunity site.
- The Wellesley Housing Authority's **Barton Road** public housing development needs reinvestment. This project is an older townhouse-style community with 90 family units. Separated from all its neighbors by woodlands and situated directly next to Route 128, the Barton Road housing development is all but segregated from the rest of Wellesley. It needs to be redeveloped, but the capital cost is prohibitive without substantial subsidies and, most likely, relief from some of the requirements that apply to public construction projects under G.L. c. 149. In addition, the project would have to include funding for tenant relocation. According to the Massachusetts Housing Partnership (MHP), the feasibility of

<sup>35</sup> We will include map inserts for each of these areas in the public version of the draft plan.

public housing redevelopment generally requires three market-rate units for each low-income replacement unit.

**760 CMR 56.03(d)(3). Characteristics of proposed residential or mixed-use developments that would be preferred by the municipality (examples might include cluster developments, adaptive re-use, transit-oriented housing, mixed-use development, inclusionary housing, etc.).**

Wellesley has a long-standing policy of protecting established single-family neighborhoods from changes in use. This principle is reinforced by the Zoning Bylaw and articulated in the Unified Plan, its predecessor the Wellesley Comprehensive Plan, and the Affordable Housing Policy. While this policy matters to townspeople, it is critical for residents and town officials to understand that until Wellesley reaches the 10 percent minimum under Chapter 40B, the single-family neighborhoods *will* see more comprehensive permit activity. It will take well-informed leadership and flexible policies to accommodate some residential use changes, especially in older neighborhoods where so much of the demolition/rebuild activity has already taken place.

Multifamily Apartments	<input checked="" type="checkbox"/>
Single Family - Multifamily Conversions	<input checked="" type="checkbox"/>
Cottage-Style Homes	<input checked="" type="checkbox"/>
Accessory Apartments	<input checked="" type="checkbox"/>

Residents who participated in the public meetings for this plan identified some preferences for the types of housing they would like to see in Wellesley. Below are some of the ideas people expressed, together with ways to make comprehensive permit developments as compatible as possible with nearby single-family residences.

- Well-designed **multifamily apartments** could be considered in numerous locations along Worcester Street/Route 9, within the AO district, and near the train stations. Context is everything, so a multi-story development that works well in an office park would not be appropriate along Route 9 on sites that directly abut single-family neighborhoods. Designing for transitions should be part of the plan in these settings, e.g., upper-story step backs, deeper yards with generous buffers, and lower-density housing closer to the neighborhood side of the property.
- Multifamily units can also be created through **single-family conversions**. This approach provides opportunities to preserve some existing older structures instead of losing them to the teardown/rebuild market. It also offers a seamless way to mix housing types in established single-family neighborhoods. This approach to creating more housing options gained many positive responses during the Unified Plan process.
- Clusters of **cottage-style homes** could provide desirable homeownership options both for downsizing seniors and young families. This method of creating housing choices in

Wellesley may be hard for private developers because of the town's exceptionally high land values, but mixed-income cottages could be feasible on private land at a fairly high density or municipally owned land because the town could choose to offer the land at below-market value.

- **Accessory apartments** should be a relatively "barrier free" housing choice in Wellesley. In the past few years, numerous communities have adopted zoning that makes it easier for single-family homeowners to create accessory apartments. By complying with a set of basic requirements and design standards in the zoning bylaw, a homeowner with an eligible property can obtain approval to construct an accessory unit by applying for a building permit and filing a simple site plan. Most towns still require a special permit for free-standing accessory dwellings, e.g., back yard cottages, carriage houses, or units above a detached garage, but an accessory apartment inside a single-family home can be almost invisible to the neighborhood.

**760 CMR 56.03(d)(4). Municipally owned parcels for which the municipality commits to issue requests for proposals to develop SHI Eligible Housing; and/or participation in regional collaborations addressing housing development.**

There are scores of examples of affordable housing on town-owned land in Massachusetts. It is probably one of the easiest strategies for increasing the supply of affordable units in any city or town. Wellesley has recently pursued a town-owned land development strategy through a Request for Proposals (RFP) process for the Tailby Parking Lot at Crest Road and Linden Street.

North 40	
Wellesley DPW/Congregational Church/Community Center	
Open Space-Affordable Housing Partnerships	

- As Wellesley's Unified Plan points out, Wellesley purchased the **North 40** property from Wellesley College to control how the land is used in the future. This parcel is large enough to accommodate multiple uses and meet multiple needs. Representatives of conservation, housing, and other interests must work cooperatively on a disposition plan that can provide as many public benefits as possible, including affordable housing. A compact, dense, low-rise development in this location could create an attractive neighborhood and give future residents of the project easy access to goods and services, and protect most of the land for conservation and open space purposes.
- There could be opportunities to create some affordable or mixed-income housing in **Wellesley Hills** on property owned by the Wellesley Community Center, the Town of Wellesley (Public Works Department), and Wellesley Hills Congregational Church - that is, where Washington Street crosses Worcester Street. A small development in this location would require a partnership of the Town, the non-profit owners of the community center, and the church, but there is land here that is also close to some services and the commuter rail.

- Wellesley's most recent Open Space and Recreation Plan (OSRP) identifies about 30 properties as priorities for **open space** protection. It may be that all the parcels merit protection, but the Planning Department should initiate a process that includes open space, recreation, and housing experts to evaluate the conservation and development suitability of each site. As the town acquires more land for open space in the future, Wellesley could prioritize sites that also have housing potential as part of an ongoing effort to meet both types of needs. The same exorbitant land costs that make open space acquisition challenging in Wellesley also make it difficult to create more affordable housing.

### Participation in regional collaborations addressing housing development.

There are two opportunities for Wellesley to explore regional initiatives for housing, and possibly more. The two most immediate possibilities are as follows.

WestMetro HOME Consortium	
Regional Housing Services Office	

- The **WestMETRO HOME Consortium** includes thirteen communities west of Boston, organized under leadership from the City of Newton. The federal Home Investment Partnership Program - HOME - is a block grant program launched by the U.S. Department of Housing and Urban Development (HUD) under the National Affordable Housing Act of 1990. Since the funds are only available on an "entitlement" basis to cities with very high need indicators, Newton worked early on with neighboring towns to form a consortium that would qualify for entitlement funding under a different set of eligibility criteria. A consortium must be comprised of contiguous cities and towns.

The WestMetro HOME Consortium uses HOME funds to make grants and loans to developers to subsidize deeply affordable housing. Wellesley could take advantage of this resource to assist with acquisition, development, or preservation of affordable units, working with the Wellesley Housing Development Corporation, other non-profits, or for-profit developers.

- The **Regional Housing Services Office (RHSO)**, currently based in Concord, is the brainchild of the Hanscom Area Towns (HATS) Committee and Metropolitan Area Planning Council (MAPC), which worked collaboratively on a study of options for regionalizing housing programs and services. Their efforts led to an interlocal agreement between Bedford, Lincoln, Concord, Lexington, Sudbury, and Weston to form the RHSO. Since its inception, the RHSO has grown to include Acton and Burlington. The RHSO has full-time staff available to help member communities with a wide range of housing services, from managing affordable housing lotteries and monitoring affordable housing restrictions to helping communities plan for affordable housing development.

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## IMPORTANT IMPLEMENTATION TOOLS

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Wellesley needs to increase local capacity to plan for affordable housing, work with state subsidizing agencies, developers, and neighborhoods, and advise the planning department and local officials about broad housing policy issues. Public education about affordable housing – policies, design, who benefits and how, positive and negative impacts – is important for neighbors, policy-makers and leaders, residents and landlords. People with the most accurate knowledge will become the best advocates for affordable housing.

### ONE PLAN, ONE VOICE

The Town's new Unified Plan is the umbrella for this HPP, and it needs to be the principal guidance document for present and future endeavors to meet Wellesley's obligations for fair and affordable housing. The Town has been guided by an Affordable Housing Policy that Town Meeting originally adopted in the late 1980s, and to a point it has value. However, Wellesley has just completed a model planning process and has begun to implement it by undertaking this HPP. Focusing on Unified Plan implementation is the most important step Wellesley can take to create affordable housing *and* manage Chapter 40B. Coupled with details contained in this HPP, the Unified Plan – not the Affordable Housing Policy – should be the standard for evaluating future requests for comprehensive permits and future local initiative opportunities.

### PROVIDE LEADERSHIP AT THE TOP

Chapter 40B was enacted in 1969 at a time when throughout the state, the Zoning Board of Appeals (ZBA) was only town board that could grant special permits and variances, so it made sense to give ZBAs authority for comprehensive permits as well. From a 1969 perspective, local regulations were the main barrier to constructing affordable housing, yet in 1969, both the federal and state governments were consistently subsidizing low-income housing development. At the time, no one could have anticipated the eventual abdication of federal responsibility for housing for the poor, or how the industry would change over the next two decades. The notion that municipalities might provide funding to create low- or moderate-income housing or work as partners with affordable housing developers was barely on the horizon at the end of the 1960s, other than in a handful of progressive towns like Lincoln. The same can be said for comprehensive planning – almost non-existent in suburbs and small towns until the federal government provided Section 701 planning grants in the 1960s.

Since 1969, the roles and responsibilities of cities and towns have changed considerably. Many functions that seem ordinary or essential today did not exist in 1969, e.g., a Council on Aging, a Youth Commission, or a Human Services Department. Forty years ago, no community anticipated that it would ever play a significant, activist role in affordable housing. At best, communities knew in 1969 that the legislature had imposed more permitting responsibilities on them and in many cases, they resented their new-found powers.

By the mid-1980s, it had become clear that local governments had to mobilize for affordable housing development and not simply wait for the arrival of comprehensive permits. Over

time, other municipal officials have taken on new duties and learned the value of collaboration for affordable housing. Working together, the Wellesley Board of Selectmen and Planning Board can help by providing leadership and support for meeting the Town's housing needs. For example, representatives of both boards have participated in a working group to develop this Housing Production Plan. They could also play an instrumental part in building consensus among groups that need to work together to increase the supply of affordable housing in Wellesley. Two key policy-level boards working as partners to convey a unified message about affordable housing would be a significant step forward in Wellesley. Most people do take it seriously when their elected officials lead by example.

On a going-forward basis, the Town should pursue affordable and fair housing training resources for the Board of Selectmen, Planning Board, and other policy-level bodies. Non-profit advocacy and education organizations that provide fair and affordable housing training and technical assistance are listed in the Appendix.

### **CREATE A HOUSING COORDINATOR POSITION**

Positioning Wellesley to build its housing supply in the many ways described in this plan requires resources, including time and money. The Town has well-qualified staff and volunteers dedicated to community planning and housing, and partners who are committed to meeting housing needs. However, there needs to be a central "point person" with the time, authority, and resources to work on housing policy and housing strategies in Wellesley. Like other towns in Massachusetts that are trying to tackle complex housing policy concerns, Wellesley would benefit from having a housing professional on staff to coordinate affordable housing education and policy, work with developers and neighborhoods, serve as liaison with the subsidizing agencies, provide support to the Board of Appeals for comprehensive permits, monitor affordable housing restrictions, and advise Town boards about potential opportunities to increase the supply of affordable housing.

Funding for this position is an allowable use of Community Preservation Act (CPA) funds. An in-house Housing Coordinator or Housing Specialist, coupled with participating in the Regional Housing Services Office, would significantly help Wellesley move forward with implementing this plan and the housing recommendations of the Unified Plan.

### **REVISIT THE POWERS OF THE WELLESLEY HOUSING DEVELOPMENT CORPORATION**

When the Town of Wellesley petitioned the General Court to establish the Wellesley Housing Development Corporation in 1997, the Municipal Housing Trust legislation (G.L. c. 44, §55C) was seven years in the future. Wellesley's petition occurred at a time that many towns were taking similar steps, all for similar reasons: to have a local non-profit vehicle for affordable housing development. Some communities wanted an agent that could work their housing authority or redevelopment authority by acting as a non-profit development partner or pass-through for funding. Others wanted an entity that could become rental property managers for projects developed by other (usually for-profit) organizations. And, still others had access to funding sources like the federal HOME Program or mitigation payments from for-profit developers, and they wanted to establish a local agent to invest those dollars in creating and preserving affordable housing. For these and other reasons, the state legislature passed a

flurry of similar home rule petitions between the mid-1990s and early 2000s, precisely as market was recovering from the deep recession a few years earlier.

However, the Department of Revenue (DOR) became concerned about the variety of special revenue accounts that would have to be tracked, many having unique local rules. This, coupled with passage of the Community Preservation Act (G.L. c. 44B) in 2000 and leadership from the Citizens Housing and Planning Association (CHAPA), provided backdrop for passage of the Municipal Housing Trust bill in 2004.

On one hand, the WHDC's powers mirror those of other non-profit organizations; on the other hand, its ability to exercise those powers hinges almost entirely on approval by the Board of Selectmen.<sup>36</sup> This may work for Wellesley, but a non-profit or semi-public entity that has more autonomy – an organization closer to the concept of a Municipal Housing Trust – could give the Town an entity that has powers similar to the Wellesley Natural Resources Commission, also a product of home rule legislation but with substantially separate authority to carry out its responsibilities.<sup>37</sup> Instead of establishing a Municipal Housing Trust, Wellesley may have opportunities to revise and update the WHDC's status and allow it to work as a more independent agent of affordable housing development. Another model the WHDC may want to review is the **community land trust**, the most widely used vehicle for creating affordable housing in many parts of the United States.

### **PARTICIPATE IN CHAPA'S MUNICIPAL ENGAGEMENT PROGRAM**

Wellesley should consult with the Citizens Housing and Planning Association (CHAPA) about participating in a new initiative, the Municipal Engagement Program. CHAPA has piloted the program this year in two communities (Acton and Medford) and it expects to work with five or six additional communities in 2018-2019. The program's focus is building a broader base of advocates for affordable housing, outside the local government "mainstream," to promote broader and deeper understanding about housing needs and opportunities to address them. The Cape Cod Commission, in partnership with the Housing Assistance Corporation of Cape Cod and the Community Development Partnership, recently conducted a similar program on Cape Cod and plans to offer it again this year.

### **STRENGTHEN PUBLIC INFORMATION AND EDUCATION EFFORTS**

While many residents know first-hand about Wellesley's very high housing prices and some have encountered housing affordability problems, it seems clear that many residents still have negative ideas about what affordable housing is and what having more of it will do to detract from Wellesley's character and prestige. Beyond the three community meetings held for this HPP, Wellesley needs more opportunities to engage residents in conversations about affordable housing, to dispel myths, and to build local support to increase the supply of affordable units.

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<sup>36</sup><sup>36</sup> See Appendix for text of Chapter 311 of the Acts of 1998.

<sup>37</sup><sup>37</sup> Secretary of the Commonwealth, Acts and Resolves, Chapter 555, An Act Authorizing Certain Bylaws and Amending Certain Acts Relating to the Town of Wellesley.

At minimum, the Town should add to its official website a page dedicated to affordable housing. The existing page about current Chapter 40B applications is helpful, but it focuses on the statute and the development applications currently before the ZBA. There is no information about local or regional housing needs, what “affordable housing” is and who is served by it, why the provision of affordable housing is a matter of basic social fairness, and how affordable housing at a variety of levels affects the Town’s and region’s economy. An early task for the new Housing Coordinator would be to develop content for a housing information web page. In addition, well-planned outreach to local groups needs to occur through speakers or information meetings. For example, Wellesley could invite representatives from other towns to speak about innovative housing strategies in their communities, or ask the Massachusetts Housing Partnership to make a presentation about local and regional housing needs at a televised meeting of the Board of Selectmen or Planning Board. Organizing panel presentations with Wellesley’s faith-based communities, realtors, Council on Aging, social services organizations, and others could help to build community awareness, improve communication, reduce misinformation, and enlist support.

The Housing Toolbox for Massachusetts Communities is a helpful resource for educating the community and gaining support for affordable housing. More information about this resource can be found in Appendix.

### **MAKE GOOD USE OF CHAPTER 40B AS A VEHICLE FOR CREATING AFFORDABLE HOUSING**

Wellesley should actively pursue partnerships with non-profit and for-profit developers that have collaborated with cities and towns on so-called “friendly” Chapter 40B developments. This could include providing land or financial support, for having a mortgage interest in projects gives the Town even more control than the comprehensive permit or deed restriction. Investing in well thought-out rental projects should be a priority for the use of local funds. A well-known example of municipal funding that fundamentally changed the outcome for a comprehensive permit project is Easton’s Shovel Shop Village. There, the Town intervened to save a historic mill complex from demolition by a mixed-income housing developer. Easton partnered with another developer and invested \$7.5 million in Community Preservation Act (CPA) funds to save the buildings. The project was permitted under Chapter 40B, not through a zoning change.

### **EXPLORE LOCAL PROPERTY TAX INCENTIVES FOR AFFORDABLE HOUSING**

Affordable housing production will not happen without predictable, adequate funding for acquisition, pre-development, development, management, and monitoring. There is growing interest in Massachusetts (and beyond) in using local government tax policy as a mechanism for creating affordable housing. While there are very few models available, a few cities have established tax incentive programs and recently, the Town of Amherst secured passage of a home rule petition with broad powers to allow special incentives and tax increment financing agreements (TIF) for production of affordable units (Appendix X). Wellesley could consider instituting a similar approach and target it to encourage sustainable projects that can be difficult to carry out, e.g., redevelopment/reuse projects or intensification of existing uses, or to encourage development of employer-assisted housing. Another option is to provide

property tax exemptions to owners who rent units to low- or moderate-income households, similar to a program that has existed in Provincetown for several years.



## 6. Appendix

### X. GLOSSARY

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**Affirmative Fair Housing Marketing Plan (AFHMP).** A plan that meets the fair housing and non-discrimination requirements of the Department of Housing and Community Development (DHCD) for marketing affordable housing units. The plan typically provides for a lottery and outreach to populations protected under the federal Fair Housing Act of 1968, as amended. The plan must be designed to prevent housing discrimination on the basis of race, creed, color, national origin, sex, age, disability, familial status, sexual orientation, gender identity, or any other legally protected class under state or federal law.

**Affordable Housing.** As used in this report, "affordable housing" is synonymous with low- or moderate-income housing, i.e., housing available to households with income that does not exceed 80 percent of area median income and at a cost that does not exceed 30 percent of their monthly gross income.

**Affordable Housing Restriction.** A contract, mortgage agreement, deed restriction or other legal instrument, acceptable in form and substance to the Town, that effectively restricts occupancy of an affordable housing unit to a qualified purchaser or renter, and which provides for administration, monitoring, and enforcement of the restriction during the term of affordability. An affordable housing restriction runs with the land in perpetuity or for the maximum period allowed by law. It should be entered into and made enforceable under the provisions of G.L. c. 184, §§ 31-33 or other equivalent state law.

**Affordable Housing Trust.** The mechanism used to account for and report revenues and expenditures for affordable housing, including but not limited to Community Preservation Act (CPA) receipts and other affordable housing funding sources.

**Age-Dependency Ratio.** A measure defined by dividing the combined populations under 18 years and 65 years and over by the 18-64 years population and multiplying by 100.

**Area Median Income (AMI).** The median family income, adjusted for household size, within a given metropolitan or non-metropolitan area, updated annually by HUD and used to determine eligibility for most housing assistance programs. For Wellesley, AMI is based on the Boston-Cambridge-Newton Median Family Income.

**Average-Income Household.** Loosely defined term for households with incomes over the maximum for affordable housing but typically outpriced by housing costs in affluent suburbs. An income between 81 and 120 percent of AMI generally encompasses average-income households.

Chapter 40A. G.L. c. 40A, the state Zoning Act. The current version of the Zoning Act was adopted in 1975 (1975 Mass. Acts 808).

Chapter 40B. G.L. c. 40B, § 20-23 (1969 Mass. Acts 774), the state law administered locally by the Board of Appeals in order to create affordable housing. It provides eligible developers with a unified permitting process that subsumes all permits normally issued by multiple town boards. Chapter 40B establishes a basic presumption at least 10 percent of the housing in each city and town should be affordable to low- or moderate-income households. In communities below the 10 percent statutory minimum, affordable housing developers aggrieved by a decision of the Board of Appeals can appeal to the state Housing Appeals Committee, which in turn has authority to uphold or reverse the Board's decision.

Chapter 40R. G.L. c. 40R (2004 Mass. Acts 149, s. 92), a state law that provides for overlay districts with variable densities for residential development and multi-family housing by right (subject to site plan review). At least 20 percent of the units in a Chapter 40R district have to be affordable to low- or moderate-income people.

Chapter 44B. G.L. c. 44B (2000 Mass. Acts 267), the Community Preservation Act, allows communities to establish a Community Preservation Fund for open space, historic preservation, and community housing by imposing a surcharge of up to 3 percent on local property tax bills. The state provides matching funds (or a partial match) from the Community Preservation Trust Fund, generated from Registry of Deeds fees.

Comprehensive Permit. The unified permit authorized by Chapter 40B, §§ 20-23, for affordable housing development.

Community Development Block Grant (CDBG). Under the Housing and Community Development Act of 1974, as amended (42 U.S.C. 5300 et seq.), the U.S. Department of Housing and Urban Development (HUD) makes funds available each year for large cities ("entitlement communities") and each of the fifty states (the Small Cities or "non-entitlement" program). CDBG can be used to support a variety of housing and community development activities provided they meet one of three "national objectives" established by Congress. Housing activities are usually designed to meet the national objective of providing benefits to low- or moderate-income people. Funds may be used for housing rehabilitation, redevelopment of existing properties for residential purposes (in some cases), making site improvements to publicly owned land in order to support the construction of new housing, interest rate and mortgage principal subsidies, and downpayment and closing cost assistance.

Community Housing. As defined under Chapter 44B, "community housing" includes housing affordable and available to (a) households with incomes at or below 80 percent AMI and (b) between 81 percent and 100 percent AMI.

Community Land Trust. Community land trusts are nonprofit, community-based organizations designed to ensure community stewardship of land. They are used primarily to ensure long-term housing affordability. To do so, the trust acquires land and maintains ownership of it permanently. With prospective homeowners, it enters

into a long-term, renewable lease instead of a traditional sale. When the homeowner sells, the family earns only a portion of the increased property value. The remainder is kept by the trust, preserving the affordability for future low- to moderate-income families.

**Community Preservation Act.** Chapter 44B. G.L. c. 44B (2000 Mass. Acts 267) allows communities to establish a Community Preservation Fund for open space, historic preservation, and community housing by imposing a surcharge of up to 3 percent on local property tax bills. The state provides matching funds (or a partial match) from the Community Preservation Trust Fund, generated from Registry of Deeds fees.

**Comprehensive Permit.** The unified permit authorized by Chapter 40B for affordable housing development.

**Department of Housing and Community Development (DHCD).** The state's lead housing agency, originally known as the Department of Community Affairs (DCA). DHCD oversees state-funded public housing and administers rental assistance programs, the state allocation of CDBG and HOME funds, various state-funded affordable housing development programs, and the Community Services Block Grant (CSBG) Program. DHCD also oversees the administration of Chapter 40B.

**Disparate Impact.** A legal doctrine under Fair Housing that states a policy may be seen as discriminatory if it has a disproportionately adverse effect on groups protected by the Act. The intent does not have to be discriminative; disparate impact looks at the *effect*.

**Extremely Low-Income Household.** A household income at or below 30 percent of AMI. (In some housing programs, a household with income at or below 30 percent of AMI is called very low income.)

**Fair Housing Act (Federal).** Established under Title VII of the 1968 Civil Rights Act, the federal Fair Housing Act prohibits discrimination in the sale, rental, and financing of dwellings, and in other housing-related transactions, based on race, color, national origin, religion, sex, familial status (including children under the age of 18 living with parents or legal custodians, pregnant women, and people securing custody of children under the age of 18), sexual orientation, gender identity, and disability.

**Fair Housing Law, Massachusetts.** G.L. c. 151B (1946), the state Fair Housing Act prohibits housing discrimination on the basis of race, color, religious creed, national origin, sex, sexual orientation, age, children, ancestry, marital status, veteran history, public assistance recipiency, or physical or mental disability.

**Fair Market Rent (FMR).** A mechanism used by HUD to control costs in the Section 8 rental assistance program. HUD sets FMRs annually for metropolitan and non-metropolitan housing market areas. The FMR is the 40th percentile of gross rents for typical, non-substandard rental units occupied by recent movers in a local housing market. (See 24 CFR 888.)

**Family.** Under the Federal Fair Housing Act (FFHA), family includes any of the following:

- (1) A single person, who may be an elderly person, displaced person, disabled person, near-elderly person, or any other single person; or
- (2) A group of persons residing together, and such group includes, but is not limited to:
  - (a) A family with or without children (a child who is temporarily away from the home because of placement in foster care is considered a member of the family);
  - (b) An elderly family;
  - (c) A near-elderly family;
  - (d) A disabled family;
  - (e) A displaced family; and
  - (f) The remaining members of a tenant family.

**Gross Rent.** Gross rent is the sum of the rent paid to the owner ("contract rent") plus any utility costs incurred by the tenant. Utilities include electricity, gas, water and sewer, and trash removal services but not telephone service. If the owner pays for all utilities, then gross rent equals the rent paid to the owner.

**Group Home.** A type of congregate housing for people with disabilities; usually a single-family home.

**Household.** One or more people forming a single housekeeping unit and occupying the same housing unit. (See definition of Family)

**Housing Appeals Committee (HAC).** A five-member body that adjudicates disputes under Chapter 40B. Three members are appointed by the Director of DHCD, one of whom must be a DHCD employee. The governor appoints the other two members, one of whom must be a city councilor and the other, a selectman.

**Housing Authority.** Authorized under G.L. 121B, a public agency that develops and operates rental housing for very-low and low-income households.

**Housing Cost, Monthly.** For homeowners, monthly housing cost is the sum of principal and interest payments, property taxes, and insurance, and where applicable, homeowners association or condominium fees. For renters, monthly housing cost includes rent and basic utilities (oil/gas, electricity).

**HUD.** See U.S. Department of Housing and Urban Development.

**Inclusionary Zoning.** A zoning ordinance or bylaw that encourages or requires developers to build affordable housing in their developments or provide a comparable public benefit, such as providing affordable units in other locations ("off-site units") or paying fees in lieu of units to an affordable housing trust fund.

**Infill Development.** Construction on vacant lots or underutilized land in established neighborhoods and commercial centers.

**Jobs-to-Housing Ratio.** An indicator of the adequacy of employment and housing in a given community or area.

**Labor Force.** The civilian non-institutionalized population 16 years and over, either employed or looking for work.

**Labor Force Participation Rate.** The percentage of the civilian non-institutionalized population 16 years and over that is in the labor force.

**Local Initiative Program (LIP).** A program administered by DHCD that encourages communities to create Chapter 40B-eligible housing without a comprehensive permit, e.g., through inclusionary zoning, purchase price buydowns, a Chapter 40R overlay district, and so forth. LIP grew out of recommendations from the Special Commission Relative to the Implementation of Low or Moderate Income Housing Provisions in 1989. The Commission prepared a comprehensive assessment of Chapter 40B and recommended new, more flexible ways to create affordable housing without dependence on financial subsidies.

**Low-Income Household.** As used in the terminology of Chapter 40B and DHCD's Chapter 40B Regulations, low income means a household income at or below 50 percent of AMI. It includes the HUD household income group known as very low income.

**Low or Moderate Income.** As used in Chapter 40B, low or moderate income is a household that meets the income test of a state or federal housing subsidy program. Massachusetts follows the same standard as the rest of the nation, which is that "subsidized" or low- or moderate-income housing means housing for people with incomes at or below 80 percent of the applicable AMI.

**Massachusetts Housing Partnership (MHP).** A public non-profit affordable housing organization established by the legislature in 1985. MHP provides technical assistance to cities and towns, permanent financing for rental housing, and mortgage assistance for first-time homebuyers.

**MassDevelopment.** A quasi-public state agency that provides financing for commercial, industrial, and multifamily rental developments and facilities owned by non-profit organizations.

**MassHousing.** A quasi-public state agency that provides financing for affordable housing.

**Mixed-Income Development.** A residential development that includes market-rate and affordable housing.

**Mixed-Use Development.** A development with more than one use on a single lot. The uses may be contained within a single building ("vertical mixed use") or divided among two or more buildings ("horizontal mixed use").

**Moderate-Income Household.** As used in the terminology of Chapter 40B and DHCD's Chapter 40B Regulations, moderate income means a household income between 51 and 80 percent of AMI. In some federal housing programs, a household with income between 51 and 80 percent of AMI is called low income.

**Non-Family Household.** A term the Census Bureau uses to describe households composed of single people living alone or multiple unrelated people sharing a housing unit.

**Overlay District.** A zoning district that covers all or portions of basic use districts and imposes additional (more restrictive) requirements or offers additional (less restrictive) opportunities for the use of land.

