



**TOWN OF  
MEDFIELD**  
*Office of the*  
**BOARD OF  
SELECTMEN**

***Board of Selectmen***

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Osler L. Peterson, Member

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February 15, 2022

Jennifer Maddox, Undersecretary  
Department of Housing and Community Development  
100 Cambridge Street, Suite 300  
Boston, Massachusetts  
02114

Dear Ms. Maddox,

On behalf of the Medfield Board of Selectmen and Planning Board, I am pleased to submit the attached Medfield Housing Production Plan for your review and approval under the State's Housing Production Program.

The Planning Board voted to adopt the Housing Production Plan on February 7, 2022 and the Board of Selectmen voted to adopt the Housing Production Plan on February 15, 2022.

This Housing Production Plan outlines how the Town will continue the progress it has made toward reaching and sustaining the goal of having 10% affordable housing. Through the Housing Needs Assessment, completed by JM Goldson, we have documented the extent of the local housing needs for affordable housing as well as more diverse housing options. Through multiple meetings with the Affordable Housing Trust, the Planning Board, Board of Selectmen, and public comments, the plan identifies desired local housing preferences and locations, goals and strategies to help increase the Town's supply of affordable housing, and an implementation plan to meet housing targets through efforts already in progress, such as the construction of the Aura, a 56 unit LIP development currently under construction, Hinkley South, a 24-unit senior ownership LIP currently undergoing permitting, and additional sites and actions that have potential to diversify Medfield's housing stock and increase its supply of SHI-eligible Affordable Housing.

Our municipal contact is: Sarah Raposa, AICP, Town Planner. Ms. Raposa can be reached by telephone at (508) 906-3027 or email at [sraposa@medfield.net](mailto:sraposa@medfield.net).

We look forward to your determination that the plan meets HPP Regulations and Guidelines.

Sincerely,

A handwritten signature in blue ink, appearing to read 'Michael T. Marcucci', with a long, sweeping horizontal line extending to the right.

Michael T. Marcucci, Chair  
Board of Selectmen



# TOWN OF MEDFIELD

# HOUSING PRODUCTION

# PLAN

FY2022-2026

**PREPARED FOR:**

Town of Medfield, MA

**PREPARED BY:**

JM Goldson LLC

Approved by the Medfield Planning Board on February 7, 2022

Seth Meehan, Chair

Paul McKechnie

James Brand

Sarah Lemke

Teresa James

Approved by the Medfield Board of Selectmen on February 15, 2022

Michael Marcucci, Chair

Gustave Murby

Osler Peterson

Affordable Housing Trust

Michael Marcucci, Chair

Ann Thompson

Greg Sandomirsky

Joseph Hunt

Newton Thompson

Kerry McCormack

James Brand (res. 2021)

Sarah L. Raposa, AICP, Town Planner

# Housing Production Plan 2021 Kick-off Meeting

Please join the Affordable Housing Trust and the Planning Board for a discussion about housing needs, priorities, and strategies on Thursday, June 3, 2021 at 7:30 P.M.

<https://us02web.zoom.us/j/83455699372?pwd=MWNSbGJlNC8xRXowZHpIV1QrSmI2Zz09>

Passcode:

584069

Or Telephone: [+1 346 248 7799](tel:+13462487799)

Webinar ID: 834 5569 9372

Passcode: 584069

**The 'Housing Production Plan 2021 Update' will  
identify new housing challenges and shape  
Medfield's housing goals for the future.**





## TABLE OF CONTENTS

|   |    |
|---|----|
| <i>Acronyms</i> .....                           | 6  |
| <i>Key Definitions</i> .....                    | 7  |
| <i>Data Sources</i> .....                       | 9  |
| CHAPTER 1: INTRODUCTION.....                    | 10 |
| <i>HPP Purpose</i> .....                        | 10 |
| <i>Report Organization</i> .....                | 10 |
| <i>Community Overview</i> .....                 | 11 |
| <i>Summary of Housing Needs</i> .....           | 11 |
| <i>Summary of HPP Goals</i> .....               | 12 |
| <i>Summary of HPP Strategies</i> .....          | 12 |
| CHAPTER 2: HOUSING GOALS AND STRATEGIES .....   | 14 |
| <i>Five-Year Goals</i> .....                    | 14 |
| <i>Goals and Strategies Matrix</i> .....        | 16 |
| <i>Five-Year Strategies</i> .....               | 17 |
| <i>Action Plan</i> .....                        | 29 |
| CHAPTER 3: HOUSING AND DEMOGRAPHICS .....       | 30 |
| <i>Introduction</i> .....                       | 30 |
| <i>Demographic Profile</i> .....                | 30 |
| <i>Population Characteristics</i> .....         | 35 |
| <i>Housing Characteristics</i> .....            | 46 |
| <i>Housing Market</i> .....                     | 47 |
| <i>Housing Affordability</i> .....              | 49 |
| CHAPTER 4: HOUSING DEVELOPMENT CONSTRAINTS..... | 53 |
| <i>Natural Features</i> .....                   | 53 |
| <i>Infrastructure</i> .....                     | 58 |
| <i>Local Bylaws</i> .....                       | 60 |
| <i>Land Use</i> .....                           | 65 |
| <i>Historic Resource Protection</i> .....       | 66 |
| CHAPTER 5: IMPLEMENTATION CAPACITY .....        | 68 |
| <i>Key Findings</i> .....                       | 68 |
| <i>Local Capacity and Resources</i> .....       | 68 |

|   |                                     |
|---|-------------------------------------|
| <i>Regional Capacity and Resources</i> .....                    | 71                                  |
| APPENDICES .....  | 73                                  |
| <i>Medfield Subsidized Housing Inventory</i> .....              | <b>Error! Bookmark not defined.</b> |
| <i>DHCD Affirmative Fair Housing Marketing Guidelines</i> ..... | 75                                  |
| <i>Interagency Bedroom Mix Policy</i> .....                     | 76                                  |
| <i>Comprehensive Permit Denial and Appeal Procedures</i> .....  | 78                                  |

## ACRONYMS

|          |   |
|----------|---|
| ACS      | US Census Bureau's American Community Survey, Five-Year Estimates   |
| ADA      | Americans with Disabilities Act                                     |
| ADU      | Accessory Dwelling Unit   |
| AHT      | Affordable Housing Trust  |
| AMI/AMFI | Areawide Median Family Income set by HUD (household of four)        |
| AUL      | Activity and Use Limitation designation, monitored by the DEP       |
| CHAPA    | Citizens Housing and Planning Association                           |
| CHAS     | Comprehensive Housing Affordability Strategy                        |
| CPA      | State of Massachusetts Community Preservation Act (MGL Chapter 44B) |
| CPC      | Community Preservation Committee                                    |
| CPI-U    | U.S. Census Bureau's Consumer Price Index                           |
| CRA      | U.S. Federal Community Reinvestment Act                             |
| DEP      | Massachusetts Department of Environmental Protection                |
| DHCD     | Massachusetts Department of Housing and Community Development       |
| EPA      | U.S. Environmental Protection Agency                                |
| FEMA     | Federal Emergency Management Agency                                 |
| FY       | Fiscal Year(s) (July 1-June 30)                                     |
| HPP      | Housing Production Plan   |
| HUD      | United States Department of Housing and Urban Development           |
| LMI      | Low/Moderate- Income (at or below 80 percent AMI)                   |
| MACRIS   | Massachusetts Cultural Resources Information System                 |
| MAPC     | Metropolitan Area Planning Council                                  |
| MassDOT  | Massachusetts Department of Transportation                          |
| MassGIS  | Massachusetts Bureau of Geographic Information                      |
| MBTA     | Massachusetts Bay Transportation Authority                          |
| MGL      | Massachusetts General Laws  |
| MLS      | Multiple Listings Service (central real estate database)            |
| MSA      | Metropolitan Statistical Area                                       |
| MWRA     | Massachusetts Water Resources Authority                             |
| NHESP    | Massachusetts Natural Heritage and Endangered Species Program       |
| SHI      | Massachusetts Subsidized Housing Inventory                          |
| TODEX    | MHP's Transit Oriented Development Explorer                         |
| YTD      | Year to Date  |
| 40B      | Comprehensive Permit, per MGL Chapter 40B, §20-23                   |



# KEY DEFINITIONS

This list of key definitions is intended to assist the reader and is not intended to replace applicable legal definitions of these terms. The following definitions are for key terms used throughout the document, many of which are based on definitions in statutes and regulations.

**Areawide Median Income (AMI)** – the median gross income for a person or family as calculated by the United States Department of Housing and Urban Development, based on the median income for the Metropolitan Statistical Area. For FY2021, the HUD area median family income (AMFI) for the Boston-Cambridge-Newton MA HUD Metro FMR Area was \$120,800.<sup>1</sup> AMI is also referred to in the document as median family income (AMFI).

**Cost-Burdened Household** – a household that spends 30 percent or more of their income on housing-related costs (such as rent or mortgage payments). Severely cost-burdened households spend 50 percent or more of their income on housing-related costs.

**Household** – all the people, related or unrelated, who occupy a housing unit. It can also include a person living alone in a housing unit or a group of unrelated people sharing a housing unit as partners or roommates. Family households consist of two or more individuals who are related by birth, marriage, or adoption, although they also may include other unrelated people. Nonfamily households consist of people who live alone or who share their residence with unrelated individuals.

**Family Household** – Family households consist of two or more individuals who are related by birth, marriage, or adoption, although they also may include other unrelated people.

**Non-Family Households** – Non-family households consist of individuals living alone and individuals living with roommates who are not related by birth, marriage, or adoption.

**Income Thresholds** – the U.S. Department of Housing and Urban Development (HUD) establishes income thresholds that apply to various housing assistance programs. These thresholds are updated annually and are categorized by household size. Medway is part of the Boston-Cambridge-Quincy, MA-NH HUD Metro FMR Area.

**Extremely Low-Income (ELI)** – the FY 2014 Consolidated Appropriations Act changed the definition of extremely low-income to an individual or family whose annual gross income is the greater of 30/50ths (60 percent) of the Section 8 very low-income limit or the poverty guideline. The FY2021 ELI income limits for a household of one is \$28,200 and for a household of four is \$40,250.

**Very Low-Income (VLI)** – an individual or family whose annual gross income is at or below 50 percent AMI. The FY2021 VLI income limits for a household of one is \$47,000 and for a household of four is \$67,100.

**Low/Moderate income (LMI)** – an individual or family whose annual gross income at or below 80 percent of the area median income (AMI).<sup>2</sup> The FY2021 LMI income limits for a household of one is \$70,750 and for a household of four is \$101,050.

**Labor Force** – all residents within a community over the age of 16 who are currently employed or *actively* seeking employment. It does not include students, retirees, discouraged workers (residents who are not actively seeking a job) or those who cannot work due to a disability.

**Non-Family Households** – Non-family households consist of individuals living alone and individuals living with roommates who are not related by birth, marriage, or adoption.

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<sup>1</sup> U.S. Department of Housing and Urban Development. *FY 2021 Income Limits Summary*. <https://www.huduser.gov/portal/datasets/il/il2021/2021summary.odn> (accessed August 2021).

<sup>2</sup> For purposes of MGL c.40B, moderate income is defined as up to 80 percent AMI.

**Open Space** – land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh and saltwater marshes and other wetlands, oceans, rivers, streams, lake and pond frontage, beaches, dunes and other coastal lands, lands to protect scenic vistas, land for wildlife or nature preserve, and/or land for recreational use.



Before & After: 71 North Street (8 unit LIP Project,

## DATA SOURCES

This plan utilizes data from the U.S. Census, American Community Survey Five-Year Estimates (ACS) 2015-2019, Housing and Urban Development (HUD) Comprehensive Housing Affordability Strategy (CHAS) 2013-2017, and The Warren Group (TWG) 2021 as well as projections from the University of Massachusetts at Amherst Donahue Institute (UMDI) and Metropolitan Area Planning Council (MAPC). It also includes 2019 economic data from the Massachusetts Department of Labor.

The report draws data from the 2016 Medfield Housing Production Plan and the Medfield Affordable Housing Trust Action Plan. The Housing and Demographics chapter also draws from the 2018 Medfield Senior Housing Report and the Development Constraints includes information from the Town of Medfield.

The U.S. Census counts every resident in the United States by asking ten questions, whereas the ACS provides estimates based on a sample of the population for more detailed information. It is important to be aware that there are margins of error (MOE) attached to the ACS estimates, because the estimates are based samples and not on complete counts.

# CHAPTER 1: INTRODUCTION

## HPP PURPOSE

This Housing Production Plan (HPP) is a state-recognized planning tool that, under certain circumstances, permits municipalities to influence the location, type, and pace of affordable housing development. This HPP establishes a strategic plan for production of affordable and mixed-income housing that is based upon a comprehensive housing needs assessment and provides a detailed analysis of development constraints due to infrastructure capacity, environmental constraints, protected open space, and regulatory barriers.

This HPP has been prepared in accordance with the Massachusetts Department of Housing and Community Development (DHCD) requirements and describes how the Town of Medfield plans to create and preserve affordable and mixed-income housing as well as create more housing options in the community.

When an HPP is certified by DHCD, then a denial of a Comprehensive Permit will be upheld—if the application is not consistent with local needs, as outlined in this plan.

Under Massachusetts General Laws Chapter 40B Section 20-23 (C.40B), the Commonwealth's goal is for all Massachusetts municipalities is to have 10 percent of housing units affordable to low/moderate income households or affordable housing on at least 1.5 percent of total land area. Most communities that are in compliance with the state's minimum goals have been able to comply based on the 10 percent minimum. In 2021, Medfield had 9.6 percent of units listed on the Subsidized Housing Inventory (SHI), based on the 2010 census count of 4,220 units total year-round units. With 406 units of affordable housing, the Town would need 16 more units to reach 10 percent per the 2010 year-round unit count.

While DHCD's official determination of compliance with the 10 percent minimum is pending given the 2020 Decennial Census figures that were released recently, the 2020 counts indicate that Medfield's percentage of SHI units will decrease to 9.34 percent with a need for an additional 29 units to reach the 10 percent minimum goal. The 2020 count of total housing units reported by the Census Bureau is 4,450 and 104 vacant units.<sup>3</sup>

## REPORT ORGANIZATION

This Housing Production Plan is organized in six chapters as follows:

- Chapter 1 provides an overview of the purpose of the plan, a community overview, description of the planning process, and summary of the Town's housing needs, goals, and strategies and may serve as an executive summary for this report.
- Chapter 2 describes the Town's five-year housing goals, strategies, and action plan as identified through the planning process associated with development of this plan.
- Chapter 3 provides a demographic profile of the community's residents and an analysis of local housing conditions including housing supply, residential market indicators, and affordable housing characteristics.
- Chapter 4 describes the Town's development constraints and limitations including environmental constraints, infrastructure capacity, regulatory barriers
- Chapter 5 describes local and regional capacity and resources to create and preserve affordable and mixed-income housing in the community.

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<sup>3</sup> Note that this is an estimate based on the 2020 Census data, not an official DHCD percentage or number of units.



## COMMUNITY OVERVIEW

Medfield is an attractive, affluent suburban community located about 17 miles southwest of Boston. The town's large preservation areas, historic downtown, and neighborhoods of single-family homes create a small-town character, despite being close to a major metropolitan area. Many families move to Medfield for the high quality of life and strong school system. Founded in 1651, Medfield was historically a farming community. The manufacture of straw ladies' hats later became an important industry and was the largest industry in Medfield until the mid-20<sup>th</sup> century. The Medfield State Hospital, constructed in 1896 and closed in 2003, was also a major regional employer. Today, land use is dominated by single-family homes, and the town is largely a bedroom community to Boston with a vibrant town center retail district, but an otherwise small commercial base.

Historic and natural resource preservation is important to the Medfield community. There are four historic districts in town: Town Center Historic District, Clark-Kingsbury Farm Historic District, John Metcalf Historic District, and Hospital Farm Historic District.

There are several significant state - and Town-owned conservation lands in town including the Medfield Rhododendron Reservation, which protects the habitat of the rare Rosebay rhododendrons, the Medfield Charles River Reservation, the Rocky Woods Reservation, and the Noon Hill Reservation. Trails run through these and other conservation properties in town. Medfield's water resources include the Charles River, which forms the town's western border with Millis and Sherborn, and several ponds. Over 21 percent of the town is wetlands.

## SUMMARY OF HOUSING NEEDS

As described in detail in Chapter 3 regarding Medfield's demographic characteristics, Medfield's population has experienced moderate growth in the last decade. While population projections do not show this growth continuing, the population of Medfield residents aged 65 and older is projected to increase in the next decade, indicating a community that is aging. Medfield is predominately comprised of well-educated and high-income households, although there is still several households that have lower incomes and may be cost burdened.

Chapter 3 examines housing needs based both on the needs of current residents and in the regional context. Some key findings are summarized below.

### DEMOGRAPHIC ANALYSIS AND HOUSING CONDITIONS ANALYSIS KEY FINDINGS:

- The housing stock in Medfield is primarily single-family ownership units, leading to a lack of affordable, small rental options for lower-income individuals and families.
- According to the 2019 ACS, about 83 percent of housing units have three or more bedrooms, but 47 percent of households have two or less people living in them. This indicates that smaller households in Medfield may be over housed – in dwelling units that are larger than they need. Larger units tend to be more expensive to buy/rent, heat/cool, and maintain and, with higher assessed values, have higher property tax burden.
- About a quarter of Medfield residents are cost-burdened, meaning they spend more than 30 percent of their income on housing costs.
- Like in similar communities in the region, housing costs in Medfield have risen over the last decade. Sales prices for both single-family homes and condos have increased, as have property taxes.
- Medfield has 9.34 percent affordable housing as of 2021, which means that the Town would need at least 29 more units to meet the State's mandated 10 percent affordable housing minimum, based on the 2010 Decennial Census, which is the most recent census count available as of August 2021 (2020 Census data has not been fully released as of the date of this writing).<sup>4</sup>
- Most affordable units listed on the SHI are in or near the center of Medfield and on main roadways.
- The number of older adults living in Medfield is expected to grow significantly, leading to a unique challenge of housing affordability and availability for seniors with low incomes in the next several decades.

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<sup>4</sup> Note that this is an estimate based on the 2020 Census data, not an official DHCD percentage or number of units.

