

PROJECT REQUIREMENTS AND RESPONSE TO RFP

Wellesley is an impressive, maturely developed suburb of Boston. It is a higher education mecca that offers an exceptional quality of life and amenities and a resident population with high expectations. Wellesley attracts home seekers who want the advantages of urban living and excellent public services, especially schools. With little vacant land (and expensive land, too), intense pressure for redevelopment, populations with different needs all competing for the same desirable housing supply, and Wellesley's prestige all contribute to the town's very high housing costs. In turn, its hot housing market has gradually fueled growth and change conditions that have helped to widen the wealth gap and exacerbate housing affordability problems.

To arrive at a workable housing strategy requires more than statistical analysis and projections. Town government, non-profit and for-profit developers, human service agencies, charitable organizations, and dedicated citizens need a shared understanding of roles and responsibilities and a commitment to work together. Although Wellesley's total population has not changed significantly, there is evidence that economic, social, and cultural change has occurred here as households have continued to come and go. Just about everywhere, economic change often triggers social conflict, and Wellesley is no exception. Not all parts of the town have benefited from the effects of rising household wealth and new housing construction. Wellesley does have residents who struggle to make ends meet and have trouble finding housing they can reasonably afford.

Wellesley needs a framework for achieving a shared vision of its housing future and a strategic plan for getting there. Through the efforts of the Planning Board, Zoning Board of Appeals, Wellesley Housing Development Corporation and others, Wellesley has taken steps to provide for housing affordability and access to housing choices. Recognizing the intensity of housing demand in Wellesley and the challenge of managing the Chapter 40B permitting process, the Town wants to prepare a Chapter 40B Housing Production Plan to identify housing opportunities and gain as much control as possible over comprehensive permits. While doing so, the Town also wants to make the most efficient use possible of existing data, plans, and studies.

It is important to note that while Chapter 40B recognizes three statutory minima, the Department of Housing and Community Development's Housing Production Plan regulation focuses on only one: producing enough low- or moderate-income housing to reach the 10 percent minimum number of affordable units.

APPROACH AND PLAN OF SERVICES

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

MOBILIZATION

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

HOUSING MARKET ANALYSIS AND NEEDS ASSESSMENT

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

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

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

HOUSING GOALS

Barrett/Goldson will assist the Town in developing goals for the Housing Production Plan. “Goals” are numeric on one hand – number of units – and qualitative on the other hand, e.g., types of housing the Town needs, or underserved settings with critical housing needs. The goals should be informed by DHCD’s housing plan certification requirements (meaning the minimum one- and two-year certification targets), but what is most important is a clear description of Wellesley’s own quantitative and qualitative goals.

HOUSING STRATEGIES (ACTION PLAN)

- **Site Suitability Criteria.** We will work with Town staff and boards to determine criteria that can be used to identify and evaluate potential sites for affordable or mixed-income housing, or housing in mixed-use developments. For site identification decisions, we encourage municipal boards to identify properties or areas they think would be appropriate and let the consultants conduct a technical review of those sites. This approach has always worked well, in our experience, largely because it respects the knowledge that already exists in local government and reinforces that the community owns the plan. Nevertheless, we understand that Wellesley would like the criteria to be vetted and determined in an open public process, e.g., a community meeting sponsored by the Planning Board or other town agency, and our team will be pleased to facilitate that kind of process.

It is important to note that the approach requested by Wellesley is very similar to the approach the Town of Brookline hoped to follow. Among the many “lessons learned” in Brookline: the number and types of criteria people wanted to apply to the site identification and prioritization process did not produce the results that Brookline’s steering committee expected. In the end, the criteria had to be narrowed considerably, and it is best to make that clear at the outside of the criteria selection process in order to manage expectations.

The Board of Selectmen will be updated about the status of this project while the site criteria and site identification tasks are underway.

- **Identification of Suitable Sites; Prioritization.** Using zoning assumptions provided by Town staff (e.g., effective FAR multipliers) and GIS technology, we will work with the Town to apply a reasonable set of criteria and identify potentially suitable locations for affordable and mixed-income housing. Sites meeting all or a substantial majority of the previously agreed-upon criteria will be determined in consultation with town boards and the public at a meeting under the direction of the Planning Board or working group and following a general review of

those sites, we will report back to the Town by presenting our review and initial recommendations.