**Regulatory Agreement.** An affordable housing restriction, recorded with the Registry of Deeds or the Land Court, outlining the developer's responsibilities and rights

**Section 8.** A HUD-administered rental assistance program that subsidizes "mobile" certificates and vouchers to help very-low and low-income households pay for private housing. Tenants pay 30 percent (sometimes as high as 40 percent) of their income for rent and basic utilities, and the Section 8 subsidy pays the balance of the rent. Section 8 also can be used as a subsidy for eligible rental developments, known as Section 8 Project-Based Vouchers (PBV), which are not "mobile" because they are attached to specific units.

**Shared Equity Homeownership.** Owner-occupied affordable housing units that remain affordable over time due to a deed restriction that controls resale prices, thereby retaining the benefits of the initial subsidy for future moderate-income homebuyers.

**Single Room Occupancy (SRO).** A building that includes single rooms for occupancy by individuals and usually includes common cooking and bathroom facilities shared by the occupants.

**Subsidized Housing Inventory (SHI).** A list of housing units that "count" toward a community's 10 percent statutory minimum under Chapter 40B.

**SHI-Eligible Unit.** A housing unit that DHCD finds eligible for the Subsidized Housing Inventory because its affordability is secured by a long-term use restriction and the unit is made available to low- or moderate-income households through an approved affirmative marketing plan.

**Subsidy.** Financial or other assistance to make housing affordable to low- or moderate-income people.

**Sustainability.** To create and maintain conditions under which people and nature can exist in productive harmony while fulfilling the social, economic and other requirements of present and future generations. For housing, sustainability requires an equity framework that includes affirmative measures to provide greater energy-efficiency and healthy housing, to connect housing to jobs, to improve access to affordable transportation, and to enhance educational opportunity.

Typical, Non-substandard Rental Units. A term that defines the types of rental units that HUD includes and excludes in establishing the FMR for each housing market area. The term excludes: public housing units, rental units built in the last two years, rental units with housing quality problems, seasonal rentals, and rental units on ten or more acres.

U.S. Department of Housing and Urban Development (HUD). The lead federal agency for financing affordable housing development and administering the Fair Housing Act.

Very Low Income. See Extremely Low Income.

Workforce. People who work or who are available for work, either in a defined geographic area or a specific industry.

Workforce Housing. There is no single industry standard that defines “workforce housing.” HUD defines it as housing affordable to households earning between 80 and 120 percent of AMI. The Urban Land Institute has traditionally used the term “workforce housing” to describe units affordable to households with incomes between 60 and 100 percent AMI. By contrast, MassHousing defines “workforce housing” as housing affordable to individuals and families with incomes of 61% to 120% of AMI. In general, workforce housing is housing for people who work in a community and the pricing methodology should account for wages paid by local employers.



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## **X. RESOURCES FOR AFFORDABLE HOUSING INFORMATION, EDUCATION, AND COMMUNITY ENGAGEMENT**

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Housing Toolbox for Massachusetts Communities  
[www.housingtoolbox.org/](http://www.housingtoolbox.org/)

Citizens Housing and Planning Association (CHAPA)  
[www.chapa.org](http://www.chapa.org)

Local Initiatives Support Corporation (Boston Office)  
[www.lisc.org/boston/](http://www.lisc.org/boston/)

Joint Center for Housing Studies at Harvard University  
[www.jchs.harvard.edu/](http://www.jchs.harvard.edu/)

National Low-Income Housing Coalition  
[nlihc.org/](http://nlihc.org/)

MassAccess Housing Registry  
<http://www.massaccesshousingregistry.org/>

National Fair Housing Alliance  
[nationalfairhousing.org/](http://nationalfairhousing.org)

Housing Rights Center  
[www.hrc-la.org/](http://www.hrc-la.org/)

The Fair Housing Center of Greater Boston  
<http://bostonfairhousing.org/>

Massachusetts Affordable Housing Alliance  
[mahahome.org/](http://mahahome.org/)



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## X. SAFE HARBOR STATUS THROUGH HOUSING PLAN CERTIFICATION

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In 2002, the Massachusetts Department of Housing and Community Development (DHCD) created an incentive for cities and towns to take an active role in increasing the supply of affordable housing. By developing a plan that met DHCD's requirements under the Planned Production program, communities could become eligible to deny a comprehensive permit for twelve (or possibly twenty-four) months if they implemented their housing plan by meeting a minimum annual low-income housing production target. The Planned Production program was overhauled in 2008, at which time the planning component became known as the Housing Production Plan.

To qualify for the flexibility that a DHCD-approved Housing Production Plan offers, Wellesley would need to create (through the issuance of permits and approvals) at least twenty-four new low- or moderate-income housing units (or an amount equal to or greater than the 0.50 percent production goal) in a given calendar year and obtain certification from DHCD that the Housing Production Plan standard had been met. Units eligible for the Subsidized Housing Inventory (SHI) will be counted for certification purposes in accordance with 760 CMR 56.03(2):

(2) Subsidized Housing Inventory.

- (a) The Department shall maintain the SHI to measure a municipality's stock of SHI Eligible Housing. The SHI is not limited to housing units developed through issuance of a Comprehensive Permit; it may also include SHI Eligible Housing units developed under G.L. Chapters 40A, 40R, and other statutes, regulations, and programs, so long as such units are subject to a Use Restriction and an Affirmative Fair Marketing Plan, and they satisfy the requirements of guidelines issued by the Department.
- (b) Units shall be eligible to be counted on the SHI *at the earliest* of the following:
  1. For units that require a Comprehensive Permit under M.G.L. c. 40B, § 20 through 23, or a zoning approval under M.G.L. c. 40A or completion of plan review under M.G.L. c. 40R, the date when:
    - a. the permit or approval is filed with the municipal clerk, notwithstanding any appeal by a party other than the Board, but subject to the time limit for counting such units set forth at 760 CMR 56.03(2)(c); or
    - b. on the date when the last appeal by the Board is fully resolved;
  2. When the building permit for the unit is issued;
  3. When the occupancy permit for the unit is issued; or
  4. When the unit is occupied by an Income Eligible Household and all the conditions of 760 CMR 56.03(2)(b) have been met (if no Comprehensive Permit, zoning approval, building permit, or occupancy permit is required.)

Requests for certification may be submitted at any time. DHCD will determine whether Wellesley complies within 30 days of receipt of the Town's request. If DHCD finds that Wellesley complies with the Housing Production Plan, the certification will be deemed

effective on the date upon which Wellesley created new units on the SHI under 760 CMR 56.03(2). The certification will remain in effect for one year from its effective date. If DHCD finds that Wellesley has increased its number of SHI Eligible Housing units in a calendar year by at least 1 percent of its total housing units (91 units), the certification will remain in effect for two years from its effective date.

The certification process would allow the Zoning Board of Appeals to deny a comprehensive permit for twelve months (or twenty-four months, as applicable), or continue to approve projects based on merit. However, if the Board decides to deny a comprehensive permit or impose conditions during the Housing Plan certification period, it must do so according to the following procedures. 760 CMR 56.05(3) and 56.03(8):

- Within fifteen days of opening the public hearing on a comprehensive permit application, the Board has to provide written notice to the applicant, with a copy to DHCD, that denying the permit or imposing conditions or requirements would be consistent with local needs, the grounds that it believes has been met (e.g., a Housing Plan certification is in effect), and the factual basis for that position, including supportive documentation.
- If the Applicant wishes to challenge the Board's assertion, it must do so by providing written notice to DHCD, with a copy to the Board, within fifteen days of receiving the Board's notice, and include supportive documentation.
- DHCD will review the materials provided by the Board and the applicant and issue a decision within thirty days. The Board has the burden of proving that a denial or approval with conditions would be consistent with local needs, but any failure of DHCD to issue a timely decision constitutes a determination in favor of the Town.
- While this process is underway, it tolls the requirement to complete the public hearing and final action within 180 days.

## APPENDIX X. WHDC SPECIAL LEGISLATION (1998)

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### Chapter 311. AN ACT ESTABLISHING THE WELLESLEY HOUSING DEVELOPMENT CORPORATION.

*Be it enacted, etc., as follows:*

**SECTION 1.** There is hereby established a nonprofit housing corporation to be known as the Wellesley Housing Development Corporation, which shall be subject to the supervision of the board of selectmen of the town of Wellesley. Said corporation shall be governed by a board of directors hereinafter referred to as the board. Said board, which is hereby established, shall consist of not less than five members who shall be residents of said town and who shall be appointed by the board of selectmen for staggered three year terms as designated by said board of selectmen. Such appointments shall be made on or before June 30. Members shall serve until their successors are appointed and qualified. Continuing members may act despite a vacancy in said board and, for this purpose, shall be deemed to constitute a full board. A vacancy in the board, however occurring, may be filled by said board of selectmen for the remainder of the unexpired portion of the term.

The board shall exercise its powers and perform its duties for the purpose of investigating and implementing alternatives for the provision of and providing affordable housing for persons of low, moderate and middle income and others whose needs may be identified from time to time in said town. The powers and duties of said board shall be alternative and supplemental to, and not in limitation of, the powers and duties of the Wellesley Housing Authority, established pursuant to chapter 121B of the General Laws. The liability of said board and its members shall be limited to the same extent as the liability of a public employer and public employees as provided in section 2 of chapter 258 of the General Laws.

**SECTION 2.** The board shall have the powers conferred by the provisions of paragraphs (a) to (i), inclusive, and paragraph (k) of section 9 of chapter 156B of the General Laws and the following powers; provided, however, that no such power shall be exercised either in a manner inconsistent with this act or any other general or special law or to carry on any activity which is not in furtherance of the purposes set forth herein:

(a) to adopt, amend and repeal corporate by-laws for the regulation and conduct of its business including, but not limited to, the call and conduct of its meetings, the number of members which shall constitute a quorum and the mode of voting by proxy;

(b) to elect a chairman and vice-chairman, each of whom shall be members of said board, and a secretary and a treasurer, who need not be members of said board and who may be the same person. The treasurer shall give bond for the faithful performance of his duties in a form and amount approved and affixed by the board of selectmen, the cost of which bond shall be paid from funds of said board. The chairman and, in his absence, the vice-chairman shall chair meetings of said board. The secretary shall be the custodian of all books, documents and papers filed with said board and of the minute book or journal of said board;

(c) with the approval of the board of selectmen, to make and execute all contracts and all other instruments necessary or convenient for the exercise of its power and functions, subject to approval of the town counsel as to form;

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(d) with the approval of the board of selectmen, to acquire or lease, by purchase, gift or otherwise, and to own, hold and use, on such terms and conditions and in such manner as it may deem proper, and to exchange, grant options on, sell, transfer, convey, assign, lease, pledge, mortgage, encumber, grant liens on and security interests in, or to otherwise dispose of, on such terms and conditions as it may deem proper, real, personal or mixed real and personal property or any interest, easements or rights therein and assets or revenues of said board, as may be necessary or appropriate to carry out its purposes, it being understood that said board's right to acquire or sell town owned real estate shall be subject to town meeting vote authorizing the same;

(e) with the approval of the board of selectmen, to enter into agreements or other transactions with the commonwealth or a political subdivision or public instrumentality thereof, the United States government or a federal, state or other governmental agency;

(f) with the approval of the board of selectmen, to borrow money and to execute notes therefor which shall not be deemed to be debts or obligations of said town, to hold mortgages and to invest any funds not required for immediate disbursement in such investments as may be lawful for fiduciaries in the commonwealth; provided, however, that said board shall have no stock;

(g) with the approval of the board of selectmen, to enter into contracts or agreements with, and to employ from time to time, contractors, architects, engineers, consultants, attorneys, accountants, construction, financial and other experts, superintendents, managers and such other agents and employees as may be necessary in its judgment and to fix their compensation;

(h) with the approval of the board of selectmen, to receive and hold funds appropriated by the town and other funds, property, labor and other things of value from any source, public or private, by gift, grant, bequest, loan or otherwise, either absolutely or in trust, and to expend or utilize the same on behalf of said board for any of its purposes or to act as an agent or conduit in administering or disbursing funds or financial or other aid from any source; provided, however, that all revenues collected or received by said board in connection with its activities, investments or transactions shall be expended only with the approval of said board of selectmen;

(i) to appear in its own behalf before boards, commissions, departments or other agencies of government, municipal, state or federal;

(j) to procure insurance against any loss in connection with the property or activities of said board, in such amounts and from such insurers as it may deem necessary or desirable and, with the approval of the board of selectmen, to indemnify its members or agents if and to the extent specified from time to time in the by-laws of said board and subject to and in the manner provided in section 6 of chapter 180 of the General Laws;

(k) to formulate and, with the approval of the board of selectmen, carry out or monitor plans for projects involving the acquisition or operation of housing facilities of any kind or nature and to construct, reconstruct, renovate, expand, extend, improve, repair, remodel, equip, furnish, maintain, manage and operate such facilities;

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(l) with the approval of the board of selectmen, to fix and revise from time to time and to charge and collect rates, fees, rentals and other charges and sales prices for or in connection with the use, occupancy or other disposition of any housing facility or other property or portion thereof under its ownership or control;

(m) with the approval of the board of selectmen, to establish, impose, grant or amend, by deed, lease or other means or method, and to hold the benefit of, monitor, exercise and enforce lawful restrictions on the rental, sale, resale, use or occupancy of housing facilities or other property under its ownership or control or other facilities or property designated by said board of selectmen or restrictions with respect to the income of owners, tenants or occupants of such housing facilities or other property or options and rights of first refusal with respect to such facilities or property and to waive, release or discharge any such rights or restrictions; provided, however, that the foregoing shall not apply to any town owned real estate or facilities except upon the vote of the town meeting so voting;

(n) with the approval of the board of selectmen, to enter into, perform or monitor agreements or other transactions with contractors, developers, brokers or other real estate professionals or any other person relating to the providing of affordable housing for persons of low and moderate income in the town;

(o) to do any and all things necessary or convenient to carry out its purposes and exercise the powers conferred by this act.

Said board may delegate to any subcommittee or member of the committee any action which said board is authorized to do or make. Said board may be a partner in any business enterprise which it would have power to conduct by itself.

**SECTION 3.** Notwithstanding the provisions of any general or special law to the contrary, the income, assets and activities of the board shall be exempt from all taxes and assessments and said board shall not be subject to any of the provisions of chapter 63 of the General Laws or to any taxes based upon or measured by property or income imposed by the commonwealth or by any political subdivision thereof. Said board may enter into agreements with the assessor of the town of Wellesley, with the approval of the board of selectmen, wherein said board shall undertake to make to said town annual payments in lieu of taxes in connection with any real property acquired and owned by said board, the amounts of such payments to be reasonable sums stipulated in such agreement or agreements or determined in accordance with a reasonable formula so stipulated.

**SECTION 4.** Without limiting the powers of the board, said board may receive, expend and utilize for its purposes all interests in town owned real estate and proceeds of the sale by the town of Wellesley of certain lands, properties, and surplus buildings, as voted by said town but not otherwise. In addition, said town may appropriate other funds for the carrying out by said board of its purposes as set forth herein. Any appropriation therefor may be raised by said town by taxation. At least annually, said board shall cause independent audits to be made of its books and records of said board, which annual audits shall be filed with the board of selectmen.

**SECTION 5.** In the event that the board shall be dissolved in accordance with law

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## Chap. 311

at any time, all property and interests therein, assets and rights of said board existing at such time shall be transferred to the town of Wellesley and title to all such property and all such rights shall vest in said town automatically without the need for further action or instrument, and said town shall, to the maximum extent permitted by law and acting by and through its board of selectmen, assume, hold and exercise the powers and duties of said board set forth herein with respect to such property and rights so transferred to said town.

**SECTION 6.** This act shall take effect upon its passage.

Approved August 28, 1998.

## Chapter 312. AN ACT RELATIVE TO THE QUALIFICATIONS OF COMMISSIONER OF CODE ENFORCEMENT IN THE CITY OF SPRINGFIELD.

*Be it enacted, etc., as follows:*

**SECTION 1.** Section 2 of chapter 194 of the acts of 1991 is hereby amended by striking out the first sentence and inserting in place thereof the following five sentences:- The commissioner shall be an architect, as defined in section 60A of chapter 112 of the General Laws or a professional engineer, as defined in section 81D of said chapter 112 or shall have had at least five years of experience in the supervision of building construction or design, or in the alternative, a four year undergraduate degree in a field related to building construction or design, or any combination of education and experience which would confer equivalent knowledge and ability, as determined by the state board of building regulations and standards. Said commissioner shall also have general knowledge of the accepted requirements for building construction, fire prevention, light, ventilation and safe egress, as well as a general knowledge of the other equipment and materials essential for safety, comfort, and convenience of the occupants of a building or structure. Said commissioner shall be certified by said state board of building regulations and standards in accordance with the provisions of section 3 of chapter 143 of the General Laws. The city of Springfield may require additional qualifications or experience as it deems necessary. Said commissioner shall be subject to the residency ordinance of said city.

**SECTION 2.** This act shall take effect upon its passage.

Approved August 28, 1998.

## Chapter 313. AN ACT PROVIDING FOR THE CONSTRUCTION OF CERTAIN FACILITIES OF THE MASSACHUSETTS PORT AUTHORITY.

*Whereas*, The deferred operation of this act would tend to defeat its purpose, which is forthwith to provide for the construction of certain facilities of the Massachusetts Port

## Jop, Meghan

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**Subject:** FW: Draft HPP comments  
**Attachments:** DRAFT Wellesley Housing Production Plan 08-2018 copy\_PB.PDF

**From:** Pete Buhler [<mailto:petebuhler1@gmail.com>]  
**Sent:** Saturday, September 01, 2018 12:10 AM  
**To:** Zehner, Michael <[mzehner@wellesleyma.gov](mailto:mzehner@wellesleyma.gov)>  
**Subject:** Draft HPP comments

Hi Michael,

I finally made it through the draft HPP and think its excellent! Very interesting, thorough background info and well-conceived strategies/action plan.

I added all of my comments to the attached doc. and most were edits and wording suggestions. Overall, I think it is very well-written but could use some finesse/clarity where I made the most suggestions at the very beginning and very end.

Let me know if you have any questions about my comments.

Thanks,  
Pete

## **Jop, Meghan**

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**From:** Holly Grace <hollymgrace@hotmail.com>  
**Sent:** Thursday, September 6, 2018 2:46 PM  
**To:** Zehner, Michael; Jop, Meghan  
**Subject:** Support for Housing Production Plan

To the Planning Board and Board of Selectmen,

I write to convey my strong support for the draft Housing Production Plan (HPP). Through my work as an affordable housing professional, I've read the HPPs for many communities across the Commonwealth. Wellesley's draft HPP is well written and outlines reasonable and important goals for the Town concerning housing creation. It also incorporates significant feedback from a long and transparent public process.

I encourage the Planning Board and Board of Selectmen to adopt the Housing Production Plan.

Best regards,  
Holly Grace  
158 Bristol Road  
(617) 285-7380

## Jop, Meghan

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**Subject:** FW: Comments on Draft HPP  
**Attachments:** Next City - Community Land Trusts.pdf

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**From:** Zehner, Michael  
**Sent:** Tuesday, September 04, 2018 12:08 PM  
**To:** 'Tad Heuer' <[tadheuer@gmail.com](mailto:tadheuer@gmail.com)>  
**Subject:** RE: Comments on Draft HPP

Tad,  
Thank you for the thorough review and support! I'll share your comments with the board members shepherding the process and our consultant.

Best,  
Michael

Michael D. Zehner, AICP, LEED Green Assoc.  
Planning Director

Town of Wellesley - Planning Department  
525 Washington Street, Wellesley, MA 02482  
Phone: 781.431.1019 x2234 - Email: [mzehner@wellesleyma.gov](mailto:mzehner@wellesleyma.gov)

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*When responding, please be advised, the Town of Wellesley and the Secretary of State have determined that email could be considered a public record.*

**From:** Tad Heuer [<mailto:tadheuer@gmail.com>]  
**Sent:** Tuesday, September 04, 2018 11:36 AM  
**To:** Zehner, Michael <[mzehner@wellesleyma.gov](mailto:mzehner@wellesleyma.gov)>  
**Subject:** Comments on Draft HPP

Michael -

I wanted to write to provide a few observations and suggestions on the draft HPP. Before doing so, I should note at the outset that the draft is exceptionally well done - thorough, informative, and consolidates a wealth of disparate factual data that I think will help inform not just the Town's affordable housing efforts but many other Town planning efforts as well.

First, it would be valuable for the draft to have a more robust discussion of what role the WHDC can and should play in bringing more affordable housing on line under the plan, as well as what additional tools and policies either WHDC (or perhaps a new municipal entity such as a community land trust, see below) might benefit from having at their disposal.

For instance, as you know, there have been several successful revolving loan funds for affordable housing implemented around the country (see <https://ced.sog.unc.edu/revolving-loan-funds-for-affordable-housing/>), as well as a number of Community Land Trusts (Dudley Square in Boston is an excellent and long-running local

example, <https://www.dudleyneighbors.org/land-trust-101.html>; see also the attached Next City article). A discussion in the HPP of how a revolving fund or CLT option could be implemented or improved upon in Wellesley as an element of an overall HPP would increase the robustness of the draft and the options available to the Town.

Second, it would be valuable for the HPP to discuss in more detail the value-added intersection between historic preservation and affordable housing. This would seem to be particularly promising for a built-out community like Wellesley there is a critical mass of older housing that contributes (both aesthetically and, where renovated, economically) to the character of the community, and where large-scale single-site affordable housing is less practical due to a dearth of available land.

In particular, it would be beneficial if the final HPP could incorporate at least an initial discussion of how CPC funding, zoning amendments, financial incentives, or revolving loan funds (such as New Bedford's very successful WHALE fund, which has frequently assisted in conversions of structures to affordable housing, <http://www.waterfrontleague.org/past-projects/>), might be used to a) incentivize renovation of existing historic residential (or non-residential) structures for affordable housing purposes, or b) incentivize the relocation to Town-owned land of historic homes that would otherwise be torn down, for dedicated use as affordable housing.

For instance, on the latter point, house moving is a more viable option than many believe (e.g., <http://www.sylvesterbuildingmovers.com/>). Many owners of homes they otherwise intend to tear down would presumably value the ability to avoid demolition costs and (potentially) obtain a tax deduction for donating the structure to an entity like WHDC. For the price of the move, WHDC could potentially obtain a structure that would be significantly more costly to build, thus preserving heritage while increasing the affordable housing stock, all at a lower cost to the Town that would otherwise be incurred. Providing this type of option in the Town's affordable housing toolbox would seem to be a win-win.

Finally, two minor points. First, I may be wrong, but I do not believe that Morses is technically a Great Pond, since it is man-made (and thus had no "natural state"). Regardless, it is not included on the state's official list of Great Ponds, which was updated in 2017, which may be the dispositive point.

<https://www.mass.gov/files/documents/2017/09/18/magreatponds.pdf>. Second, it was not immediately clear to me what the green/yellow/red marks next to each strategy option sub-bullet represented. Including a key to any color-coding in the final report is essential.

Let me know if you have any comments or questions about the above, as I am happy to discuss in more detail. Again, congratulations on an excellent draft HPP, which I look forward to voting in favor of at the earliest possible opportunity.

Best,  
Tad Heuer  
17 Abbott Street

## **Jop, Meghan**

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**From:** Zehner, Michael  
**Sent:** Wednesday, September 5, 2018 2:16 PM  
**To:** Jop, Meghan  
**Subject:** FW: housing production plan comments

**Michael D. Zehner, AICP, LEED Green Assoc.**  
Planning Director

Town of Wellesley - Planning Department  
525 Washington Street, Wellesley, MA 02482  
Phone: 781.431.1019 x2234 - Email: [mzehner@wellesleyma.gov](mailto:mzehner@wellesleyma.gov)

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**From:** Zehner, Michael  
**Sent:** Tuesday, August 21, 2018 9:53 AM  
**To:** 'annhowley@aol.com' <annhowley@aol.com>  
**Subject:** RE: housing production plan comments

Ann,  
Thank you for taking the opportunity to review the draft Plan and for sharing your thoughts. I will share them with our consultant, as well as the Selectmen and Planning Board members of the working group that have been assisting in shepherding this process. I believe the reference to the form of government considerations provides necessary context with respect to the environment that exists that makes it more challenging for the Town to proactively address affordable housing issues, pending and potential 40Bs, and the development of a Housing Production Plan. That said, point taken, and perhaps the language can be softened.

Best,  
Michael

**Michael D. Zehner, AICP, LEED Green Assoc.**  
Planning Director

Town of Wellesley - Planning Department  
525 Washington Street, Wellesley, MA 02482  
Phone: 781.431.1019 x2234 - Email: [mzehner@wellesleyma.gov](mailto:mzehner@wellesleyma.gov)

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**From:** [annhowley@aol.com](mailto:annhowley@aol.com) [mailto:[annhowley@aol.com](mailto:annhowley@aol.com)]  
**Sent:** Monday, August 20, 2018 11:29 AM

**To:** Zehner, Michael <[mzehner@wellesleyma.gov](mailto:mzehner@wellesleyma.gov)>

**Subject:** housing production plan comments

Michael, Congratulations on the housing production report... I thought it very thorough and clearly points out where we are and where challenges are... Unlike so many of our town studies which conclude we are doing everything fine, keep going, this one is honest and forthright in what is happening and what needs to be done.

My only concern is the first paragraph of the document ...

I take serious issue with this paragraph as a way to introduce the report that follows... Emphasizing the town manager issue here is way off topic.... Broadly, what relevance does the town manager yes/no issue have to this report? It was a difficult time but town hardly came to a halt during or after and lack of passage can hardly take the blame for our lack of action on affordable housing... that was years in the making... Seriously, it is time we dropped the divisive rhetoric and moved forward - what happened was several years ago now ... time to stop referencing it, especially as this paragraph seems to imply that something wonderful was lost and we are just living with the awful consequences....Honestly, I would ask that a more balanced beginning be used.. surely, we can do a better intro...

Otherwise, really interesting!

Thanks for all your efforts on this.... Ann

## Jop, Meghan

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**Subject:** FW: Thank you for the thorough HPP efforts by you and all

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**From:** Zehner, Michael  
**Sent:** Tuesday, September 04, 2018 10:01 AM  
**To:** 'anne lehman' <[cestannelaure@gmail.com](mailto:cestannelaure@gmail.com)>  
**Subject:** RE: Thank you for the thorough HPP efforts by you and all

Hi Anne-Laure,  
Thank you for sharing your thoughts, I will let the boards know of your support.

Happy Fall to you as well!

Best,  
Michael

Michael D. Zehner, AICP, LEED Green Assoc.  
Planning Director

Town of Wellesley - Planning Department  
525 Washington Street, Wellesley, MA 02482  
Phone: 781.431.1019 x2234 - Email: [mzehner@wellesleyma.gov](mailto:mzehner@wellesleyma.gov)

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*When responding, please be advised, the Town of Wellesley and the Secretary of State have determined that email could be considered a public record.*

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**From:** anne lehman [<mailto:cestannelaure@gmail.com>]  
**Sent:** Saturday, September 01, 2018 9:33 AM  
**To:** Zehner, Michael <[mzehner@wellesleyma.gov](mailto:mzehner@wellesleyma.gov)>  
**Subject:** Thank you for the thorough HPP efforts by you and all

Dear Mike,

Hope you and your growing family enjoyed a fun summer.

I just returned from being away, so my apology for my tardiness on yesterday's deadline.

Having just reread the HPP, as I did some weeks back, I continue to concur with all of its points and appreciate all the diligent efforts that went into creating it.

Looking forward to seeing you soon, and Happy Fall to you all.

Anne-Laure Lehman  
686 Worcester Street

Sent from [Mail](#) for Windows 10

495 A Washington St.

Wellesley, MA. 02482

August 31, 2018

Michael Zehner

Planning Director

Town of Wellesley

525 Washington St.

Wellesley, MA. 02482

Cc: Ellen Gibbs, Jack Morgan

Dear Michael:

This responds to your request for comments on the draft of the Housing Production Plan of August 14.

As a resident of Wellesley for approaching forty years, having raised three kids here, being a voter, a Town Meeting member and an active participant in town activities, I hope to live here a few more years and am very much committed to the town and its continued growth and development.

I appreciate the effort you all have put into developing the Housing Production Plan and find many good ideas in it. In Particular your thoughts on creating a housing coordinator position and the thread of coordination that runs through the sections from pp. 55-59 is very relevant.

The swirl of talk that goes around the words like "affordable" and "40B" is scary to many of us. Some of it is probably valid, but somehow some of it also rings true with all of us in that they are issues that need careful and carrying attention.

For me I'd like very much to see more attention paid to public-private idea and thinking about mixed income projects. I haven't had nor probably more accurately, made the time to visit the Easton project mentioned. But I will do so very soon.

In the meantime I was disappointed to see how little mention or even apparently effort was made in this plan to recognize the presence of the needs and concerns seniors who aren't so called "low income".