## DEVELOPMENT CONSTRAINTS KEY FINDINGS:

- Water resources and their associated regulatory areas span a significant proportion of the town, which can impose some limitations on development associated with impervious surface area.
- Most wetlands and other state-identified habitat areas are within protected open space; however, there are several certified and potential habitat areas scattered throughout town that have some protection under the local wetland bylaw and would require Conservation Commission review of any new development in those areas.
- The municipal water and sewer systems serve most of the town, except a few neighborhoods that lack sewer service. The anticipated redevelopment of Medfield State Hospital should be possible to accommodate under the existing water withdrawal permit, assuming the Town maintains a proactive approach to water conservation and there are no other significant increases in demand.
- New water and sewer infrastructure will be necessary as part of the MSH redevelopment, but the Town sewer system is expected to have sufficient capacity to accommodate this growth.
- Most of Medfield is zoned for single family residential development and limit structures to a maximum height of 35 feet and no more than two and one half (2.5) stories. Minimum lot sizes in residential zones range from 12,000 sq. ft. (zone RU) up to 80,000 sq. ft. (zone RE).
- Open Space Residential Zoning would also allow for smaller lots but requires land area greater than 10 times the lot size of the base zoning, which is challenging to find in Medfield.
- Opportunities for by right mixed-use and multifamily residential development are limited: both are allowed in certain subdistricts under the Medfield State Hospital District zoning, and multifamily is allowed in the Upper Spring Street Overlay District, contingent upon site plan approval by the Planning Board.
- The Inclusionary Zoning bylaw has not been used as of the time of this writing; larger residential developments have gone through the Comprehensive Permit process.
- About 80% of Medfield's existing land use is split between residential development and open space. The limited remaining vacant land generally has wetland or floodplain issues.

## SUMMARY OF HPP GOALS

As explained in Chapter 2, this plan includes the following five goals:

1. MEET THE STATE'S AFFORDABLE HOUSING PRODUCTION GOALS AND MAINTAIN SAFE HARBOR
2. ADDRESS LOCAL HOUSING NEEDS AND PROMOTE SOCIOECONOMIC DIVERSITY WITH A GREATER VARIETY OF HOUSING OPTIONS
3. DISTRIBUTE NEW HOUSING OPTIONS THROUGHOUT MEDFIELD
4. SUPPORT OLDER ADULT RESIDENTS TO HELP THEM AFFORD TO REMAIN IN MEDFIELD
5. INCREASE MEDFIELD'S CAPACITY TO IMPLEMENT HOUSING INITIATIVES THROUGH ENHANCED LOCAL AND REGIONAL COORDINATION

## SUMMARY OF HPP STRATEGIES

Achieving the community's five-year goals will require a variety of regulatory, programmatic, and policy strategies. The strategies, described in detail in Chapter 2, are intended to offer multiple ways that the community can work to achieve its goals. Many of these strategies are contingent on factors beyond the municipality's control, including market opportunities and funding availability. All strategies will require local approvals in accordance with all applicable laws and regulations. The strategies are organized in three categories and are in no particular order:

- Planning, Policies, and Zoning Strategies
- Local Initiatives and Programmatic Strategies
- Capacity, Education, and Coordination

## **PLANNING, POLICIES, AND ZONING STRATEGIES**

The Town's authority to update zoning regulations can have powerful effects to encourage private responses to address local housing needs with minimal local expenditure. The following strategies incorporate recommendations for both local planning initiatives and zoning amendments. The Planning Board would consider zoning changes which would then need to be adopted by the Town as a whole.

1. Enhance the existing Inclusionary Zoning Bylaw to encourage use
2. Reconsider adoption of a senior housing zoning bylaw
3. Update zoning to explicitly allow Accessory Dwelling Units by right
4. Amend OSRP bylaw to Open Space Design/Natural Resource Protection Zoning (OSD/NRPZ)
5. Consider rezoning portion of Route 109 corridor for mixed use and consider zoning amendments for town center to allow more flexibility to create mixed uses including top-of-shop apartments

## **LOCAL INITIATIVE AND PROGRAMMATIC STRATEGIES**

Local initiative strategies refer to recommendations that the Town can undertake to foster the creation of more housing options, especially affordable housing. These initiatives are not regulatory in nature - they deal with allocation of Town resources including staff time, funding, and property:

6. Seek proposals and fund the "Housing Opportunities Incentive Program" to create SHI-eligible rental units through small-scale new development or conversions of existing buildings
7. Help foster creation of supportive special needs congregate housing
8. Support production of new housing at the Housing Authority's surplus property adjacent Tilden Village
9. Consider creation of a Homebuyer Assistance Program
10. Support Affordable Housing as part of Medfield State Hospital Plan

## **CAPACITY, EDUCATION, AND COORDINATION**

The following strategies are recommendations for expanding the Town's capacity to implement housing initiatives, promote education, and to coordinate housing initiatives with other local or regional entities:

11. Consider adopting CPA to support local housing initiatives including to provide a regular funding source for the Medfield Affordable Housing Trust
12. Advance and expand local housing advocacy by considering seeking CHAPA's support through municipal engagement program
13. Consider collaborating with regional communities and funding to establish regional shared housing services
14. Enhance local coordination with various entities promoting housing and servicing residents in need
15. Continue to renew designation as a Housing Choice Community
16. Designate AHT as a local HPP oversight entity and perform annual review of status of HPP goals and strategies

# CHAPTER 2: HOUSING GOALS AND STRATEGIES

A Housing Production Plan can help communities shape the location and type of future housing development and address affordable housing needs. Medfield's housing goals and strategies go beyond meeting minimum requirements for producing housing units eligible for inclusion on the Subsidized Housing Inventory (SHI). This plan also emphasizes the need for a mix of housing options for a variety of housing preferences, including accessible housing, and downsizing choices for seniors.

These goals and strategies were developed based on a comprehensive housing needs and development constraints analysis, other current local plans and policies, as well as the consultant's recommendations and best practices. The HPP's goals and strategies are intended to provide guidance for local housing policies and initiatives as well as a path for certification (a.k.a., safe harbor), but do not bind future actions or decisions of local officials or Town Meeting.

*How could Medfield protect its valued community characteristics while still creating more housing options to address local housing needs and promote socioeconomic diversity?  
How could Medfield create balanced strategies to create housing options that recognize economic realities of development and promote equity and inclusion while still preserving community assets?*

These questions are at the heart of this planning effort and the goals and strategies described here are intended to address these questions.

## FIVE-YEAR GOALS

The goals of this plan are consistent with the Comprehensive Permit Regulations (760 CMR 56) as required by DHCD for Housing Production Plans:

- a) a mix of types of housing, consistent with local and regional needs and feasible within the housing market in which they will be situated, including rental, homeownership, and other occupancy arrangements, if any, for families, individuals, persons with special needs, and the elderly.
- b) a numerical goal for annual housing production, pursuant to which there is an increase in the municipality's number of SHI Eligible Housing units by at least 0.50 percent of its total units (as determined in accordance with 760 CMR 56.03(3)(a)) during every calendar year included in the HPP, until the overall percentage exceeds the Statutory Minimum set forth in 760 CMR 56.03(3)(a).

As explained in detail below, this plan includes the following five goals:

1. Meet the state's affordable housing production goals and maintain safe harbor
2. Address local housing needs with greater variety of housing options and promote socioeconomic diversity
3. Distribute new housing options in strategic locations throughout Medfield
4. Support older adult residents to help them afford to remain in Medfield
5. Increase Medfield's capacity to implement housing initiatives through enhanced local and regional coordination



## **1. MEET THE STATE'S AFFORDABLE HOUSING PRODUCTION GOALS AND MAINTAIN SAFE HARBOR**

To maintain Medfield's "safe harbor" status through a certified Housing Production Plan (HPP), the Town will actively strive to create 29 additional homes that count on the Subsidized Housing Inventory (SHI) to achieve the state's 10 percent goal per MGL c.40B.<sup>5</sup>

## **2. ADDRESS LOCAL HOUSING NEEDS WITH A GREATER VARIETY OF HOUSING OPTIONS AND PROMOTE SOCIOECONOMIC DIVERSITY**

When Medfield reaches the 10 percent goal, the Town will continue to promote and encourage initiatives to create affordable and community housing to help meet local housing needs and to promote a more racially and ethnically diverse, equitable, and inclusive community. The community's goal is to promote both ownership housing for moderate/middle-income households (60% to 150% AMI) and rental units and rental assistance for low-income households at or below 30% and 50% AMI.

The Town will continue to promote a variety of housing options including affordable and community housing options for older adults to downsize, service-enriched housing for individuals and families with special needs, as well as starter homes and homes affordable to Medfield's workforce. The Town will work to promote flexible regulatory policies and local initiatives that encourage diverse and affordable housing types, such as accessory apartments, two-family houses, townhouses, mixed-use buildings, and supportive congregate housing, in addition to well-designed new multi-family development and rehabilitation/reuse of historic buildings, including at the Medfield State Hospital.

## **3. DISTRIBUTE NEW HOUSING OPTIONS IN STRATEGIC LOCATIONS THROUGHOUT MEDFIELD**

Strategic areas for accommodating a variety of housing options have convenient access to community services and amenities and are in areas that are already developed. These areas include land that is walkable (within one-half mile) to Medfield town center. Additionally, the Town will strive to balance the creation of housing options near town center with housing options in other areas of the town that are supported with future potential transportation options (such as a local trolley or shuttle service) and have proximity to mixed-uses including shops, services, and other community amenities or by incorporating community spaces within new developments. These areas include the Medfield State Hospital and portions of Route 109 (outside of town center).

## **4. SUPPORT OLDER ADULT RESIDENTS TO HELP THEM AFFORD TO REMAIN IN MEDFIELD**

Continue to assist older adult residents with housing costs including fuel/heating, taxes, transportation, rent, and home efficiency and accessibility improvements the older adult population increases in Medfield. Leverage state and other public/private programs to maximize support for older adult residents.

## **5. INCREASE MEDFIELD'S CAPACITY TO IMPLEMENT HOUSING INITIATIVES THROUGH ENHANCED LOCAL AND REGIONAL COORDINATION**

As a state-designated Housing Choice Community, Medfield has demonstrated a great ability to produce housing and implement local initiatives with limited resources. However, increasing local capacity will benefit the town so it can successfully reach local housing goals. Additional local funding, professional support, and coordination among local entities will strengthen the town's ability to continue its strong track record.

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<sup>5</sup> Note that this number is based on unofficial calculations based on the preliminary 2020 census data. The official DHCD SHI based on the 2010 census indicates that Medfield would need to create 16 more units but will change pending the release of official 2020 census data later in 2022. The 2020 count of total housing units reported by the Census Bureau is 4,450 and 104 vacant units. This, albeit unofficial analysis, indicates that the town would need to produce 29 SHI units for a one-year certification.

# GOALS AND STRATEGIES MATRIX

The strategies, which are described in greater detail on the following pages, are summarized in the matrix below that indicates which goal or goals each strategy could help Medfield to achieve.

| Type                                | #  | Strategy   | Production | Local Needs & Diversity | Strategic Locations | Older Adults | Capacity |
|-------------------------------------|----|--|------------|-------------------------|---------------------|--------------|----------|
|                                     |    |  | G1         | G2                      | G3                  | G4           | G5       |
| Planning, Policies, & Zoning        | 1  | Enhance the existing Inclusionary Zoning bylaw to encourage use  | X          | X                       |                     |              | X        |
|                                     | 2  | Reconsider adoption of a senior housing zoning bylaw   | X          | X                       |                     | X            |          |
|                                     | 3  | Update zoning to explicitly allow Accessory Dwelling Units by right  |            | X                       |                     | X            |          |
|                                     | 4  | Amend OSRP bylaw to Open Space Design/ Natural Resource Protection Zoning (OSD/NRPZ)   | X          | X                       |                     |              |          |
|                                     | 5  | Consider rezoning portion of Route 109 corridor for mixed use and consider zoning amendments for town center to allow more flexibility to create mixed uses including top-of-shop apartments |            | X                       | X                   |              |          |
| Local Initiatives & Programmatic    | 6  | Seek proposals and fund the “Housing Opportunities Incentive Program” to create SHI-eligible rental units through small-scale new development or conversions of existing buildings.          | X          | X                       |                     |              |          |
|                                     | 7  | Help foster creation of supportive special needs congregate housing  |            | X                       |                     | X            |          |
|                                     | 8  | Support production of new housing at the Housing Authority’s surplus property adjacent Tilden Village  | X          | X                       | X                   | X            |          |
|                                     | 9  | Consider creation of a Homebuyer Assistance Program  |            | X                       |                     |              |          |
|                                     | 10 | Support affordable housing as part of Medfield State Hospital Plan   | X          | X                       | X                   |              |          |
| Capacity, Education, & Coordination | 11 | Reconsider adopting CPA to support local housing initiatives including to provide a regular funding source for the Medfield Affordable Housing Trust.  |            |                         |                     |              | X        |
|                                     | 12 | Advance and expand local housing advocacy by considering seeking CHAPA’s support through the municipal engagement program  |            |                         |                     |              | X        |
|                                     | 13 | Consider collaborating with regional communities and funding to establish regional shared housing services   |            |                         |                     |              | X        |
|                                     | 14 | Enhance local coordination with various entities promoting housing and servicing residents in need   |            | X                       |                     |              | X        |
|                                     | 15 | Continue to renew designation as a Housing Choice Community  |            |                         |                     |              | X        |
|                                     | 16 | Designate AHT as a local HPP oversight entity and perform annual review of status of HPP goals and strategies  |            |                         |                     |              | X        |

# FIVE-YEAR STRATEGIES

Achieving the community's five-year goals will require a variety of regulatory, programmatic, and policy strategies. This section includes descriptions of local regulatory strategies, local initiatives, and strategies that deal with implementation capacity, education, and outreach.

The intent of these strategies is not to suggest that Medfield will implement all these strategies over five years, but to offer multiple ways that the community can work to achieve its goals. Many of these strategies are contingent on factors beyond the municipalities control, including market opportunities and funding availability. All strategies will require local approvals in accordance with all applicable laws and regulations.

This plan's strategies comply with the requirements of the Comprehensive Permit Regulations (760 CMR 56), which are summarized as follows:

*The HPP shall address the matters set out in the Department's guidelines, including an explanation of the specific strategies by which the municipality will achieve its housing production goal, and a schedule for implementation of the goals and strategies for production of units, including all the following strategies, to the extent applicable:*

- a) *the 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.*
- b) *the identification of specific sites for which the municipality will encourage the filing of Comprehensive Permit applications.*
- c) *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.).*
- d) *municipally owned parcels for which the municipality commits to issue requests for proposals to develop SHI Eligible Housing; and/or*
- e) *participation in regional collaborations addressing housing development.*

The strategies are organized in three categories and are not in order of priority:

- A. Planning, Policies, and Zoning Strategies
- B. Local Initiatives and Programmatic Strategies
- C. Capacity, Education, and Coordination

An action plan matrix is included at the end of this chapter that recommends sequencing of strategies over the five-year planning horizon and lists responsible entities.

## PLANNING, POLICIES, AND ZONING STRATEGIES

The Town's authority to update zoning regulations can have powerful effects to encourage private responses to address local housing needs with minimal local expenditure. The following strategies incorporate recommendations for both local planning initiatives and zoning amendments.

### 1. Enhance the existing Inclusionary Zoning bylaw to encourage use

As was recommended by the 2016 HPP, Medfield adopted an Inclusionary Zoning Bylaw (§300-14.16 of the Zoning Bylaw) in 2017. The purpose of this Bylaw is to encourage development of new housing that is affordable to low- and moderate-income households. It is intended that the affordable housing units that result from this Bylaw/ordinance be considered as local action units, in compliance with the requirements for the same as specified by the Department of Housing and Community Development (DHCD) or successor state agency or regulations.

The inclusionary zoning provisions apply to any project requiring a special permit or site plan approval that results in a net increase of six or more dwelling units over a 10-year period. The provisions are applicable in all zoning districts and trigger a special permit from the Planning Board that requires provisions of affordable units

per the following table as a condition of the approval. The affordable units are required to have affordable housing deed restrictions in perpetuity and include a local preference to the extent permitted by law.

| Table of Affordable Units Requirements* |                  |
|---|------------------|
| Total Units in Project                  | Affordable Units |
| 6 to 20                                 | 15%              |
| 21 to 49                                | 20%              |
| 50+                                     | 25%              |

To promote more use of Inclusionary Zoning (IZ) provisions, consider incorporating incentives and some options for compliance, including allowing in-lieu payments.

### *Incorporating Incentives*

As explained in the MAPC *Inclusionary Zoning and Payment in Lieu of Units Analysis* (see link in “More Information”, below), IZ asks developers to share the responsibility of creating affordable housing without creating uneconomic conditions that deter future housing development.

If an IZ bylaw has little use in a community, it is often because the IZ provisions limit feasible development options to the extent that developers avoid triggering the IZ provisions. The costs of providing affordable housing units are usually absorbed by modest declines in land prices and reductions in developer profits instead of being passed on to tenants and homebuyers, as unit prices must continue to be competitive with the local real estate market.

Effective IZ bylaws usually offer a range of incentives to help make the provision of affordable units feasible. Some of the most common incentives include:

- **Density bonuses:** An extra density bonus above the by-right maximum is by far the most common development incentive. One example of a density bonus is the allowance of an additional 30% of floor area or unit count when IZ units are provided.
- **Design flexibility and/or dimensional zoning relief:** Flexible design grants relief from some unit and lot dimensional requirements that may constrain development.
- **Expedited permitting:** Allowing expedited permitting for projects with an affordable housing component can save developers weeks or months of the permitting process, reducing some risk and financial costs of development.
- **Parking waivers:** Some IZ programs allow developers to build fewer parking spaces than required under local zoning to save parking costs

Other incentives could include permit fee deferral, reduction, or waiver; public subsidies; and tax abatements

### *Allow Options for Compliance, Including In-Lieu Payments*

As explained in the MAPC report, a “Payment-in-lieu” (PILU) is an optional means of compliance that gives both municipalities and developers flexibility in providing affordable housing. A PILU is most appropriate when a development is small or specialized so providing an on-site unit is more likely to create a financial hardship. Additionally, when the affordable requirement results in a fraction of a unit being required, a PILU may be allowed for the fraction instead of requiring that the affordable unit count be rounded up or down.

While there is no standard way to set PILU fees, there are two major approaches: affordability gap, which is based on the difference between price of market rate and affordable units, and production costs, which is based on the cost of development. The consultant advises against an indexed fee (a set fixed fee per unit), which would need to be adjusted annually if used.



PILU fees can be earmarked for the Affordable Housing Trust fund, thereby increasing the Trust's revenue for local initiatives.

More information:

- MAPC, *Inclusionary Zoning and Payment in Lieu of Units Analysis*, prepared for the RHSO member towns of Acton, Bedford, Concord, and Lexington: [https://www.rhsohousing.org/sites/g/files/vyhlif421/f/uploads/final\\_report\\_-\\_rhso\\_07.18.18.pdf](https://www.rhsohousing.org/sites/g/files/vyhlif421/f/uploads/final_report_-_rhso_07.18.18.pdf)
- Grounded Solutions Network, *Advancing Racial Equity in Inclusionary Housing Programs: A Guide for Policy and Practice*, February 2021: <https://groundedsolutions.org/tools-for-success/resource-library/racial-equity-inclusionary-housing>

## 2. Reconsider adoption of a Senior Housing zoning bylaw

In the past few years, the Town considered the merits of a Senior Housing Overlay District. The purpose of this bylaw would be to provide diverse and appropriate housing opportunities for seniors (age 62 or over) and disabled persons. The amendment proposed to allow such development by special permit in the RS, RT, BI, or IE zoning district on lots that had a minimum area of three developable acres, water and sewer availability, and within 2,000 feet of a Public Amenity. Such developments would trigger compliance with the Inclusionary Zoning bylaw and therefore would also provide affordable housing units.