- **Recommendations.** Barrett/Goldson will identify opportunities for regulatory reform and other mechanisms to bridge the gap between existing conditions and Wellesley’s affordable housing needs. The recommendations should include, at a minimum:
 - Land development regulations;
 - Financial mechanisms to support the development of affordable housing;
 - Employer and institutional involvement;
 - Potential use of Chapter 40B, Chapter 40R, and other measures;
 - Staffing needs for carrying out affordable housing initiatives;
 - Potential for partnerships or regional collaborations; and
 - A review of “best practices” from other communities in New England and beyond, considering communities with similar demographics and location characteristics.
- **Implementation Schedule.** Barrett/Goldson will propose a five-year action plan schedule to guide the Town’s implementation of strategies outlined in the plan.
- **Presentations.** Our team will present a draft of key findings, goals, and strategies at a public meeting sponsored by the Planning Board or working group and present the final Housing Production Plan at a public meeting of the Board of Selectmen. Ideally, the Board of Selectmen and Planning Board should conduct a joint hearing to consider the proposed Housing Production Plan, as both boards are required to approve the plan and submit it to DHCD for review.
- **Technical Appendix.** Summary metrics of current and projected demands for affordable housing, a report glossary, comparable community case studies, and other documentation as needed.

COMMUNITY PARTICIPATION; PROPOSAL ASSUMPTIONS

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

- A kickoff meeting with the Planning Department to discuss the project approach and timetable, refine the scope of work, and develop a public participation plan.

- Four public meetings which may occur primarily under “Housing Strategies” and the adoption process, but they may also be divided up to accommodate the needs of other tasks in the scope of services. Meeting design will be determined as part of the public participation plan. An alternative the Town may wish to consider would be three community-wide public meetings and two focus groups with a selection of knowledgeable residents whose experience could help to refine, shape, and make practical the goals and recommendations of the Housing Production Plan. Again, this can be discussed and resolved when the public participation plan is developed.
- One day of individual or small-group interviews and/or focus groups conducted as part of developing the Housing Strategies (Action Plan).
- Reasonable number of daytime project coordination meetings with Town staff, which may be done face-to-face or by videoconference, e.g., Webex.

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

PROJECT SCHEDULE

The Barrett/Goldson Team agrees that the proposed project can be completed within 28 weeks, but a 28-week completion goal is a little ambitious. For a Housing Production Plan, the schedule issues that can arise have far less to do with the consultant’s level of effort than with the community’s need for time to hear, digest, reach agreement about, and work with the information the consultants submit along the way. If Wellesley determines that it needs additional time for consensus building, deliberation, or negotiation, we will consider a modest extension of the contract to meet the Town’s needs. Otherwise, we understand the project should be completed within 28 weeks and our proposed schedule is based on that assumption.

DELIVERABLES

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

- Interim reports: Housing Needs, Goals, and Strategies, submitted to the Town in electronic format (PDF);
- PowerPoint presentations for each of the public meetings included in our proposal; and

- Twenty bound copies of the HPP, including a separate stand-alone Executive Summary, in written and electronic format.

TEAM RESPONSIBILITIES BY TASK

The chart below lists tasks, lead responsibilities, and approximate time required for each major phase of the project. (Time is expressed in number of weeks from Notice to Proceed.)

PROJECT RESPONSIBILITIES & ORGANIZATION		
Task/Approximate Completion Timeline	BPG	JMG
MOBILIZATION (Within 3 weeks of NTP)		
Start-up tasks (e.g., kickoff meeting, tour)	★	★
Assemble, organize demographic, market, GIS data	★	
Review existing plans		★
NEEDS ASSESSMENT (7 weeks from NTP)		
Data Review: Existing Conditions & Trends	★	⊙
Sub-markets assessment	★	⊙
Population, social, economic trends		★
Existing housing conditions and trends	★	⊙
Municipal services, schools, utilities		★
Transportation/mobility	★	
Interviews/focus groups		★
Analysis of constraints		
Regulatory, physical, market	★	
Resources/capacity assessment		★
Fair housing	★	
GOALS (9 weeks from NTP)	⊙	★
STRATEGIES (20 weeks from NTP)		
Criteria for suitable locations	★	
Refine criteria	★	
Evaluate public/private sites	★	
Identify development strategies, roles/responsibilities	★	⊙
Develop proposed timeline		★
FINAL HPP (28 weeks from NTP)	★	
PUBLIC MEETINGS (4) (TBD in citizen participation plan)	⊙	★

★ = Primary responsibility

⊙ = Support role

*NTP = Notice to Proceed