As you know I've been working on assembling a more moderately priced continuing care retirement community (CCRC) for Wellesley than is now available, that would be within the means of the mainstream of our residents and their families, who cannot afford the facilities now use. It was Ellen Gibbs who passed the August 14 draft along to me, the result of a very fruitful presentation and discussion we had.

I've got a few more folks to get with and listen to and overall making some good progress. which I would hope to be ready for an RFP. Maybe not necessary to add, the project to be proposed will be for a not-

for profit, professional as can be made, (with my role only as a resident helping to put it together) from market evaluation and architectural design, to engaging a professional, competent and experienced developer/operator to bring it all together, and anchoring it all a mission-based organization to orchestrate and conduct development and operation, a board of directors if you will, who be needed right now, even before the others. Well more to come on that.

Separately as you go forward with this plan I would only ask that you add more specificity; identify just who the people are to be helped, how more specifically they fit in with Wellesley, how you would provide for them without setting them apart as a what could become spectacle, rather than accepted as normal citizens trying to contribute to the community like the full range of citizens now living here.

Thanks for listening,



Dick

[rcarls1@verizon.net](mailto:rcarls1@verizon.net)

617 930 2275

## Jop, Meghan

---

**Subject:** FW: Housing plan comments

---

**From:** Zehner, Michael  
**Sent:** Tuesday, August 21, 2018 5:54 PM  
**To:** 'erin@personaldays.net' <[erin@personaldays.net](mailto:erin@personaldays.net)>  
**Subject:** RE: Housing plan comments

Erin,  
Thank you for reviewing! Please continue to share any thoughts that you may have. Some type of provision for accessory dwelling units is in the cards, and this has been a consideration for at least a decade now as part of the 2007 Comprehensive Plan.

Best,  
Michael

**Michael D. Zehner, AICP, LEED Green Assoc.**  
Planning Director

Town of Wellesley - Planning Department  
525 Washington Street, Wellesley, MA 02482  
Phone: 781.431.1019 x2234 - Email: [mzehner@wellesleyma.gov](mailto:mzehner@wellesleyma.gov)

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*When responding, please be advised, the Town of Wellesley and the Secretary of State have determined that email could be considered a public record.*

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**From:** [erin@personaldays.net](mailto:erin@personaldays.net) [mailto:[erin@personaldays.net](mailto:erin@personaldays.net)]  
**Sent:** Tuesday, August 21, 2018 5:36 PM  
**To:** Zehner, Michael <[mzehner@wellesleyma.gov](mailto:mzehner@wellesleyma.gov)>  
**Subject:** Housing plan comments

First of all, congratulations on an amazing document! I look forward to reading more. As an architect who started her career with an interest in affordable housing, I am pleased to see how comprehensively you are viewing this issue.

My two-cent's worth:

An easy first step is to **relax zoning around having accessory units**. It could be a win-win for seniors in town, allowing them to rent out unused space for income, and maybe company; or to move into one of these smaller units in town, again perhaps connecting them to a family.

Thanks for your work.

Erin Reilly, Architect

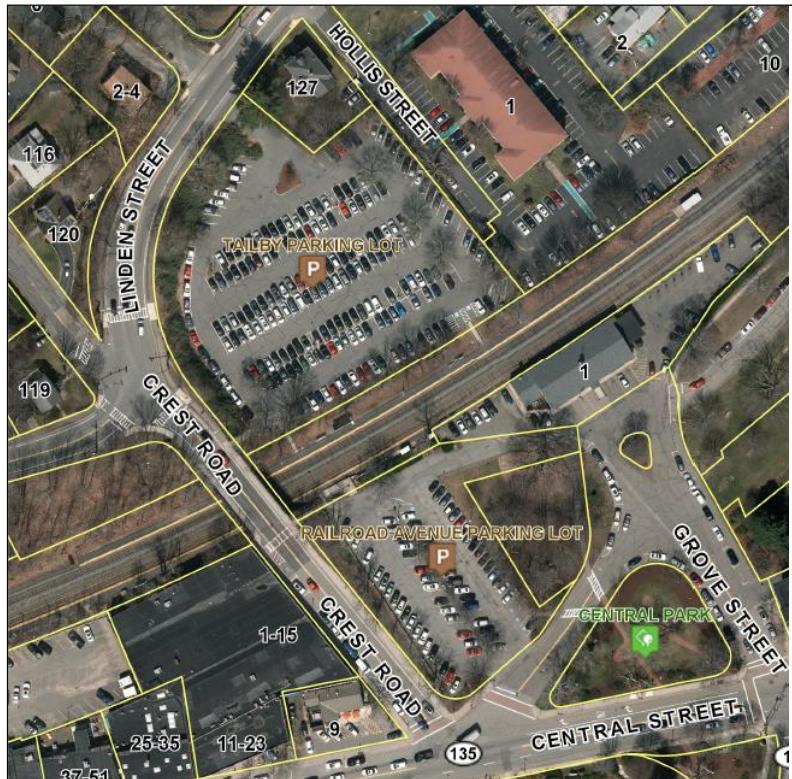
## **7. Discuss Tailby/Railroad Working Group Report**

Please find the report of the Tailby and Railroad Lots Working Group which reviewed and ranked the five proposals received by the Town. As a reminder, the Board authorized the issuance of an RFP which was released on March 29, 2018. The Town received 6 responses on June 1, 2018, of which one respondent later withdrew their response in July. The Town currently has 5 responses that the Board is being asked to consider. The report of the WG identifies the ranking, as well as several considerations for the Selectmen to decide including whether you would like to proceed under this existing RFP to select a respondent to begin negotiations or to issue a secondary RFP. This is the first public deliberation the Board will have had on the responses.

## **NO MOTION**



# TAILBY LOT & RAILROAD LOT - WORKING GROUP



## FINAL REPORT

Sept. 6, 2018

Review of the RFP Responses



# Tailby Lot & Railroad Lot - Working Group Final Report

## REVIEW OF THE RFP RESPONSES

### EXECUTIVE SUMMARY

### WORKING GROUP (WG) MEETING OUTCOMES

The WG had representation from a variety of Town Departments and Town Residents with expertise in architecture, construction, sustainability, real estate development, and finance. The WG initially was intended to meet once to review and rank the responses received. At the close of the RFP process, the Town had received 6 responses for well-established commercial development firms. The synergy of the members and the high participation at the 5 Working Group meetings contributed to the success of the process over the past 8 weeks. Due to the unexpected duration of the review, several WG members could not attend all of the meetings and their scores have not been used in the final product. The WG members whose scoring has been eliminated, but whose contributions have been valuable, include Mr. Grignaffini and Mr. Carley. In between each meeting, members reviewed the responses, summary of discussions, shared input for document accuracy, gathered feedback from within their own departments or constituencies, and completed action items asked of them.

Meeting Date	Meeting Outcome
June 25, 2018	Discussed the following responses: <ul style="list-style-type: none"><li>• Aura-Prizker</li><li>• Berkeley Financial</li><li>• Boston Development Group</li></ul>
June 28, 2018	Discussed the following responses: <ul style="list-style-type: none"><li>• Federal Realty</li><li>• Pennrose</li><li>• Trinity Financial</li></ul>
July 11, 2018	Reviewed a comparative analysis of all 6 responses. Determined the WG should interview candidates. <ul style="list-style-type: none"><li>• Initially contemplated 3-4 interviews, after discussions with Town Counsel offered interviews to all respondents</li></ul>
July 31, 2018	Interviewed 5 of 6 respondents (Boston Development Group withdrew response)
August 20, 2018	Discussed status of RFP and established strategy to finalize the ranking of responses

## WORKING GROUP MEMBERS

In a memo dated May 16, 2018, the Assistant Executive Director recommended a review team be formed to analyze the Comparative Evaluation Criteria of the RFP and to assist the Selectmen Staff in recommending to the Board of Selectmen the top three (3) or four (4) respondents for interviews. The Assistant Executive Director formed the Working Group (WG) which is comprised of Town staff and residents. Throughout the process WG members have participated as they could accommodate into their schedule. Representation has varied, but each WG member has contributed through comments, questions, and participation in at least 2 meetings, most of the members have participated in all of the meetings. The timing of this review has been challenging due to summer vacation schedules.

Town Staff	Board/Community Representative
Executive Director – Blythe Robinson	Selectmen Liaison – Beth Sullivan Woods
Assistant Executive Director – Meghan Jop (WG Facilitator)	WHDC Representative – Tim Barrett
Planning Director – Michael Zehner	Merchant Representative – Demian Wendrow
Senior Planner – Victor Panak	DRB Member- Sheila Dinsmoor
DPW Director – Michael Pakstis	Planning Board Member- Catherine Johnson
Assistant DPW Director – Dave Cohen	College Heights Neighborhood Representative – <b>Annie Newman</b> (architect)
Town Engineer – Dave Hickey	Linden Street Merchant- <b>Joe Grignaffini</b> (former TMM, Builder, Designer)
NRC Director – Brandon Schmitt	Town Meeting Member - <b>Steve Fessler</b> (Real Estate professional)
Building Inspector – Michael Grant	Resident with Real Estate Development Expertise <b>Ed Chazen</b> (former PB member, Professor of Real Estate at Boston College)
Assistant MLP Director – Don Newell	Resident with Real Estate Development Expertise <b>Robert Carley</b> (WHC member, attorney at Massdevelopment)
	Resident with Sustainable Design Expertise – <b>Ellen Watts</b> (former HDC member, architect, Chair, Massachusetts Governor's Zero Net Energy Buildings Task Force, real estate professional)

**Tailby Lot & Railroad Lot - Working Group Final Report**  
**COMPARATIVE ANALYSIS OF RESPONSES**

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**PLEASE SEE ATTACHED MATRIX – ON JULY 27, 2018 BOSTON  
DEVELOPMENT GROUP RETRACTED THEIR PROPOSAL.**



	AURA-Pritzker Wellesley	Berkeley	Federal Realty; Option A	Federal Realty; Option B	Pennrose	Trinity Financial	
Housing	<b>Total Units</b>	150 + 30 (@ 148 Weston Rd)	180	266	234	139	90
	<b>Total Units Added to SHI</b>	125 + 5 (@ 148 Weston Rd)	36	167 + 99 (@ 231 Linden St)?	135 + 99 (@ 231 Linden St)?	139	45
	<b>Total Rental Units</b>	120	180	167 + 99 (@ 231 Linden St)	135 + 99 (@ 231 Linden St)	139	45 incl. 10 live/work units
	Number of Affordable Units	30	36	42 + 25 (@ 231 Linden St)?	34 + 25 (@ 231 Linden St)?	57	23
	Percent Affordable	25%	20%	25%?	25%?	41%	51%
	AMI Affordability	80% of AMI	80% of AMI	unspecified? 80%?	unspecified? 80%?	80% of AMI, with units restricted for lower tiers down to 20%	80% of AMI
	Units Added to SHI	120	36	167 + 99 (@ 231 Linden St)?	135 + 99 (@ 231 Linden St)?	139	45
	<b>Total For-Sale Units</b>	30 + 30 (@ 148 Weston Rd)	0	0	0	0	45
	Percent Affordable	16.60%	0	0	0	0	0
	AMI Affordability	80% of AMI	N/A	N/A	N/A	N/A	N/A
Parking	Units Counting Towards SHI	5 + 5 (@ 148 Weston Rd)	0	0	0	0	0
	<b>Total Parking Spaces</b>	540 + 60 (@ 148 Weston Rd)	559	470 + 180 (@ 231 Linden St)	405 + 180 (@ 231 Linden St)	476	450
	Residential Parking Spaces	240 (5 visitor spaces) + 60 (@ 148 Weston Rd)	224	235 + 150 (@ 231 Linden St)	203 + 150 (@ 231 Linden St)	183	135 + 22 flex
	Residential Parking Ratio	1.6 at Tailby/RR; 2.0 at 148 Weston Rd	1.24	1.4 at Tailby/RR; 1.5 at 231 Linden St	1.5 at Tailby/RR; 1.5 at 231 Linden St	1.3	1.5-1.75
	Public Parking Spaces	300	335	235 + 30 (@ 231 Linden St)	202 + 30 (@ 231 Linden St)	293	293
	Parking Garage/Underground Spaces	540 + 60 (@ 148 Weston Rd)	559	470 + 120 (@ 231 Linden St)	363 + 120 (@ 231 Linden St)	476	450
	Open Air Parking Spaces	0	0	60 (@ 231 Linden St)	42 + 60 (@ 231 Linden St)	0	0
	<b>Total Buildings Square Footage*</b>	352,500	419,362	~370,000	~320,000	292,300	202,000
	Residential Area	198,000	201,166	198,550	166,550	141,148	192,000
	Retail Area	3,500	0	4,500	5,300	0	10,000 (arts space)
Buildings	Parking Area	150,000	211,486	~160,000	145,800	178,800	
	Community Space**	1,000	10,000	1,000	2,500	>500 SF, unspecified	10,000
	*square footage numbers are often estimates or are inconsistent, but these are generally close to accurate						
	**not including open space						
	<b>Total Cost of Construction</b>	\$97,188,600 (w/148 Weston)	\$74,275,986	\$68,795,376	\$72,896,845	\$102,337,980	
	<b>Total Hard Costs</b>	\$47,514,300 + \$14,899,300(@148 Weston)	\$52,498,885	\$57,036,000	* Unable to determine	\$80,482,500	
	Construction Loan	65%-75% interest only (RR), 55%-65% interest only Tailby	50% Loan to Value. East Boston, Peoples, BofA and Santander; End would be 65% Debt and 35% Equity	unclear	65% Construction loan. Series of tax credit programs including Low Income Tax Credit, MassHousing, Mass Works and an assumption of	1.75M of CPC funds.	65% Debt/35% equity
	Equity	30% of Condo and 45% of Rentals	35%	unclear	unclear	unclear	35%
	Estimated Real Estate Taxes	\$757,500 + 337,500 (@148 Weston)	\$720,000	\$896,250	\$291,900 (assumes 40% abatement for affordability)	\$1,614,780	
	Cash Flow Assumption	Positive year 2	Positive year 4	Positive year 1	Positive year 1	Positive year 1	
Financials	Payments to Town	\$ 11,850,000 (infrastructure) and \$1/year rent	\$4,200,000 (cash) and \$10 annual rent grown at 3% every 5 years, OR \$200,000 annually grown at 3% every 5 years	9,400,000 (infrastructure) and \$50,000 annually	\$10,970,000 (infrastructure), \$315,692 (cash), and \$1,500 per market rate unit (total: \$102,000)escalating at 3% annually	\$15,690,000 (infrastructure) and 25% of the development management overhead and fee paid to Trinity (est. \$1.2 million)	
	Parking fee compensation from construction	unclear	Lost revenue limited through phasing of construction and upfront	unclear	covered by upfront ground lease payment (\$315,692)	600,000 over two years	
	Suggested Term of Lease	99 years w/ negotiated extensions	99 years	99 years w/ two 50 yr extensions	99 years but open to shorter term	99 years	
	<b>Proposed Rents</b>		\$3,299	\$3,200			
	Studio	\$2,300					
	1 - bed	\$2,850			\$2,500	\$2,764	
	2- bed	\$3,779			2800/3300	\$3,853	
	3- bed	\$4,925			\$4,600	\$4,858	
	Parking	Parking Revenue 300 covered spaces	NOI \$152,204	unclear - 20% reduction in spaces	Shared parking with residential - remaining information in process proposal	Town parking structure	



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## RFP PROCESS TO DATE- SUMMARY OF WORKING GROUP MEETINGS

### JUNE 25, 2018 MEETING

At the June 25, 2018 meeting the group had an overall discussion of the responses, and then had a more specific discussion of the first 3 responses to be reviewed which were Aura-Pritzker, Berkeley Financial, and Boston Development Group.

#### General Comments included the following:

- Traffic is a driving factor of success for all of the projects. It was suggested that the Selectmen consider doing a preliminary traffic study to consider the existing conditions prior to assessing new projects.
- The WG discussed the creation of a matrix to easily compare proposals. (This has been completed and is attached as Appendix A)
- The WG was largely supportive of having one developer that is a confident builder, not just an investor. The Town wants an experienced builder and working capital to put this in the ground.
- Some felt there was a disconnect with the architecture, mass, and scale of the proposals. Overall, the WG found elements of all 6 responses intriguing.
- The WG was impressed with all of the proposals noting that all of the respondents are capable of completing the projects as proposed. The WG was further impressed with the various urban design proposals including the fact that 2 of the proposals are relying or incorporating land in addition to the Tailby and Railroad Lots. There are also of the 6 proposals, 4 different approaches to the Railroad Lot.
- The WG discussed how the proposals differentiate themselves including the transit oriented designs and improvements to increase walkability. The WG had some reservations about the Town's long-term role in maintaining parking structures proposed. The location of access to the various garage proposals was discussed and distances from garages to shops/restaurants was a concern.
- The WG discussed housing in general and noted the Town's aging population and lack of step down housing. The Town does not have enough starter housing and having step down units, condos or apartments on these sites provides an alternative to the aging population, which in turn increases starter home potential.
- In review of the Railroad Lot, the Station Oak was discussed. Many of the proposals bring some portion of traffic through the gap between the Station Oak and the Post Office, which could impact the tree. The Station Oak's location also hinders the design potential for the area. The WG discussed whether it would be possible to include the Post Office parcel into the proposal. Town staff indicated the Post Office Square was studied several years ago, however the Post Office parcel is privately owned.
- Several members of the WG discussed timing and the construction cycle noting the market will have a shift and this project could get tabled if the Town does not keep moving forward with the project.
- The cost of building the parking structures was a concern, but many found the yield of housing units appropriate. It was noted construction costs are rising based on demand, so the Town needs to diligently keep going through the process.

## Aura-Pritzker

There was some concern about the team concept verses one entity moving forward with the project. With regard to design, there was concern over the circulation of parking and parking lot design. One level has 33 compact car spaces. Many liked the bridge connection option. The WG noted the density of the Delanson project would be downsized with this project only. The WG discussed having to weight proposals against the fact that something will be at Delanson Circle. The WG did find the Townhouse proposal at Delanson much more favorable to the 40B proposal. The density at 148 Weston Road continues to be a concern. The site planning proposed by Aura was not optimal. Many felt the design missed the mark with an urban scale. The landscaping and open space was found to be an afterthought, and the design style did not fit the surrounding neighborhoods, Wellesley Square or Linden Street. Many also felt the parking ratio was high at 1.5 per unit given the amount of town parking. Staff indicated the 1.5 has been considered an optimal threshold as part of the 40B proceedings. The aspects that were successful were the combination of rental units and condominiums, and the proposed connector bridge.

## Berkeley

The WG noted the quality of the team. The WG real estate experts noted they are good developers with a strong money partner from Germany. The industrial design style was found to be inappropriate, especially along the Railroad lot. Many found the curved access along Crest appealing along with the scale and geometry, others found the curve to create a wall along Crest Road which forces pedestrians to the interior of the site. The WG commented that more green space is needed or must be reconfigured to allow more public access. The public space is internally focused with a core that doubles as the entry to the garage. The open space amenities, do not give a sense of public accessibility. The proposed orientation also has all public spaces entirely in shadow. The WG noted the proposed community space.

The WG discussed the Berkeley proposal and was concerned over the singular use of the Railroad lot as a parking structure. The WG liked the availability of parking closer to Wellesley Square, but found the stand alone garage proposal would create a further division between the upper and lower areas of Wellesley Square. Rather than linking the two areas, the parking structure approach was considered to be deactivating the area. The WG were not supportive of adding additional retail in Wellesley Square. There were suggestions of minor restaurant uses such as a breakfast/lunch use, but no retail. The WG discussed the potential change to parking in the next 5-10 years and were concerned over the long term impacts of the large parking garage in the specific location. The WG was further concerned that a singular parking structure would cause a large traffic load at a difficult intersection.

## Boston Development Group

(Discussion included in the report however response was retracted on July 27, 2018)

The WG found this proposal of the three was the only one that uses solar. The concept for the Railroad Lot was unique with a small boutique hotel with a discreet entrance off of Railroad Ave. The WG in general found the building mass was much more approachable and the proposed landscaping components were complimentary to the design. The mass is the skinniest of the proposals which maintained view corridors. The proposal has all of the units being built in the same year, which could impact the parking for merchants and commuters significantly albeit for a shorter duration. Of the 3 proposals reviewed today, many found this

proposal to have the best design, but was lacking specificity and information. There was some concern that the company has not been actively developing for some time and that the Town needed someone who was used to constructing from the ground up, rather than taking over ownership on existing structures. Members of the WG noted a financial partner has not been identified in these materials. The WG noted additional information was needed on the proposed eight furnished apartments serving as rental property within a hotel. There was concern over the appropriateness of the location for a hotel and the economics working long-term. Hotels have high fixed operating, and if the hotel fails, what is plan B. The WG thought the concept could be better explained.

The WG found the proposal focused on connectivity and liked the notion of a pedestrian access across the train tracks. The existing sidewalks are narrow and to enhance pedestrian activity wider sidewalks on either side of the bridge would be helpful. Some members of the WG considered a free standing pedestrian bridge connecting the two sites as the best accessibility option that would also improve traffic flow on Crest Road.

## **JUNE 28, 2018 MEETING**

At the June 28, 2018 meeting the group had an overall discussion of parking, general comments on the responses, and then had a more specific discussion of the second 3 responses to be reviewed which were Federal Realty, Pennrose, and Trinity Financial.

### **Parking Discussion**

- The WG had considerable discussion on parking and the evolution of parking demands. This will be something the Selectmen must consider as technology evolves. The parking discussion was the initial basis for consideration of the issuance of a second RFP. There was substantial discussion on the fact that reduction in parking would only improve the financial feasibility of the projects, therefore on its face that should not require a secondary RFP. The bullets below highlight the main discussion points on parking as related to the development of the Tailby and Railroad lot sites.
- Parking is a problem. Concept of parking is changing. Parking decks and parking structures are antiquated. Do we consider ride shares? What is the benefit to the town?
- The RFP has asked for too many things including Affordable Housing, Parking, and Community space. To accommodate the parking requirements and other uses, the projects have increased the scale of the buildings.
- Parking ratios are too high. The Town having to operate and maintain a parking garage is concerning.
- Parking is needed to accommodate visitors, merchants, employees, commuters who add to Wellesley's economy. Signage needs to be improved to direct drivers to appropriate parking.
- Parking as designed should be adaptable and convertible to other uses as the need for parking is changed over time.
- The proposal is seeking parking for residents and parking for shoppers. The parking for shoppers is concerning as it is unclear whether shoppers would park and walk. Parking for commuters will change and there will be more drop off and ride sharing. Drop off and ride sharing can produce more traffic.
- WG discussed potential for alternative locations for commuter parking such as Linden/Weston Road.
- Should there be dedicated area for employee/merchant parking?

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- Train ridership is not static. When gas prices increase, ridership increases. If a carbon tax is created, ridership will increase and the focus should be on MBTA platform amenities and access.
- Ride shares have increased. There have been 193,000 rides that originated in Wellesley in the past year.
- Storing 300 cars from 9 am – 5 pm all day does not revitalize the downtown. Could a shuttle bus be provided from an alternative location?
- Town should look at best practices from elsewhere. Perhaps Urban Land Institute could be engaged for technical assistance.

## General Comments included the following:

- Designs could be more positive on sustainability. If correctly massed, some of the density would fit. The designs have more building than is needed. An example would a lobby space with 3,000 – 4,000 square feet. Is that space convertible later?
- High priced condominiums are needed to offset the cost of the parking structures.
- 40B has stimulated the work on this project. The fundamental issue with the site is that the below grade topography only has certain uses that can be placed there. What is the highest and best use for the site and parking? On the Railroad Lot there is a programmatic issue.
- How will Delanson 40B and Wellesley Office Park impact the need for affordable housing on these sites. Is affordable housing still the driver for the RFP?
- These two proposals have hired local counsel and include Steve Langer for Federal and Larry Shind for Trinity. Aura-Pritzker has hired David Himmelberger.
- Responses did not indicate how the improvements on the MBTA will be made. High level platforms should be a consideration that run the full length of the waiting areas.
- Continued interest in the Post Office parcel to assist with the developments.
- After review of all the projects, it seems the Town might want to consider restructuring the RFP.
- Continued discussion of eliminating retail from the two lots.

## Federal Realty

The WG found the Federal design to be too dense and poorly executed. The architecture was found to be chaotic. The WG was not opposed to development of the Volkswagen lot in connection with the project, but found the design at Tailby and Railroad lacking. The WG did find Federal to be the strongest developer financially. The WG overall found that Federal could do better.

## Pennrose

The WG found the Pennrose proposal thoughtful and noted its review and consideration of the Unified Plan and the 2007-2017 Comprehensive Plan. The WG was concerned over the complex funding scenario that includes state and federal housing tax credits and local CPA funds. The grants being sought under this proposal are very competitive, and Wellesley is a community that could face difficulties. Some members of the WG noted that tax credits are a risk as corporate income tax has dropped. Tax credits are worth less and may pay less per dollar available. The more an applicant relies on tax credits, the more risk for the

project. There was also concern as to the team's experience in comparable communities in Massachusetts as the company is more Pennsylvania based.

The WG did like the programming which included a 55+ component. The 55+ component was intriguing and assists with the Town's empty nester population. The WG found the respectful development of the MBTA platform appealing. Many liked the open space design, but found the modern architecture stylistically inconsistent with the surrounding commercial and residential districts.

Pennrose had a strong sustainability design with the use of passive house standards. Passive house standards make super insulated buildings that are extremely well ventilated and operate at about 90 % of energy loads. Structures have complete resiliency with power outages. Heat/cool can maintain climate for week or more.

## **Trinity Financial**

Many thought Trinity's proposal was the best proposal from a design and density perspective. The 4 story structures were designed to feel 3 stories in height with the setbacks. The differentiating between brick materials assisted to break up the mass. Some WG members thought the apartments could have slightly more density. The proposed theater was well liked and was to be found to reactivation to the area and met the public amenity request in the RFP. The open space proposed that leads into Wellesley Square is welcoming.

Concerns with the Trinity proposal were that it had the least amount of affordable units to be placed on the Subsidized Housing Inventory compared to the other proposals. The Trinity proposal also separated the affordable and market rate units on the Tailby and Railroad lots. The WG did believe the mixed affordability works best. The proposal included condominiums that were to be sold for over \$2 million, which in Wellesley there is a demand.

The WG also noted that Trinity had a strong sustainable design with the indication of passive house standards, but not a clear explanation.

## **JULY 11, 2018 MEETING**

At the July 11, 2018 meeting the group had an overall discussion on the interview process and potential next steps in the RFP process.

## **General Discussion Items**

The discussion centered around all six proposals including Aura-Pritzker, Berkeley Financial, Boston Development Group, Federal Realty, Pennrose, and Trinity Financial. A matrix has been created so more easily compare the responses received.

The WG had a general discussion on whether to narrow the field for interviews. There was variation in terms of the "right" number of respondents to interview. The WG discussed the benefits of shortlisting. The process for the interviews was discussed and it was recommended that a series of questions be prepared and submitted to the respondents prior to the interview date. It was determined that the Working Group members would submit a ranking of who they would prefer to interview to Ms. Jop.

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The WG questioned if following the interviews whether the WG could open the cost proposals for the land lease. The WG strongly believed that the financial information is integral in understanding the total proposal. Ms. Jop noted she would discuss the matter with Town Counsel.

The WG discussed whether a secondary RFP should be issued. Many of the WG found reissuing the RFP is not going to change the proposals and would not substantially alter responses.

Additional comments on the responses included the following:

### **Sustainability**

Two proposals stand out, but there are tremendous differences in the development teams including design teams.

### **Aura-Pritzker**

The WG noted this proposal is a realistic proposal that addresses the Town's primary concerns with the Aura part of the team's 40B proposals at Delanson Circle and 148 Weston Road. It was agreed the existing 40B projects are not favorable. There was concern whether the team had the wherewithal to execute the proposal. The WG also found the relationship with Pritzker unclear, noting partnerships can generate additional risk. The splayed design shape of the structure on the Tailby Lot raised concerns. Many of the WG found the open space component of the proposal to be an afterthought.

### **Berkeley Financial**

The density of the project was a concern. The standalone parking garage on the Railroad Lot, would provide ample parking to the merchants, but the WG was concerned would significant deactivate the connection between Upper Wellesley Square and Lower Wellesley Square.

### **Boston Development Group**

The WG found the response did not stack up to the other 5 responses in terms of detail and depth of information provided. The WG had concerns over the integration of a boutique hotel with residences and public parking on the smallest component of the site. Members of the WG questioned the viability of a boutique hotel at the density proposed.

### **Federal Realty**

The WG noted that Federal Realty has been a long term financial partner and the WG found the team would make sure the project was built and designed in a responsive way. It was noted that Federal has built projects like this in a lot of communities with mixed housing types. The WG questioned why Federal included the development of the VW parcel with this proposal. The WG overall did find that Federal had significant experience in development, design, and financing projects.