Reconsider adoption of such a Senior Housing Overlay District. Assess whether the prior proposal warrants refinements through engagement with town officials and other community members. Implement an informational campaign to disseminate accurate information regarding the proposed amendment and address any concerns about adoption.

More information:

- Senior Housing Overlay District, failed at STM 2018; Article 5: <http://ma-medfield.civicplus.com/DocumentCenter/View/2138/STM-October-29-2018-Warrant-ReportPDF>

## 3. Update zoning to explicitly allow Accessory Dwelling Units (ADUs) by right

An ADU is an apartment within or on the property with a single-family house. The property appears from the street to be a single-family, not a two-family house. As of the 2018 Pioneer Institute report, included in the list of more information below, about 37 of 100 cities and towns surrounding Boston allow ADUs and an additional 31 allow ADUs only under temporary circumstances.

Accessory apartments, either as an alteration to a single-family dwelling or conversion of a detached accessory building (garage, barn, or gate house) can help diversify a community's housing stock by providing smaller rental units for increasing numbers of smaller households. They are also typically more affordable and can provide income to cost burdened owners.

Medfield's current ADU bylaw is stringent and, to the knowledge of current town staff, has never been utilized. Medfield's bylaw also includes provision for family units, which likewise has been rarely used. However, demand for ADUs does exist; some residents have expressed interest in retrofitting a basement or garage into an ADU, though current requirements have ultimately proved too restrictive for this. The current zoning provisions allow ADUs only by special permit and only for houses built prior to 1938 that have a minimum of 2,000 sf floor area and meet all lot area requirements.

Some Planning and Select board members have recently shown interest in ADUs as a context-sensitive way to create homes suitable for seniors and millennials. To help address this interest, the Town Administrator submitted a request the Metropolitan Area Planning Council in May 2020 for technical assistance to help the town update and improve the ADU zoning bylaw.

As a town whose zoning is primarily single-family, a progressive ADU bylaw could create opportunities for small-scale, incremental housing in town. As stated by AARP at its *All About Accessory Dwelling Units* website included as more information below:

*As small houses or apartments that exist on the same property lot as a single-family residence, ADUs play a major role in serving a national housing need. This traditional home type is re-emerging as an affordable and flexible housing option that meets the needs of older adults and young families alike.*

Through the MAPC study, consider allowing more flexibility for property owners to create ADUs in Medfield with the following zoning amendments:

- Allow ADUs as of right within the principal dwelling or an existing detached structure on the same lot that meets lot area requirements.
- Removing or ease the requirement that applicable houses must have been built prior to 1938.
- Reduce the minimum floor area requirement for applicable houses.
- Create a special permit option. This can be triggered, for example, for houses that do not meet all lot area requirements.

More information:

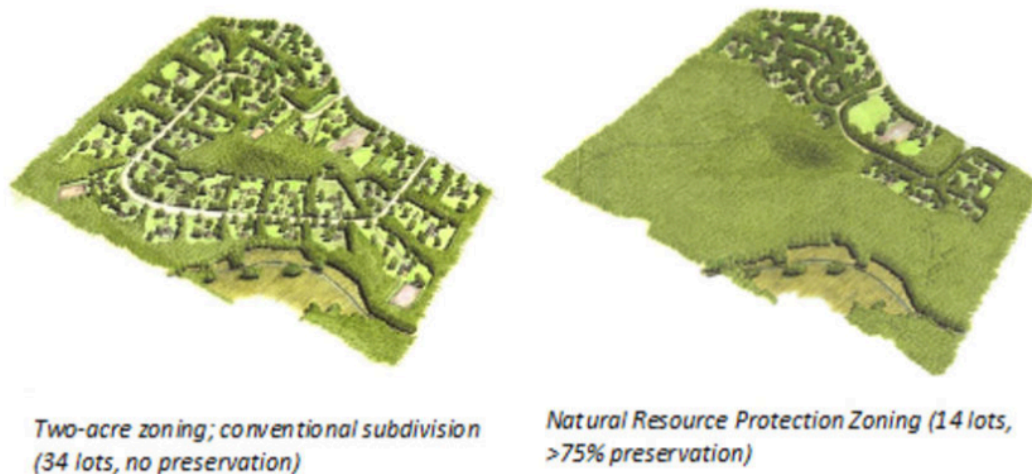
- MAPC Living Little Report, 2018 (which includes Medfield): <http://ma-medfield.civicplus.com/DocumentCenter/View/1687/Living-Little-Report-MAPC-2018-PDF>
- Pioneer Institute and Dain, Amy, *The State of Zoning for Accessory Dwelling Units*, White Paper No. 184, July 2018: <https://masmartgrowth.wpengine.com/wp-content/uploads/2019/01/ADU-MSGA-Pioneer-paper-2018.pdf>
- AARP, *All About Accessory Dwelling Units*: <https://www.aarp.org/livable-communities/housing/info-2019/accessory-dwelling-units-adus.html>

#### 4. Amend OSRP bylaw to Open Space Design/Natural Resource Protection Zoning (OSD/NRPZ)

The purpose of the existing Open Space Residential Zoning (OSRZ) is to encourage the preservation of open space and promoting the more efficient use of land in harmony with its natural features. However, the existing bylaw per [Article 7](#) of the Zoning Bylaw has only been used four times in the past 35 years (1986, 1988, 1992, 1999). As supported by recommendations of the Medfield Master Plan, the Town should update and revise the current bylaw to make it an effective tool for natural resource protection and housing choice following the approach of Natural Resource Protection Zoning as a best practice.

Consider amending the OSRZ bylaw to Natural Resource Protection Zoning (NRPZ). NRPZ is a zoning tool focused on maximizing protection natural resources, wildlife habitat, and open space and reducing sprawling subdivisions through creative site planning. This zoning tool is often blended with “traditional neighborhood design” provisions to create attractive, functional, and land-efficient residential neighborhoods. It includes elements of conservation subdivision regulations and cluster development bylaws and is used to regulate new subdivisions of land in a manner that maximizes the protection of natural resources (wetlands, forests, agriculture lands, open space) while providing for new construction and adequately compensating landowners.

Such a bylaw could also incorporate [Low Impact Development standards](#) to better protect natural resources. Consider density bonus for including affordable units that count on the SHI and/or up to 150 percent AMI.



Source: Massachusetts Smart Growth Tool Kit

The Town is currently seeking a Community Planning Grant that would include funding for professional support to revise Article 7 to make it an effective, best practices tool for natural resource protection and housing choice. The Town Planner submitted this grant request as part of One Stop for Growth application on 6/4/21. The grant request includes recommendations for updates to these zoning provisions that include eliminating the “perfect square” requirement in the minimum lot regulations for OSRZ developments, allowing a mix of residential use types (single-family, townhouse, two-family, multifamily), and reduce the minimum acreage for a qualifying tract of land. The current provisions require that a tract of land be not less than 10 times the minimum lot size permitted in that zoning district. In addition, the current provisions only require that 25 percent of the property be preserved as open space, whereas NRPZ can result in conserving 50-80 percent of a property as open space.

With approvals from required public entities (i.e., Board of Health and/or MA Department Environmental Protection), compact NRPZ developments can utilize wastewater alternatives such as shared septic systems.

More information:

- MA Smart Growth Took Kit “OSRP/NRPZ”: <https://www.mass.gov/service-details/smart-growth-smart-energy-toolkit-modules-open-space-design-osdnatural-resource>
- CPTC Presentation: <https://masscptc.org/docs/conference-docs/2019/cptc-conf19-5-NRPZ2.PDF>
- Randall Arendt, FRTPI, ASLA (Hon.), *Conservation Subdivision Design*: [http://www.greenerprospects.com/PDFs/CSD\\_Overview.pdf](http://www.greenerprospects.com/PDFs/CSD_Overview.pdf)
- MA Smart Growth Tool Kit “Wastewater Alternatives”: <https://www.mass.gov/service-details/case-studies-wastewater-alternatives>

## 5. Consider rezoning a portion of the Route 109 corridor for mixed use and consider zoning amendments for town center to allow more flexibility to create mixed uses including top-of-shop apartments

Portions of the Route 109 corridor could present opportunities for better mixed-use and multi-family zoning regulations with zoning provisions tailored to three different portions of the corridor: Medfield Shops area, residential area southwest of the Medfield Shops, and Town Center. The current [mixed-use zoning](#) is significantly limited in that it requires a special permit that allows for up to only two accessory residential dwelling units.

However, the community's goals as captured in the Master Plan include supporting mixed uses in business-zoned areas (Goal 4.1). To achieve this community goal, consider allowing context-sensitive and well-designed mixed-use and/or multi-family uses in certain areas along the Route 109 corridor, as described below.

**Area A - Medfield Shops Area:** This shopping plaza and immediate non-residential uses include Shaw's, Marshalls, and Mobile gas station, among other businesses. Through rezoning that allows mixed-use development, with commercial uses on the ground floor and residential uses on upper floors, the town could encourage redevelopment, perhaps retaining all or many of the existing businesses, if feasible, and creating additional housing options and increasing property tax revenue.

The current zoning district is B- Business. Creating new multi-family zoning provisions could encourage redevelopment based on traditional neighborhood design principles that enhance design aesthetics, business vitality, and pedestrian access and safety. In addition, such rezoning could also provide opportunities for assemblage of commercial lots. The commercial parcels in this area consist of roughly just under 18 acres.

**Area B - Residential Rehabilitation and Conversion Area:** This area, located southwest of the Medfield Shops Area primarily consists of single-family houses, many of which are larger historic houses. Consider allowing conversion of existing larger single-family homes into several smaller units. Work closely with the Historic Commission to create design guidelines to ensure historically sensitive conversion of existing buildings.

**Area C - Town Center:** Town Center is Medfield's historic commercial downtown and includes a variety of businesses as well as institutional uses including the Town Hall, Library, and the Montrose School, and residential buildings, among other uses. The Master Plan envisions that the Town Center continue to be improved as a vibrant living room for the Town's residents.

Consider providing more flexibility for opportunities to create more residential top-of-shop uses, such as rehabilitation the Medfield Odd Fellows Lodge at 481 Main St to utilize the 3<sup>rd</sup> floor for housing (currently the 3<sup>rd</sup> floor, a former dancehall, is vacant and cannot be reused for housing due to zoning limitations). Work closely with the Local Historic District Commission

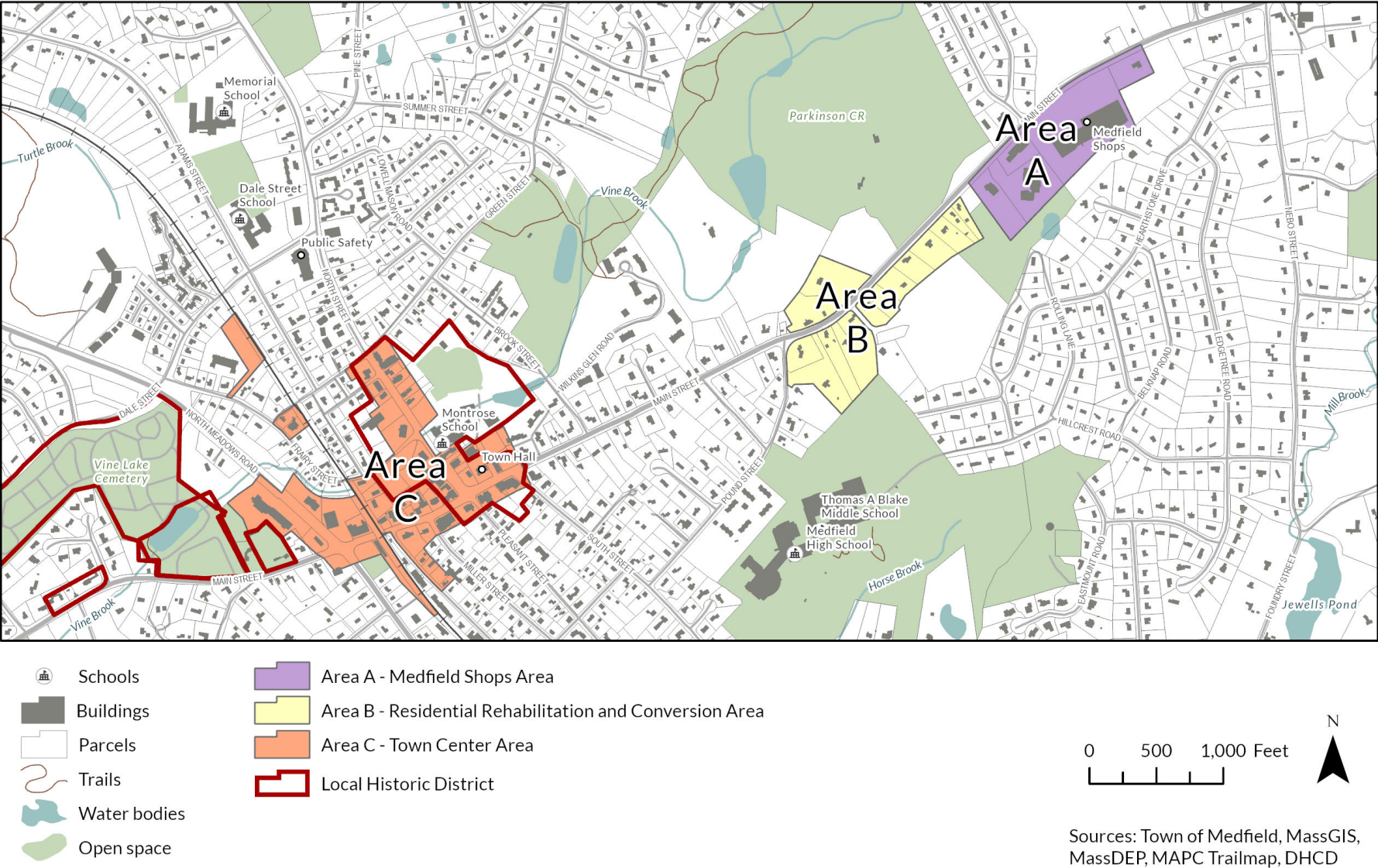
The Town is currently seeking a Community Planning Grant that would include funding for professional support to study and recommend multi-use zoning provisions for this corridor that support the Medfield Master Plan recommendations that also include conceptual design of about 0.5 miles of sidewalk interconnection between Shaw's and Pound Street. The Town Planner submitted this grant request as part of One Stop for Growth application on 6/4/21.



# TOWN OF MEDFIELD - POTENTIAL HOUSING STRATEGIES

Prepared by JM Goldson LLC

J M G O L D S O N



## LOCAL INITIATIVE AND PROGRAMMATIC STRATEGIES

Local initiative strategies refer to recommendations that the Town can undertake to foster the creation of more housing options, especially affordable housing. These initiatives are not regulatory in nature - they deal with allocation of Town resources including staff time, funding, and property.

### 6. Seek proposals and fund the “Housing Opportunities Incentive Program” to create SHI-eligible rental units through small-scale development or conversions of existing buildings

Medfield has about 556 rental units including multi-family rental apartments. Approximately 200 of these units are market rate units. Consider encouraging the conversion of market-rate rental units or purchase of deed restrictions in existing buildings to create affordable units or to encourage creating new small-scale multi-family rental developments.

The Town is already considering pursuing an initiative to seek proposals from experienced developers and property owners for the conversion or construction of affordable rental apartment units that can count on the Town’s Subsidized Housing Inventory (SHI). The initiative would seek proposals to create small (~ 8 units), affordable rental units or preserve existing such units which are at risk to be converted to market pricing. Fund the Program with all or a portion of the proceeds of the \$1 million bond for affordable housing.

### 7. Help foster the creation of supportive special needs congregate housing

Support the creation of supportive special needs congregate housing (sometimes called “group homes”) with local funding and technical support and consider possible public/private partnerships to foster creating of such housing in Medfield. Congregate housing can support individuals with special needs of all ages including younger and older adults by providing services necessary to help them remain independent for as long as possible. Services often include a variety of services to improve quality of life for residents such as services focused on community building, self-sufficiency, mental/physical health, medical support, and learning opportunities.

Congregate housing is identified as a possible use at the State Hospital as part of the site’s Master Plan. Consider additional possible sites as well. Continue to collaborate with local stakeholders and families with persons in need of congregate housing to support local efforts.

More information:

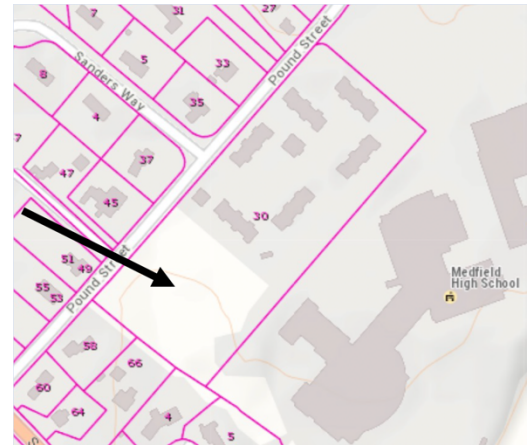
- Congregate Housing and Eligibility in Massachusetts: <https://www.mass.gov/service-details/congregate-housing-eligibility>
- An incomplete list of organizations focused on managing/creating congregate housing:
  - Specialized Housing, Inc <https://www.specializedhousing.org/>
  - Life Path: [https://lifepathma.org/images/Brochures/LifePath Congregate Housing brochure updated Nov 18.pdf](https://lifepathma.org/images/Brochures/LifePath%20Congregate%20Housing%20brochure%20updated%20Nov%2018.pdf)
  - Springwell: <https://springwell.com/resource/congregate-housing-program/>
  - Tri-Valley: <https://www.trivalleyinc.org/community-based-services/congregate-housing/>

## 8. Support production of new housing units at the Housing Authority's property adjacent to Tilden Village

The Medfield Housing Authority (MHA) is located at 30 Pound Street in Medfield Massachusetts. MHA is authorized and operates under the provisions of Chapter 121B of the Massachusetts General Law and is responsible to the Department of Housing and Community Development for the management of Chapter 667 Elderly/Handicapped Housing.

The existing complex called "Tilden Village" consists of six two-story brick buildings with ten apartments in each. There is surplus land to the south of the Tilden Village property that the MHA is planning to issue a Request for Proposals (RFP) to seek development proposals to expand the stock of affordable rental housing on this site.

This site is adjacent to the Medfield High School and Blake Middle School and is less than ½ mile from Town Center. The Town should support production of new housing units at this site to increase the Town's stock of affordable rental housing.



## 9. Consider the creation of a homebuyer assistance program

Many communities run local first-time homebuyer programs, including buy-down programs. Community Preservation Act (CPA) funds could be used for such a program if Medfield adopts CPA at some point in the future.

There are various ways to structure a homebuyer program. One example is a **buy-down program**, which converts existing houses or condos to affordable units and protects the affordability with a deed restriction and allows income-eligible households to purchase a house or condo with local subsidies to write-down the costs of a mortgage so that the household pays typically no more than 30 percent of its annual income for housing costs. To count these units as affordable units on the state's Subsidized Housing Inventory, the program's guidelines and marketing plan must meet with the requirements of the Department of Housing and Community Development (DHCD) under the state's Local Action Unit program. Specifically, the units must be restricted with a permanent deed restriction, affirmatively and marketed, and comply with DHCD's resident selection criteria.