### **Pennrose**

The WG continued to find the submittal a creative proposal, but were concerned as the WG found Pennrose has not built anything like this in the Boston area. The funding proposal included layers of capital, debt financing, grants, and tax credits. The WG was concerned over the complexity of the financial proposal. The

WG found Pennrose had the lowest property tax component. The grants proposed including a Massworks grant were noted as being competitive grants to win. The WG found the equity proposed unclear. A true benefit to the project is it is a highly sustainable proposal.

## Trinity

The WG in general liked the proposal, many suggested the project have more rental apartments as the 45 proposed seemed light in terms of density.

## Town Counsel Follow up

Ms. Jop followed up with Town Counsel who verified that the RFP includes the price proposals as a factor of the comparative evaluation criteria, so the WG is able to review the price proposals. With regards to the interviewing the top responses, Town Counsel disagreed. Town Counsel advised the WG to commit to interview everyone who meets the minimum criteria or no one at all to maintain equity between the responses that have met the minimum qualifications. Town Counsel advised the WG should ask the same questions of all respondents.

## INTERVIEWS – JULY 31, 2018

Interviews were conducted in the order of the WG response to whom individual members wanted to interview. The respondents were interviewed in the order of highest preference to lowest preference. Each respondent gave a presentation and had 50 minutes to address questions that were provided in advance of the meeting. The interview instructions were as follows:

For the first 20 minutes please focus on the development program – housing, parking and public open space/amenity.

1. It is possible that the Town's affordable housing stock will soon be expanded by 90 proposed units at Delanson Circle (current 40B in permitting) and 54 units at 148 Weston Road (current 40B in permitting) and 300-350 newly proposed units at Wellesley Office Park (Selectmen informed on June 5, 2018). With this in mind, would you change the unit mix, ownership models or density proposed in your project? If yes, how? If not, describe the different market segments you anticipated in your original proposal.
2. The RFP required existing parking counts to be maintained, causing parking to dominate many of these proposals. In anticipation of expanding on-demand rideshare services as well as enhanced bike paths and pedestrian routes, the Town is interested in hearing ideas about how to create a more innovative / flexible car management system, especially for the commuter capacity. How would you envision that structured parking could be transformed or adapted if reliability on personal cars is reduced in the next 10-15 years?
3. Describe how the open space component of your proposal interacts with the streetscape, residents, and community at large? How do you believe you have enhanced the commuter experience? How do you believe you addressed the public amenity component?

For the next 30 minutes, explore the “how” with a priority on money and sustainability?

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4. Please discuss your proposed financing of this project – including pre-development costs, participants, debt, equity, tax credits, phasing. What are the key financing challenges? What affect will a possible market downturn have on your performance? In general, why do you believe your proposal is financially advantageous to the Town? [Payments to the Town will be reviewed separately.]
5. Describe a project or two in the recent past that encountered unexpected delays and how the delays were addressed? Has the firm abandoned a project during pre-development in the past 5 years?
6. How will exemplary sustainability be achieved as part of your proposal? What standards do you propose to meet? Who are your LEED accredited team members? Describe your experience with Passive House standards and/or net zero buildings
7. What do you think are the greatest challenges with the viability of your proposal, and how do you intend to meet them if you are selected?

## Trinity Financial

In attendance from Trinity Financial were Patrick Lee, Dan Drazen, Aaron Horne, Tim Smith, Peter Dane, John Martin, Chris Jones, Johnathan Law, and Lauren Baumman.

Patrick Lee, Principal of Trinity Financial introduced the team and project. Dan Drazen, proposed project manager began the presentation identifying the proposal. Trinities proposal includes 90 units, of which 45 market rate units are proposed for the Tailby lot, and 45 mixed income (affordable and market rate) units are proposed on the Railroad lot. Total parking for the development includes 450 total parking spaces. The project includes a 200 seat black box theater that is intended to share parking. Mr. Drazen reviewed previous art gallery spaces that have been developed by Trinity.

The project architecture was reviewed by John Martin, Principal of Elkus Manfredi Architects. Mr. Martin reviewed the design proposal indicating the project is on an urban site in a suburban setting. Mr. Martin reviewed the massing proposed of the project elements, the scale, and density proposed.

Mr. Drazen indicated the project is currently projecting \$1 Million annually in property tax.

A member of the Working Group (WG) asked how the design program was determined. Mr. Martin stated the mass of a four-story structure fit the site. The team noted they reached out to various Wellesley constituencies including the College Heights neighborhood, Wellesley Square Merchants Association, the Wellesley Art Alliance, Sustainable Wellesley, and Wellesley Chamber of Commerce. With regards to the unit mix, the proposal is capturing both rental and condominium needs. Many residents currently in Wellesley are looking to downsize, like the area and amenities and want to stay. The condominiums (approximately 2000 s.f.) capture that segment of the market. The rental component creates alternatives to single family residential. The affordable units are able to capture working to retiree populations.

Mr. Drazen introduced Peter Dane, the team's parking consultant. In answering question #2, he thought it wise for the Town to consider the number of spaces. He stated the proposal delivered the 300 replacement spaces requested. It is possible that the Town might not need all the spaces due to ride share. Should the team be selected, the first step would be to do a parking study right away and jointly determine what number of parking spaces needs to be developed. The whole parking design would be the most flexible optimal design. Half of the parking, not underground, could be developed in an independent garage that could be designed to be taken down or redeveloped. Precast concrete is an example. The parking could be modified to any configuration over time. The project can build spaces with options for over the course of time. The Town could

have 280 spaces and go down further to 150 spaces. The entrance and exit designed is independent and could work jointly to modify the garage. With a precast garage there is minimal cost to demolish. The project has flexibility. The proposal would be to do a study at the outset and see what makes sense. The upper deck could also be converted to additional open space.

WG member Catherine Johnson stated Howard Stein Hudson did an off-street parking study for the town. She indicated Trinity might choose to pay attention to that study in terms of a baseline parking in Wellesley Square followed by the most recent analysis for parking management.

WG member Steve Fessler stated there is an increase in rideshares and having the ability to easily go in and out of site is helpful. How would your concept work for that type of activity?

Mr. Dane stated the same amount of access as is currently proposed would be needed. If we can accommodate 300 vehicles coming in the issues are the same. We think we have accommodated the ability to approach the site in addition to the improvements to the accessibility.

Mr. Lee stated he is not a traffic consultant, and a traffic consultant would be better able to answer the question. If a car means one person going to the train station, there is little change in whether Uber or a car parking can access the site.

Selectmen Beth Sullivan Woods asked about the strategic decision to the location of parking.

Mr. Dane stated there is parking on Railroad lot for tenants in the rental units. All of the commuter parking was aggregated on the Tailby lot for better access in and out onto Linden Street rather than Central Street. With better accessible platforms it allows us to aggregate the parking at the larger site to the rear of the site. Not all parking has to be for residents in the rental units, it gives us flexibility.

Mr. Jonathan Law, landscape architect, discussed the connectivity and open space design. Widening the sidewalk and engaging a plaza and will have hardscape areas and allows a pedestrian to continue to the shops down on Washington Street. The proposal is to remove a section of Railroad Avenue and make it one-way. The plaza provides extra space as an amenity on Central Street. The design tries to reduce the scale to not be imposing on the neighborhood like Delanson 40B was imposing.

Mr. Martin described several theater spaces and the art gallery space that Elkus Manfredi has designed to give a flavor of what the proposed theater would look like.

The WG asked whether the proposed pocket park will be utilized or whether it was needed to break up the massing on Crest Road. Mr. Martin stated the design could flip the U and have more open space on Crest Road. Defining the street edge is an appropriate scale for this part of Wellesley. The front doors have stoops and front yards to separate the residents.

The team discussed the project financing noting Trinity Financial has done 2.4 Billion worth of development. Funding sources include 65/35 debt equity. The team believed they have conservatively underwritten the transaction. It was noted they understand the challenges with retail space so there is not a retail component here. On the black box theater, this is seen as a public amenity, not a large part of the revenue stream. Mr. Lee indicated the concern for the project is that construction prices are rising. The impact of tariffs is already being seen in the construction industry with steel and lumber. Mr. Lee did not think in the next period of time that interest rates will increase, but rising construction costs are the greatest concern.

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Mr. Larry Shind, Counsel, briefly discussed the potential use of zoning the site as a 40R district.

Mr. Drazen discussed a challenging past project completed by Trinity, the Avenir in North Station. Trinity was in predevelopment in 2006 and 2007 and originally programmed the project as condos, and had to reprogram to rental as the market changed. The project was able to go to construction on schedule, was completed and is performing above anticipated rent.

Ms. Lauren Baumann, Sustainable consultant from New Ecology, Inc. a Boston based Nonprofit that partners with development. She stated this project is focusing on energy load reduction and making that building envelope as air tight and insulated as possible. Health and resiliency is a balance. Ms. Baumann discussed the air system designs and other sustainable elements of the building.

## **Pennrose**

In attendance from Pennrose were Charlie Adams, Ed Hodges, Michelle Crowley, Karmen Cheung, Philippe Saad, Alejandra Menchaca, Jessica Knapp, and Sapir Ng/

Mr. Charlie Adams, Regional VP of Pennrose and project manager gave a brief introduction. He stated Pennrose's approach was to look at what elements of the current 40B proposals are abhorrent to the Town. The proposals were incredibly dense. Pennrose did not max out the density, the proposal maintained less than 50 units per acre. It seemed the Town was interested in multi-family condos. The second thing was commuter parking for residents. A tremendous cost to the proposal is parking. Themes of the proposal include open space and building sustainable energy design. Pennrose projects are about creating places. Mr. Adams stated the team feels it created a flexible and robust financing plan, that is a benefit to the project and not a detriment.

Mr. Ed Hodges, principal at Dimella Shafer Architects stated they want to make designs more beautiful, functional, and sustainable. The team is committed to a project with the art of balance. To get balance right you have to be a listener.

Mr. Philippe Saad, associate at Dimella Shaffer Architects, stated over several months a lot of thought has been put into a design to provide the best project to respond to the RFP. The team is inspired by the context of what the Town needs. The site is deeply rooted in Wellesley Square and consideration was given to how to position the project to better serve the community. This is the first pass as a team. Project proposal includes two large buildings on each parcel and 12 townhomes that border Linden Street. The buildings have been sited to minimize impact. The Townhomes are located across from College Heights. The Townhomes have been setback 25 feet from the street. The larger building points the narrow sections of the building towards the street to minimize impact. Two concepts to enhance community to celebrate diversity. The design is acknowledging the marathon route and MBTA plaza and considers how to make them accessible and celebrate transportation while enhancing green space. Connectivity is a main concept with T, Platforms, and how development will connect various areas in the Town. Created a connector for the Crosstown Trail and Wellesley Square. Sustainability is a core value to the project. The team will be working with the Town and will look with sustainability as an overall approach. Our plans are showing bike lanes and pedestrian connections between Wellesley Square and Linden Street. Curb cuts have tried to be maintained. On lower end of site, L shaped building with green roofs are proposed. The design has purposefully closed Railroad Avenue completely and made it into a public space that will enhance traffic.

Ms. Michelle Crowley, Principal Crowley Cottrell, discussed parking. She stated because parking is all underground the design is able to maximize the open space. The concept is to consider all open spaces as multipurpose. Townhouses have some semi-private space for each of them. As we move down to the entrance of the building there is also a MBTA access point which is proposed to have a green roof and access. On the south side of the MBTA a café/coffee shop is proposed at the track level with seating at track level. From Crest Road on the Tailby lot the density has been minimized. At the street is a T plaza with farmer's market. The structure proposed is of wood, masonry, and siding materials. The building is designed with 3 stories with a 4<sup>th</sup> story in a darker shade. Units will have a lot of natural light and balconies. Another perspective was created for the meeting. Commuter platform is below. The design emphasized verticality of the building with direct access from the street. The platform has been re-imagined with a covered space for people to wait, and possibly with the café.

Buildings are stepping down and allow for roof decks and green amenities. With closing of Railroad Avenue, the parks and open space can be rethought. The proposal is to use Railroad Ave as the access to the site. We have enhanced the oak tree and eliminated the road by the post office. Topography has been added by the tracks to separate the park from the MBTA and to buffer the units and the park. A connector to the Crosstown trail has been proposed. Ms. Crowley, presented an alternative for the parking and access to the Railroad lot.

Ms. Crowley discussed the proposed forum space, which is both indoor and outdoor and can be used for public use. The residential units on top of the Railroad lot building have decks and terraces and integrate with the public space. Under option 2, which eliminates Railroad Ave, the forum space can get deeper for different groups in the community including theater, art, etc. The forum would work well as one level with the retail space.

Mr. Adams reviewed the financing of the project. He noted the tax credit funding is one stop shopping. One application is used for multiple funding avenues. Pennrose completed a deal in Eastham and is getting the same type of financing as proposed for the project. Any combination of the subsidizing resources is available for the type of money needed. To make this project more appealable to the State, if the Town submits funds such as CPC it assists the project. This proposal fits into the box and Pennrose has started to have conversations with DHCD. We did research on CPC allocation proposed, and would make the funding open to additional state and federal funding. The workforce funding from MassHousing is similar to other locations. Massworks grants might be able to leveraged to assist with the MBTA. At the end of the day the 3.1 million in tax credits and grants are able to come from multiple sources. The sources are not critical to the development. Pennrose gets tax credits all the time and have a great relationship with DHCD. The financing plan is flexible and robust. In this proposal, only 50% of the units are market rate. This allows us to deliver on the plan. Pennrose did review volatility of the market, noting that tax credits have remained. Pennrose when proposing multi-family both owns the units and manages the units. t

Pennrose is based in Philadelphia, but have been in Massachusetts for 20 years. Pennrose has completed one passive house development in Pennsylvania, and we just broke ground on 76 units in Meridan Connecticut that will be passive house.

Mr. Adams noted Pennrose is a true partner, and the plans can be modified to fit Wellesley. He noted the Town wants someone to get the project through town meeting and that Pennrose could do just that. Pennrose has flexibility and options.

Mr. Adams reviewed the interview questions that Town had transmitted. He noted Pennrose are not going to change the plans based upon the 40Bs in the area. The projects suggested rents have not been very aggressive. The project creates income bands for a number of residents.

Mr. Adams discussed parking. He noted there will be opportunity to further study parking. Is there a way to make parking adaptable? Mr. Adams suggested the plan could accommodate that by making the parking convertible. He stated the project team thinks it could be a resource for other parking as you move forward. For Wellesley there will be more of a need for parking and the team is happy to look at that.

As for the Financing plan, Pennrose will self-fund the project and does not have to bring in an investor. The proposal is to sell tax credits. Another important factor is that Pennrose will provide guarantees. There will not be a partner on the project and Pennrose has never defaulted.

With regards to construction delays, Mr. Adams said most delays can be avoided. It requires proper due diligence. Pennrose would do due diligence on the site, environmental, geo tech, ledge. Our design standards are to bring in a contractor right away with the design team. The team has check-ins every 2 weeks to continually have contractor price the deal. The weather has created delays in the past, and Pennrose worked with contractor to work longer hours and were able to make up the time. Mr. Adams gave an example where the Town they were working in lost several inspectors. IN that instance, Pennrose was able to work with department to find additional resources to bring in a temporary inspector.

Mr. Adams identified the greatest challenges of the project as the Town Meeting process. We need the proposal to be championed. The Town is looking for a thoughtful design which is a big obstacle. Pennrose does a lot of community outreach and we think that is the greatest challenge. We feel that we have a viable design and viable finance plan.

WG member Ellen Watts asked the team's experience on passive house with renewable components.

Mr. Adams stated Pennrose routinely does a lot of solar and geo thermal. We try to look to build those components in to projects. There are not a lot of resources. This comes down to vision. Pennrose worked in CT to support the elements through tax credits to bring additional energy components. For solar we will design a base amount and will set up a contingency for additional solar. In terms of passive house, Pennrose has just finished one at Sacred Heart. We don't have data yet. We are not going to set our rents based on passive house. All our benefits are ancillary, and we are not taking an energy risk. For cost we think it adds 3-5%. On Townhouse style developments it is a challenge.

WG member Steve Fessler stated the project as a differed development fee. What are you looking for returns on?

Mr. Adams stated more conventional gains are through sales. So our return will be a development fee. \$49.9M will be to get them built and would have a 15-year tax credit compliance period. Pennrose is responsible for the operating expenses as well and intends to maintain ownership.

WG member Ed Chazen stated with the unit mix the return is at about 3.5%, not uncommon but low. You are deferring a fee. What is the incentive to move forward with the project?

Mr. Adams stated the team would get a development fee of \$2-3 million and then cash flow. A low income tax credit are investors are only concerned about the tax credit and not the cash flow. At the end of 15-year period there is a buyout. Banks invest to meet requirements of the Community Reinvestment Act, as well as credits. Tax credits still have a price. Tax credits are valued at \$1 and we believe in Wellesley they will trade higher.

WG member Annie Newman stated the project is at 130 units, all rental, and she was unsure whether Town Meeting would find the density to high without any homeownership. She asked if the unit design would change?

Mr. Adams stated Pennrose does do homeownership and can do a percentage of the project as homeownership if the Town prefers to do that. We would not propose 130 condos, but could do 10-20. We arrived at 130 because it is less dense than other projects. We could do more units; the drivers are parking. We have lots of open space. We didn't think that is where the Town wanted to go.

## **Federal Realty**

In attendance from Federal Realty were David Webster, Patrick McMahon, Bryan Furze, Andrea Simpson, Liz Ryan, Michael Binette, John Copley, Brian Beisel, and Stephen Langer

Mr. David Webster, Director of Development, gave the opening remarks and stated Federal's proposal was based on priorities in the RFP and what they understood to be the priorities of the Town to maximize housing and maintain 300 parking spaces. The VW site was included in the proposal to allow the Town to maximize the number of affordable units in a phased manner. The team thought it was a creative approach. Based on conversations, it is understood that is not something that the group wants to consider at this time. Linden Street is a big property at the far end of the street and the Town should consider what they would like to see.

Mr. Webster stated the team considered the question of whether they would change their proposal. The team is interested in working with the Town on whatever the Town wants to achieve on these 2 parcels. An alternative plan with a simple alternative has been provided that reduces the overall density and reduces the density of the Tailby Lot.

Mr. Patrick McMahon, VP of Development, discussed parking. Mr. McMahon stated Federal Realty has been studying parking for some time and understands where technology might intersect with parking. Federal is invested in car and parking technology to track parking. We have installed pucks all in our Somerville garages that track cars and lights for tracking open space. We have been innovative for the better part of 10 years. With regards to autonomous vehicles, Federal has worked for 2 years with Audi funded research in public realm and real estate development for autonomous vehicles and have looked at Somerville, Germany, and Mexico City and how real estate can be designed for in this area. In Somerville at Assembly Row, Federal has designed the garage for driverless technology and it allows us to shrink the garage for conversion. Most garages are sloped. It is the quickest and cheapest way to construct. We designed our garage with flat plates and speed plates so we can begin to convert that space to some other use. Garages do not need floor to ceiling height. We have instituted an increased floor to floor for future uses. Parking and drive aisle widths can be reduced and dimensions can be reduced. Our focus to be innovative.

Mike Binette, Principal of The Architectural Team, stated Wellesley's downtown is inviting, warm, with pedestrian activity. The design initially had buildings contiguous to the streetscape. Initially there were 15

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units on the curve to Linden Street and engaging the walk. That was used to mask the parking and to compliment the bigger building up against the back portion of the site. The intention moving forward would be to have an intensive community process, but based on some of the feedback, we took another look at introducing a significant open space. The new open space encourages the public into the site. Away from the sidewalk, a pedestrian does not ever have the same view. A revised plan provides significant open space along Linden with 2 decks of parking underground. On Railroad Lot, design is reconnecting down Central Street and having access to the garage below and to finish building with residential above. The plans are conceptual designs, but have familiar forms like balconies, detailing this with elements from Wellesley. From Crest Road, encouraging food trucks in a designated area, creating a few grade changes, and a dramatic monumental stair.

Mr. Binette discussed sustainability noting Massachusetts is leading the country with stretch energy code, so to get from the Stretch Code to LEED is not so much of a reach. When you look at the market and how alternative energy and stormwater are integrated it begins to form a comprehensive approach to sustainability. Affordable housing is leading that charge where funding programs require net zero energy and sustainability. Funding is requiring passive house design in PA and NJ. We expect to have an innovative process for this design.

John Copley, Principal of Copley Wolff Design Group, reviewed the proposed landscape. He put the parcels in context to trail system and Wellesley Square. Mr. Copley recognized the village church and Linden Square to bring elements together. Take trail system and new open space and make part of project and name it Crosstown Trail Park. Enhance the trail with 2 public realms that take materials that can be seen through rock walls and create a new park for Town. The goal is to make it a town public space on Tailby, it will be a continuation of the street. Gathering space and a small plaza for food and some play structures.

Infrastructure improvements can slow down water and filter the water quality on the Tailby site. Alexander Golob, Federal's public artist would design art sculpture. Mr. Copley highlighted the elements brought into the new open space plan. Federal is very familiar with place making and examples from Bethesda, Maryland and Somerville were shown.

Mr. Webster stated Federal is a \$9 Billion company and this project will be self-financed and Federal did not envision any debt. Federal historically and traditionally have done our projects. The portfolio over the last 3 years is \$276M to \$337M. This year the development spending is over \$300M. Federal did not anticipate a market downturn would have any impact on the project. In Somerville, Federal began demolishing and acquiring assets in 2008. The project started and didn't collect rents until 2014. Federal invested funds to the project throughout the recession and built out the infrastructure at the front end of the project so it was done and could develop of all of the land. We do not believe a downturn would create a problem.

With regards to lease payment, Federal proposed a \$50K annual payment that is calculated based on the development priorities. Subsidizing the development cost and the rent, and constructing 300 public parking spaces drives the residual value and that is what we can pay to the Town. If the development priorities change, it allows us to pay the Town more.

Federal projects are not typically delayed. The team has not put the shovel in the ground and then abandoned a project. Once Federal starts a development project, we finish it.

Mr. McMahon discussed sustainability noting all recent developments are designed to achieve LEED certifications. What is important for the Town is a holistic approach. The project would be LEED certifiable. Most of what we do is LEED Certifiable. Federal has constructed a LEED Gold office building in Somerville, and has installed PV panels in Maryland. Federal is one of the top 10 companies of solar in the United States that goes back to the grid. We generate 1800 KW hours a year which is 30 million of carbon offset. Federal produces 10,000 pounds of agriculture a year and work to farm to table in Bethesda Row. Mr. McMahon detailed the review of a site. Federal focuses on the spaces between the buildings as much as we focus on the buildings. We took a brownfield site with AULs and have granite that has been found and reused on site. Pulled steel from the building we torn down and made place making elements and then created a 6-acre waterfront park. We also have a team that actively programs the park and does outdoor activities on the site and ties into our realtors and food/beverage.

Mr. McMahon detailed challenges on the site noting there are a lot of objectives including affordable housing, parking, sustainability, net revenue positive for the town, good design for the Town, programming at the street and neighborhood. There is a lot of objectives. To balance that takes a partnership between the citizens, development team and Town. To maximize each one of those takes time and trust. It can't be created in a 2-month response to a RFP. Specifically, how the team thinks and how we approach projects, an example is Bethesda, Maryland. In Bethesda we still own the project and are still evolving. We are still developing and evolving. That is what we want to do at Linden. In order to do so and balance the expectations of the Town takes time and we are a long-term owner and developer. We are hoping to be here in 10 years and saying we no longer need the parking and figuring out how we will convert those spaces. Our intention is to balance the objectives and we look forward to forming a partnership.

Mr. Webster addressed questions on retail. There was generally a consensus that the WG did not want retail. Federal started out as a retail developer, but we have divided our company into two portfolios which includes retail and mixed use divisions. Development of the Tailby site creates connectivity all the way down Linden Street, and around the corner onto Central Street. We did include a small retail component with 4500 sf of retail to improve connections to the east and west on Central Street. We programmed that as a restaurant use and are open to working with the Town. It could be entirely community space or a mix.

Mr. Bryan Furze, VP Asset Management, stated one of the things we have thought to do is to find compatibility. By taking a barrier, the bridge/railroad, to create a bridge to bring people to Linden Street and Wellesley Square together. That is our goal. These two parcels speak to the long term objective.

WG member Steve Fessler stated the WG have had a lot of questions on traffic. We notice Federal has a traffic expert here and asked for his initial recommendations.

Mr. Brian Beisel, Traffic Engineer, Howard Stein Hudson, stated a lot depends on the parking. If we reduce the parking, we are reducing the existing traffic. There are different ways we can clean up the Crest/Central/Washington intersection, but without finalizing the project program it is difficult to say.

The WG asked if the plan is to keep Railroad Ave a two-way street. Mr. Beisel stated closing Railroad Avenue would allow for the creation of a softer entrance to the site, but that would impact the Grove Street intersection. Railroad Ave. could be a one-way roadway that could soften it and improve traffic flow.

WG Member Catherine Johnson asked about the total unit count. Mr. Webster stated the proposal includes 266 total units with the VW site. If the Townhomes are removed the project scope is 150 units.

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Ms. Johns asked about the affordability.

Mr. Webster stated the proposal would follow Chapter 40B and would be at 80% of AMI. Federal Realty would work with the Town in setting the rents between 70% to 80% of AMI.

Ms. Johnson asked for Federal to discuss the connectivity through the wall on the train tracks.

Mr. Webster stated Federal has good experience working with the MBTA in several locations. There are clear discussions that need to be had with the MBTA – from a Wellesley perspective. Converting the stop to more of a hub and historical location. By orienting the park and train it would allow the hitch and ride and drop off. From a pedestrian connection between the two it takes more thought. My initial comment would be to keep the pedestrian activity on the sidewalk. How do you make the track side more inviting? We have track connections on the back edge. Bringing the track population back to the sidewalk is a logical move.

Mr. Furze noted Federal is working with an artist to contribute local art on sidewalk and in proposed park. On August 26<sup>th</sup> a new mural will be unveiled between Wellesley Bank and CPK. We do engage with local artisans to bring in the local flavor. We have also had murals on our building.

WG member Steve Fessler asked how Federal would envision reusing the parking at this location.

Mr. McMahon stated the speed ramps are located closest to One Hollis Street. Driverless vehicles will evolve. The need for parking will shrink over time. The parking that is below grade, and therefore the conversion would be to either dark space or residential in two forms –deep units could be created which are good for live/work or art space. The alternative could be townhouses. Townhouse could be less deep and less wide, and more units could fit along the One Hollis Street edge. It would create a liner of residential around the perimeter of the structures.

WG member Annie Newman asked with the current proposal of 150 units of all rentals, whether condos were considered.

Mr. McMahon stated condos is not something Federal does, but we have done it in large master plans. Federal does not do it because condos are a one-time capital event. We are retailers, so we are based on annualized cash flow. It doesn't impact the value of our company. As a Wellesley resident, I agree there is not a diversity of housing for the demographic that is not a family or does not have large down payment. There are not a lot of apartment products for the young or the elderly in Wellesley. There are no options.

WG member Ellen Watts asked what the project would take to meet passive house?

Mr. McMahon stated Federal does have 2 passive house projects in PA and one in CT. What we are finding is that it a requirement. It adds cost to the existing robust construction market. It is something Federal is doing, but are looking for subsidies. The cost could be upwards of 20%. Federal is familiar with passive house and it is envelope. Because we are long-term and we don't sell we do have a return on investment on sustainability and payout over years. We are a huge solar provider and we see in investment over time.

## **Aura-Pritzker**

In attendance from Aura-Pritzker were Addie Grady, Victor Sheen, Bob Engler, Dartanian Brown, David Himmelberger, Jeffrey Dirk and Peter Holland

Ms. Addie Grady gave a brief introduction noting the team has a proposal for a sound investment with much needed investment. Ms. Grady discussed relationship between Pritzker and Aura, with Pritzker having 51% of the partnership. Ms. Grady stated typically a private developer does not bring the entire equity stack. The equity today needs the capital and the investor is not getting in until the end of the project. The developers often have requirements that they impose on the project. The dynamics can be changed and the project can be changed. The point of contact changes. It is easier to bring the 3<sup>rd</sup> party developer early in the process. Aura-Pritzker has the financial wherewithal and local expertise. Ms. Grady stated she worked with Victor Sheen in Melrose to create redevelopment of a mill. Pritzker is the controlling partner. Our project offers the lowest net density of all the proposals submitted to the Town. The proposal also has the most comprehensive response to the RFP objectives. If the response is selected, the buildings will then be finalized with a collaborative effort.

Ms. Grady stated the proposal has a truly working construction management plan. It ends up being remote and a lot ends up on the Delanson site and the Tailby site. We are the only group that has been able to address construction management comprehensively. The team has reached out to Nausea, Callahan, and Winslow construction companies and they have evaluated the project. The Delanson Circle project density would be shifted to Tailby and would retain 9 units on Delanson. Weston Road would be reduced to 30 units (from 55), and 120 units would be constructed on the Tailby site, with 30 units on the Railroad site. The condos on Railroad and Weston Road are needed to subsidize the parking spaces at the lots. The parking garage is still \$27k - \$30K per parking space. The condos are necessary to subsidize the cost.

Ms. Grady stated the proposal meets the design objectives in a comprehensive way. All of the factors that go into making it work. Our key objectives are to replace and improve parking, add vehicular entrance at Linden Street, maintain a residential parking ratio, improve the MBTA station access by making it welcoming to ADA compliant, and the design will soften edge to neighborhood.

Mr. Dartagnan Brown, Embark Architecture, walked through the proposed architecture noting the main building is a splayed approach that opens out to Linden Street. The team looked at several iterations aligning the building with Linden Street. The Tailby Lot is a splayed out building with 2 court yards with entry from the existing signalized entry. There are 2 entrances to the parking, one at the lights and one further down on Linden Street. The next influence on the design was how to house the parking on site. A stacked parking structure is proposed next to One Hollis street. The building on Railroad lot is an H shaped building to break up the architectural volume on Crest Road. On Central Street the building is pulled back and creates an inviting pedestrian space. Initial discussions have occurred with the MBTA to see how we could create a pedestrian bridge to allow direct access to cross the track. On the way back to the site, pedestrians could enter the garage. Commuter parking would now all be covered. Our thoughts were to have a brick vernacular, but we have not dived into much detail as of yet with regards to building material.

Mr. Brown stated unlike other proposals, the team has control of Delanson and Weston Road lots. Mr. Brown reviewed the construction management plan which allows for parking at Delanson Circle while construction is taking place at Railroad and Tailby. Day 1 of construction would have 275 spaces and after construction of garage was complete over 375 parking spaces would be on site.

Ms. Grady noted parking with a double level of podium parking that goes down below the existing grade is cost prohibitive. There is a lot of ledge that would be blasted. The podium parking is \$55K per space. Precast parking garage is the right way to approach the parking strategy. The team feels we have a realistic

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proposal. The rent assumes \$3.50 per s.f. for rent. That is a high rent, but we do have operating expenses in detail for our underwriting. Ms. Grady stated the rents are high because the construction costs are so high that you couldn't do this project elsewhere due to cost.

The proposal underwrites the condos at \$8 per s.f. It is a stumbling block to lend for a condo on a ground lease. There is an inherit discount that a lender is willing to do when there is a ground lease.

Ms. Grady addressed density. She stated overall net increase from the 40B proposals is only for 35 units. Wellesley Office Park (WOP) is a complimentary project. There is a high demand for rental units in the area. WOP allows for 2-3 years landing. For convenience and renters by choice. This project would be renter by choice. Early 30s' couples that maybe have a child to ultimately be able to buy. It is intended for empty nesters, downsizers, and snowbirds. The units range from 700-1300 s.f. On average it is roughly 1000 square feet per unit. Ms. Grady did see this as downsizing, but do not see the project as one step away from senior living. The team did not anticipate downsizers going to WOP as they can't walk to amenities.

Ms. Grady discussed the Parking strategy indicating 300 spaces are for the Town, 180 parking spaces for rental units, and 60 spaces for condo. The parking ratios are 1.5 for rentals and 2 per unit for the condo. The team thought about what this means for the future and autonomous vehicles. The precast garage can be disassembled. If the parking strategy is reduced through shared uses and reducing the parking ratios, the development can go to a podium strategy that would reduce the total parking and could go to a 5 story structure. The development proposal anticipates having a transit screen that provides all options for transit. We think we could use social media, apps, etc. to better coordinate services.

Mr. Brown discussed the proposed open space. He stated the idea off of Linden Street is to increase the width of sidewalks to 15 feet. The project has a playground and steps the buildings back to have public spaces as you enter the building. Part of study indicated that ground water management occurs along the edge of the site. Using the smaller frontage of 60 feet allows the project to have open space and stormwater management. Playground would have more integrated surfaces that residents and children could engage in. There would be soft seating and benches. We would have some additional hardscape and landscape elements, and would have in the open space 4-5 visitor spaces. The two amenities in the Railroad lot includes, should the Town desire to have retail spaces, flanked along Railroad Ave with spaces for residents and have a café or public space.

Ms. Grady discussed the proposed financing that includes conventional financing with APW as direct developer. We are the equity. Ms. Grady will be made the primary contact as Pritzker is the 51% owner. Ms. Grady stated the Pritzker firm is not Hyatt, and that Ms. Pritzker is now independent and investing her own resources. The Pritzker company is an experienced multifamily developer since 1994 and this is not a hotel developer. We will raise conventional debt through either Wells Fargo or Eastern Bank. Our structure and resources create immunities to the market. We are not subject to a remote 3<sup>rd</sup> partner investors. Ms. Grady noted the APW proposal has clear financial advantages by adding taxes and financing the offsite traffic mitigation

Ms. Grady discussed past experiences with challenges including the Alta Stone Place in Melrose where the team encountered a 20-month delay from the EPA and were able to get the lender stay onboard and the project got through the contamination issues. The cleanup cost \$14M on a 60M project and the team was ultimately able to complete the project.

Ms. Grady discussed the sustainable aspects of the project, stating the team did look at the LEED Checklist and the project can get to LEED certifiable. Ms. Grady is a LEED certified Agent since 2004 and she stated it is important to deliver the most cost effective sustainable design. Solar is also able to be added.

Ms. Grady discussed the project challenges noting the team approach is to identify the challenges early on so we can present something feasible. The team spent a lot of time vetting construction costs, and are able to handle the site logistics. The proposal considers traffic and civil engineer. With regards to project financing, the team has brought the upfront equity to the table. The Town Meeting process is the right way to go to do a rezoning of the site using a bylaw that the team drafted to bring the existing zoning to bear. We also think that since the Town Meeting Members will be voting on the Ground lease that we should have them vote on the zoning language.

WG member Ellen Watts asked if the team has looked harder at a higher level of sustainability for other projects? Such as passive house or net zero.

Ms. Grady stated her personal expertise is in energy conservation.

Ms. Watts asked if passive house is the future why is not affordable yet?

Ms. Grady stated the contractors that execute the fine detailing are as important as the equipment itself. The best way to achieve passive house is to reduce the overall energy first. It requires craftsmanship to execute on tight seals. The labor force is not there yet. To get contractors there it is more time and energy. Technology the heating and cooling is improving, but for multifamily housing it is tough to manage the heating and cooling.

Ms. Grady stated in South Boston a passive house project has been completed, but the cost of the passive house is the burden of the builder not the renters. It does not fit in the market yet. For the Town's project, at this time is not feasible.

WG member Catherine Johnson asked if the construction would use passive house techniques?

Ms. Grady stated the envelope will be critical on this project from an acoustic standpoint. The design will call for extra layers on the windows. The traditional insulation loses a lot of its acoustical qualities.

Selectmen Beth Sullivan Woods asked why all of the affordable rental units are on Tailby. Ms. Grady noted there is a challenge in selling condominiums on a ground lease. She further stated that the apartments were put on the larger site because there are more of them.

WG member Steve Fessler noted traffic is something the WG has talked about. He asked if the team has done preliminary analysis and how they would approach traffic

Mr. Jeff Dirk, Vanasse Associates, stated when everyone is getting off the train, one access on Linden Street to the site creates challenges. The current proposal allows for more dispersal of traffic when the residential traffic is exiting. This option allows for some traffic queuing onsite, and some heading east bound on Linden. We did a model of the proposed ingress/egress with all the buildout and we found adding the access, splitting the traffic, and reconstructing the intersection to operate more efficiently improves the flow. The current traffic controllers are demand responsive so they can more easily accommodate surges of traffic. Traffic improvements would be proposed at the Central/Washington/Grove intersection.

## Berkeley Financial

Interview attendees included Carolyn Zern, Brian O'Connor, Ian McGill, and Henry (?)

Ms. Carolyn Zern gave a brief presentation and indicating that for the interview, Berkeley Financial has taken the opportunity to address design concerns raised at previous WG meetings. The proposal is keeping the affordability at 20% with some 55+ and increasing public space.

Mr. Brian O'Connor, architect from Cube 3, stated the proposal is about 200 parking spaces less in this iteration with a reduction in units from 180 to 150 units. The design has tried to redistribute some of the residential units and how they could be organized to enhance the public spaces and unit density. The initial plan had 180 units with no units on Railroad lot with a parking structure on the Railroad lot. On Tailby, the parking was proposed below grade with the building along the street edges. The design has been reimagined from the ground up. We looked at a technological approach to parking and detailing the edges of the Railroad lot and Crest Road by linking the edges. This proposal has residential units that are single loaded units with advanced car parking that allows the design to line the street with residential units. For Tailby the building has been pulled back and a nice arrival has been created to contribute to open space. The proposed project now would have a total of 385 parking spaces with 44 conventional spaces on Railroad and 100 automated spaces with an automated lift system.

For the Tailby Lot, the revisions include changes to the main parking area with a better drop off area at the front of the site and a ramp to a lower level of parking. There are 230 spaces in this garage. At the track level, there is an access point to the MBTA and this proposal includes creating a community space.

Additionally, there is a sidewalk from Linden to the Community Space. This proposal has a terrace on the back side of the lot with a green space with a public space for pick up and drop off. They presented the new view from Central at Grove. In review of the Railroad lot it was noted that balconies will be added and the main portion of the building will have brick and stone elements. Up from Crest Road, the street edge needs to be activated but there are grades cutting up the hill. This proposal is looking to add stoops to Crest Road with door access from the street. The building has been pulled back from Crest/Linden and the height has been reduced. At Tailby Lot the building has been set back significantly to improve the resident experience. Mr. O'Connor identified possible walking connections from the track to the neighborhood and discussed the commuter experience with an accessible lift. The proposal also includes track side canopies.

Mr. O'Connor discussed the new proposals public amenities which include ADA compliance to track, approved canopies and the improvement of the buildings from various perspectives. He stated he hoped the proposal was responsive to the WG comments.

The WG asked for a clarification on the new proposal. Mr. O'Connor stated it was 35 condos and 120 rental units. At Railroad the proposal is to have shared parking for 1.5 spaces for the condo and then short term merchant parking.

Ms. Blythe Robinson asked about the proposed community room space in the parking structure, which would have limited accessibility to the public.

Ms. Zern stated the proposal associates the space with commuters in an active way. Ms. Zern stated the team would think about the comment, but uses included continuing education as an example.

WG member Catherine Johnson asked what the proposals target market was?

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Ms. Zern stated it is for those people who grew up in Town, but can't afford to buy a house here. It is also for short term stays of 2-3 years. There is such a wealth of people who want to stay here, but can't afford to stay here. The market also includes empty nesters.

Ms. Meghan Jop asked about the 20% affordable percentage. She questioned if the intention was to follow the Town's inclusionary Zoning requirements which are 20%?

Ms. Zern stated getting to Town Meeting and Zoning will be the biggest challenge with variances. The team would anticipate a significant outreach process. We would like to ideally go through a special town meeting. Ms. Zern confirmed the 20% affordable housing is based on the Inclusionary Zoning, similar to the Belclare, but indicated the team can look at increasing the percentage to 25%.

WG member Steve Fessler asked if the modification in the plan modified the financing at all.

Ms. Zern indicated the project would still have the 65/35 debt to equity proposal. Debt proposal includes two different loans.

Mr. Fessler noted the revised proposal was a very creative approach and proposal. He asked how they would like the WG to assess the revisions? HE asked if the team was going to provide the WG with an assessment of the new proposal.

Ms. Zern indicated the backup material can be put together.

Ms. Zern stated that all groups might have come back with modifications. We are happy to give these handouts and the financial package to back these ups.

Working Group Ellen Watts noted that the team mentioned in the previous proposal you had one garage and are taking away revenue which was driving the square footage. Ms. Watts asked whether the team is confident on how they have underwritten this deal?

Ms. Zern indicated both deals work. She stated the previous garage was a podium, this space is comparable. The Condos on the Railroad site is all market rate. We had more parking, by getting the parking more tailored there is less cost than before because we aren't digging down as far. We have not thought of this as a totally new response, but we have thought to keep the existing garage at Railroad and changed the exterior to add condominiums.

Ms. Robinson asked under the revised proposal how many commuter parking spaces would remain>

Mr. O'Conner stated there are 105 for all commuters, but the team did think there is an opportunity for shared space. Mr. O'Conner stated there are about 200 public parking spaces for the site.

Ms. Watts asked the team to discuss the sustainability proposed for the project?

Ms. Zern stated the team does not have passive house or net zero experience. The team recently completed a LEED gold building, and would work with architect and builder.

Mr. O'Connor stated 80% of the work that we do is LEED Certifiable. Mr. O'Connor stated he would ask the Town what they want to see noting there are so many things that can be done including building envelope and systems.

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Mr. Fessler asked where the entry to the Railroad entrance was located.

Mr. O'Connor stated the main entry would be the lounge entry and there is a stairway off of Railroad Avenue. A pedestrian can also come in at the Railroad track portion of the site. It is a four sided building with units wrapping the parking structure.

The WG asked the pricing for the condos.

Ms. Zern indicated the prices would be below the Belclare in the mid \$900,000. The condo unit mix included, 10 1-bedroom and 25 2-bedrooms.

Ms. Sullivan Woods asked if there were amenities for the condos.

Mr. O'Connor stated there are minimal amenities except the lounge/lobby.

Mr. Fessler asked if a pro forma has been done on this proposal with the \$900 s.f. and pricing with automated parking?

Ms. Zern indicated she could get that to the WG.

## **AUGUST 20, 2018 MEETING**

Demian Wendrow, Wellesley Square Merchant Association (WSMA) Representative was not present for the meeting, but sent along comments for the Working Group to consider from the Wellesley Square Merchant's Association. Mr. Wendrow indicated the WSMA were seeking a team who had a comprehensive approach and whose proposal provides the necessary 40B housing, more parking for Wellesley Square, and new vitality for the quality of life in Wellesley Square.

Mr. Wendrow indicated specifically regarding parking in Wellesley Square, insufficient parking has been an ongoing, critical issue for decades. Merchants have continually canvased and surveyed customers about the parking and have never received a favorable reply. The proposed development of the Tailby and Railroad Lots is the opportunity to resolve this with public parking on the Rail Road/Central Street side, especially with a new development with a potential theatre in the conversation. The WSMA were very concerned that consumers will not park on the Tailby side. The WSMA finds that right now the need for more parking is critical and are looking for a developer who can listen and respond to our need for a game plan for if-and-when parking needs change one way or another in the future.

The WSMA find the proposed project is an extraordinary project and will have a long-term impact on the entire town, especially Wellesley Square. They believe the Town needs a developer who truly partners with us, who listens and responds as if they will match our eagerness in making this a stronger community.

The WSMA were interested in whether the Post Office parcel was something the Town would consider acquiring and if so, that would be a good reason to issue a second RFP.

With regards to ranking, Mr. Wendrow and the WSMA strongly found Trinity Financial would be the ideal fit. They found the proposal is comprehensive and they are the one option to have demonstrated a real desire to work with us as team-partners. Trinity has listened to the Merchants' needs, are responsive, and expressed they want to work with the Merchants. Trinity is the only group that reached out to key Wellesley

organizations across the board with a desire to understand what is really needed and desired. Mr. Wendrow indicated the Trinity team was outstanding, the CEO enthusiastic, understanding and willing to listen to what our needs are so changes or suggestions can be made in the best interest for Wellesley. Mr. Wendrow noted that Trinity was the top choice from the start, and this has even grown stronger after the interviews. Having a strong partnership in this particular project is extremely important to us and crucial to our success for a strong healthy downtown business community.

The WSMA have long craved for the kind of community black box theater and arts venue as exists in their proposal. It will be a huge and much-needed benefit that will bring a fresh new look and more importantly feel to Wellesley Square that we all desire.

The WSMA ranking following Trinity would be Pennrose, Federal, Aura-Pritzker, and Berkeley.

Ms. Jop opened the discussion by seeking comments as to whether the WG believed a second RFP should be issued.

Ms. Johnson found the proposals were too dense and too big. She noted she would prefer the Town have more of a say in what is constructed. She suggested a study group be formed to further consider what the Town would like to see constructed on the sites.

Ms. Newman also was in agreement that a second RFP should be issued. Ms. Newman was concerned over the parking and massing of the structures.

The WG discussed how much negotiation power the Town would have with a selected firm. Ms. Jop reminded the group the RFP is for a land lease. The Town cannot get into the specifics of designing the project or it will become a Town project subject to procurement laws and prevailing wage. Ms. Jop noted she would discuss with Town Counsel the extent to negotiation, but reminded the group of the long process of negotiation, town meeting approval, then permitting, that have the ability to shape a project.

The majority of the group found a second RFP would not improve the responses. If anything, many felt due to the time, effort, and money that has been spent to date by the developers who submitted proposals, that the Town could lose candidates with the issuance of a second RFP.

Mr. Barrett asked if the interviews eliminated any of the respondents. The WG was in agreement that the interviews were very helpful in determining the rankings and better understanding the projects and seeing modifications proposed. The WG was concerned the Berkeley as part of their interview proposed a completely modified project, but did not follow up with any of the financial details. The Berkeley interview also largely failed to address the questions that were posed to each of the respondents.

Ms. Johnson noted the Town residents have consistently identified that they prefer Wellesley's village like character and the proposals would significantly change Wellesley Square.

The WG discussed the density and intensity of the projects. The RFP was open ended and let the market determine the densities with the expectation that affordable housing should be maximized. The local for Transit Oriented Development is exceptional, and many believed that residents would move forward with a denser project at these locations.

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The WG was in agreement the Federal Realty team did an excellent job at the interview, and proposed minor revisions that greatly enhanced the proposed project.

Ms. Watts noted that Trinity and Pennrose both indicated some ability to moderate their proposals. Ms. Watts did not think the Town needed to issue a second RFP.

Mr. Fessler noted a second RFP will lose people. The Town needs a team who will stay now. The bigger question is where does the Town want to go. The RFP focused on affordable housing, parking, and what the project delivers financially to the Town. Mr. Fessler stated he believed the parking numbers can be negotiated out as the developer is taking the risk of the project. There has been much debate on parking, but a second RFP will not change that debate. Mr. Fessler noted Pennrose had a very complex finance model, but was committed to moving forward. He discussed the advantages to having an owner committed to the project, and noted only Trinity Financial had an owner present, which showed commitment to the project.

Mr. Fessler also did want to recognize the WG cannot under value the option to do nothing. He was not recommending not moving forward, but wanted to recognize the variables present with regards to the 40B projects and remind the Town it is an option.

Mr. Fessler noted that less density may be better if the SHI is no longer the driving factor. The enhancement of open space, architectural enhancement, and connectivity would activate the Wellesley Square.

Mr. Barrett discussed the importance of keeping the affordable housing component. The WG was in agreement, but noted the intensities of the sites could be reduced if the Wellesley Office Park project moves forward.

Ms. Jop asked Mr. Barrett about his experience with tax credits. Mr. Barrett stated tax credits are very competitive, and there is an annual round in February. Mr. Barrett noted he has seen that a good project can move forward. He noted that use of tax credits is a much longer process, but if the Town is putting funds in with the developer, he has seen the projects work.

Mr. Chazen was concerned that Pennrose may be overstating the number of units that would qualify for tax credits.

The WG discussed the financial proposals.

Mr. Fessler thought Federal should be able to pay more. He stated that Trinity Financial is contributing 25% of their development fees. It could be 2.5% to 4% of the payment along with \$600,000 for lost parking revenue during construction. Mr. Fessler noted Pennrose is producing the most annual rent with a \$350,000 payment.

The WG discussed the difference in tax revenues for the project noting Pennrose will have a low real estate tax revenue, whereas Trinity has \$1.6M over time.

The WG discussed construction costs and recognized that of all respondents Aura— Pritzker has done the most work on the construction costs. Members of the WG found Trinity has been more conservative financially.

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Ms. Watts stated it was remarkable that two proposals had strengths towards sustainability. Both spoke of passive house, air infiltration rates, remarkable benefits. Negotiations should push hard on their proposals. The three other proposals were much more checking the box on sustainability.



## EVALUATION CRITERIA

The RFP requires the responses to be evaluated on the following criteria:

Comparative Evaluation Criteria			
Criteria	Rating Scale		
A1 - A4: Advantages to the Town			
A1	Affordable Housing Units that will add to the Town's Subsidized Housing Inventory	Very Advantageous	All proposed housing units are eligible for the Town's SHI
		Advantageous	25% or more of the proposed units are eligible for the Town's SHI
		Non-Advantageous	20% of the proposed units are eligible for the Town's SHI
		Unacceptable	No units qualify for the Town's SHI
A2	Compensation for the land lease.	Very Advantageous	Benefits to Town are significantly above the market rate expectation.
		Advantageous	Benefits to Town are above the market rate expectation.
		Non-Advantageous	Benefits to the Town meet the market rate expectation.
		Unacceptable	Benefits below market rate.
A3	Existing Commercial and Commuter Parking spaces are maintained at the completion of the project.	Very Advantageous	An increase in parking for Commercial and Commuter Parking is created
		Advantageous	Existing parking spaces are maintained.
		Non-Advantageous	Due to the size of construction there is a reduction of parking spaces for Commercial and Commuter Parking
		Unacceptable	Reduction in parking spaces for Commercial and Commuter Parking in excess of 15%.
A4	Construction Management Plan addresses impact on public parking	Very Advantageous	Proposed plan allows for up to 85% of existing parking spaces to remain open during construction through phasing and/or alternative site.
		Advantageous	Proposed plan allows for up to 75% of existing parking spaces to remain open during construction through phasing and/or alternative sites
		Non-Advantageous	Proposed plan allows for up to 50% of existing parking spaces to remain open during construction
		Unacceptable	Proposed Plan closes public parking areas during construction.
A5	Amenities or open space are included in the proposed	Very Advantageous	One or more amenities and/or open space areas provided and accessible for use by the public.

Comparative Evaluation Criteria			
Criteria	Rating Scale		
<p>Facility or on adjoining land and can be accessible or rented to the public. Internal amenities may include as examples visual and performance art space, public meeting rooms, community space, and youth gathering space</p>	Advantageous	One amenity and/or open space provided and accessible for use by the public.	
	Non-Advantageous	Amenities provided, but only accessible by residents	
P1 - P7: Permitability			
P1	Lighting - Outdoor Lighting	Very Advantageous	Uses newest technologies to maximize use of dark sky lighting programs, with minimal impact on abutters. Minimize impact during all hours of darkness.
		Advantageous	Reasonable use of dark sky lighting programs and acceptable impact on abutters. Minimize impact during all hours of darkness.
		Non-Advantageous	Some use of dark sky lighting programs and some impact on abutters. Minimize impact after 10PM.
		Unacceptable	Minimal use of dark sky lighting programs and maximum impact on abutters
P2	<p>Neighborhood impact - Potential noise</p> <p>Noise is more troublesome late at night through early in the morning.</p> <p>Noise includes things such as trash pickup, car doors closing, talking, mechanical systems.</p>	Very Advantageous	Site noise that would impact the neighbors especially during the evening, night and morning hours (including the weekends) is fully mitigated.
		Advantageous	Site noise that would impact the neighbors during the late night or early morning hours (including the weekends) is fully mitigated.
		Non-Advantageous	Site noise to be no greater than current Route 9 site noise.
		Unacceptable	Significant noise that would impact the neighbors.
P3	Parking - Parking shall be based on best practices	Very Advantageous	125% of required parking during peak hours located on property, including visitor and loading parking

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Comparative Evaluation Criteria			
Criteria	Rating Scale		
and/or proposed zoning to accommodate resident parking, in addition to Commercial and Commuter Parking	Advantageous	100% of required parking during peak hours located on property, including visitor and loading parking.	
	Non-Advantageous	Most required parking during peak hours located on property, with minimal visitor and loading parking	
	Unacceptable	Unable to accommodate peak parking on site.	
P4 Traffic - Traffic considerations shall be based geometric improvements to adjacent intersections, on the site study, and on meeting requirements resulting from respondent's consideration of the Project of Significant Impact (PSI) Special Permit analyses.	Very Advantageous	Project proposes clear and sufficient mitigation for anticipated traffic impacts on Linden Street, Crest Rd, Washington Street, Central Street and adjoining neighborhood streets, and plans to manage process and fund 100% of the cost.	
	Advantageous	Project proposes mitigation for anticipated traffic impacts on Linden Street, Crest Rd, Washington Street, Central Streets and adjoining neighborhood streets and plans to manage process and fund 100% of the cost.	
	Non-Advantageous	Project generally states it will mitigate anticipated traffic impacts on Linden Street, Crest Rd, Washington Street, and Central Street and fund 100% of the cost.	
	Unacceptable	Project does not include mitigation of expected traffic impact on Linden Street, Crest Rd, Washington Street, and Central Street and neighborhood streets and /or funds less than 100% of the cost.	
P5 Pedestrian Safety and Circulation (including bicycles). Consideration of requirements resulting from the Project of Significant Impact (PSI) Special Permit analyses.	Very Advantageous	Project promotes bicycle and pedestrian access to and on the site. Project effectively designs pedestrian sidewalks on main roadways and internal to the site, in particular through the parking lot and around the building perimeter. Project has a bike rack. Project effectively connects or leads to alternative paths such as the aqueduct trail or Fuller Brook Park	

Comparative Evaluation Criteria			
Criteria	Rating Scale		
		Advantageous	Project promotes bicycle and pedestrian access to and on the site. Project effectively designs pedestrian sidewalks along main roadways and internal to the site, in particular through the parking lot and around the building perimeter. Project has a bike rack.
		Non-Advantageous	Project provides some bicycle and pedestrian access to and on the site.
		Unacceptable	Project does not support bicycle and pedestrian access to and around the site.
P6	Design elements and integration of facility with surrounding abutters and neighborhood.	Very Advantageous	Facility respects abutters' views, leverages existing natural topography and trees, provides walkways around and through site and will work with the abutters on effective mitigation. Facility has high curb appeal from Linden St., Crest Road, and Washington Street.
		Advantageous	Facility respects abutters' views and will work with abutters on mitigation. Facility uses some of the existing natural topography and trees to mitigate impact, provides walkways around and through site. Facility has high curb appeal from Linden Street and Washington Street.
		Non-Advantageous	Is a stand-alone facility with little curb appeal, and with minimal mitigation of impact on neighbors.
		Unacceptable	Doesn't meet PSI requirement
P7	Zoning needs clear	Very Advantageous	No zoning variance, bylaw or map changes required. Variance, bylaw, or map change expectations clear in requested exhibit
		Advantageous	Variance, bylaw, or map change expectations clear in requested exhibit
		Non-Advantageous	Variance, bylaw, or map change expectations clear in separate paragraph in response

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Comparative Evaluation Criteria			
Criteria	Rating Scale		
		Unacceptable	Variance, bylaw, or map change expectations not clearly stated in either an exhibit or a separate paragraph
Q1 - Q3: Developer Qualifications			
Q1	Experience of Developer	Very Advantageous	Developer has designed and built a significant number of multi-family housing facilities, in close proximity to the MBTA rail line, that were successful and that were similar to the Town's goals and expectations.
		Advantageous	Developer designed and built some multi-family housing facilities that were successful and that were similar to the Town's goals and expectations.
		Non-Advantageous	Developer has designed and built some larger commercial facilities that were successful that had different goals from the Town's.
		Unacceptable	Developer has a minimal number of projects developing similar types of housing facilities.
Q2	Experience of Property Manager	Very Advantageous	Property Manager has a significant number of years operating similar types of facilities that match the Town's goals for this site
		Advantageous	Property Manager has a reasonable number of years operating similar types of facilities that match those project's goals and quality expectations
		Non-Advantageous	Property Manager has some years operating similar types of facilities that have survived multiple business cycles.
		Unacceptable	Property Manager has a minimal number of years operating similar types of facilities.
Q3	Town Management of Development - The town does not intend to be involved with the development of the project or with	Very Advantageous	No Town management of project, and one point of contact for developer.
		Advantageous	No Town management of project, and one point of contact with developer, but sub-developer(s) engaged for portion(s) of the project

Comparative Evaluation Criteria			
Criteria	Rating Scale		
managing the relationship between multiple developers of different use facilities. Preference will be given to a single organization that develops the entire site as well as a single organization that manages sub-developer(s).	Non-Advantageous	Two or more points of contact for the Town with distinct areas of responsibility for elements of the project for each.	
	Unacceptable	Town oversight and management required.	
F1 - F3: Project Financials			
F1	Financials – Project equity; construction loan	Very Advantageous	Sources of project equity identified and conservative equity investment plan.
		Advantageous	Sources of project equity identified and sufficient equity investment plan.
		Non-Advantageous	Sources of project equity unknown but demonstrated ability to raise equity on other projects
		Unacceptable	Sources of project equity unknown and little or no prior record of raising comparable amount of equity on other projects
F2	Financials – Financial feasibility, including construction and operation.	Very Advantageous	Pro Forma for the project give confidence the project can be capitalized within the time required to obtain permits, operate highly profitably and be able to maintain a high quality development.
		Advantageous	Pro Forma for the project make the project appear able to be capitalized within the time required to obtain permits, operate sufficiently profitably while maintaining the development.
		Non-Advantageous	Pro Forma require favorable assumptions for the project to be capitalized within the time required to obtain permits, be successful and to allow for high quality maintenance.