With Medfield's high home values, such a program may be challenging to fund and administer, however, and would warrant further study, should the community be interested in pursuing. Consider this type of program after the Town has surpassed the state's minimum 10 percent goal.

## 10. Support Affordable Housing as part of Medfield State Hospital Plan

The 128-acre Medfield State Hospital closed in 2003. The Board of Selectmen created the Medfield State Hospital Development Committee (MSHDC) in 2018 to explore the feasibility of redeveloping the property as envisioned in the Strategic Reuse Master Plan. The MSHDC issued an RFP in 2021 to seek developers to redevelop the site. In April 2021, the Board of Selectmen voted unanimously to designate Trinity Financial's plan as the most advantageous response. The Trinity proposal calls for 25 percent of the units to be set aside as affordable housing.

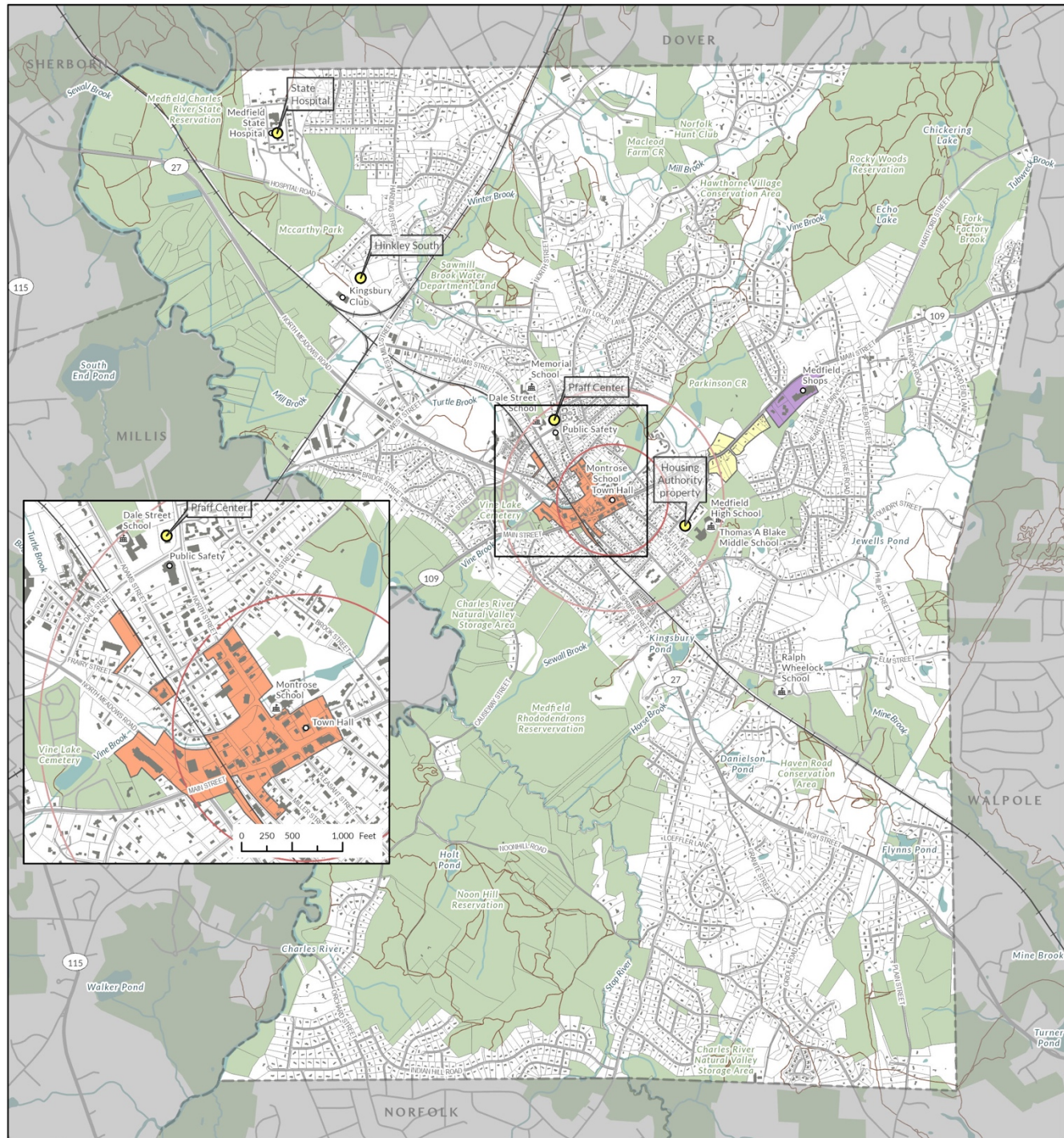
As this process moves forward, continue to advocate for the inclusion of affordable housing in this project, which would likely ensure moving beyond the 10 percent threshold on the town's SHI.



# TOWN OF MEDFIELD - POTENTIAL HOUSING STRATEGIES

Prepared by JM Goldson LLC

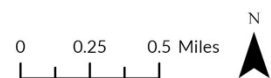
J M GOLDSON



- Schools
- Buildings
- Parcels
- Trails
- Water bodies
- Open space
- Potential Housing Sites
- Downtown Zoning
- Mixed-use Redevelopment
- Multifamily Rehabilitation / ADUs

Distance from town center

- 0.25 mi.
- 0.5 mi.



Sources: Town of Medfield, MassGIS, MassDEP, MAPC Trailmap, DHCD

## CAPACITY, EDUCATION, AND COORDINATION

The following strategies are recommendations for expanding the Town's capacity to implement housing initiatives, promote education, and to coordinate housing initiatives with other local or regional entities.

### 11. Reconsider adopting CPA to support local housing initiatives including to provide a regular funding source for the Medfield Affordable Housing Trust.

Fifty-three percent of the state's municipalities are CPA communities (187 towns and cities). These communities are eligible to receive annual state trust fund distributions to boost local funds generated for community preservation initiatives, including creation of affordable and community housing.

To help with creating affordable housing, which typically requires subsidies and grants to make the project feasible, and other housing initiatives, seek out additional local funding sources. The Community Preservation Act (CPA) is a local option tool that allows communities to put aside and spend funds dedicated for community housing, open space, recreation, and historic preservation projects. It generates funds through a local property tax surcharge (up to 3 percent) that is matched by a variable annual distribution from the state's Community Preservation Trust Fund. At least one community has adopted CPA at a low surcharge of only 0.5 percent. Some communities also adopt exemptions, including the first \$100,000 of taxable property value for residential and/or commercial/industrial properties and low-income households or low/moderate-income senior households, which can reduce the impact of the surcharge on eligible households. According to estimates provided by the Town's Principal Assessor, adopting the CPA in Medfield would add between \$53 and \$316 per year to the average single-family tax bill and generate between \$300,400 and \$1.9 million, depending on the level of surcharge.

Medfield has considered adoption of CPA in the past, but it has not been successful to date.

More information:

- Community Preservation Coalition: <https://www.communitypreservation.org/about>

### 12. Advance and expand local housing advocacy by considering seeking CHAPA's support through the municipal engagement program

Consider seeking support from the Citizen Housing and Planning Association (CHAPA) through its Municipal Engagement Initiative (MEI) to expand community education and outreach as well as local housing advocacy. As CHAPA website explains: The MEI works with residents on the ground to change the conversation and support existing local efforts in favor of more affordable housing. Each community has its unique housing challenges, so the CHAPA program focuses on bringing together local businesses, civic groups, houses of worship, and other groups and individuals that are active in their community to build coalitions of support for affordable housing production.

More information:

- CHAPA MEI Program: <https://www.chapa.org/about/chapa-programs/municipal-engagement-initiative>

### 13. Consider collaborating with regional communities and funding to establish regional shared housing services

The Town has been exploring the possibility of participating in the formation of a Shared Housing Services Office (SHSO) with other Three Rivers Interlocal Council (TRIC) and Southwest Advisory Planning Committee (SWAP) communities. As described in Town Administrator's recent letter to the Metropolitan Area Planning Council (MAPC), by proportionally sharing the costs of housing staff through an SHSO, small and midsize TRIC

and SWAP communities will be able to access specialized housing expertise and will be better equipped to monitor existing Affordable Housing stock without committing to the set expense of hiring our own housing-focused town staff.

MAPC is conducting a planning process for the future TRIC/SWAP SHSO to assess the capacity and needs of participating towns and establish SHSO functions, staffing, fee structure, and governance. This process is being facilitated by the Metropolitan Area Planning Council (MAPC) with support from a Community Compact grant via the Town of Norwood.

The budget and services of the future SHSO will be designed around the needs of the communities participating in this planning phase. Medfield should continue to actively participate in this planning initiative and work with MAPC and communities in the TRIC/SWAP subregions to evaluate possibility of shared services.

#### **14. Enhance local coordination with various entities promoting housing and servicing residents in need**

Medfield has various entities working toward creating affordable and mixed-use housing option. To foster collaboration and communications and reinforce the efforts of various local entities, organize a more formal collaboration framework involving the Housing Authority, Planning/Zoning Dept., Affordable Housing Trust, Medfield Outreach, and the Medfield State Hospital Development Committee with clearly defined goals. Conduct a quarterly or semi-annual coordination meeting and report regularly on progress to the Board of Selectmen to ensure accountability.

#### **15. Continue to renew designation as a Housing Choice Community**

If possible given levels of local housing production, maintain Medfield's status as a Housing Choice Community to ensure enhanced access to state funding, by reapplying every two years and continuing to meet the requirements for designation through a combination of housing production and best practices. Seventy-nine communities in Massachusetts have achieved state designation as a Housing Choice Community. This designation provides access to new financial resources including Housing choice Community Capital Grants and preferential treatment for many state grant and capital funding programs including State Revolving Fund for Water and Sewer infrastructure, MassWorks, Complete Streets, MassDOT capital projects, and PARC and LAND grants. Medfield's current designation expires in 2022.

More information on Housing Choice Community requirements:

- **Housing Choice Communities:** <https://www.mass.gov/housing-choice-designation-and-grants>

#### **16. Designate the Medfield Affordable Housing Trust as a local HPP oversight entity and perform annual review of status of HPP goals and strategies**

This HPP is intended to provide the Town with multiple options and avenues for meeting the state's minimum 10 percent goal for affordable housing as well as addressing local needs. The plan recommendation strategies that would require coordinated efforts by multiple local entities. Therefore, to effectively implement this plan will require oversight and accountability. The Town should designate the Medfield Affordable Housing Trust (MAHT) as the local HPP oversight entity, with assistance from the Town Planner. This was previously in the purview of the Planning Board before the creation of the Trust. The MAHT should track and coordinate progress and report regularly, at least annually, to Board of Selectmen.



# ACTION PLAN

The Planning Department will oversee all aspects of the HPP's implementation. The matrix below provides detailed information on responsible and supporting entities and a suggested timeframe to implement the housing strategies.

## Abbreviations Used the in Matrix Below:

AHT = Medfield Affordable Housing Trust  
 PB= Planning Board  
 BOS= Board of Selectmen  
 TP = Town Planner  
 CC = Conservation Commission  
 WS = Board of Water & Sewerage  
 TA = Town Administration  
 MO = Medfield Outreach  
 HC = Historic Commission  
 HDC = Historic District Commission  
 P&R = Parks & Recreation  
 WC = Warrant Committee  
 COA = Council on Aging  
 MSHDC = Medfield State Hospital Development Committee

| Type                                  |    | Housing Strategy   | FY2022 | FY2023 | FY2024 | FY2025 | FY2026 | Responsible Entity | Supporting Entities   |
|---------------------------------------|----|--|--------|--------|--------|--------|--------|--------------------|-----------------------|
| Planning, Policies, & Zoning          | 1  | Enhance the existing Inclusionary Zoning bylaw to encourage use  |        |        |        |        |        | PB                 | AHT, TP               |
|                                       | 2  | Reconsider adoption of a senior housing zoning bylaw   |        |        |        |        |        | PB                 | AHT, TP, COA          |
|                                       | 3  | Update zoning to explicitly allow Accessory Dwelling Units by right  |        |        |        |        |        | PB                 | TP                    |
|                                       | 4  | Amend OSRP bylaw to Open Space Design/ Natural Resource Protection Zoning (OSD/NRPZ)   |        |        |        |        |        | PB                 | TP, CC, WS, BoS       |
|                                       | 5  | Consider rezoning portion of Route 109 corridor for mixed use and consider zoning amendments for town center to allow more flexibility to create mixed uses including top-of-shop apartments |        |        |        |        |        | PB                 | TP, BoS, TA           |
| Local Initiatives & Programmatic      | 6  | Seek proposals and fund the "Housing Opportunities Incentive" to create SHI-eligible rental units through small-scale new development or conversions of existing buildings.                  |        |        |        |        |        | AHT                | TP, BoS, TA           |
|                                       | 7  | Help foster creation of supportive special needs congregate housing  |        |        |        |        |        | AHT                | BoS, PB               |
|                                       | 8  | Support production of new housing at the Housing Authority's surplus property adjacent Tilden Village  |        |        |        |        |        | HA                 | AHT, BoS, PB          |
|                                       | 9  | Consider creation of a Homebuyer Assistance Program  |        |        |        |        |        | AHT                | BoS, TP, TA           |
|                                       | 10 | Support Affordable Housing as part of Medfield State Hospital Plan   |        |        |        |        |        | BoS                | MSHDC                 |
| Capacity, Education, and Coordination | 11 | Reconsider adopting CPA to support local housing initiatives including to provide a regular funding source for the Medfield Affordable Housing Trust.  |        |        |        |        |        | BoS                | AHT, CC, HC, HDC, P&R |
|                                       | 12 | Advance and expand local housing advocacy by considering seeking CHAPA's support through the municipal engagement program  |        |        |        |        |        | AHT                | PB, TP, BoS, TA       |
|                                       | 13 | Consider collaborating with regional communities and funding to establish regional shared housing services   |        |        |        |        |        | AHT                | TP, BoS, TA, WC       |
|                                       | 14 | Enhance local coordination with various entities promoting housing and servicing residents in need   |        |        |        |        |        | TP                 | AHT, MO, COA          |
|                                       | 15 | Continue to renew designation as a Housing Choice Community  |        |        |        |        |        | TP                 | BoS                   |
|                                       | 16 | Designate AHT as a local HPP oversight entity and perform annual review of status of HPP goals and strategies  |        |        |        |        |        | AHT                | TP                    |

# CHAPTER 3: HOUSING AND DEMOGRAPHICS

## INTRODUCTION

An analysis of local demographic data and housing stock reveals key characteristics and trends in Medfield that help explain housing needs and demand. Medfield data is compared to Norfolk County and Massachusetts and, in some instances, to comparison communities to provide a broader regional context. This plan is grounded in an examination of Medfield's demographic makeup, including an analysis of the current population, household composition, and educational attainment.

The population of Medfield has increased over the last decade but is projected to decline by 2030. Household composition is expected to change in the same period. The proportion of residents aged 65 and older is projected to increase, and while Medfield currently has a higher proportion of school-aged children than the County and the state, this younger age group is projected to decrease in numbers. Most households in Medfield are family households and are large in size, but these changing demographics may indicate a need for smaller units.

### Key Findings

- The housing stock in Medfield is primarily single-family ownership units, leading to a lack of affordable, small rental options for lower-income individuals and families.
- About 83 percent of housing units have three or more bedrooms, but 47 percent of households have two or less people living in them. This indicates that smaller households in Medfield may be over housed – in dwelling units that are larger than they need. Larger units tend to be more expensive to buy/rent, heat/cool, and maintain and, with higher assessed values, have higher property tax burden.
- About a quarter of Medfield residents are cost-burdened, meaning they spend more than 30 percent of their income on housing costs.
- Like in similar communities in the region, housing costs in Medfield have risen over the last decade. Sales prices for both single-family homes and condos have increased, as have property taxes.
- Medfield has 9.6 percent affordable housing as of 2021, which means that the Town would need at least 16 more units to meet the State's mandated 10 percent affordable housing minimum.
- Most affordable units listed on the SHI are in or near the center of Medfield.
- The number of older adults living in Medfield is expected to grow significantly, leading to a unique challenge of housing affordability and availability for seniors with low incomes in the next several

## DEMOGRAPHIC PROFILE

Medfield had an estimated population of 12,841 people in 2019 – a 7 percent increase from the 2010 population. There are approximately 4,245 households in Medfield, and the town has an average household size of 3.0 persons per household (pph), compared to the state average of 2.5 pph.

MAPC projects a decline in population in the next decade, as shown in the following chart, although recent estimates have indicated moderate growth. The only age group that is projected to increase in the next decade is residents over 65, which is a common trend for many communities in the region.

#### MEDFIELD POPULATION TRENDS BY AGE COHORT<sup>6</sup>

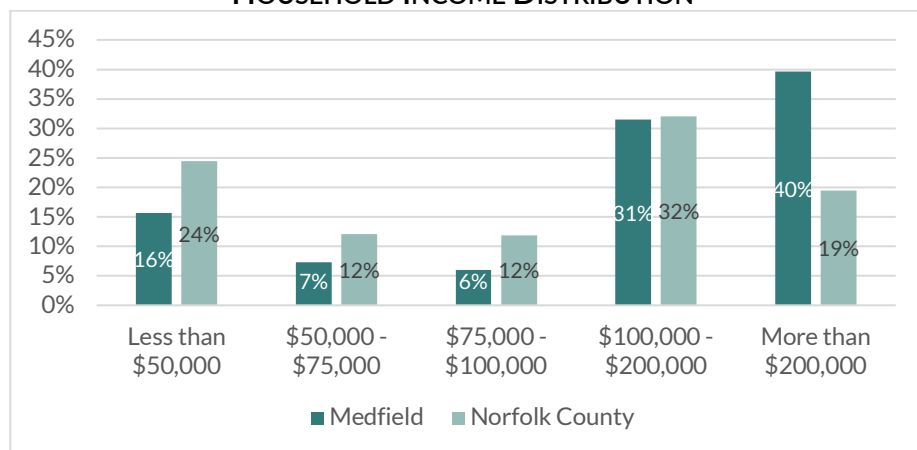
| Age   | 1990   | 2000   | 2010   | 2019 Estimate | 2030 Projection |
|-------|--------|--------|--------|---------------|-----------------|
| 0-4   | 871    | 1,042  | 606    | 985           | 442             |
| 5-19  | 2,222  | 3,258  | 3,403  | 3,193         | 2,231           |
| 20-34 | 2,176  | 1,198  | 947    | 1,319         | 1,102           |
| 35-49 | 2,890  | 3,692  | 2,857  | 2,441         | 2,428           |
| 50-64 | 1,506  | 1,946  | 2,839  | 3,179         | 2,010           |
| 65+   | 866    | 1,137  | 2,001  | 1,724         | 2,803           |
| Total | 10,531 | 12,273 | 12,653 | 12,841        | 11,016          |

#### HOUSEHOLD INCOMES<sup>7</sup>

|                | Median Income All Households 2019 | Median Household Income 2010 | Change in Household Income since 2010 | Median Family Income | Median Nonfamily Income |
|----------------|-----------------------------------|------------------------------|---------------------------------------|----------------------|-------------------------|
| Medfield       | \$160,963                         | \$126,048                    | 28%                                   | \$186,149            | \$39,536                |
| Norfolk County | \$103,291                         | \$81,027                     | 27%                                   | \$129,076            | \$54,874                |
| Massachusetts  | \$81,215                          | \$64,509                     | 26%                                   | \$103,126            | \$46,467                |

Medfield's median household income is \$160,963, which is significantly higher than the County (\$103,291) and the state (\$81,215). This is a 28 percent increase in household income since 2010, not accounting for inflation. However, income levels vary throughout the town. While the median income for family households is \$186,149, the median income for nonfamily households, including many people who are living alone, is just \$39,536.