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Comparative Evaluation Criteria			
Criteria	Rating Scale		
		Unacceptable	Pro Forma seem insufficient for the project to be capitalized within the time required to obtain permits and support the project and its expected maintenance over the life of the project.
F3	Budget and Pro Forma assumptions	Very Advantageous	Reasonable revenue, expense, and project cost assumptions clearly listed with explained adjustments in future operating pro forma projections
		Advantageous	Reasonable revenue, expense, and project cost assumptions clearly listed with explained fixed growth rate in future operating pro form assumptions
		Non-Advantageous	Some Revenue Assumptions, project cost assumptions, and expenses listed and used in future pro forma with explained fixed growth rate
		Unacceptable	Minimal revenue assumptions provided leaving questions about cost to customers and therefore reasonableness of occupancy rates / and revenue projections
D1 - D2: Development Design			
D1	Sustainability and energy efficiency (Town related)	Very Advantageous	Project uses the current best practices for energy and water efficiency, recycled materials, is committed to alternative sources of energy and other aspects of sustainability, and incorporates LEED considerations.
		Advantageous	Project uses many of the current best practices for energy and water efficiency and recycled materials, is committed to alternative sources of energy and other aspects of sustainability, and reflects some LEED considerations.
		Non-Advantageous	Project uses some of the current best practices for energy and water efficiency and recycled materials, is committed to alternative sources of energy and other aspects of sustainability, and reflects a limited consideration of LEED.

Comparative Evaluation Criteria			
Criteria	Rating Scale		
		Unacceptable	Project does not use the current best practices for energy and water efficiency and recycled materials, reflects little consideration of alternative sources of energy and other aspects of sustainability and/or LEED.
D2	Synergy of facilities on the site and their uses.	Very Advantageous	Proposed uses fit together and make highly efficient use of the site as well as shared uses of common facilities.
		Advantageous	Proposed uses fit reasonably together and make less efficient use of the site as well as shared uses of common facilities.
		Non-Advantageous	Proposed uses fit together less efficiently or are independent and there is minimum or no shared space.
		Unacceptable	Separate independent proposals are submitted without regard for construction management, parking configuration, access or shared spaces.

## RANKING OF RESPONSES

The WG had completed preliminary scores prior to the interviews and review of the financial proposals. Following the interview and review of the financial proposals, it was determined at the August 20, 2018 meeting that the 5 respondents have equally met the following criteria, and the criteria would not be used to differentiate the responses.

The WG found Aura-Pritzker, Berkeley Financial, Federal Realty, Pennrose, and Trinity Financial all equally met the following criteria listed in Table 1:

*Table 1 Evaluation Criteria Equally Met by Each Respondent*

Criteria	Description
A3	Existing Commercial and Commuter Parking spaces are maintained at the completion of the project.
A4	Construction Management Plan addresses impact on public parking.
P1	Lighting – Outdoor Lighting
P2	Neighborhood Impact – Noise
P3	Parking – Parking shall be based on best practices and/or proposed zoning to accommodate resident parking, in addition to commercial and commuter parking
P4	Traffic - Traffic considerations shall be based geometric improvements to adjacent intersections, on the site study, and on meeting requirements resulting

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	from respondent's consideration of the Project of Significant Impact (PSI) Special Permit analyses.
<b>P5</b>	Pedestrian Safety and Circulation (including bicycles). Consideration of requirements resulting from the Project of Significant Impact (PSI) Special Permit analyses
<b>P7</b>	Zoning needs are clear
<b>Q3</b>	Town involvement in Management if any
<b>F1</b>	Financials – Project equity; construction loan
<b>F2</b>	Financials – Financial feasibility, including construction and operation
<b>F3</b>	Budget and Pro Forma assumptions

The main differences in the projects were centered around a few key criteria identified in Table 2:

Table 2 Evaluation Criteria Considered

Criteria	Description
<b>A1</b>	Affordable Housing Units that will add to the Town's Subsidized Housing Inventory
<b>A2</b>	Compensation for the land lease
<b>A5</b>	Amenities or open space are included in the proposed Facility or on adjoining land and can be accessible or rented to the public. Internal amenities may include as examples visual and performance art space, public meeting rooms, community space, and youth gathering space
<b>P6</b>	Design elements and integration of facility with surrounding abutters and neighborhood
<b>Q1</b>	Developer experience
<b>Q2</b>	Property Manager experience
<b>D1</b>	Sustainable and energy efficiency
<b>D2</b>	Synergies of facilities on the site and their uses

The findings of the rankings based upon the Evaluation Criteria Considered identified the following rankings as very advantageous, advantageous, less advantageous, and non- advantageous.

1. Trinity Financial
2. Pennrose
3. Federal Realty
4. Aura-Pritzker
5. Berkeley Financial

**Trinity Financial** – The WG unanimously finds the Trinity Financial proposal, with the addition of the proposed lease payment and the interview to be the most highly advantageous proposal. The WG finds that although the Subsidized Housing Inventory is not raised as high as other proposals, the proposed density and mix of owner and rental were the right fit for the Town and addressed the need for affordable housing, diversity of housing mix, and parking. The WG finds this proposal, as a result of the proposed density, is the most advantageous project to construct should the Delanson project across the street move forward. The WG finds the architectural and landscape design to also be the most highly advantageous as a fit to the surrounding neighbors and as a link between the Linden Square and Wellesley Square commercial districts. The WG finds the proposal, which includes a black box theater to be located at the Railroad Parking Lot site

added the most highly advantageous public amenity that would foster a dynamic response to the much needed art and performing art space requested by many Wellesley civic groups including the Wellesley Art Alliance, Wellesley Players, and the Wellesley Theater Project. The WG found the proposed financing plan the most advantageous in terms of execution and compensation to the Town, and the Developer's team and experience to be the most highly advantageous.

**Pennrose-** The WG finds the Pennrose proposal, with the addition of the proposed lease payment and the interview to be a very advantageous proposal. The WG finds Pennrose's proposed public open space, trail connections, and thoughtful consideration of the Comprehensive Plan and Unified Plan to be amenities that are very advantageous to the Town as the proposal creates a sense of place and considerably improves the MBTA access at Wellesley Square Station. The WG finds the Pennrose proposal is very advantageous for its substantial sustainable design. The WG finds the financial model possible, but less advantageous due to the use of tax credits, grants, and CPA funds, and finds the complexity of the financing may slow down the process and may be more difficult for residents to support.

**Federal Realty** – The WG finds the Federal Realty proposal, with the addition of the proposed lease payment and the interview to be an advantageous proposal. The WG finds Federal Realty's ability to finance the project and compensation to the Town to be the very advantageous, particularly if an economic downtown begins in the next few years. The WG finds the revised proposal discussed at the interview to be advantageous to the Town with regards to design, open space, sustainability, and adaptability of parking in the future. The WG finds that it is advantageous to the Town to consider condominiums as an option on the site, and as part of the interview process, Federal Realty discussed that condominiums are not generally something that is pursued, but that it could be considered. The WG also noted Federal Realty as a reliable, good partner for the Town that offers advantageous. Some members of the WG did raise concerns that one property owner having significant interest along Linden Street could be undesirable for the Town.

**Aura-Pritzker** - The WG finds the Aura-Pritzker proposal, with the addition of the proposed lease payment and the interview to be an advantageous proposal. The WG recognized the proposal by Aura-Pritzker would be very advantageous to the neighborhoods by eliminating the 40B proposal at the Delanson Circle site and reducing, but not eliminating, the 40B proposal at the 148 Linden Street site. The WG finds that although the relocation of the units proposed for the Delanson Circle project is beneficial, the design aesthetic, open space, and adaptability of the project parking is only advantageous to the Town. The WG finds the sustainable elements of the proposal were advantageous, but less advantageous than other proposals. The WG finds the development team to be advantageous and recognized the considerable experience of the Pritzker Team and the Aura Team in executing projects independently, but did raise some concerns over a partnership model.

**Berkeley Financial** – The WG finds the Berkeley Financial proposal, with the addition of the proposed lease payment and the interview to be the least advantageous proposal. The WG finds the development team to be advantageous with considerable experience. The WG finds the submitted response, although providing the most accessible parking in the closest proximity to Wellesley Square, less advantageous due to the parking structure. The WG raised concerns that rather than increasing vitality in Wellesley Square, the installation of a parking structure only would detract from the vitality. During the interview, Berkeley Financial substantially modified their proposal and brought housing to both the Tailby and Railroad sites. The WG found the revised concepts intriguing, but found the lack of back up information, financial pro forma, and lack of response to the Town's questions presented a disadvantage of the proposal.

## BOARD OF SELECTMEN NEXT STEPS

The objective of the WG was to review and determine a ranking of the RFP responses in order to recommend the most advantageous proposals to the Selectmen. The WG has completed this task. The WG ranking and evaluation has been performed. The majority of the WG recommends the Board of Selectmen interview the advantageous candidates which include Trinity Financial, Pennrose, Federal Realty, and Aura-Pritzker. It is recommended the interviews be televised/recorded by Wellesley Media and provide opportunity for citizen questions and engagement as part of the interview process. Two of the WG members recommend the Board of Selectmen interview Trinity Financial only, as the top candidate.

It should be noted the WG is a staff formed working group, which does not require public notice, public comment or consideration. The WG's role is not to determine which project is the best project for the Town, only the Board of Selectmen and Town Meeting can make that determination, but rather to rank the responses based on the evaluation criteria. The Selectmen, having not been part of the process, might want to consider interviewing all the respondents. The next phase of review of the responses should include considerable public engagement, for as the WG discusses in their meeting notes, general considerations of mass, scale, density, intensity, parking, aesthetics, open space, and public amenities raised considerable debate.

As the Selectmen deliberate on whether to move forward under this current RFP, to conduct interviews, or to select a respondent to enter into negotiations with some items that the Board might want to consider have been identified by the WG below.

### ADDITIONAL CONSIDERATIONS

#### **Issuing a New RFP**

As stated in the notes of the August 20, 2018 meeting, the majority of the WG found the Town should proceed under the existing RFP, particularly given the caliber of responses received. The Selectmen must consider whether issuance of a new RFP would benefit the Town. Some WG members argue further study of the sites could better define appropriate scale and density for the project. It is staff's opinion, not the WG, that the current RFP process did not raise questions that were not considered in the existing RFP, and that a new RFP would only seek to add criteria related to parking, use, and scale. If the Board wants to consider changing the use of the site to primarily commercial, then the Board should consider a second RFP. If the residential use is the preferred objective, staff finds the existing RFP has served that purpose. The Selectmen have issued and undergone similar RFP processes in the past with the 900 Worcester Street project. The 900 Worcester Street process did issue a second RFP, but only after considerable questions on financing of the project were raised and found to have not been included in the initial RFP. The procurement laws allow a Town to issue an RFP for a long-term land lease with criteria, however the more design requirements placed on the project, the more the Inspector General's office considers whether a project is to be defined as a Town project rather than a private project.

## Development Timeline

The majority of the WG recommends the Town proceed with the development of the Tailby and Railroad lots regardless of the potential development proposed on Delanson Circle and 148 Weston Road. The 40B projects are in permitting, and currently have an undetermined destiny with regards to approval and if approved, project density. There are many unknowns with these 40B projects, including the potential appeal by either the developer or neighborhood from any decision made by the Zoning Board of Appeals or the opportunity to be selected by the Selectmen for the development of the Tailby and Railroad lots.

The WG had substantial debate on the impact of the 40B projects on the development of the Tailby and Railroad lots, and specifically asked each development team in the WG interviews how the 40B developments could impact their projects. The development teams responses can be found in their interview PowerPoint presentations [online](#) and in the notes from the interviews in this report.

Lastly, the WG wants to reaffirm the Board of Selectmen also has the option to do nothing. There are certainly pros and cons to this tactic as well. The WG recognizes the considerable variables the Selectmen must consider with the development of the site including the responses, the 40B projects currently under review, as well as the Hunnewell School Project which could impact the availability of public parking during construction. The WG is confident the Town could work with the respondents under this RFP, but recognized the value of the location and proximity to the commuter rail will continue to be a desirable development opportunity in the future.

APPENDIX A  
COMMENTS RECEIVED FROM THE PUBLIC AND WG MEMBERS



# [AN]

Annie Newman  
94 Crest Road  
Wellesley, MA 02482  
annethrushnewman@gmail.com  
617.459.7242

August 22, 2018

Dear Tailby / Railroad RFP Working Group

As I step back from the insightful and productive conversations of our Working Group to prepare my final rankings, I have intentionally taken a step back from the narrow scope of this RFP to reflect on the big picture – **what's best for the entire Town in the long-term?** I worried that perhaps we lost sight of our broader mission and were too focused on the task of selection – identifying the best of six proposals – and not on the larger picture. Two things confirmed for me that we may have lost our way: first, a note from David Himmelberger, which I received directly after our final meeting and served as a harsh reminder of the realities we face; and second, a meeting with my neighbors.

Last night, I met with the College Heights Association (CHA) Steering Committee, with whom I have been meeting regularly since last fall. CHA is a community of neighbors committed to responsible growth in Wellesley. We formed officially last year in response to the onslaught of predatory 40B housing developments being proposed in our neighborhood. With our neighborhood's proximity to the heart of Town, these projects negatively impact every Town resident who travels to and from Linden Square and Wellesley Square. The group strongly supported the Tailby/Railroad RFP.

In fact, the current RFP was inspired by two 40B projects in particular – Delanson Circle, and to a lesser extent, 148 Weston Road – which together propose 145 new rental units in the Wellesley Square / College Heights neighborhoods. While the Town has studied the viability of developing the Tailby/Railroad lots for decades, the motivation to act came from the threat of these ill-conceived projects. All parties agree that it would be better to concentrate large-scale new development on a Town-owned lot, through a Town-controlled process, rather than allow it to be carved out of neighborhoods in an ad hoc manner that is inconsistent with the fabric and scale of existing neighborhoods. Thus, the RFP was born.

The Delanson Circle project, which calls for 90 rental units on a small and steep parcel of land across the street from the Tailby Lot, raised significant concerns during hearings before the Zoning Board of Appeals throughout the winter and spring. Major problems with the project were identified in the areas of density, traffic, parking and pedestrian safety. The 148 Weston Road project raised similar traffic, parking and public safety concerns, proposing 55 units a few blocks away on a very congested section of this essential Town roadway. Despite the significant concerns recognized by the ZBA, **40B law makes the Town powerless to block these projects**, and at best we can hope for a minor reduction in the number of units.

**It is my opinion that this current slate of 40B proposals must be taken into account in assessing the submitted proposals.** Given the reality of the Delanson Circle project, and taken in that context, the only viable options for the Town with respect to the Tailby/Railroad lots are to either (a) award the project to AURA/Pritzker, or (b) do nothing. While aspects of the various proposals resonated with me personally, I do not believe that any of the other proposals are actually viable to succeed if the Delanson and Weston projects proceed. The ZBA and Board of Selectmen had significant concerns about the negative impact that the Delanson and Weston projects would have on the town. All other proposals for Tailby/Railroad would add, at minimum, another 90 units and grossly exacerbate those problems to the point of becoming unviable.

# [AN]

**Annie Newman**  
94 Crest Road  
Wellesley, MA 02482  
annethrushnewman@gmail.com  
617.459.7242

While I have been enticed by some of the exciting ideas presented – affordable housing for seniors and workforce, a town theatre, gallery space, inviting plazas, and playlots – I have been overwhelmed and remain concerned by the overall scale of these presentations. As our planning board chair pointed out in our final meeting, and as members of the CHA steering committee reinforced when we met, these projects do not reflect the desire of the broader Wellesley community, or the Unified Plan. They are too darn big and urban. To get anything approved on this site, and to gain the political momentum necessary for approvals, there must be serious negotiation.

The best opportunity for success on Tailby/Railroad is to develop this precious Town resource with the qualified development team lead by Pritzker, who included an escape clause in their proposal – a concession to replace 90 units at Delanson with 9 townhomes and 55 units at Weston with 30. I believe that we could bring the wise perspective gained from our long discussions to a thoughtful negotiation phase with Pritzker. I encourage you to consider this in your ranking of teams for the Board of Selectman.

The attached note from David Himmelberger underscores my concern that we must remember the context in which this RFP has been created. It is clear that AURA intends to proceed with the development of Delanson and Weston if they are not awarded this project. This is not the best result for the Town in the long term. We cannot let pride get in the way of making the best choice for our Town.

I have enjoyed the opportunity to work with you all on this important project. Thank you for your consideration.

Regards-

Annie Newman  
Cc: Michael Zehner / Planning Director

**From:** David Himmelberger <[david@wshlawoffice.com](mailto:david@wshlawoffice.com)>  
**Subject: RFP and College Heights**  
**Date:** August 20, 2018 at 10:57:51 AM EDT  
**To:** " [annethrushnewman@gmail.com](mailto:annethrushnewman@gmail.com)" <[annethrushnewman@gmail.com](mailto:annethrushnewman@gmail.com)>

Anne: I wanted to just briefly comment upon the RFP process, and why I believe the Aura-Pritzger proposal is the most beneficial proposal for the College Heights neighborhood. As you know, I represent Aura-Pritzger in its RFP submittal. I agreed to represent Aura-Pritzger only after I learned that its proposal would specifically "move" the currently proposed hostile 40B project from Delanson Circle to the Tailby/Railroad sites, and reduce the density at its Weston Road project. I only represent Aura-Pritzger as regards the RFP proposal, as I have a personal commitment to not representing hostile 40B projects, and all the more so when they are located across from my office.

At the outset, it is my understanding that the RFP was brought about by significant concerns regarding a 90 plus unit 40B project going in at Delanson Circle, and the thought was that by putting out an RFP, Aura might be induced to "move" its project to the Tailby/Railroad sites. This is precisely what has occurred, in that the Aura-Pritzger proposal makes clear that as part of its RFP submittal, if selected, the Delanson Circle parcels would only be developed with the same number of units as currently exist at Delanson, which I understand to be 9 units. Thus, the Aura-Pritzger proposal is the only one, that if selected, will cause the existing 40B proposal at Delanson to be fully eliminated. Moreover, as part of its proposal, Aura-Pritzger has also committed that if selected, its Weston Road hostile 40B project will be reduced to 30 units, down from the currently proposed 60 units.

Finally, as I believe your review of the various RFP submittals makes clear, the Aura-Pritzger proposal is the only one with a comprehensive Construction Management Plan, and the only project that can be built without the construction activity significantly impacting traffic and the surrounding neighborhood.

For these critical reasons, I believe the Aura-Pritzger proposal deserves favorable consideration and support from the College Heights neighborhood.

I would be remiss if I did not address another issue. Aura-Pritzger's position, if it is not chosen as the developer of the Tailby/Railroad project, is that it will continue with its Delanson Circle and Weston Road projects. I understand that there are some who can or will construe this as some sort of threat; but it is nothing more than the reality of the situation. Aura began these projects in advance of the RFP and will simply continue them unless it has the opportunity to move them to the Tailby/Railroad sites. I fervently hope that this reality will not be held against the merits of the Aura-Pritzger proposal for Tailby/Railroad. It is my hope that the relative merits of eliminating the Delanson Circle 40 B project entirely, and cutting in half the density of the Weston Road 40B project, coupled with Aura-Pritzger's unique ability to manage the Tailby/Railroad construction through its comprehensive Construction Management Plan, will be viewed as critical reasons as to why, when all factors are considered, the Aura-Pritzger proposal is the most deserving.

Aura-Pritzger indicated in its interview that it was quite open to working with the town and the neighbors to refine the design and look of its proposed project at Tailby/Railroad. I hope it gets the opportunity to do so, and I look forward to assisting it in this process. As noted previously, however, should Aura-Pritzger not be selected, my representation of it will also end.

I apologize for this quick email; I am on vacation and only came back to observe this morning's meeting. Should you wish to contact me for any reason, please call me on my cellphone at 781 883-9412, as I will be heading back to the Cape soon.

Best regards, and thanks for your consideration in sharing this with the College Heights neighborhood. David

David J. Himmelberger, Esq.  
Wilder, Shea & Himmelberger, LLP  
One Hollis Street, Suite 400  
Wellesley, MA 02482  
781 237-8180  
fax 781 235-8242

## **Jop, Meghan**

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**From:** Catherine L. Johnson  
**Sent:** Tuesday, August 28, 2018 11:04 AM  
**To:** Jop, Meghan; Zehner, Michael  
**Cc:** Jack Morgan  
**Subject:** Tailby final analysis  
**Attachments:** Scoring Sheet Word Trinity.docx; Scoring Sheet Word Pennrose.docx; Scoring Sheet Word Federal.docx; Scoring Sheet Aura-2.docx; Scoring Sheet Word Berkeley.docx

Meghan,

Apologies for the delayed timing of this response. The specific attachments on the five current proposals are relatively unchanged except for the General Comment sections at the end of each.

I would appreciate it if this email could be forwarded to the working group and to the BoS, although the attachments need not be forwarded as they become part of the general matrix. The following comments are not specifically pro or con to pick an applicant. Instead, they are a request to make sure we get this right.

First, I want to express appreciation to you, the working group, and -- in particular -- all six applicants. Many of the ideas provide a good starting point for discussion.

Second, the current state of the Railroad lot and especially the Tailby lot represents the "under use" of a critical part of Wellesley Square.

Third, while it would be admirable to create better parking and a better use of these parcels for affordable housing, all six proposals represent an "over use" of Tailby and Railroad. Some of this comes from the RFP, where we asked applicants to retain current parking levels AND add to the affordable housing stock in town. The remainder of this comes from the need of each developer to create enough (market rate) units as well as affordable ones and parking to have a financially viable product. All six proposals, or the five that remain, have shoehorned too much onto these lots. And, it is not a question of density, but of intensity.

1. All designs have mass, scale, and architecture that are urban. While change and the resulting growth are expected, it is the type and rate of change that confounds us. If we look at every Comprehensive Plan the Town has produced since 1965 and including the 2018 Unified Plan, the residents have continually expressed a desire for three things: maintain the residential character of Wellesley, maintain the village-like character of our commercial districts, and maintain significant open space [which could be construed as parks or view corridors between buildings].
2. Since the issuance of the RFP, the additional opportunity of having 300-350 affordable units at The Wellesley Office Park takes the pressure off creating extreme density on Tailby/Railroad.
3. Only one plan, Pennrose, drew on the Unified Plan for creativity and input.
4. Another plan, Trinity, developed the idea of a small theater, which was mentioned to all developers who attended the site walk.

Fourth, there are positive and negative externalities that accompany each proposal. They are different and difficult to contrast. Within the interview process, several developers indicated a willingness to listen to and work with the Town to develop something appropriate. That's a perfect answer, but *what does the Town*

want? Smaller scale, less housing, less parking (for either the housing or the station/merchants? In other words, and this is important, who is going to decide what Wellesley wants here, the Town or a developer? When the Town entered the RFP/lease for 900 Worcester, the Town already had studied the western gateway and the St. James parcel for many years with many committees.

1. Trinity: first level design (mass and scale) fills curve of Linden at Crest on Tailby, parking and open space in rear (negative as this wall off the project from the street) and almost fills Railroad with a change to the geometry of Railroad Avenue (negative). Provides black box theater (positive); second level design (architecture) is urban with narrow band of open yard space along curve of Linden (negative).
2. Pennrose: first level design (mass and scale) places townhouses along curve of Linden with taller apartment building at southeast rear of Tailby (positive) with hotel on Railroad and odd geometry to Railroad Avenue (both negative); second level design (architecture) is urban (negative) although hotel has better articulation (positive).
3. Federal: first level design (mass and scale) is similar to Pennrose with lower buildings along the curve of Linden Street (positive) but the Tailby site is either all building or all pavement without grassy open space (negative); second level design (architecture) in the drawings is weak compared to Linden Square, but the interview process indicated that this could change (almost positive, because what is there is too urban).
4. Aura-Pritzker: first level design (mass and scale) is confusing (negative) because some buildings put an end to the street creating little pockets of open space that were meant to engage with the College Heights neighborhood but were too small and in shadow for most of the day to be inviting (negative); second level design (architecture) is pedestrian, urban, and institutional (negative). The fact that Aura is the developer for Delanson Circle and 148 Weston Road complicates any decision. If not selected for Tailby/Railroad, those two parcels would proceed through the Comprehensive Permit of the 40B to some end. Delanson would be less dense while 148 Weston Road might be approximate to what is currently proposed under 40B (negative in intensity). The construction management plan for Aura-Pritzker is the easiest to understand (positive), but all projects built in Wellesley have to have a satisfactory construction management plan in order to be permitted and that is for the chosen developer to prove (negative).
5. Berkeley: first level design (mass and scale) has open space interior to the buildings (negative) and a wide sidewalk border (positive). All parking is underground; second level design (architecture) is inconsistent with any strong architecture in Wellesley (negative).

Finally, for this email, there are several things that must be considered when choosing and/or negotiating:

1. All applicants should revisit the Unified Plan and adapt parts of it to the designs.
2. All applicants should be willing to build using the PSI process rather than 40B comprehensive permits with waivers.
3. The Town needs to be more specific about parking for the station and for any residential ratio off-street; further, applicants need to address versatility in parking to accommodate ride-share, docked or dockless bikes, use of electric vehicles as parking needs are evolving rapidly and current ones could be obsolete before the project is completed.
4. Building materials are critical as part of the second level design. Please note that the DRB is currently creating design guidelines for Wellesley to direct PSI and LHR projects.
5. All designs should involve the MBTA and improvements to the station, especially ADA compliance.

6. Would it be better or more beneficial to expand the project to include the Post Office site and/or pushing eastward to One Hollis?

Thank you for your attention,

*Catherine*

Catherine L. Johnson  
Planning Board  
Wellesley, MA  
[cjohnson@wellesleyma.gov](mailto:cjohnson@wellesleyma.gov)  
(c) 617 413-5414

Meghan- thanks for sharing the draft report for the Board of Selectmen. My opinion is that the Selectmen should choose to work with Trinity Financial, and no others, and definitely not re-open the RFP process. A second RFP process could discourage Trinity, and perhaps other highly qualified developers, from continuing their interest. And, I do not see a good reason to do that. As to the second ranked proposal from Pennrose, I remain skeptical about the viability of its financing plan and feel its experience is less relevant to a community like Wellesley.

From a massing perspective Trinity has the most modest density of development (90 units), although I prefer that it orient the open space on both sites to the primary facing streets (Crest Road and Linden St), instead of putting buildings along the street and orient open space more internally (which does not make it accessible to the public). A pedestrian bridge over the RR tracks, though costly, would be a terrific enhancement to connect the sites and improve pedestrian access to Wellesley Square. MassWorks is a state-funded program that might provide the money for that.

Lastly, I am troubled by the clear implication from Aura Pritzker that the Town must accept its proposal as a quid pro quo to reduce the (very inappropriate) density on Delanson Circle. I understand the dilemma for the Town, but feel this proposal should not be selected.

Thank you, your staff and the Working Group for all the hard work over the summer.

--

Edward Chazen, Senior Lecturer  
Boston College, Carroll School of Management  
Chestnut Hill, MA 02467

## Jop, Meghan

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**From:** Timothy J. Barrett <Timothy.Barrett@pinestreetinn.org>  
**Sent:** Tuesday, September 4, 2018 10:27 PM  
**To:** Jop, Meghan  
**Cc:** Robert Kenney  
**Subject:** FW: Draft Report

Meghan,

Thanks for your work on the Tailby/Railroad draft report to BOS. I have read WPP member comments from Annie, Catherine and Ed. Through you, please share my comments/follow-up to WPP and use as you see appropriate with BOS.

If WPP members have not had the opportunity to read the Town's draft Housing Production Plan (<http://www.wellesleyma.gov/CivicAlerts.aspx?AID=166>), I encourage you to review Section 4 (Housing Goals) and Section 5 (Housing Development Strategies and Action Plan). Approval of the Housing Production Plan by the State (DHCD) will allow the Town to gain greater control over Chapter 40B proposed projects, which is important given the flood of 40Bs that have occurred in the past year. Such requires the Town to commit to annually producing at least 45 new units towards subsidized housing inventory (SHI) until we achieve the 10% affordability goal. All 5 of the proposals we reviewed would help the Town achieve this goal for the first year. I understand many member's concerns about the intensity of the proposed projects and this is a very important consideration. Though I would prefer to obtain the highest number of affordable units from this project (I am a member of the Wellesley Housing Development Corporation whose mission is to expand affordable housing in the Town), I understand affordability is but one of many goals that the Town must balance to achieve the most effective outcome. I believe the Evaluation Criteria we used has done this effectively and Meghan's report summarizes options for BOS to deliberate.

Through the Housing Production Plan process, many residents expressed that the Town is "built-out" and does not have much room for more housing. This belief heightens the importance that land under the Town's control, and appropriate for development, should have an affordability component. Furthermore, to achieve the Unified Plan's goal of a more diverse housing stock, such opportunities also should encourage multi-family options. I do not believe potential plans for Wellesley Office Park reduces the Town's responsibility to consider affordable housing options at such sites such as Tailby/Railroad. Instead, I see these plans as a complementary project that hopefully over many years and decades to come will show the Town's commitment to the Housing Production Plan and Unified Plan developing a mix of housing stock – affordable and market – spread throughout the Town, appropriately placed, and further strengthening Wellesley's appeal.

From my professional experience, affordable housing works best for communities when part of larger projects that are effectively integrated into the surrounding community. We've done an outstanding job as WPP reviewing the 5 remaining proposals and I am hopeful BOS can take action on the one it believes will accomplish increased affordable housing, multi-family housing options and addresses the density and intensity concerns expressed.

Thank you,  
Tim

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**From:** Timothy Barrett [mailto:[barrett\\_bc1993@yahoo.com](mailto:barrett_bc1993@yahoo.com)]  
**Sent:** Tuesday, September 4, 2018 8:49 AM



8. **New Business and Correspondence** - Other Documents: The Board will find documents the staff are not seeking action on, but is for informational purposes only. Please find the following:

- ❖ Police Commendation for Officers Dixon, Hughes, and Cunningham
- ❖ Police Commendation for Officer Debernardi and Dispatcher Harris
- ❖ Police Commendation for Officers Popovski, and Gerard
- ❖ Wellesley September 11<sup>th</sup> memorial events
- ❖ Correspondence from BAA regarding 2019 Boston Marathon
- ❖ Correspondence from Recreation Commission
- ❖ Correspondence from the Planning Board
- ❖ Correspondence re: Recycling Dividends Grant
- ❖ Correspondence from David Himmelberger
- ❖ Citizen letter re: Bradley Avenue
- ❖ July 2018 Parking Meter Collections
- ❖ July 2018 Animal Control Report





## TOWN OF WELLESLEY

WELLESLEY, MA 02482  
Telephone 781-235-1212

## POLICE DEPARTMENT

JACK PILECKI  
Chief of Police

**TO:** OFFICER TRAVIS DIXON  
OFFICER LAMARS HUGHES  
OFFICER CHRISTOPHER CUNNINGHAM

**FROM:** CHIEF JACK PILECKI

**SUBECT:** LETTER OF COMMENDATION

**DATE:** AUGUST 24, 2018

I recently received an email from a Wellesley Housing Authority resident thanking each of you for helping her diffuse a difficult and on-going neighbor dispute. Although the dispute was civil in nature, the personal anguish and disruption caused by this dispute had adversely affected her quality of life. Your coordinated effort to deescalate tempers and find some common ground between the two tenants, resolved the issue and restored some normalcy to her daily routine. Your actions exemplify the Department's commitment to quality Community Policing.

As Chief of the Wellesley Police Department, I want to thank you for your service and compassion in handling this situation. You utilized appropriate discretion, caring, and professionalism, exemplifying the work that Wellesley Police Officers do on a continual basis.

A copy of this letter will be maintained in your personnel file.

AUTHORIZED:

A handwritten signature in black ink, appearing to read "Chief Pilecki".  
\_\_\_\_\_  
JACK PILECKI  
CHIEF OF POLICE

cc: Board of Selectmen  
Bulletin Board  
Personnel File

**Renzella, Jeff**

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**From:** debbie granowitz <dgranowitz1@gmail.com>  
**Sent:** Thursday, July 19, 2018 12:03 AM  
**To:** Renzella, Jeff  
**Subject:** Thank you

Dear Wellesley police

The reason why I'm sending you this letter is to let you know that 3 of your patrolman really helped me diffuse a situation I was having with my neighbor they went above and beyond their Call of Duty the patrolmen's names are officer Travis Dixon, officer Lamar Hughes, and officer Christopher Cunningham. You police officers have a very hard job and I can't thank you enough for all you did for me

God bless you all

Deborah Granowitz  
Wellesley Housing Authority resident  
513 h Washington Street Wellesley Mass



## TOWN OF WELLESLEY

WELLESLEY, MA 02482  
Telephone 781-235-1212

## POLICE DEPARTMENT

JACK PILECKI  
Chief of Police

**TO:** OFFICER MARK DEBERNARDI  
DISPATCHER DEREK HARRIS

**FROM:** CHIEF JACK PILECKI

**SUBECT:** LETTER OF COMMENDATION

**DATE:** AUGUST 24, 2018

I recently received a very positive email from Sergeant Gerrans, speaking highly of the way you both handled a call for a homeless man who didn't have any money and was looking for a place to stay for the night. This man walked into the Police Department lobby around 5:30PM and stated that he could not cash a check because he did not have any positive identification. He declined a ride to a local shelter due to a bad experience at the Pine Street Inn recently.

However, the man did state that he had friends he could stay with in Framingham, but he didn't have a ride. Without hesitation Off. DeBernardi and Disp. Harris pitched in some cash and were able to get the man to the Wellesley Square Train Station with \$20 in his pocket, where he caught the outbound train to Framingham.

Your patience, professionalism and empathy to do what was best for this person is a testament to your dedication to community policing and is to be commended. This case clearly demonstrates our mission to provide much more than just 'traditional' policing to our community.

A copy of this commendation will be maintained in your personnel file.

AUTHORIZED:

  
\_\_\_\_\_  
JACK PILECKI  
CHIEF OF POLICE

Cc: Bulletin Board  
Board of Selectmen  
Personnel File



## TOWN OF WELLESLEY

WELLESLEY, MA 02482  
Telephone 781-235-1212

## POLICE DEPARTMENT

JACK PILECKI  
Chief of Police

TO: Lieutenant Renzella

FROM: Sergeant Gerrans

DATE: July 24, 2018

RE: Call number 18-15949

Lieutenant Renzella,

On July 24, 2018 a man walked into the lobby requesting assistance with cashing a check. He said he couldn't cash a check due to lack of identification. While his story appeared dubious it appeared he was homeless. Dispatcher Harris spoke with the man and called me to ask for advice. I suggested we offer to take to him to a shelter in Framingham. Dispatcher Harris made the offer. The man declined saying that he's afraid of shelters due to a previous experience at Pine St. Inn.

The homeless man did say that he had friends in Framingham who could help him if he could get there. Dispatcher Harris and Officer DeBernardi each chipped in and gave the man \$20. Officer DeBernardi drove the man to the train station in the square where he caught the outbound train.

Dispatcher Harris and Officer DeBernardi actions in helping this man were generous and thoughtful. They reflect well on them personally as well as our internal culture.

Respectfully Submitted,

Glen Gerrans, Sergeant

For Date: 07/24/2018 - Tuesday

<u>Call Number</u>	<u>Time</u>	<u>Call Reason</u>	<u>Action</u>	<u>Duplicate</u>
18-15949	1734	Phone - REQUEST TO SPEAK TO OFFICE 10S-SERVICES-RENDERED		
Call Taker:		Dispatcher DEREK L HARRIS		
Location/Address:		[WEL 21] 485 WASHINGTON ST - WELLESLEY POLICE DEPT. - 485 WASHINGTON ST		
Involved Party:		DUNN, DAVID SEAN @ 106 WATER ST Apt. #208 - LEOMINSTER, MA 01453-3252		
SSN:		011664513 DOB: 11/08/1969 Sex: M		
Unit:		1408 Patrolman MARK A DEBERNARDI		
Disp-17:35:15		Arvd-17:35:16 Clrd-17:52:32		
Cleared By:		Dispatcher BRIAN C COLLINS		
Narrative:		07/24/2018 1744		
		Party is looking for assistance to try and cash a check to pay for a place to stay for the night. Party has friends in framingham who can assist him but no way to get there		
Narrative:		07/24/2018 1744		
		1408 transporsting party to the train station SM 35113.3		
Narrative:		07/24/2018 1750		
		EM 35114.1		





## TOWN OF WELLESLEY

WELLESLEY, MA 02482  
Telephone 781-235-1212

## POLICE DEPARTMENT

JACK PILECKI  
Chief of Police

**TO:** OFFICER DERRICK POPOVSKI  
OFFICER MICHAEL GERARD

**FROM:** CHIEF JACK PILECKI

**SUBECT:** LETTER OF COMMENDATION

**DATE:** AUGUST 27, 2018

---

I was very pleased to receive an email from Adam Epstein regarding a recent encounter he had with both of you. On August 22, 2018 around 7:00PM, Mr. Epstein was traveling on Washington St. near Cliff Rd., when his vehicle experienced an electrical problem and stopped in the left turn lane of Washington St.

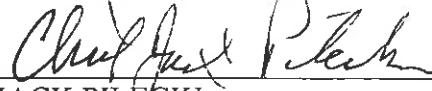
Realizing that traffic would quickly back up on Washington St. as the result of Mr. Epstein's disabled vehicle, you both took it upon yourselves to push Mr. Epstein's car into the Wellesley Hills Post Office parking lot, allowing traffic to flow again on Washington St.

Mr. Epstein was impressed with your responsiveness and professionalism. He also remarked that by pushing his car into the parking lot, you save him the time and expense of getting the car towed.

As Chief of the Wellesley Police Department, I would like to take this opportunity to thank you for your exemplary level of service that you provided in this situation. Your actions are indicative of the level of service and professionalism that the Wellesley Police Department provides to the citizens on a daily basis.

A copy of this commendation will be maintained in your personnel file.

AUTHORIZED:

  
\_\_\_\_\_  
JACK PILECKI  
CHIEF OF POLICE

## Renzella, Jeff

---

**From:** Gerrans, Glen  
**Sent:** Friday, August 24, 2018 12:12 PM  
**To:** Renzella, Jeff  
**Subject:** Fwd: recognition of a job well done

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**From:** Gerrans, Glen  
**Sent:** Friday, August 24, 2018 12:11:27 PM  
**To:** Adam Epstein  
**Subject:** Re: recognition of a job well done

Thank you Mr. Epstein for your kind words. I'll forward this to our chief.

Glen Gerrans, Sgt.  
WPD

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**From:** Adam Epstein <asepstein@comcast.net>  
**Sent:** Thursday, August 23, 2018 10:43:29 PM  
**To:** Gerrans, Glen  
**Cc:** Popovski, Derrick  
**Subject:** recognition of a job well done

Sgt. Gerrans:

I am writing to acknowledge Officer Derrick Popovski's assistance on Wednesday evening. My vehicle unexpectedly stopped in the middle of Washington St. due to an electrical problem and I couldn't restart it. Officer Popovski was very polite and assisted getting my vehicle off the road by pushing it into the post office parking lot, which saved me the significant time and expense of getting it towed. There was another officer (whose name I didn't get) that also assisted.

Although this was a brief event, I wanted to let you know that the responsiveness and professionalism of your staff is greatly appreciated.

Regards,  
Adam S. Epstein

For Date: 08/22/2018 - Wednesday

<u>Call Number</u>	<u>Time</u>	<u>Call Reason</u>	<u>Action</u>	<u>Duplicate</u>
18-17964	1904	Phone - MOTOR VEHICLE-DISABLED	10S-SERVICES-RENDERED	
Call Taker:		Dispatcher BRIAN C COLLINS		
Location/Address:		337 WASHINGTON ST @ 4 CLIFF RD		
Unit:		1410 PATROLMAN DERRICK Z POPOVSKI		
		Disp-19:06:11	Arvd-19:10:05 Clrd-19:20:07	
Unit:		1411 Patrolman MICHAEL S GERARD		
		Disp-19:07:11	Arvd-19:07:13 Clrd-19:15:19	
Vehicle:		GRY 2015 BMW M4 Reg: PC MA PS2388 VIN: WBS3U9C53FJ967968		
Owner:		EPSTEIN, ADAM S @ 84 ROYALSTON RD - WELLESLEY, MA 02481-1244		
		SSN: 016549907 DOB: 08/13/1970 Sex: M		
Narrative:	08/22/2018 1907	DMV IN THE LEFT TURN LANE		
Narrative:	08/22/2018 1916	VEHICLE PUSHED TO THE PARKING LOT OF THE POST OFFICE, PRIVATE TOW ON THE WAY		





# SEPTEMBER ELEVENTH COMMITTEE

C/O THE WELLESLEY FIRE DEPARTMENT  
457 WORCESTER STREET ♦ WELLESLEY HILLS, MA 02481



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WELLESLEY FIRE DEPARTMENT \* WELLESLEY POLICE DEPARTMENT \* WELLESLEY VETERANS' COUNCIL

August 28, 2018

Blythe C. Robinson  
Executive Director for General Government  
**TOWN OF WELLESLEY – MASSACHUSETTS**  
525 Washington Street  
Wellesley, MA 02482-5992

Dear Executive Director Robinson:

I am writing to formally advise you that the Town of Wellesley will conduct the following observance to remember the tragic events on September 11th, 2001:

*National Patriots Day Memorial Observance, ..... Tuesday, ..... September 11th*

The Wellesley Fire Department, Police Department and Veterans' Council would like to extend a cordial invitation to you to attend this ceremony and join us for refreshments immediately following at the Fire Department Headquarters.

A program for the service has been enclosed for your information. The observances are scheduled to begin at nine forty-five a.m.

Thank you for considering our request and if there are any questions please do not hesitate to call me at 617-840-0597.

Sincerely yours,

Richard R. Dillon  
Secretary, W.V.C.

Enclosure: Memorial Observances Program

\*\*\*\*\* "LEST WE FORGET" \*\*\*\*\*



# 911 Memorial Observances

★ ★

## PROGRAM ◆ SEPTEMBER ELEVENTH

9:30 A.M. FIRE APPARATUS AND POLICE CRUISERS FORM UP IN FRONT OF FIRE HEADQUARTERS  
LOWERING OF UNITED STATES FLAG TO HALF STAFF BY FIRE FIGHTER HONOR GUARD

9:45 A.M. PARTICIPANTS AND GUESTS ASSEMBLE AT ATTENTION AND MAINTAIN SILENCE

9:50 A.M. **MEMORIAL CEREMONIES COMMENCE**  
- **Welcome and Introductions** - *Fire Chief*  
- **Invocation** - *Chaplain*  
- **Salute to the Flag and Pledge of Allegiance** - *Veterans' Representative*

9:59 A.M. - **Remembrance of World Trade Center** - *South Tower "Collapse"*  
- **Tolling of Fire Station Bell** - 5-5-5-5  
- **Observe One Minute of Complete Silence**  
- **"Amazing Grace"**  
- **"Firefighters Prayer"** - *Fire Department Representative*  
- **"Police Officers Prayer"** - *Police Department Representative*  
- **"Prayer for all in Service"** - *Veterans' Council Representative*  
- **Board of Selectman** - *Board Representative*  
- **State Representative** - *Alice Piesch*  
- **State Senator** - *Cynthia Creem*  
- **State Senator** - *Richard Ross*  
- **Tolling of Fire Station Bell** - 5-5-5-5  
- **"Taps"**  
- **Raising of United States Flag** - *Fire Fighter Honor Guard*  
- **Benediction** - *Chaplain*

10:30 A.M. **Conclusion of Program**  
- Recognition of Participants and Guests - *Fire Chief*  
- Participants and Guests are invited to remain for Refreshments



# Boston Athletic Association

185 DARTMOUTH STREET, 6<sup>th</sup> FLOOR, BOSTON, MASSACHUSETTS 02116  
617.236.1652 [www.baa.org](http://www.baa.org)

August 22, 2018

Ms. Marjorie Freiman, Chair  
Board of Selectmen  
Town of Wellesley  
525 Washington Street, 3<sup>rd</sup> Floor  
Wellesley, MA 02482

Dear Ms. Freiman:

Planning is well underway for the 123<sup>rd</sup> Boston Marathon on Monday, April 15, 2019. This year's race promises to be a particularly exciting local, national and international sporting event as 30,000 athletes and many thousands more friends and family from around the world will join us for all the festivities on Patriots' Day Weekend.

The Boston Athletic Association, through the generous support of our principal sponsor, John Hancock Financial Services, will continue to underwrite the significant expenses of logistical course support to the Marathon communities, through planning and cooperation with the Massachusetts Executive Office of Public Safety and other federal, state, and local public safety agencies.

**Additionally, we are especially pleased to inform you that in 2019 we are able to increase our level of support, and contribution to the Town of Wellesley to the amount of \$64,900.** As agreed in past discussions, it is in the best interest of each community to determine the use and distribution of the B.A.A. contributions. However, it is our continued hope that available funds will be allocated to local youth and community programs whenever possible.

**Further, in order to assist with your future planning and to further demonstrate our commitment to you, we are also very happy to inform you that we will commit additional funds in 2020, 2021, and 2022 in the amounts of \$66,500, \$71,500, and \$71,500 respectively. The B.A.A. will celebrate the 125<sup>th</sup> running of the Boston Marathon in 2021, and as such the contribution will increase accordingly. The B.A.A. is both pleased and proud to commit such an unprecedented and noteworthy level of support to the Town of Wellesley, totaling \$274,400 over the next four years.**

We anticipate funds will be sent on or around March 1<sup>st</sup> 2019, similar to past years.

On behalf of all of us at the Boston Athletic Association, thank you again for your support and commitment to the Boston Marathon. We look forward to working with you and to our continued mutual success.

Sincerely,

The signature of Thomas S. Grilk, Chief Executive Officer of the Boston Athletic Association.

Thomas S. Grilk  
Chief Executive Officer

The signature of Jack Fleming, Chief Operating Officer of the Boston Athletic Association.

Jack Fleming  
Chief Operating Officer

CC: Mr. Blythe Robinson, Executive Director



TOWN OF WELLESLEY



RECREATION DEPARTMENT

WARREN BUILDING  
90 WASHINGTON STREET  
WELLESLEY, MASSACHUSETTS 02481

DIRECTOR  
MATTHEW G. CHIN

TELEPHONE: 781-235-2370  
FAX: 781-237-3558

DEPUTY DIRECTOR  
BRANDON FITTS

August 23, 2018

Mr. Jack Morgan, Chair  
Board of Selectmen  
Town of Wellesley  
525 Washington Street  
Wellesley, Massachusetts 02482

Re: Notice of Recreation Commission Vacancy

Dear Mr. Morgan,

I am writing on behalf of the Recreation Commission to notify the Board of Selectmen that Andy Wrobel has submitted his resignation from the Recreation Commission, effective August 22, 2018 (attached).

Consistent with Town practice, the Recreation Commission wishes to publish an announcement of the vacancy and ask for submissions of interest from residents; once candidates are identified, the Recreation Commission would interview selected candidates and ultimately select preferred candidates for recommendation to the Board of Selectmen. Pursuant to M.G.L. Ch. 41, Section 11, the Recreation Commission and Board of Selectmen would then convene a joint meeting to vote to fill the vacancies.

Your attention to this notice is greatly appreciated. Please do not hesitate to contact me if you have any questions.

Sincerely,

Matthew Chin  
Recreation Director

cc: File Copy, Recreation Commission, K.C. Cato (Town Clerk), Blythe Robinson (Executive Director of General Government Services), Meghan Jop (Assistant Director of General Government Services)



PLANNING BOARD

TOWN OF WELLESLEY

MASSACHUSETTS

Catherine Johnson, Chair  
James Roberti, Vice Chair  
Kathleen Woodward, Secretary  
Albert Berry IV  
Patricia Mallett, P.E.  
Shelia Olson, Associate Member



Town Hall, 525 Washington Street  
Wellesley, MA 02482  
Tel. (781) 431-1019 ext. 2232, 2234, 2238  
Fax (781) 237-6495

Michael Zehner, AICP  
Planning Director

August 27, 2018

Polaris Circle Homeowners Association  
c/o Kirzner, Fuchs & Hill, LLC  
Marci Hill  
1674 Beacon Street  
Brookline, Massachusetts 02445

Re: Release of Conditional Approval Agreement and Covenant and Final Approval  
Definitive Subdivision - North Star Estates - Polaris Circle (PB-04-E-1)

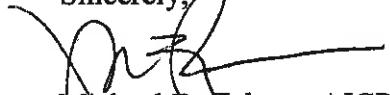
Dear Polaris Circle Homeowners Association,

I am writing on behalf of and authorized by the Town of Wellesley Planning Board, as unanimously voted (3-0) at a meeting on June 25, 2018, to release the *Conditional Approval Agreement and Covenant for Subdivision PB-04-E-1 North Star Estates - Polaris Circle* ("Approval Agreement & Covenant) recorded in Book 23453 Page 44 at the Norfolk County Registry of Deeds. The Board's action approving this release was based on their determination that prerequisite conditions and restrictions as stipulated in the Approval Agreement & Covenant had been satisfied, and further, the Board's approval of a modification of the subdivision as memorialized in the *Certificate of Planning Board Action - Approval* for the modification and filed with the Town Clerk on July 23, 2018 and *Revised Definitive Subdivision Plan Lotting Sheet - North Star Estates*, Sheet 1 of 1, prepared by Grady Consulting, L.L.C., dated January 9, 2018; this release is predicated on those documents, along with this letter, also being recorded at the Norfolk County Registry of Deeds.

Please note, while the Approval Agreement & Covenant is released as noted above, the Board believes that the property owners within the subdivision have a continuing obligation for a Homeowners Agreement and Homeowners Association, that the Association has a continuing maintenance obligation for commonly owned areas, namely the roadway and stormwater drainage system (if and until such time as either of those facilities are accepted by the Town of Wellesley), and that the Association is required to maintain a surety in perpetuity for the maintenance of the stormwater drainage system.

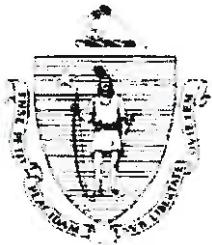
Thank you for your attention to this matter. Should you have any questions, or need any further information, please do not hesitate to contact me.

Sincerely,

  
Michael D. Zehner, AICP  
Planning Director

cc: File Copy, Board of Selectmen;  
Department of Public Works





OFFICE OF THE GOVERNOR  
COMMONWEALTH OF MASSACHUSETTS  
STATE HOUSE • BOSTON, MA 02133  
(617) 725-4000

CHARLES D. BAKER  
GOVERNOR

KARYN E. POLITO  
LIEUTENANT GOVERNOR

August 21, 2018

Dear Mr. Hans Larsen,

Congratulations! I am pleased to notify you that the Town of Wellesley has been awarded a Recycling Dividends Program grant of \$14,300 through the Sustainable Materials Recovery Program. I want to thank you for your commitment to reducing waste and increasing recycling for the benefit of our communities and the environment.

Enclosed you will find further instructions from the Department of Environmental Protection on next steps. Please feel free to contact Janine Bishop at 617-348-4004 if you have any questions.

Governor Charles D. Baker

Lt. Governor Karyn E. Polito

A handwritten signature in blue ink that reads "Charles Baker".

A handwritten signature in blue ink that reads "Karyn Polito".



Commonwealth of Massachusetts  
Executive Office of Energy & Environmental Affairs

## Department of Environmental Protection

One Winter Street Boston, MA 02108 • 617-292-5500

Charles D. Baker  
Governor

Matthew A. Beaton  
Secretary

Karyn E. Polito  
Lieutenant Governor

Martin Suuberg  
Commissioner

August 21, 2018

Mr. Hans Larsen  
Executive Director  
Town of Wellesley  
525 Washington Street  
Wellesley, MA 02482

Dear Mr. Larsen,

Congratulations! It is my pleasure to inform you that the Massachusetts Department of Environmental Protection (MassDEP) has awarded the Town of Wellesley Recycling Dividends Program funds under the Sustainable Materials Recovery Program. The Town of Wellesley has earned 11 points and will receive \$14,300.

The Sustainable Materials Recovery Program (SMRP) was created under 310 CMR 19.300-303 and the Green Communities Act, which directs a portion of the proceeds from the sale of Waste Energy Certificates to recycling programs approved by MassDEP. The Recycling Dividends Program (RDP) provides payments to municipalities that have implemented specific programs and policies proven to maximize reuse, recycling and waste reduction. Municipalities receive payments according to the number of criteria points their program earns. Eligibility criteria will ramp up over time, leveraging increasingly greater diversion results and lower solid waste disposal.

The key dates and deadlines specific to your award are summarized in the enclosed Checklist. The detailed terms and conditions are specified in the RDP Contract which has been mailed to the Recycling Contact of record for your municipality, copied below. The Recycling Contact will facilitate getting this document signed by an Authorized Signatory and will return it to MassDEP. Once received, the RDP Payment will be remitted to your municipality. Should you have any questions, please call Janine Bishop at 617-348-4004.

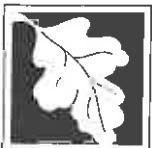
Please note that awards for other SMRP grant categories (Mattress Recycling Incentive, SMART/PAYT, Curbside Recycling/Food Waste Carts, Drop-off Equipment, School Recycling Assistance and Waste Reduction Projects) will be announced separately.

Thank you for your commitment to advancing recycling and waste reduction in Massachusetts. Together our efforts will reduce greenhouse gas emissions, conserve natural resources and save energy, while also supporting jobs and reducing disposal costs for waste generators and municipalities.

Sincerely,

Martin Suuberg  
Commissioner

cc: Jeff Azano-Brown, RDF Superintendent, DPW



**Checklist for Recycling Dividends Program Grant Award**

**This document contains important grant deadlines and requirements**

**STEP ONE: EXECUTING THE CONTRACT**

It is the responsibility of the municipal Recycling Contact to ensure that the RDP Contract is signed by an individual currently holding one of the Titles listed on page 1 of the Authorized Signatory Listing form, which your municipality filed with MassDEP in the spring of 2017. If the person(s) listed on the form has changed (for example, a new Mayor has been elected), the municipal official with the same title may sign the RDP Contract. A new Authorized Signatory Listing form IS NOT REQUIRED.

*The signed original RDP Contract must be returned to the address listed below no later than January 15, 2019 or funds will be forfeited.*

**STEP TWO: TRACK EXPENDITURES BY APPROVED EXPENSE CATEGORY**

- This is not a reimbursement-based grant. Your award payment will be processed as soon as the RDP Contract is returned.
- However, you are required to keep track of approved expenditures, by expense categories. See the 2018 Grant Guidance, for a list of approved expense categories, and Section 9 for record keeping requirements.
- Be prepared to be audited.

**STEP THREE: REPORT EXPENDITURES AND REMAINING BALANCE**

- The municipality is required to report all expenditures from the previous calendar year no later than February 15<sup>th</sup>.

**Contact Dawn Quirk with any questions: 617-292-5557 or Dawn.Quirk@state.ma.us**

**Return completed documents to: Dawn Quirk, MassDEP, Consumer Programs, One Winter Street, 7<sup>th</sup> Floor, Boston, MA 02108**



**WILDER, SHEA & HIMMELBERGER, LLP**

Counselors at Law  
One Hollis Street, Suite 400  
Wellesley, Massachusetts 02482

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Fax: (781) 235-8242

David J. Himmelberger  
Telephone: (781) 237-8180  
Email: [david@wshlawoffice.com](mailto:david@wshlawoffice.com)

Leslie B. Shea  
Telephone: (781) 235-3400  
Email: [les@wshlawoffice.com](mailto:les@wshlawoffice.com)

September 5, 2018

Jack Morgan, Chair  
Wellesley Board of Selectmen  
Town Hall  
Wellesley, MA 02482

**RE: Request for Change in Parking Meters  
Request for Licensing of Town Land**

Dear Mr. Morgan:

I am writing to request a change in the length of time permitted at parking meters located in Zone 2340, as well as to explore the possible licensing of town land to allow for improvements to the former railroad right of way adjacent to 27 Washington Street, Wellesley.

I represent EP 14 Mica Realty, LLC ("EP 14 Mica"), EP 16 Mica Realty, LLC ("EP 16 Mica") and their Principal, Mitchell Kassler, the new record owners of 14 and 16 Mica Lane. EP 14 Mica and EP 16 Mica recently completed their purchase of these properties from the prior owner, which I also represented in connection with its successful requests to the Zoning Board of Appeals for Special Permits and Site Plan Review. EP 16 Mica will complete the construction project described in those permitting requests, resulting in a significant renovation of 16 Mica Lane along with the creation of a new parking field for 25 vehicles.