#### HOUSEHOLD INCOME DISTRIBUTION<sup>8</sup>



<sup>6</sup> ACS 2015-2019, Table C01001, MAPC Municipal Forecasts

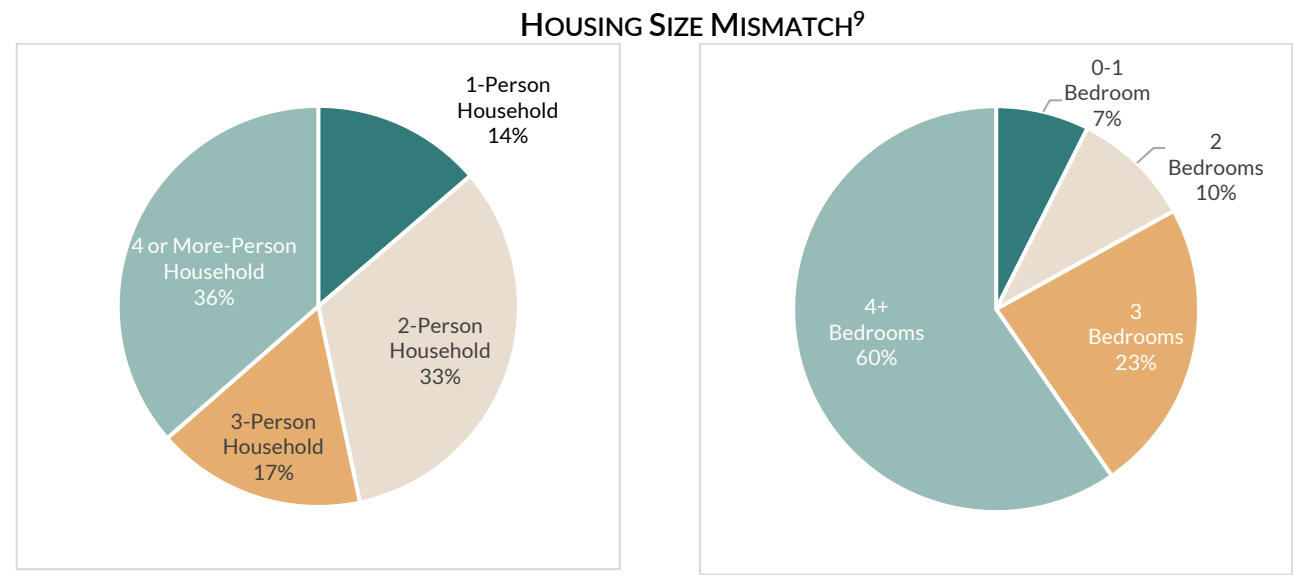
<sup>7</sup> ACS 2015-2019, Tables A14006, A14012, B19215

<sup>8</sup> ACS 2015-2019

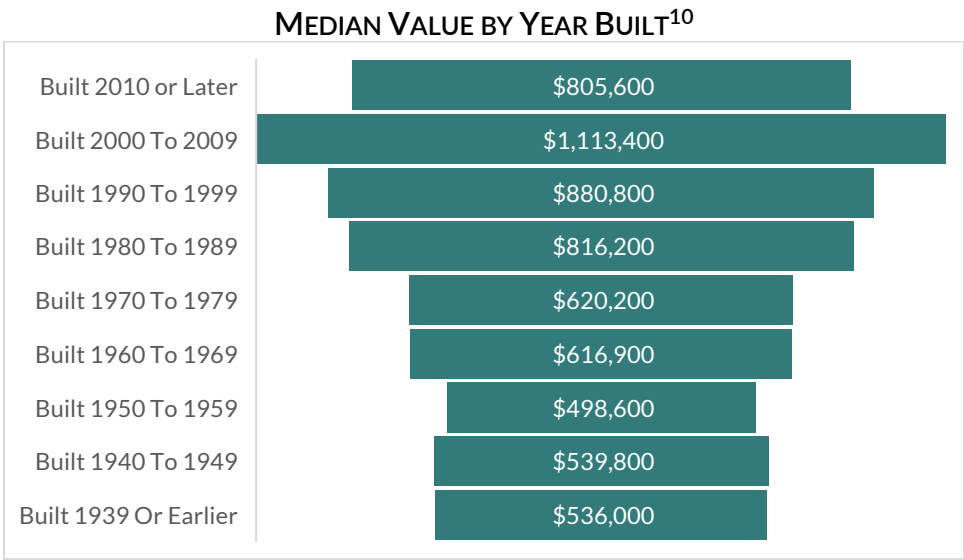
Approximately 40 percent of households in Medfield earn more than \$200,000 per year, compared to about 19 percent in Norfolk County. However, 16 percent of households in Medfield earn less than \$50,000 per year.

**HOUSING SUPPLY**

Medfield’s housing stock is both predominately owner-occupied and large in size (3- or more-bedrooms). Approximately 83 percent of housing in Medfield has more than three bedrooms, although about 47 percent of households are occupied by less than three people.



Most of Medfield’s housing was built over the course of the mid-20<sup>th</sup> Century. The highest valued homes were built after 1980, with homes built in the period between 2000 to 2009 holding the highest values.



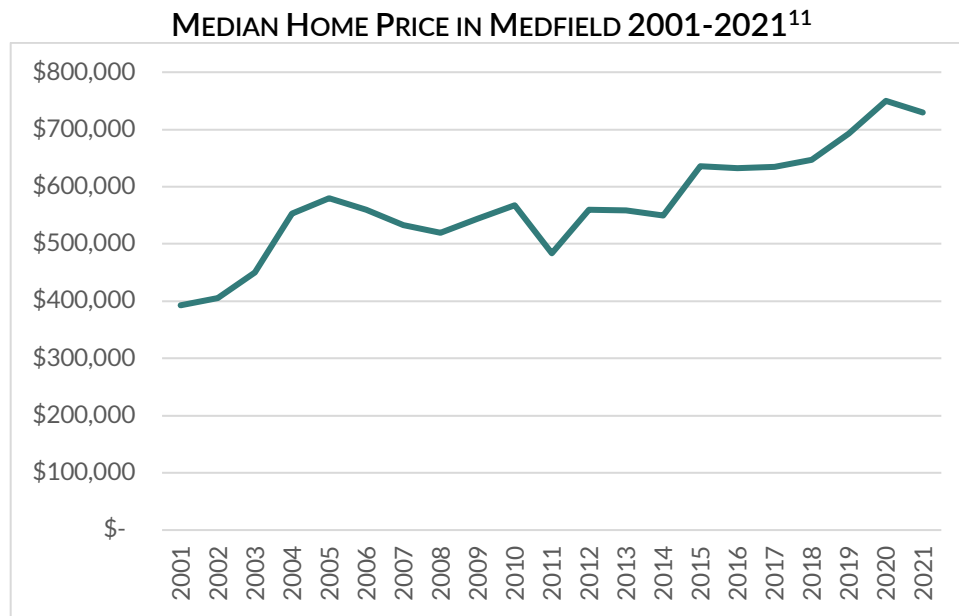
<sup>9</sup> ACS 2015-2019, Tables A10024, A10060, A10032

<sup>10</sup> ACS 2015-2019



## AFFORDABILITY

Housing costs in the region and the state have continued to increase. The median sales price of a home (single-family and condo) in Medfield has increased 91 percent in the period between 2001 and 2020, from \$392,750 to \$749,950, while median household income increased by about 65 percent from \$97,748 in 2000 to \$160,963 in 2019. However, note that interest rates have decreased in this period from 6.97 to 3.11, which has a direct effect on monthly housing costs.



Households are housing cost-burdened if they spend more than 30 percent of their gross income on housing costs. As of 2017, 26 percent (about 1,070) of households in Medfield are cost burdened. This includes about 57 percent of renter households and 21 percent of owner households.

*However, most of Medfield's cost-burdened households have low/moderate incomes (at or below 80 percent of the Area Median Income). Of the estimated 770 Medfield households with low/moderate incomes, about 74 percent (or 570 households) are cost burdened.*

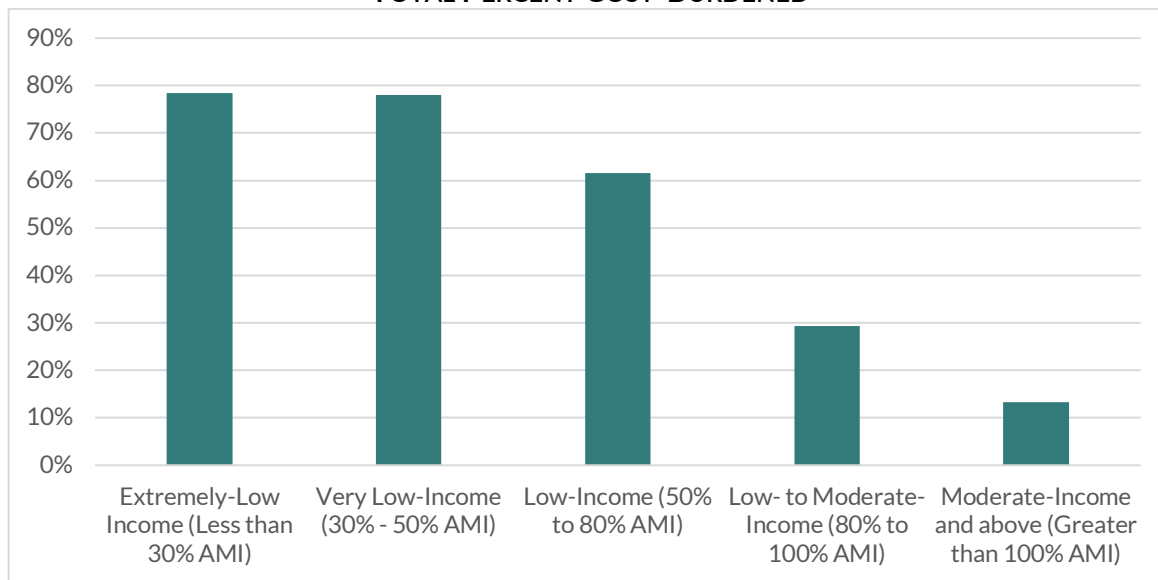
The majority (78 percent) of extremely low-income households (households that earn less than 30 percent of the Area Median Income) are cost burdened. The proportion of cost-burdened very low-income households, which make between 30 and 50 percent of the AMI, is also 78 percent. About 13 percent of those that make more than the Area Median Income are cost-burdened.

<sup>11</sup> The Warren Group

### HOUSING COST BURDEN<sup>12</sup>

|   | Cost Burdened Renters | Cost Burdened Homeowners | Total Cost Burdened Households |
|---|-----------------------|--------------------------|--------------------------------|
| Extremely Low-Income (Less than 30% AMI)          | 175                   | 90                       | 255                            |
| Very Low-Income (30% - 50% AMI)                   | 85                    | 110                      | 195                            |
| Low-Income (50% to 80% AMI)                       | 55                    | 65                       | 120                            |
| Low/Moderate-Income (80% to 100% AMI)             | 0                     | 85                       | 85                             |
| Moderate-Income and above (Greater than 100% AMI) | 0                     | 415                      | 415                            |
| Total   | 315                   | 765                      | 1,070                          |

### TOTAL PERCENT COST-BURDENED



<sup>12</sup> 2013-2017 CHAS Data

# POPULATION CHARACTERISTICS

Medfield's population is approximately 12,841 people, according to the 2015-2019 ACS data. This is a 5 percent increase since 2000, and an 8 percent increase since the population dipped in 2010. Norfolk County and Massachusetts have both increased in population at a rate of about 8 percent in the same period.

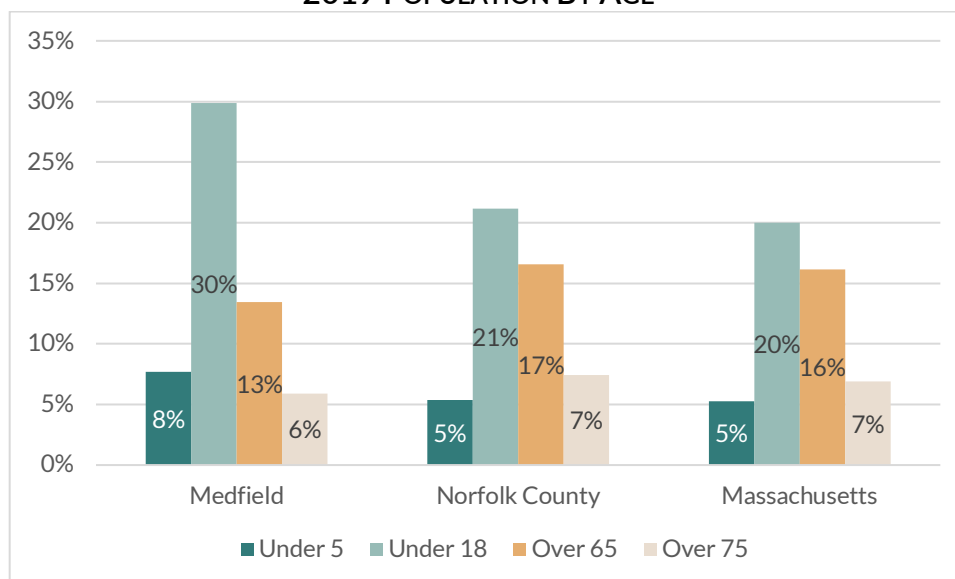
**POPULATION CHANGE 2000 TO 2019<sup>13</sup>**

| Population     | 2000      | 2010      | 2019      | % Change 2000-2019 |
|----------------|-----------|-----------|-----------|--------------------|
| Medfield       | 12,273    | 12,024    | 12,841    | 5%                 |
| Norfolk County | 650,308   | 670,850   | 700,437   | 8%                 |
| Massachusetts  | 6,349,097 | 6,547,629 | 6,850,553 | 8%                 |

## POPULATION AGE AND HOUSEHOLD COMPOSITION

Medfield has a higher proportion of school-aged children than the County and the state on average. About 30 percent of residents are under age eighteen, and 8 percent are under age five, meaning they will soon enter the school system. There is a smaller proportion of residents over age 65 in Medfield than in the County and the state, at about 13 percent.

**2019 POPULATION BY AGE<sup>14</sup>**



Medfield's households are typically headed by older adults. About 74 percent of head of households in Medfield are 45 or older, with the highest proportion between 55 and 64. The 2019 estimation shows no heads of household younger than 25, and only 7 percent between 25 and 35 years old.

<sup>13</sup> 2015-2019 ACS, 2000 and 2010 US Census

<sup>14</sup> 2015-2019 ACS, Table A01001B

### HOUSEHOLDS BY AGE OF HOUSEHOLDER<sup>15</sup>

|          | Medfield |            | Norfolk County |            | Massachusetts |            |
|----------|----------|------------|----------------|------------|---------------|------------|
|          | Number   | % of total | Number         | % of total | Number        | % of total |
| Under 25 | 0        | 0%         | 5,372          | 2%         | 69,316        | 3%         |
| 25 to 34 | 298      | 7%         | 34,165         | 13%        | 386,741       | 15%        |
| 35 to 44 | 834      | 20%        | 45,674         | 17%        | 430,851       | 17%        |
| 45 to 54 | 971      | 23%        | 54,514         | 21%        | 516,850       | 20%        |
| 55 to 64 | 1,137    | 27%        | 54,808         | 21%        | 530,829       | 20%        |
| Over 65  | 1,005    | 24%        | 70,767         | 27%        | 682,910       | 26%        |
| Total    | 4,245    |            | 265,300        |            | 2,617,497     |            |

The number of households and families in Medfield have increased in the period between 2000 and 2019 at rates of 6.1 percent and 10.1 percent, respectively. Households and families increased at a higher rate than the population which grew by about 5 percent in the same period.

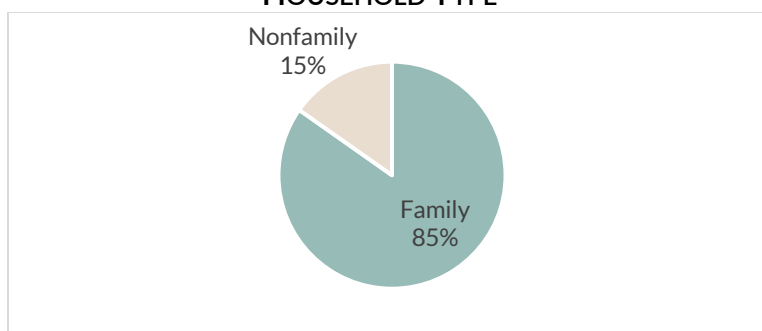
### HOUSEHOLDS AND FAMILIES<sup>16</sup>

|                | 2000       |           | 2010       |           | 2019       |           |
|----------------|------------|-----------|------------|-----------|------------|-----------|
|                | Households | Families  | Households | Families  | Households | Families  |
| Medfield       | 4,002      | 3,268     | 4,117      | 3,333     | 4,245      | 3,598     |
| Norfolk County | 248,827    | 165,858   | 247,914    | 168,903   | 265,300    | 175,945   |
| Massachusetts  | 2,443,580  | 1,576,696 | 2,547,075  | 1,603,591 | 2,617,497  | 1,659,300 |

*The vast majority (78 percent) of households in Medfield are married families.*

An additional 7 percent is classified as “other family”, which includes single parents, and 15 percent of households are “nonfamily households”, which include individuals living alone and non-related individuals living together. Medfield has a much higher proportion on married family households than Norfolk County (54 percent) and the state (47 percent). Norfolk County and Massachusetts have a higher proportion of nonfamily households than Medfield (34 percent and 37 percent, respectively, compared to 15 percent in Medfield).

### HOUSEHOLD TYPE<sup>17</sup>

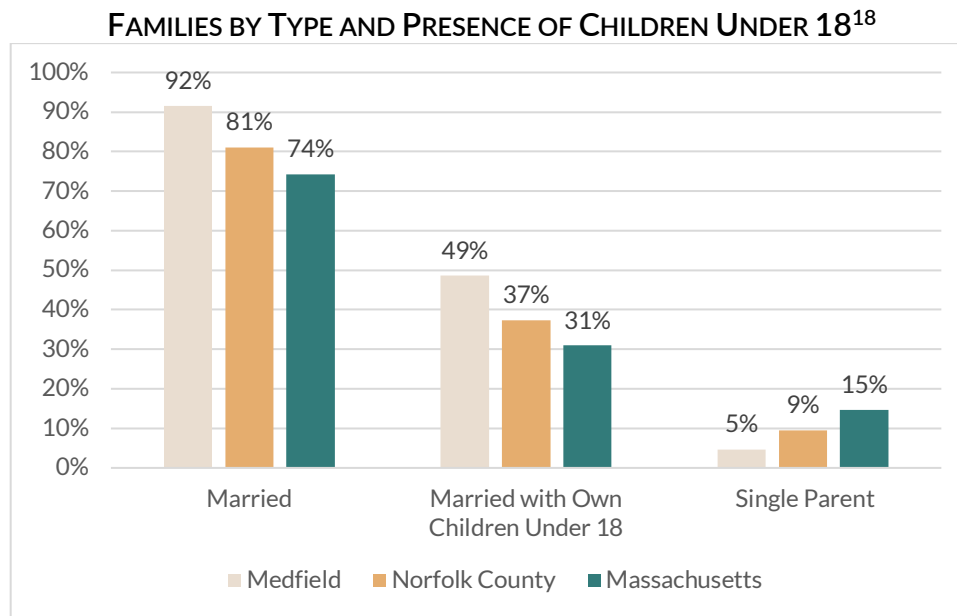


<sup>15</sup> 2015-2019 ACS

<sup>16</sup> 2015-2019 ACS, 2000 and 2010 US Census

<sup>17</sup> 2015-2019 ACS, Table A10008

Of family households, 92 percent are married families. About 49 percent of these family households are married with children, and 5 percent are single parent households. In total, 54 percent of family households have children under age 18.



## HOUSING NEEDS OF THE AGING POPULATION

About 28 percent of households have at least one person that is 65 years or older. This is a lower proportion than the County (31 percent), and the state (30 percent). An estimated 315 households in Medfield are headed by people over 65 years old.

### OVER-65 POPULATION AND CHARACTERISTICS OF HOUSEHOLDS WITH OVER-65 PERSONS<sup>19</sup>

|                | % of total population 65 and older | Total HH  | Households with Elderly Members |                       | One-person Households Headed by Elderly |                       |
|----------------|------------------------------------|-----------|---------------------------------|-----------------------|---|-----------------------|
|                |                                    |           | Number                          | % of total households | Number                                  | % of total households |
| Medfield       | 13%                                | 4,245     | 1,173                           | 28%                   | 315                                     | 7%                    |
| Norfolk County | 17%                                | 265,300   | 82,356                          | 31%                   | 31,711                                  | 12%                   |
| Massachusetts  | 16%                                | 2,617,497 | 786,625                         | 30%                   | 312,687                                 | 12%                   |

*In 2018, the Town of Medfield conducted a Senior Housing Study to gather data on the growing senior population in Medfield. The study found that over the next few decades the number of seniors will increase to make up more than 40 percent of Medfield's population.<sup>20</sup>*

<sup>18</sup> 2015-2019 ACS, Table A10009

<sup>19</sup> 2015-2019 ACS

<sup>20</sup> Medfield Senior Housing Report, 2018

A survey conducted by the Town determined that 68 percent of respondents have lived in Medfield for 30 years or longer, and that staying and aging in Medfield is a goal for 88 percent of respondents. Householders over age 65 have significantly lower median incomes than the median household income for all ages in Medfield as well, leading to a lack of affordable housing options in the town. The Senior Housing Report finds this to be true, determining the availability of affordable options for seniors to be very low.

## HOUSING OCCUPANCY

Housing units in Medfield are primarily occupied by homeowners. About 87 percent of units in Medfield are owner-occupied, and 13 percent are renter occupied. In Norfolk County, 69 percent of units are owner-occupied, and in Massachusetts, 62 percent of units are owner-occupied. Medfield has a small renter population, with only 556 renter-occupied units. However, this is a significant increase (an addition of almost 200 units) since 2010, when renter-occupied units made up only 9.5 percent of the housing stock.

Of the 4,354 units in Medfield, 97.5 percent are occupied, creating a 2.5 percent vacancy rate. This vacancy rate is lower than in the County (9.7 percent) and in the state (4.8 percent).<sup>21</sup>

**OWNER- AND RENTER-OCCUPIED HOUSING UNITS<sup>22</sup>**

|                | Total Units | Owner-occupied | %   | Renter-occupied | %   |
|----------------|-------------|----------------|-----|-----------------|-----|
| Medfield       | 4,245       | 3,689          | 87% | 556             | 13% |
| Norfolk County | 265,300     | 182,847        | 69% | 82,453          | 31% |
| Massachusetts  | 2,617,497   | 1,632,765      | 62% | 984,732         | 38% |

In owner-occupied units in Medfield, married-couple families make up the bulk of residents (85 percent), whereas in renter-occupied units, married couples make up just 29 percent of households. Approximately 57 percent of renter households are nonfamily households, which is on par with the County and the state.

**OWNER-OCCUPIED HOUSING UNITS BY HOUSEHOLD TYPE<sup>23</sup>**

|                | Total     | Married Family |     | Other family |     | Nonfamily |     |
|----------------|-----------|----------------|-----|--------------|-----|-----------|-----|
|                |           | Total          | %   | Total        | %   | Total     | %   |
| Medfield       | 3,689     | 3,135          | 85% | 224          | 6%  | 330       | 9%  |
| Norfolk County | 182,847   | 120,694        | 66% | 20,232       | 11% | 41,921    | 23% |
| Massachusetts  | 1,632,765 | 1,003,888      | 61% | 202,619      | 12% | 426,258   | 26% |

<sup>21</sup> 2015-2019 ACS, Table A10044

<sup>22</sup> 2015-2019 ACS, Table A10060

<sup>23</sup> 2015-2019 ACS

### RENTER-OCCUPIED HOUSING UNITS BY HOUSEHOLD TYPE<sup>24</sup>

|                | Total  | Married Family |     | Other family |     | Nonfamily |     |
|----------------|--------|----------------|-----|--------------|-----|-----------|-----|
|                |        | Total          | %   | Total        | %   | Total     | %   |
| Medfield       | 556    | 159            | 29% | 80           | 14% | 317       | 57% |
| Norfolk County | 82453  | 21835          | 26% | 13184        | 16% | 47434     | 58% |
| Massachusetts  | 984732 | 227880         | 23% | 224913       | 23% | 531939    | 54% |

### RACE AND ETHNICITY

Medfield has little racial diversity. Of the estimated 12,841 residents in 2019, about 93 percent were White. This is significantly higher than the proportions in Norfolk County (78 percent) and the state (78 percent). Those who identify as Asian alone are the racial minority with the biggest proportion in Medfield (5 percent). Residents who identify as Black or African American make up about 1 percent of the population of Medfield.

### LABOR FORCE, EDUCATION, AND EMPLOYMENT

Medfield's residents are highly educated, with about 74 percent having earned a college degree or higher. This proportion is higher than 54 percent in the County and 44 percent in the state. About 38 percent of Medfield residents have an advanced degree.

### HIGHEST LEVEL OF EDUCATION, POPULATION 25 YEARS AND OLDER<sup>25</sup>

|                | Less than High School | High School or GED | Some College or Associates Degree | College Degree | Master's Degree | Professional School or Doctorate |
|----------------|-----------------------|--------------------|-----------------------------------|----------------|-----------------|----------------------------------|
| Medfield       | 1.2%                  | 8.7%               | 16.4%                             | 35.9%          | 27.8%           | 10.1%                            |
| Norfolk County | 6.1%                  | 19.2%              | 21.1%                             | 28.6%          | 16.8%           | 8.2%                             |
| Massachusetts  | 9.2%                  | 24.0%              | 23.1%                             | 24.1%          | 13.7%           | 5.8%                             |

In Medfield, Norfolk County, and Massachusetts, median income increases significantly with higher levels of educational attainment. In Medfield, residents with a college degree earn a median income of \$95,375 – more than double the earnings of residents with only a High School degree.

### MEDIAN INCOME BY EDUCATIONAL ATTAINMENT<sup>26</sup>

|                | Total Population 25+ | Less than High School | High School or GED | College Degree | Graduate or Professional Degree |
|----------------|----------------------|-----------------------|--------------------|----------------|---------------------------------|
| Medfield       | 8,122                | -                     | \$44,125           | \$95,375       | \$117,717                       |
| Norfolk County | 491,428              | \$26,312              | \$39,242           | \$70,797       | \$91,103                        |
| Massachusetts  | 4,781,683            | \$26,978              | \$36,973           | \$63,834       | \$82,404                        |

<sup>24</sup> 2015-2019 ACS, Table B25011

<sup>25</sup> 2015-2019 ACS, Table A12001

<sup>26</sup> 2015-2019 ACS Table A15001



According to the Massachusetts Department of Labor, in 2019 Medfield had 287 establishments that employed an average of 3,182 people per month, most of whom commute from other towns to work in Medfield – about 67 percent (or 2,137) people commute from other towns. The average weekly wage for Medfield workers was \$959 or less than \$50,000 annually.

About 92 percent of employees in Medfield are employed in the service-providing domain, which has lower wages (\$926 average weekly wages or about \$48,152 annually).

The highest paying industries in Medfield are wholesale trade (\$2,184 weekly), professional and technical services (\$1,682 weekly), and construction (\$1,400 weekly). The lowest paying industries are in the leisure and hospitality categories, with arts, entertainment, and recreation workers earning an average of \$357 weekly and accommodation and food services workers earning an average of \$418 weekly.

#### COMPOSITION OF LOCAL ECONOMY<sup>27</sup>

| Description                                 | No. of Establishments | Average Monthly Employment | Average Weekly Wages |
|---|-----------------------|----------------------------|----------------------|
| <b>Total, All Industries</b>                | 387                   | 3,182                      | \$959                |
| <b>Goods-Producing Domain</b>               | 55                    | 265                        | \$1,332              |
| Construction                                | 48                    | 222                        | \$1,400              |
| Manufacturing                               | 5                     | 39                         | \$995                |
| DUR - Durable Goods Manufacturing           | 3                     | 36                         | \$1,039              |
| <b>Service-Providing Domain</b>             | 332                   | 2,917                      | \$926                |
| <b>Trade, Transportation, and Utilities</b> | 54                    | 581                        | \$889                |
| Wholesale Trade                             | 27                    | 113                        | \$2,184              |
| Retail Trade                                | 22                    | 420                        | \$522                |
| Transportation and Warehousing              | 5                     | 48                         | \$1,047              |
| <b>Information</b>                          | 12                    | 76                         | \$1,103              |
| <b>Financial Activities</b>                 | 29                    | 87                         | \$1,460              |
| Finance and Insurance                       | 21                    | 81                         | \$1,510              |
| Real Estate                                 | 8                     | 6                          | \$792                |
| <b>Professional and Business Services</b>   | 98                    | 360                        | \$1,517              |
| Professional and Technical Services         | 65                    | 210                        | \$1,682              |
| Administrative and Waste Services           | 29                    | 145                        | \$1,114              |
| <b>Education and Health Services</b>        | 57                    | 1,067                      | \$923                |
| Health Care and Social Assistance           | 49                    | 466                        | \$742                |
| <b>Leisure and Hospitality</b>              | 34                    | 512                        | \$400                |
| Arts, Entertainment, and Recreation         | 8                     | 154                        | \$357                |
| Accommodation and Food Services             | 26                    | 358                        | \$418                |
| <b>Other Services</b>                       | 45                    | 145                        | \$713                |

<sup>27</sup> ES202 Wage Report, Medfield 2019

About a third of Medfield employees are residents of Medfield. About 18 percent commute from Framingham, Walpole, Medway, and Franklin, and the remaining employees commute from other towns, detailed in the table below. However, most Medfield residents in the workforce commute out of Medfield to Boston or other employment centers for work.

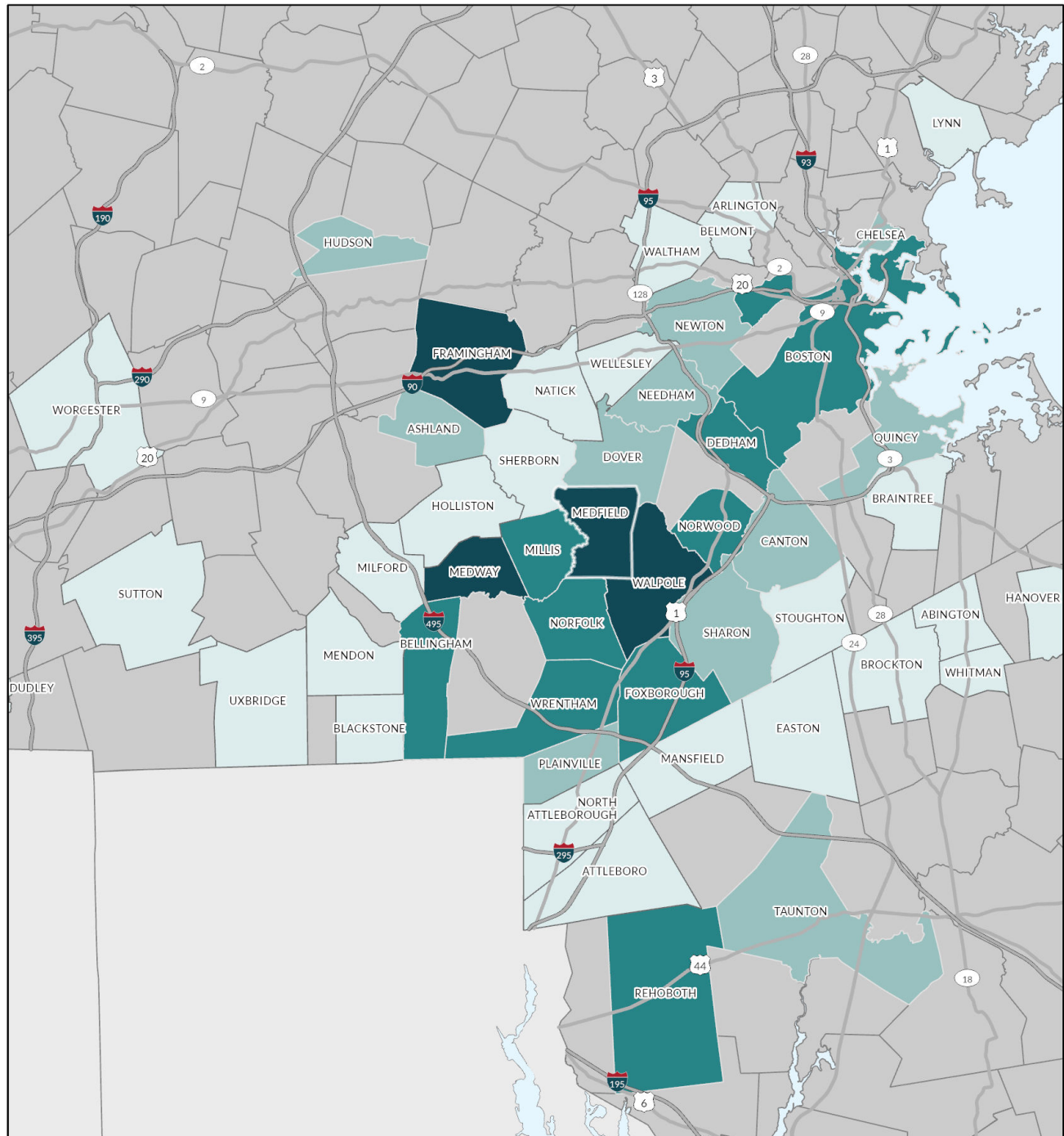
#### **WORK COMMUTING PATTERNS, 2015**

| Place of Residence of Medfield Employees |       |
|--|-------|
| Medfield                                 | 1,313 |
| Framingham                               | 235   |
| Walpole                                  | 148   |
| Medway                                   | 130   |
| Franklin                                 | 100   |
| Millis                                   | 96    |
| Norwood                                  | 86    |
| Bellingham                               | 77    |
| Norfolk                                  | 66    |
| Rehoboth                                 | 63    |
| Other Towns                              | 1,136 |
| Total Medfield Employees                 | 3,450 |

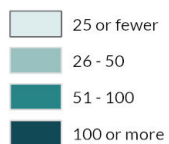
# TOWN OF MEDFIELD - COMMUTER FLOW

Prepared by JM Goldson LLC

J M GOLDSON



## Commuters to Medfield



Sources: Town of Medfield, MassGIS, MassDEP, MAPC Trailmap, US Census ACS 5-year (2011-2015)

## HOUSEHOLD INCOME

The median household income in Medfield is \$160,963, nearly double the statewide median income of \$81,215. The median family income is over \$186,000, and for families with children the median family income is over \$200,000. In Medfield, a substantial 40 percent of households have incomes over \$200,000, compared to 19 percent in Norfolk County.

**HOUSEHOLD AND FAMILY INCOME<sup>28</sup>**

|                | Median Household Income | Median Family Income | Median Family Income for Families with Children |
|----------------|-------------------------|----------------------|---|
| Medfield       | \$160,963               | \$186,149            | \$201,176                                       |
| Norfolk County | \$103,291               | \$129,076            | \$147,414                                       |
| Massachusetts  | \$81,215                | \$103,126            | \$101,390                                       |

The age bracket of householder that earns the highest amount in Medfield is householders between 45 and 64 years old. This population has a median income of \$194,453, compared to younger (25–44-year-old) householders who earn a median income of \$162,800, and older (older than 65) who earn a median income of \$85,417. Consistent with the higher income levels of Medfield compared to the County and the state, Medfield householders earn higher median incomes at all age levels than Norfolk County and Massachusetts.

*Younger householders in Medfield earn significantly more than older (65+) households, pointing to a potential difficulty for older households to afford living expenses that other households can afford.*

Options for senior residents to age in place are necessary to ensure that older households can afford to live in Medfield on lower incomes.

**MEDIAN HOUSEHOLD INCOME OF SELECTED HOUSEHOLD TYPES<sup>29</sup>**

|                | All Households | Householder <25 Years | Householder 25-44 Years | Householder 45-64 Years | Householder >65 Years |
|----------------|----------------|-----------------------|-------------------------|-------------------------|-----------------------|
| Medfield       | \$160,963      | -                     | \$162,800               | \$194,453               | \$85,417              |
| Norfolk County | \$103,291      | \$60,758              | \$116,137               | \$126,936               | \$59,435              |
| Massachusetts  | \$81,215       | \$41,095              | \$92,545                | \$100,386               | \$50,475              |

## INCOME AND POVERTY

Each year, the US Department of Housing and Urban Development publishes low/moderate-income limits, adjusted for household size, for economic areas defined by the federal Office of Management and Budget. The income limits are used primarily to determine eligibility for various housing assistance programs. These income limits can indicate income levels in each area where certain households have incomes too low to afford housing in their region.

<sup>28</sup> 2015-2019 ACS, Table A14006

<sup>29</sup> 2015-2019 ACS, Table B19049

Households are defined as having low/moderate-income when they make 80 percent of the Area Median Income (AMI) or below, which is \$95,200 or less.