The rear of the buildings at 14 and 16 Mica Lane directly abut the town's property comprised of the former railroad right of way that runs from Washington Street to the recently renovated bridge that crosses the Charles River. The first portion of this town property currently contains 16 two hour metered spaces, and one handicap space. Drivers access these parking spaces from an entrance on Washington Street and exit into and through the parking lot at 27 Washington Street. (The remainder of the town's right of way over the old rail line is green space and contains a path that runs to the bridge over the Charles River, from which the path continues on to Riverside MBTA station.) I have enclosed two maps from the town's GIS system; one which depicts the metered parking in the area, and the other that provides a fuller depiction of the railroad right of way.

It has been my client's observation that this parking field is never more than about 50% full except during the evening when the parking is free and utilized by patrons of nearby restaurants. My client would like to request that all or some of these meters that are currently limited to two hours instead be changed to four hour meters. The change to four

hour meters would allow for better utilization of the meters during business hours, as they could be used more efficiently by workers in the area, including those at 14 and 16 Mica Lane. The town would benefit from increased parking meter revenues and the viability of the Lower Falls businesses would be enhanced through more available parking for office tenants. My client and I would welcome the opportunity to discuss this with the Board at its earliest convenience.

Additionally, my client has prepared a landscape plan for the town's green space at the rear of 16 Mica Lane and is hopeful that the town would entertain a licensing agreement with EP 16 Mica, which would allow it to improve the current landscaping and place a limited amount of outdoor furniture on the green space to make it even more viable.

I have enclosed a rendering of the proposed landscape plan, along with a rendering of proposed granite piers to be installed where noted on the landscape plan. As the enclosed photos indicate, the subject area is currently an unimproved and fairly lackluster space highlighted by three utility boxes. By permitting the requested improvements, which would be open to use by anyone and not otherwise limited to occupants of my client's buildings, the area would be activated and an attractive gathering spot would be created, while the utility boxes would be screened with new plantings.

Similar in concept to the licensing of town sidewalk area on Central Street, my client would take on the responsibility for maintaining and cleaning the area. The proposed improvements would seem to represent a significant betterment for the Lower Falls business community and the Town.

Please advise as to when the Board might be able to accommodate a discussion regarding these two proposals. Thank you for your attention to this matter. We look forward to further discussion in the near future.

Should you have any questions concerning the foregoing, please do not hesitate to contact me.

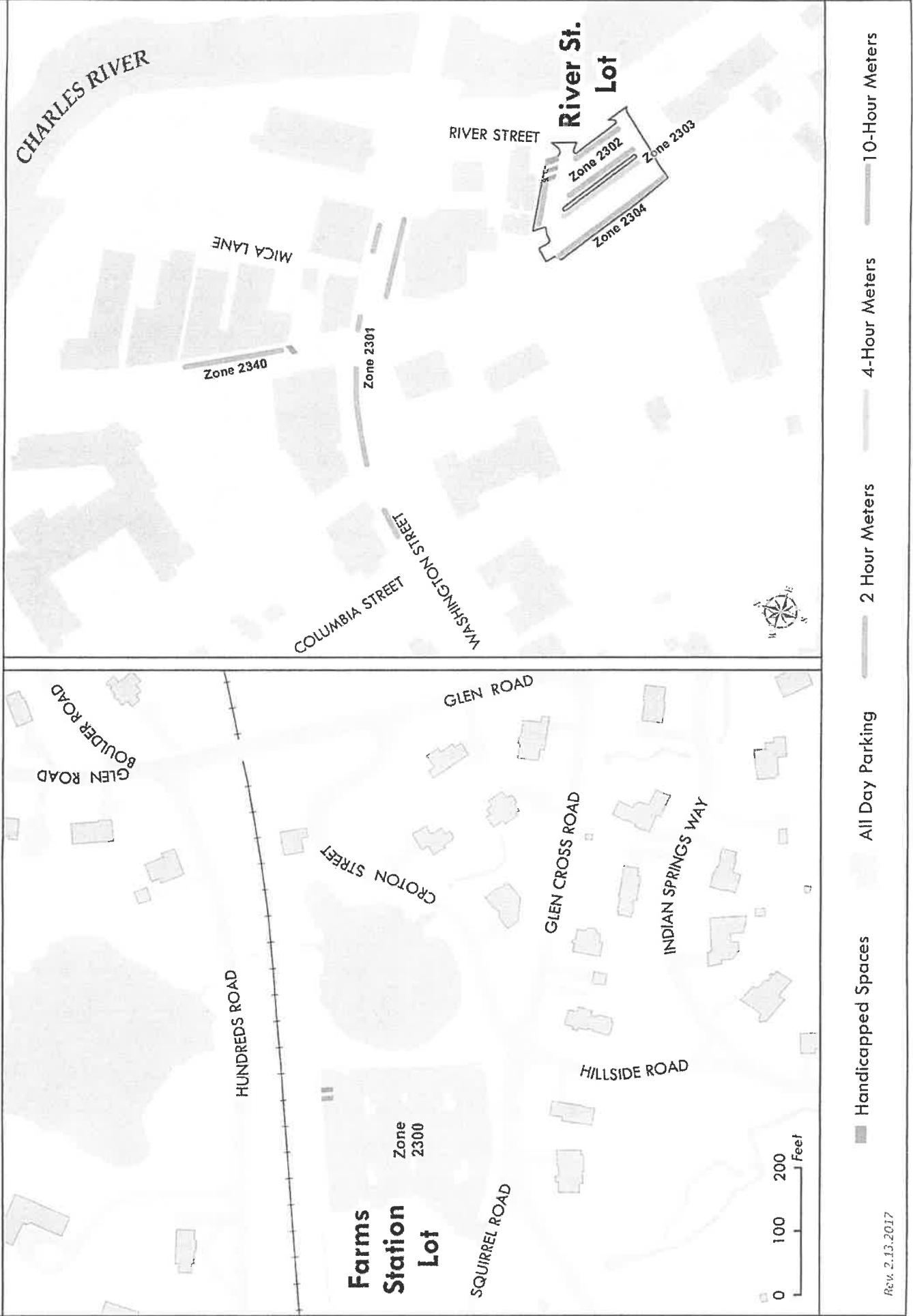
Very truly yours,



David J. Himmelberger

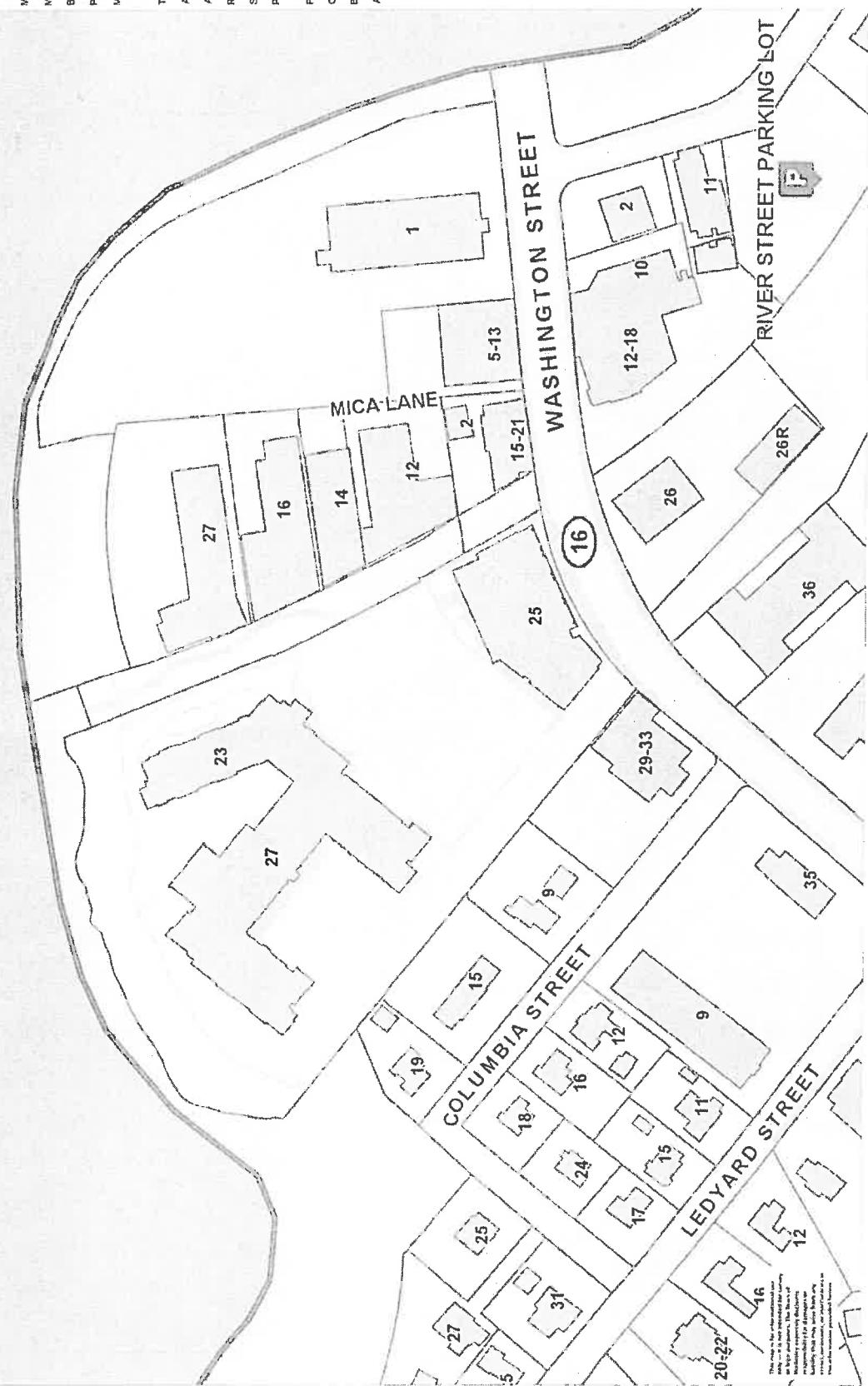
Enc.

# Wellesley Farms Station Lot & Lower Falls Area Metered / Permitted Parking





NEWTON

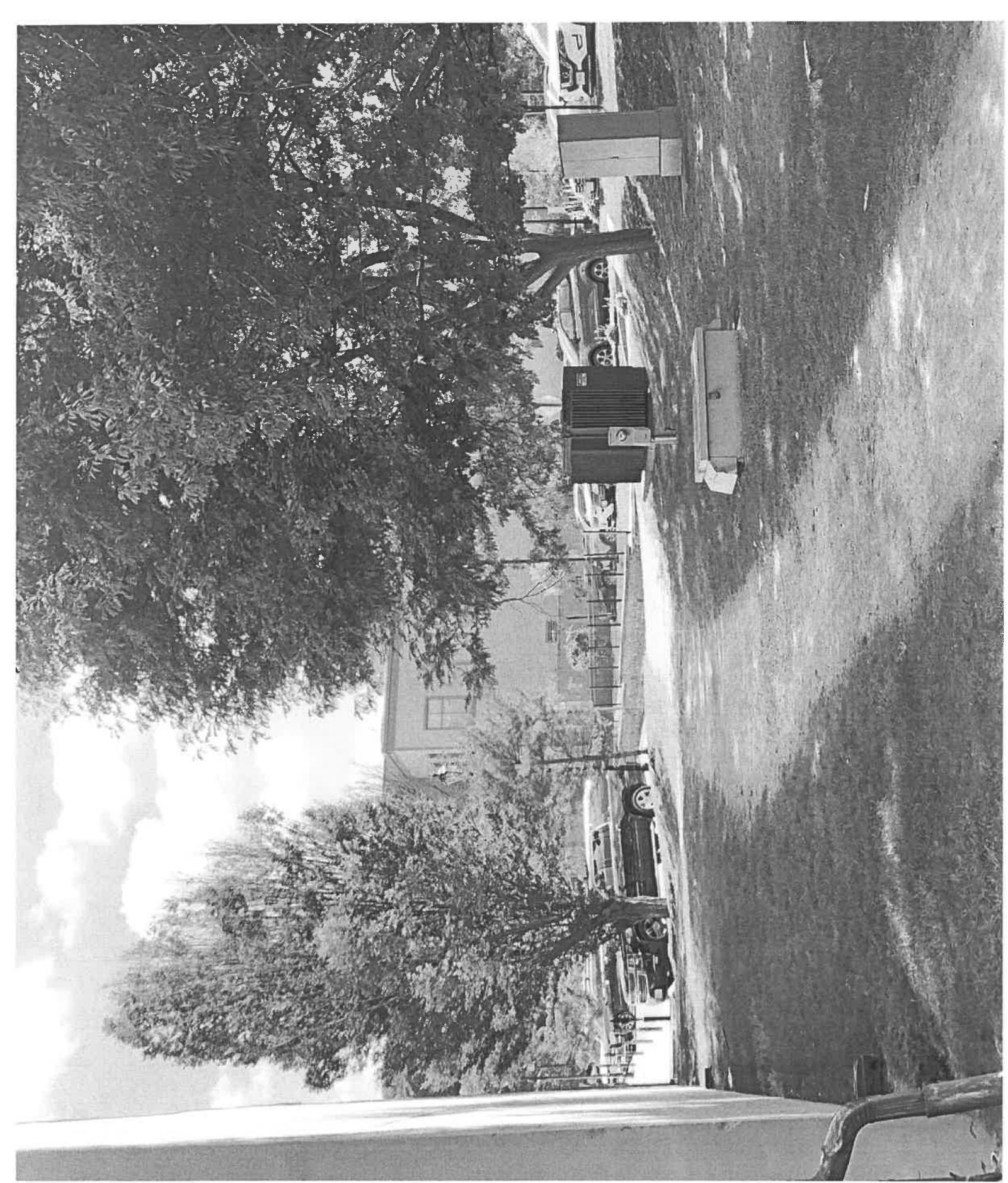


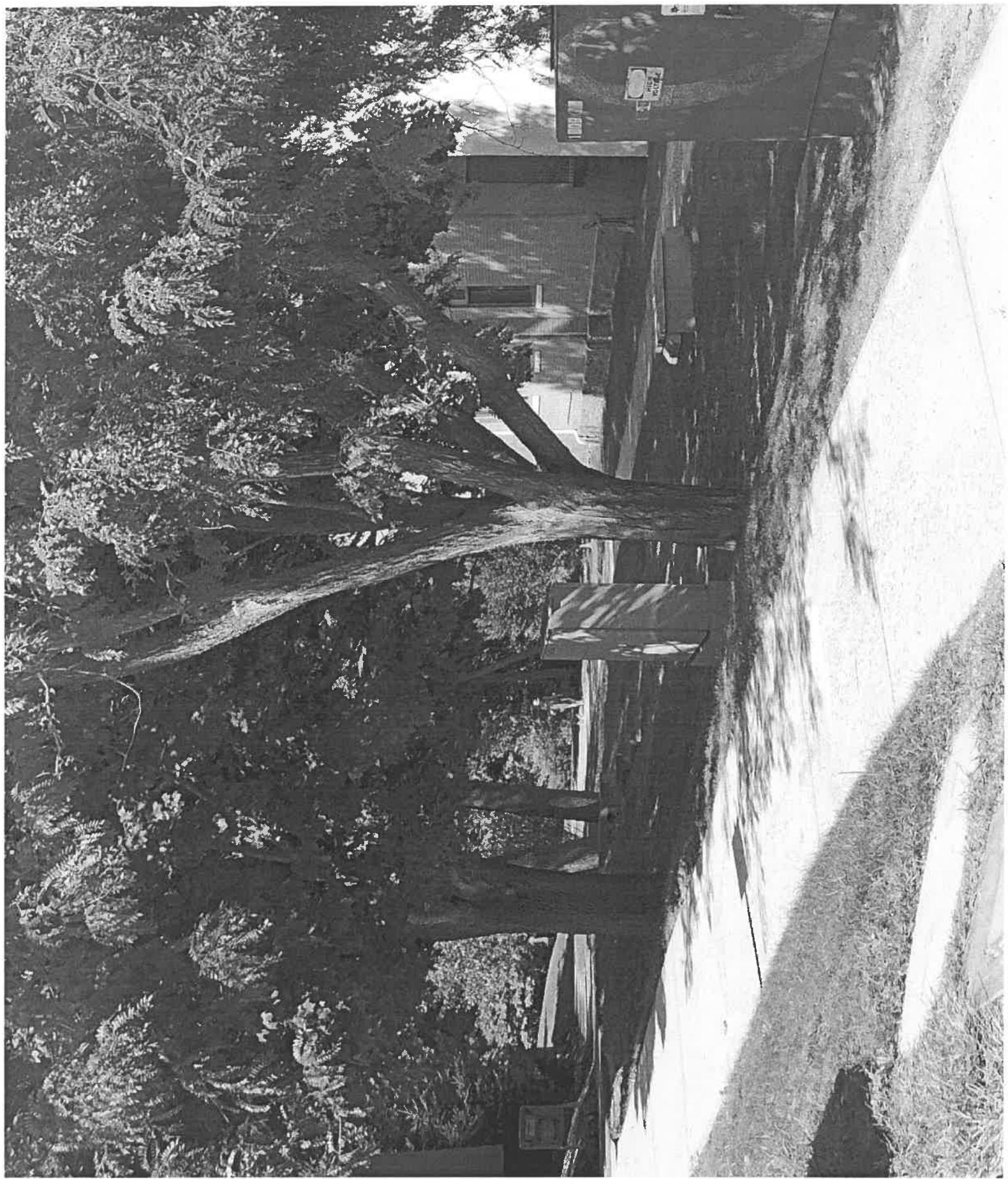
Town of Wellesley, MA

Printed on 04/14/2018 at 11:48 AM

440 ft. 220 0

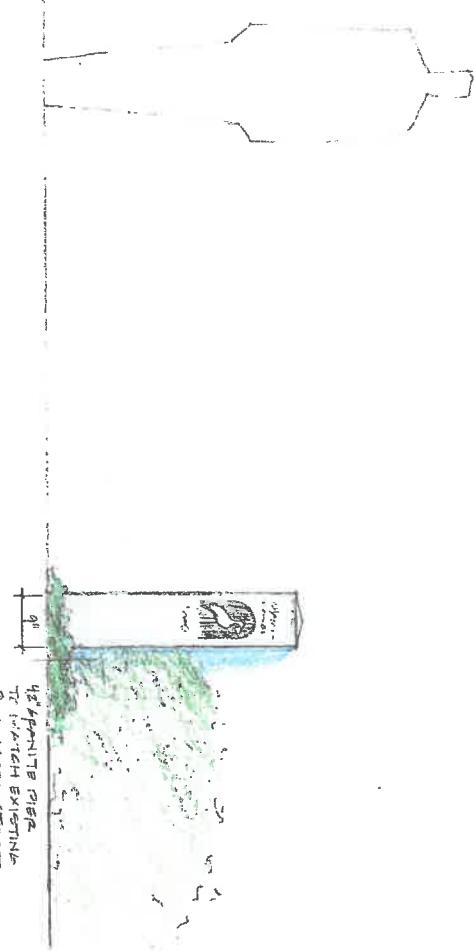
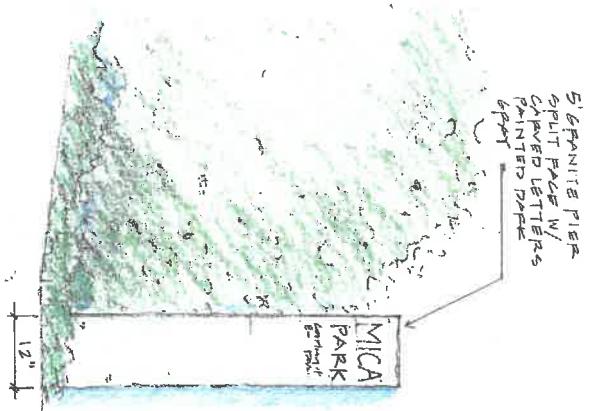












MICA PARK ENTRY plaque  
16 MICA LANE • WELLESLEY, MA  
B.9.2018 6121 create: 3/14/21 10"

9-5-18

Selectmen Office -

Was a permit given for this terrible plastic drop cloth (fence?) located at 27 Bradley Ave. Wellesley (enclosure A). Both sides and back yard are covered with this plastic drop cloth.

Also, two (2) large plastic garbage containers are left on the front driveway every day. (enclosure B).

We live in a beautiful - desirable neighborhood, people are trying to sell their properties and this messy house at the entrance to our neighborhood detracts from sales.

Thank you for your help in this matter.

Jacqueline DeNaro  
26 Mac Arthur Road

Enclosure A



Enclosure B.



## MONTHLY PARKING METER, CALE, PASSPORT COLLECTIONS

										423220, 423225, 423226, 423227, 423235, 423240, 423245, 423250, 423265, 423266, 423270, 423275, 423276, 423277, 423280, 423285,	423220, 423225, 423226, 423227, 423235, 423240, 423245, 423250, 423265, 423266, 423270, 423275, 423276, 423277, 423280, 423285,
					from Munis	from Munis	from Munis	from Munis	from Munis	from Munis	from Munis
FY14		FY15		FY16		FY17		FY18		FY19	
JULY 2013	\$41,016.09	JULY 2014	\$53,233.47	JULY 2015	\$64,094.66	JULY 2016	\$50,667.34	JULY 2017	\$54,003.77	JULY 2018	\$63,222.92
AUGUST	\$39,083.51	AUGUST	\$24,729.03	AUGUST	\$58,749.76	AUGUST	\$61,344.19	AUGUST	\$61,112.19	AUGUST	
SEPTEMBER	\$62,302.39	SEPTEMBER	\$68,978.72	SEPTEMBER	\$55,809.42	SEPTEMBER	\$50,830.99	SEPTEMBER	\$55,629.78	SEPTEMBER	
OCTOBER	\$35,001.90	OCTOBER	\$64,491.40	OCTOBER	\$61,535.29	OCTOBER	\$62,225.28	OCTOBER	\$51,914.25	OCTOBER	
NOVEMBER	\$59,404.77	NOVEMBER	\$49,401.08	NOVEMBER	\$49,936.99	NOVEMBER	\$50,881.23	NOVEMBER	\$62,836.07	NOVEMBER	
DECEMBER	\$29,443.71	DECEMBER	\$37,730.09	DECEMBER	\$50,918.32	DECEMBER	\$38,108.86	DECEMBER	\$46,604.28	DECEMBER	
JANUARY	\$29,533.71	JANUARY	\$44,776.94	JANUARY	\$47,964.92	JANUARY	\$47,280.92	JANUARY	\$35,145.28	JANUARY	
FEBRUARY	\$28,289.25	FEBRUARY	\$23,043.54	FEBRUARY	\$49,343.49	FEBRUARY	\$34,550.25	FEBRUARY	\$65,329.44	FEBRUARY	
MARCH	\$66,633.89	MARCH	\$65,716.03	MARCH	\$51,078.12	MARCH	\$59,385.45	MARCH	\$65,527.70	MARCH	
APRIL	\$49,509.40	APRIL	\$50,651.25	APRIL	\$51,021.54	APRIL	\$52,563.25	APRIL	\$51,080.85	APRIL	
MAY	\$57,311.58	MAY	\$28,135.00	MAY	\$67,963.90	MAY	\$52,878.35	MAY	\$68,547.60	MAY	
JUNE	<u>\$60,391.99</u>	JUNE	<u>\$64,391.57</u>	JUNE	<u>\$60,997.93</u>	JUNE	<u>\$59,343.56</u>	JUNE	<u>\$65,115.00</u>	JUNE	
	\$557,922.19		\$575,278.12		\$669,414.34		\$620,059.67		\$682,846.21		\$63,222.92
	\$47,467.33		\$48,980.41		\$59,551.28		\$54,280.84		\$56,915.25		\$21,074.31
	\$41,283.46		\$50,540.86		\$54,130.20		\$50,405.12		\$53,784.87		\$0.00
	\$41,485.62		\$44,512.17		\$49,462.18		\$47,072.21		\$55,334.14		\$0.00
	\$55,737.66		\$47,725.94		\$59,994.46		\$54,928.39		\$61,581.15		\$0.00

Passport Parking System  
implemented February 2017  
(included in totals above)



## Wellesley Animal Control Monthly Report

### July 2018

The end of the month was the start of bat calls. All the bats found in homes and submitted to the state Laboratory all tested negative.

The warm weather brought many people outside and aware of sick or injured wildlife. A few were rescued from basement window wells and released. Sick or injured wildlife that could not be rehabilitated were removed from public access and euthanized.

#### Breakdown of enforcement

124 Warnings (56 unvaccinated, 28 unlicensed)  
24 Citations (12 unvaccinated, 12 unlicensed)  
7 Follow up letters unpaid fines  
0 Request for Court hearings

After no response to follow up letters on unpaid fines I send the information to court to request hearings.

I make changes to keep the animal control web page monthly to updated residents on current issues with pets and wildlife. Listing found pets on the web site and in local media and newspaper helps get animals reunited with owners quickly. Often times it is a neighbor who recognizes a pet on the web and notifies the owner.

Volunteers continue to help the unclaimed pets photographed and short video's made and help post them to the internet so they get adopted quickly.

#### On my own time

I continue working with Linkup Education Network and their safepeople safepets program.

7/17 I attended a World of Wellesley meeting.

Month of:

JULY 2018

62 Total incidents investigated      Off Duty calls  
Police Responded 27

13 Loose/Uncontrolled  
1 Bite  
4 Bark  
32 Wild  
1 Cat  
13 Other

11 Loose/Uncontrolled  
1 Bite  
2 Bark  
4 Wild  
1 Cat  
10 Other

Report filed/Assistance given 12  
Gone on arrival/Quiet 15

124 Total actions taken

100 Warning      16 Loose  
28 Unlicensed  
56 Unvaccinated

1 \$50.00 Loose  
12 \$25.00 Unlicensed  
12 \$50.00 unvaccinated

29 Total Animals Picked Up

Dog	Cat	Domestic	Wild
-----	-----	----------	------

<u>1</u>	<u>1</u>	<u>6</u>	
		<u>9</u>	
<u>1</u>		<u>Parakeet</u>	
	<u>1</u>	<u>9</u>	

On Hand Beginning

Hospital

Truck

Station

Dead on arrival

\*\*\*\*\*

<u>2</u>		<u>Parakeet</u>	<u>7</u>	Returned to owner/wildlife released
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Adopted

Transferred to humane Shelter

Euthanized

Deceased-unclaimed

On hand end

## Wellesley Animal Control Monthly Report

JULY 2018

## Number of calls received daily:

1. _____	7. _____	13. <u>11</u>	19. <u>6</u>	25. <u>9</u>
2. <u>21</u>	8. _____	14. _____	20. <u>6</u>	26. <u>12</u>
3. <u>9</u>	9. _____	15. _____	21. _____	27. _____
4. <u>7</u>	10. _____	16. <u>17</u>	22. _____	28. _____
5. _____	11. <u>47</u>	17. <u>5</u>	23. <u>17</u>	29. _____
6. _____	12. <u>15</u>	18. <u>12</u>	24. _____	30. _____
				31. <u>29</u>

Average calls per day: 14-15Total Calls this year: 223

## Type of Calls

7 Lost/Found Dogs12 Lost/Found Cats16 Cat nuisance14 Cat rabies vaccination17 Dog rabies vaccination13 Licensing65 Wildlife7 Dead animalAnonymous 672 Adoptions52 Other

## Violation calls

16 Loose/uncontrolled  Bite2 Bark  OtherTotal Violation calls this year: 18

microchip <i>No</i>	date <i>7/2/18</i>	age	breed <i>Terakool</i>	sex	color <i>Yellow/Orange</i>	location picked up <i>Central ST</i>	unwanted	dead on arrival	owner claimed	location held
Euth per Owner	Euth per aco	method euth	Name vet euth	clinic name	Owner info <i>Jeanne Sindon 774-322-0610</i>				<i>7/3/18</i>	<i>Police Station</i>
microchip <i>No</i>	date <i>7/3/18</i>	age	breed <i>Adult</i>	sex	color <i>Brown Tabby</i>	location picked up <i>Appley Rd</i>	unwanted	dead on arrival	owner claimed	location held
Euth per Owner	Euth per aco	method euth	Name vet euth	clinic name	Owner info				<i>7/3/18</i>	<i>Station</i>
microchip <i>No</i>	date <i>7/10/18</i>	age	breed <i>Avst. Sheep</i>	sex	color <i>Brown</i>	location picked up <i>Crest Rd</i>	unwanted	dead on arrival	owner claimed	location held
Euth per Owner	Euth per aco	method euth	Name vet euth	clinic name	Owner info <i>Animal Heaven 36 Linden ST</i>				<i>7/10/18</i>	<i>Station</i>
microchip <i>7E 102-10404</i>	date <i>7/15/18</i>	age	breed <i>Young Husky</i>	sex	color <i>Red/white</i>	location picked up <i>R79/128</i>	unwanted	dead on arrival	owner claimed	location held
Euth per Owner	Euth per aco	method euth	Name vet euth	clinic name	Owner info <i>Animal Land 146 North ST Medfield, MA 02052</i>				<i>7/16/18</i>	<i>Animal Land R79/35 Medfield, MA 02052</i>