*About 28 percent of Medfield residents are estimated to have low/moderate-income (at or below 80 percent AMI).*

#### INCOME LIMITS FOR MEDFIELD, 2020<sup>30</sup>

| Geography                    | Median Income | Income Level         | 1-person | 2-person | 3-person | 4-person | 5-person  |
|------------------------------|---------------|----------------------|----------|----------|----------|----------|-----------|
| Boston-Cambridge-Quincy HMFA | \$119,000     | Extremely Low Income | \$26,850 | \$30,700 | \$34,550 | \$38,350 | \$41,450  |
|                              |               | Very Low Income      | \$44,800 | \$51,200 | \$57,600 | \$63,950 | \$69,000  |
|                              |               | Low Income           | \$67,400 | \$77,000 | \$86,650 | \$96,250 | \$103,950 |

A household earning the median income in the Boston-Cambridge-Quincy HMFA can afford housing costs of up to \$2,975 per month. This calculation assumes that a household paying more than 30 percent of their income on housing cannot afford their housing. A low/moderate-income household with two people (earning up to \$77,000) can afford housing costs of up to \$1,925 a month, while an extremely low-income household of the same size can afford housing costs of just \$767 a month. More than 450 households in Medfield are estimated to be extremely low-income (earning \$35,700 or less per year). Note that HUD defines the less than or equal to 80 percent AMI category as “low income” but for the purpose of this report we use “low/moderate-income” to define this category.

#### INCIDENCE OF POVERTY<sup>31</sup>

|                | Persons <18 | Persons >65 | Homeowners | Renters | Families |
|----------------|-------------|-------------|------------|---------|----------|
| Medfield       | 3%          | 2%          | 3%         | 1%      | 3%       |
| Norfolk County | 6%          | 7%          | 2%         | 3%      | 4%       |
| Massachusetts  | 13%         | 9%          | 2%         | 5%      | 7%       |

The U.S. Federal Poverty Guidelines for 2019 state that a household with four people earning less than \$25,750 per year is under the poverty level. A household with just one person earning less than \$12,490 per year would fall under the poverty level. In Medfield, 3 percent of families live below the poverty level, compared to 4 percent in Norfolk County and 7 percent in Massachusetts.

The map on the following page shows the median household incomes by census tract in Medfield. The center of town, where development is generally denser, is also where residents have the lowest median household income (\$110,000 or less). Residents in the northern portion of town earn higher median incomes (\$190,000 or more), indicating a higher concentration of wealth in neighborhoods in those census tracts.

<sup>30</sup> HUD 2020

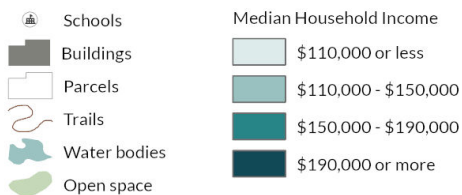
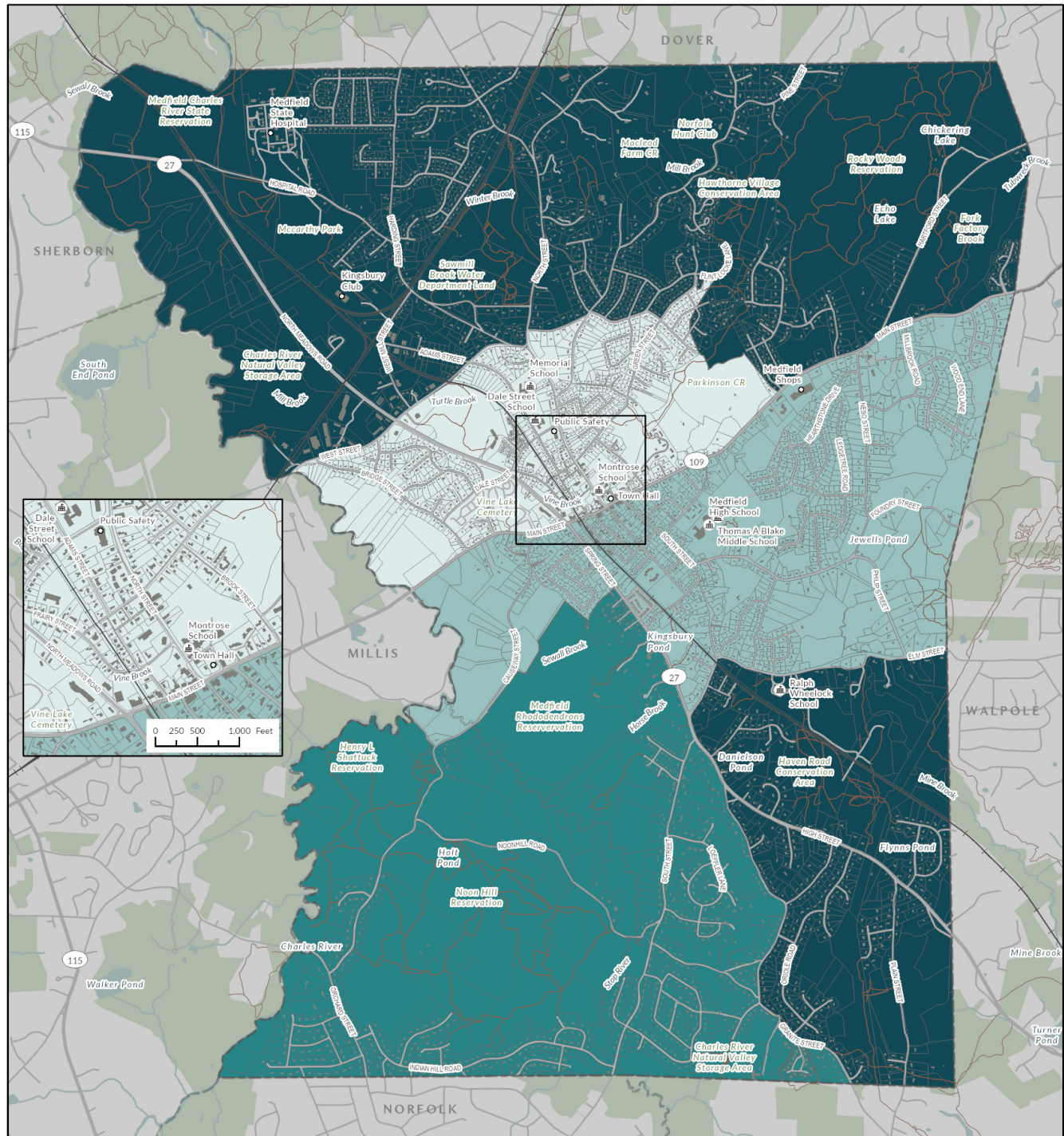
<sup>31</sup> 2015-2019 ACS, Table B17019



# TOWN OF MEDFIELD - MEDIAN HOUSEHOLD INCOME

Prepared by JM Goldson LLC

J M GOLDSON



Sources: Town of Medfield, MassGIS, MassDEP, MAPC Trailmap, US Census ACS 5-year (2015-2019)

# HOUSING CHARACTERISTICS

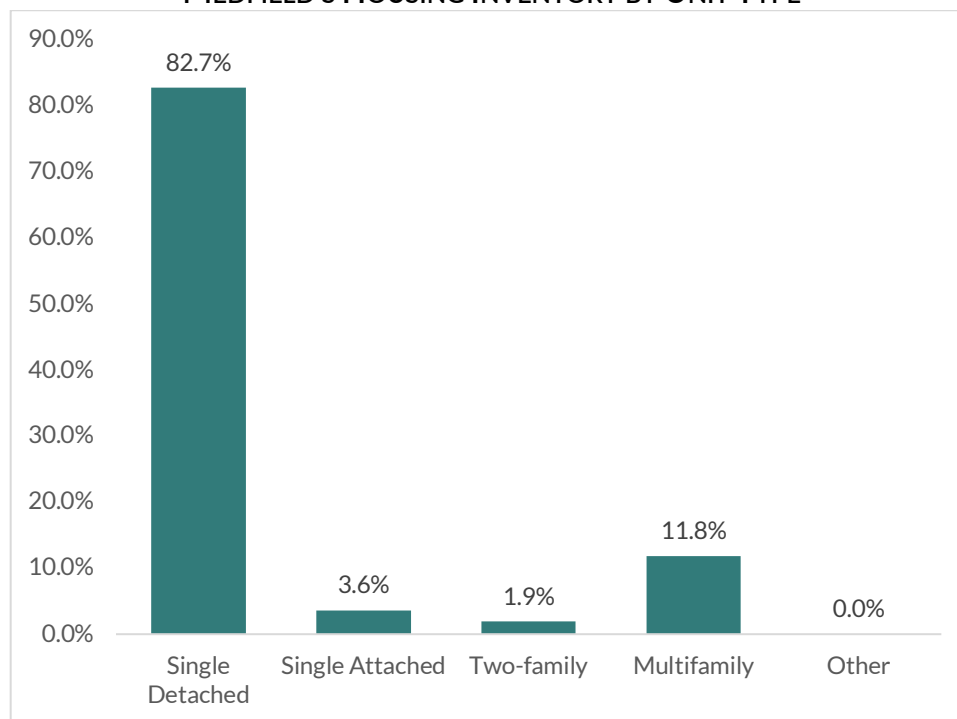
## AGE AND PHYSICAL CHARACTERISTICS OF HOUSING UNITS

Single-family, detached dwellings make up most of Medfield's housing stock, which is typical for similar communities in this region. Multifamily housing makes up about 12 percent of the housing stock, which is a lower proportion than in the County and the state.

**STRUCTURAL CHARACTERISTICS OF HOUSING UNITS<sup>32</sup>**

|                | Total Units | Single Detached | Single Attached | Two-family | Multifamily | Other |
|----------------|-------------|-----------------|-----------------|------------|-------------|-------|
| Dover          | 2,128       | 98%             | 1.4%            | 0%         | 0%          | 0%    |
| Medfield       | 4,354       | 82.7%           | 3.6%            | 1.9%       | 11.8%       | 0.0%  |
| Millis         | 3,344       | 68.2%           | 7.6%            | 4.2%       | 20.1%       | 0%    |
| Norfolk        | 3,209       | 89.3%           | 6.9%            | 1.6%       | 2.3%        | 0%    |
| Sherborn       | 1,601       | 91.5%           | 3.9%            | 0.6%       | 5%          | 0%    |
| Walpole        | 7,302       | 73.1%           | 7.6%            | 4.3%       | 15.1%       | 0%    |
| Norfolk County | 278,615     | 57.5%           | 5.6%            | 6.5%       | 30.1%       | 0.3%  |
| Massachusetts  | 2,897,259   | 52.1%           | 5.3%            | 9.9%       | 31.9%       | 0.8%  |

**MEDFIELD'S HOUSING INVENTORY BY UNIT TYPE**



<sup>32</sup> 2015-2019 ACS, Table A10032



The median age that housing units in Medfield were built is 1972, which is more recent than the County and the state. On average, housing units in Medfield are significantly larger than housing units in the County and the state. The median number of rooms in Medfield housing units is more than eight, while in the County it is six and in the state it is 5.6. Owner-occupied units are larger than rental units, which average four rooms per unit – like the County and state sizes. The small size of rental units in Medfield indicates that there may be a lack of rental units available for larger families in the town.

**MEDIAN AGE OF HOUSING UNITS AND MEDIAN NUMBER OF ROOMS BY OCCUPANCY<sup>33</sup>**

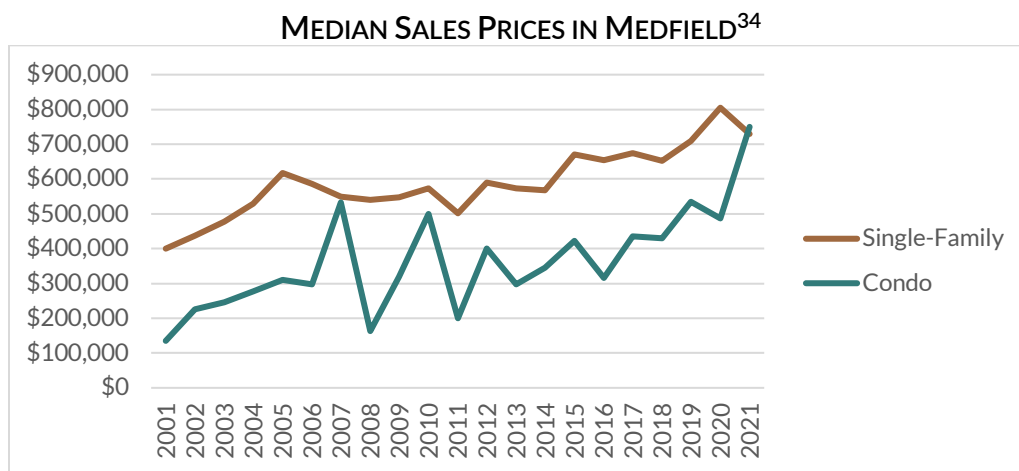
|                | Median Year Built | Median Rooms: All Structures | Median Rooms: Owner Occupied | Median Rooms: Renter Occupied |
|----------------|-------------------|------------------------------|------------------------------|-------------------------------|
| Medfield       | 1972              | 8.1                          | 8.4                          | 4                             |
| Norfolk County | 1962              | 6                            | 7                            | 3.8                           |
| Massachusetts  | 1961              | 5.6                          | 6.5                          | 4.1                           |

## HOUSING MARKET

Medfield's strong schools, small town character, conservation lands, and historic resources, combined with its proximity to Boston, make it a desirable suburb for families. The town's high property values are also a factor in the disproportionate prevalence of family households, who typically have higher incomes than other types of households. Most householders in town are homeowners, and large, detached-single family homes are the most desirable housing in town.

### HOUSING SALE PRICES

The chart below shows median sales prices for single-family homes and for condominiums in Medfield over the last two decades. While sales prices for single-family homes have been consistently higher than those for condominiums in this period (aside from in the first few months of 2021, where the price for a condo rose above the price for a single-family home), prices for all types of housing have risen significantly in the last two decades.

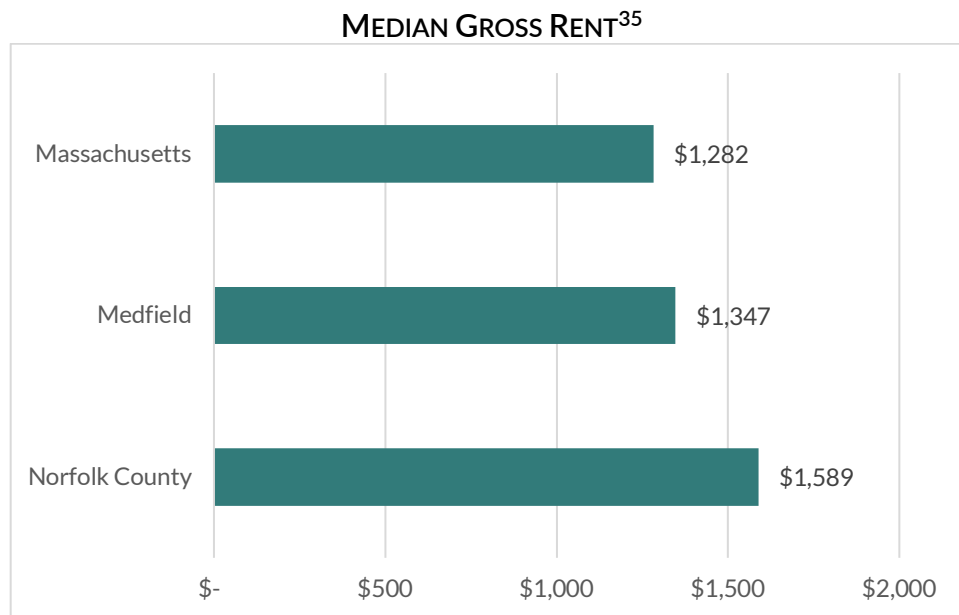


<sup>33</sup> 2015-2019 ACS, Table A10032

<sup>34</sup> The Warren Group

The 2020 median sales price was \$749,950, which would require about \$174,000 household income to afford the monthly housing costs for a 30-year fixed mortgage (assuming 20 percent down payment and an interest rate of 3.24 percent at Medfield's current FY21 tax rate of \$17.76.

The median monthly gross rent in Medfield is \$1,347, which is on par with rents in the state and the County. Although rental housing makes up a very small portion of Medfield's housing stock, rental housing is a more affordable option for households making lower incomes in the town.



In the period between 2017 and June 2021, there was a total of 340 single-family home sales in Medfield, which is an average of 68 sales per year. The average sales price increased by about 31 percent in that time period from \$697,324 in 2017 to \$904,716 in 2021.

**SELECT CHARACTERISTICS OF HOME SALES 2017-2021<sup>36</sup>**

| Unit Type     | Total Sales | Average Sales/Year | Average Sales Price | % Increase in Sales Price |
|---------------|-------------|--------------------|---------------------|---------------------------|
| Single Family | 340         | 68                 | \$725,800           | 31%                       |

Average tax bills for single-family homes have inclined steadily over the past five years, as have residential property tax rates. Tax rates are an important factor in the overall affordability of homeownership in a community. Medfield's residential tax rate is comparable with surrounding communities in 2021. The lowest tax rate in the area is 12.89, in Dover, and the highest is 19.63 in Sherborn.

<sup>35</sup> 2015-2019 ACS, Table A18009

<sup>36</sup> Berkshire Hathaway HomeServices Page Realty

### RESIDENTIAL PROPERTY TAXES<sup>37</sup>

|      | Residential Property Tax Rate | Average Single Family Tax Bill |
|------|-------------------------------|--------------------------------|
| 2017 | 16.89                         | \$10,529                       |
| 2018 | 17.03                         | \$10,809                       |
| 2019 | 17.87                         | \$11,766                       |
| 2020 | 17.83                         | \$12,062                       |
| 2021 | 17.76                         | \$12,297                       |

### RESIDENTIAL PROPERTY TAXES IN SURROUNDING TOWNS, 2021

|                 | Residential Property Tax Rate | Average Single Family Tax Bill |
|-----------------|-------------------------------|--------------------------------|
| Dover           | 12.89                         | o \$15,923                     |
| <b>Medfield</b> | <b>17.76</b>                  | <b>\$12,297</b>                |
| Millis          | 19.62                         | o \$8,505                      |
| Norfolk         | 17.99                         | o \$9,349                      |
| Sherborn        | 19.63                         | o \$16,593                     |
| Walpole         | 14.84                         | o \$8,254                      |

## HOUSING AFFORDABILITY

Most communities have some modestly priced housing: small, older single-family homes that are less valuable than new homes, multi-family condominiums, or apartments that can be leased for relatively low monthly rents. This type of affordable housing often stays affordable if the market will allow. Under a Massachusetts law that went into effect in 1969, however, the state established a goal for all communities to have at least 10 percent of its year-round housing stock that is affordable to low-income households and remains affordable to them even when home values appreciate under robust market conditions. These units remain affordable because their resale prices and rents are governed by a deed restriction that lasts for many years, if not in perpetuity.

Both types of affordable housing – less expensive market-rate housing and affordable housing - meet a variety of housing needs, and both are important. The crucial difference is that the market determines the price of market rate units while a recorded legal instrument determines the price of affordable units. There are other differences, too. For example, any household - regardless of income - may purchase or rent an unrestricted affordable unit, but only a low/moderate-income household is eligible to purchase or rent a deed restricted unit.

When less than 10 percent of a community's housing consists of deed restricted affordable units, M.G.L. c. 40B, Sections 20-23 ("Chapter 40B") authorizes the Zoning Board of Appeals to grant a comprehensive permit to qualified affordable housing developers. The 10 percent minimum is based on the total number of year-round housing units reported in the most recent decennial census; for Medfield, this currently means 4,220 (Census 2010).

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<sup>37</sup> MA Department of Revenue

A comprehensive permit is a type of *unified permit*: a single permit that replaces the approvals otherwise required from separate city or town permitting authorities. Chapter 40B supersedes zoning and other local regulations that make it too expensive to build low- and moderate-income housing. By consolidating the approval powers of multiple town boards, the state legislature hoped to provide more low-income housing options in suburbs and small towns. Under Chapter 40B, the Zoning Board of Appeals may approve, conditionally approve, or deny a comprehensive permit, but in communities that do not meet the minimum 10 percent goal, developers may appeal to the state Housing Appeals Committee (HAC).



*ZBA reviewing a Chapter 40B proposal*

The Massachusetts Department of Housing and Community Development maintains a list of affordable units in each city and town in the state. Known as the Chapter 40B Subsidized Housing Inventory, the list determines whether the community meets the State's mandated 10 percent affordable housing minimum, per Massachusetts Chapter 40B. In 2021, Medfield had 9.6 percent affordable housing, based on the 2010 census count of 4,220 units. With 406 units of affordable housing, the Town would have needed 16 more units to reach 10 percent.

While DHCD's official determination of compliance with the 10 percent minimum is pending given the 2020 Decennial Census figures that were released recently, the 2020 counts indicate that Medfield's percentage of SHI units will decrease to 9.34 percent with a need for an additional 29 units to reach the 10 percent minimum goal. The 2020 count of total housing units reported by the Census Bureau is 4,450 and 104 vacant units.

### MEDFIELD SUBSIDIZED HOUSING INVENTORY<sup>38</sup>

| Name  | Address                    | Type      | SHI Units | Affordability Expires |
|---|----------------------------|-----------|-----------|-----------------------|
| Tilden Village                                | 30 Pound Street            | Rental    | 60        | Perpetuity            |
| Allendale                                     | Dale Street                | Ownership | 17        | Perpetuity            |
| The Village at Medfield                       | Turtle Brook Way           | Ownership | 6         | Perpetuity            |
| Wilkins Glen                                  | Wilkins Glen Road          | Rental    | 103       | 2042                  |
| DDS Group Homes                               | Confidential               | Rental    | 5         | N/A                   |
| The Parc at Medfield                          | One Drive                  | Rental    | 92        | Perpetuity            |
| Country Estates (a.k.a., Chapel Hill Landing) | 21, 25, & 29 Hospital Road | Ownership | 8         | Perpetuity            |
| Cushman House AKA Cushing House               | 67 North Street            | Rental    | 8         | Perpetuity            |
| 71 North Street                               | 71 North Street            | Rental    | 8         | Perpetuity            |
| Hillside Village                              | 80 North Meadows Road      | Rental    | 16        | Perpetuity            |
| Medfield Meadows                              | 41 Dale Street             | Mix       | 27        | Perpetuity            |
| Aura at Medfield                              | 50 Peter Kristof Way       | Rental    | 56        | Perpetuity            |

Twelve properties contribute to Medfield's Subsidized Housing Inventory. Most units are rental properties, including 103 units at Wilkins Glen, 92 units at The Parc at Medfield, and 60 units at Tilden Village. Thirty-one units are ownership units, and the 27 units at Medfield Meadows are a mix of rental and ownership.

Most units on the SHI are in the center of Medfield. Two properties (Cushing Housing and 71 North Street) are located within a quarter mile of town center, and five more (Tilden Village, Wilkins Glen, Allendale, the Village at Medfield, and Medfield Meadows) are located about a half mile from town center.

#### *Housing Production*

Since 2017, 112 rental units have either been built or are in the pipeline. Twenty-eight of these units are affordable. The developments include the following:

- 67 North Street: 8 units (2 affordable, 6 market)
- 71 North Street – 8 units (2 affordable, 6 market)
- Hillside Village, 80 North Meadows Road – 16 units (4 affordable, 12 market)
- Medfield Meadows, 41 Dale Street/Hennery Way – 24 units (6 affordable, 18 market)
- Aura at Medfield, 50 Peter Kristof Way – 56 units (14 affordable, 42 market)

In the same period, 58 ownership units were built or added to the pipeline, including the following:

- Chapel Hill Landing – 49 Units (13 affordable, 36 market rate)
- Medfield Meadows – 9 units (3 affordable, 6 market rate)

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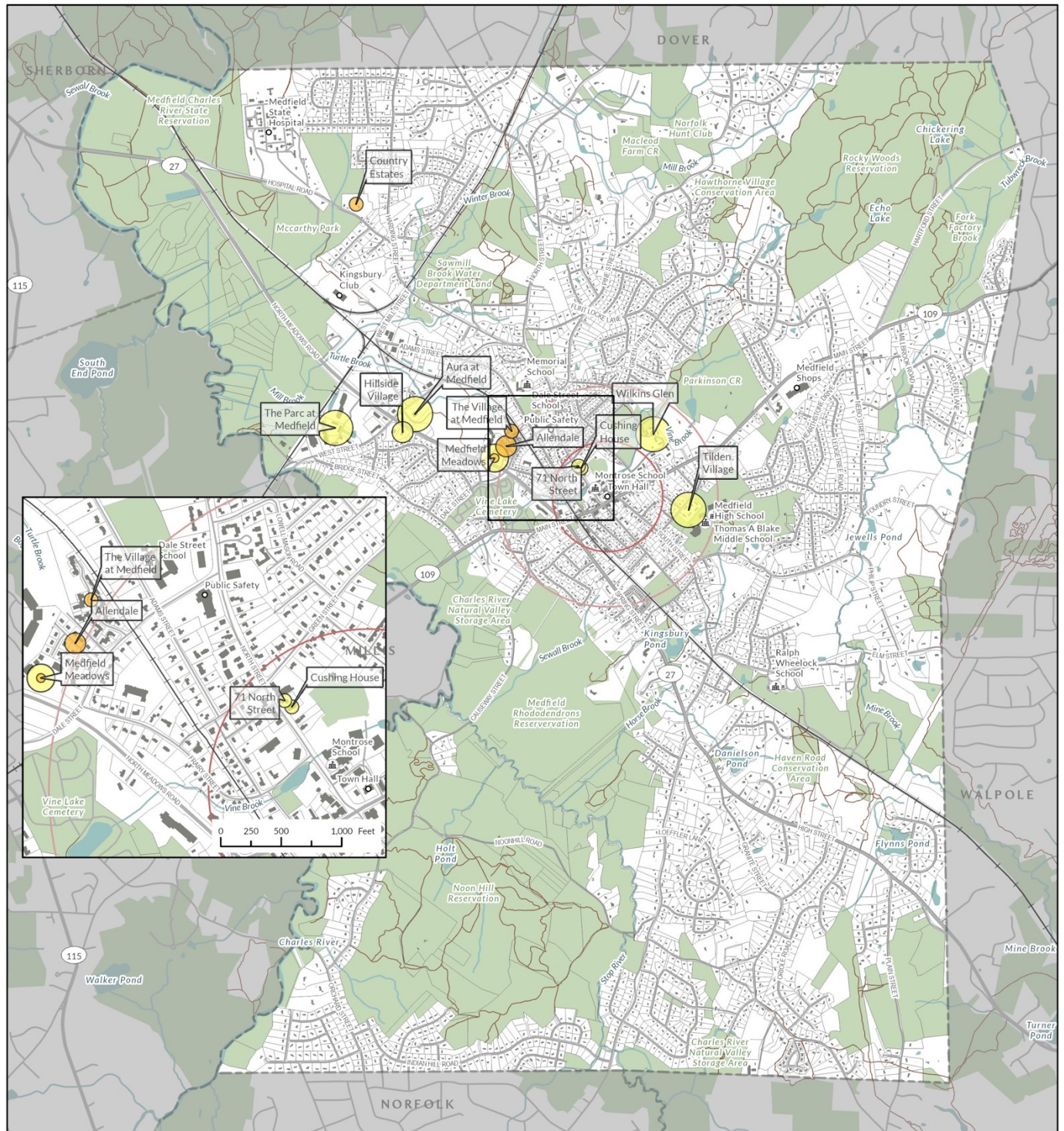
<sup>38</sup> DHCD, 2020



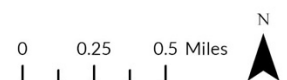
# TOWN OF MEDFIELD - SUBSIDIZED HOUSING

Prepared by JM Goldson LLC

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## Distance from town center



Sources: Town of Medfield, MassGIS, MassDEP, MAPC Trailmap, DHCD



# CHAPTER 4: HOUSING DEVELOPMENT CONSTRAINTS

The location, density, and design of housing depends on multiple factors, including local regulations, infrastructure, environmental constraints, and economic considerations. Zoning ordinances and other bylaws define rules for siting, scale, and housing type. Housing density and development costs can also be affected by the absence (or capacity limitations) of critical infrastructure, such as public water and sewer. The physical conditions of a site, including terrain, wetlands and surface water, soil type and geology can also constrain housing development. Many of these factors can be subject to change, but there is often an associated cost, either to the town or private developers. Medfield's development constraints are discussed in the following chapter, including maps and summary tables that further describe the characteristics and location of each constraint.

## Key Findings

1. Water resources and their associated regulatory areas span a significant proportion of the town, which can impose some limitations on development associated with impervious surface area.
2. Most wetlands and other state-identified habitat areas are within protected open space; however, there are several certified and potential habitat areas scattered throughout town that have some protection under the local wetland bylaw and would require Conservation Commission review of any new development in those areas.
3. The municipal water and sewer systems serve most of the town, except a few neighborhoods that lack sewer service. The anticipated redevelopment of Medfield State Hospital should be possible to accommodate under the existing water withdrawal permit, assuming the Town maintains a proactive approach to water conservation and there are no other significant increases in demand.
4. New water and sewer infrastructure will be necessary as part of the MSH redevelopment, but the Town sewer system is expected to have sufficient capacity to accommodate this growth.
5. Most of Medfield is zoned for single family residential development and limit structures to a maximum height of 35 feet and no more than two and one half (2.5) stories. Minimum lot sizes in residential zones range from 12,000 sq. ft. (zone RU) up to 80,000 sq. ft. (zone RE).
6. Open Space Residential Zoning would also allow for smaller lots but requires land area greater than 10 times the lot size of the base zoning, which is challenging to find in Medfield.
7. Opportunities for by right mixed-use and multifamily residential development are limited: both are allowed in certain subdistricts under the Medfield State Hospital District zoning, and multifamily is allowed in the Upper Spring Street Overlay District, contingent upon site plan approval by the Planning Board.
8. The Inclusionary Zoning bylaw has not been used as of the time of this writing - larger residential developments have gone through the Comprehensive Permit process.
9. About 80% of Medfield's existing land use is split between residential development and open space. The limited remaining vacant land generally has wetland or floodplain issues.

## NATURAL FEATURES

Medfield has several large protected open space areas, both public and private, which protect habitat, recreation areas, and water resources. Many of these conservation areas are Town-owned, including

portions of Noon Hill Reservation and the Medfield Rhododendron Reservation, as well as McCarthy Park and Ralph Wheelock Fields. Local land trusts also have significant land holdings, including Rocky Woods Reservation, Fork Factory Brook, and parts of the Rhododendron and Henry L. Shattuck Reservations. In general, Medfield has relatively flat topography, and most hilly areas are within the protected areas described above.

## WATER RESOURCES

Wetland resource areas, which make up about 22 percent of the town's total area, are also subject to development restrictions imposed by the state's Wetlands Protection Act and Medfield's wetlands bylaw, which establishes a 50-foot no-disturb buffer zone and requires any work within 100 feet of resource areas and flood zones to be reviewed by the Conservation Commission.<sup>39</sup> A majority of these wetland areas overlap with the 100-year and 500-year flood zones identified on FEMA's Flood Insurance Rate Maps. Flood zones A and AE are also regulated as defined in the Floodplain District section of the Town's zoning bylaws, which prohibits encroachment that would increase flood levels, except by special permit.<sup>40</sup> Title 5 setback areas also apply to wetlands and water supplies in areas where septic systems are required for new housing developments.

State and local protections are also in place for public water supplies, including Zone I and II wellhead protection areas, and the Primary and Secondary Aquifer Zones that are defined by these zones. Zone I areas do not allow any construction, while Zone II protections apply to storage of certain chemicals, removal of soil and gravel near the water table, and prohibit land uses that result in impervious surface on more than 15% of a lot (or 2,500 sq. ft.) – unless adequate measures are taken to recharge groundwater.<sup>41</sup> Water resource protection areas, wetlands, and flood zones are shown in the map on the following page. Additional details on the Aquifer Zones can be found in the Zoning section of this chapter.



*Charles River in Medfield (Source: Wikipedia)*

<sup>39</sup> Town of Medfield. Chapter 290 Wetlands bylaw. Accessed from: <https://ecode360.com/27373960>

<sup>40</sup> Town of Medfield. Article 10 Floodplain District. Accessed from: <https://ecode360.com/27374311>

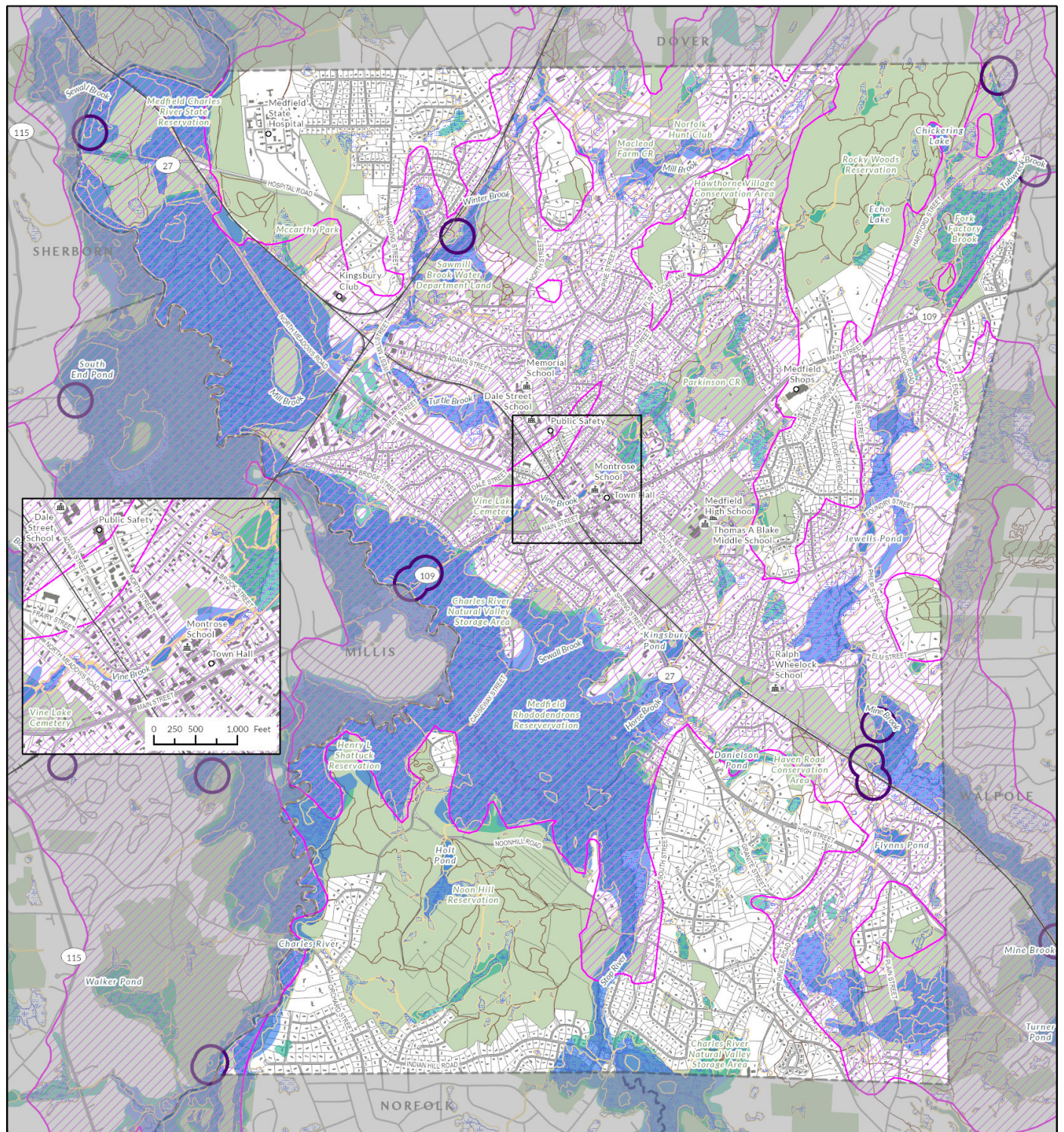
<sup>41</sup> MassDEP. Wellhead Protection Guidance: The Best Effort Requirement 310 CMR 22.21(1). Accessed from: <https://www.mass.gov/doc/wellhead-protection-guidance-best-effort-requirement-310-cmr-22211/download>



# TOWN OF MEDFIELD - WATER RESOURCE CONSTRAINTS

Prepared by JM Goldson LLC

J M GOLDSON



- |              |                       |                         |
|--------------|-----------------------|-------------------------|
| Schools      | DEP Approved Zone I   | Flood Zone Designations |
| Buildings    | DEP Approved Zone II  | 100 yr. flood zone      |
| Parcels      | Title 5 Setback Areas | 500 yr. flood zone      |
| Trails       | Wetlands              |                         |
| Water bodies |                       |                         |
| Open space   |                       |                         |



Sources: Town of Medfield, MassGIS, MassDEP, MAPC Trailmap



## HABITAT AREAS

The MassWildlife Natural Heritage & Endangered Species Program (NHESP) identified significant wildlife habitat areas throughout the state. The BioMap2 Town Report for Medfield lists 1,265 acres of Core Habitat and 1,660 acres of Critical Natural Landscape. These areas provide habitat to twelve species of conservation concern and are primarily located within existed protected open space along the Charles River and the Medfield Rhododendron Reservation, as shown in the map on the following page.<sup>42</sup>

*Medfield also has 17 certified vernal pools and 62 potential vernal pools, as identified by NHESP, which provide seasonal habitat.*

The local wetlands bylaw establishes a 100-foot resource area around vernal pools, whether they have been certified by the Massachusetts Division of Fisheries and Wildlife, excluding any existing landscaped or developed areas. Development within these resource areas would also be subject to review by the Medfield Conservation Commission.



*Rocky Woods Reservation (Source: The Trustees of Reservations)*

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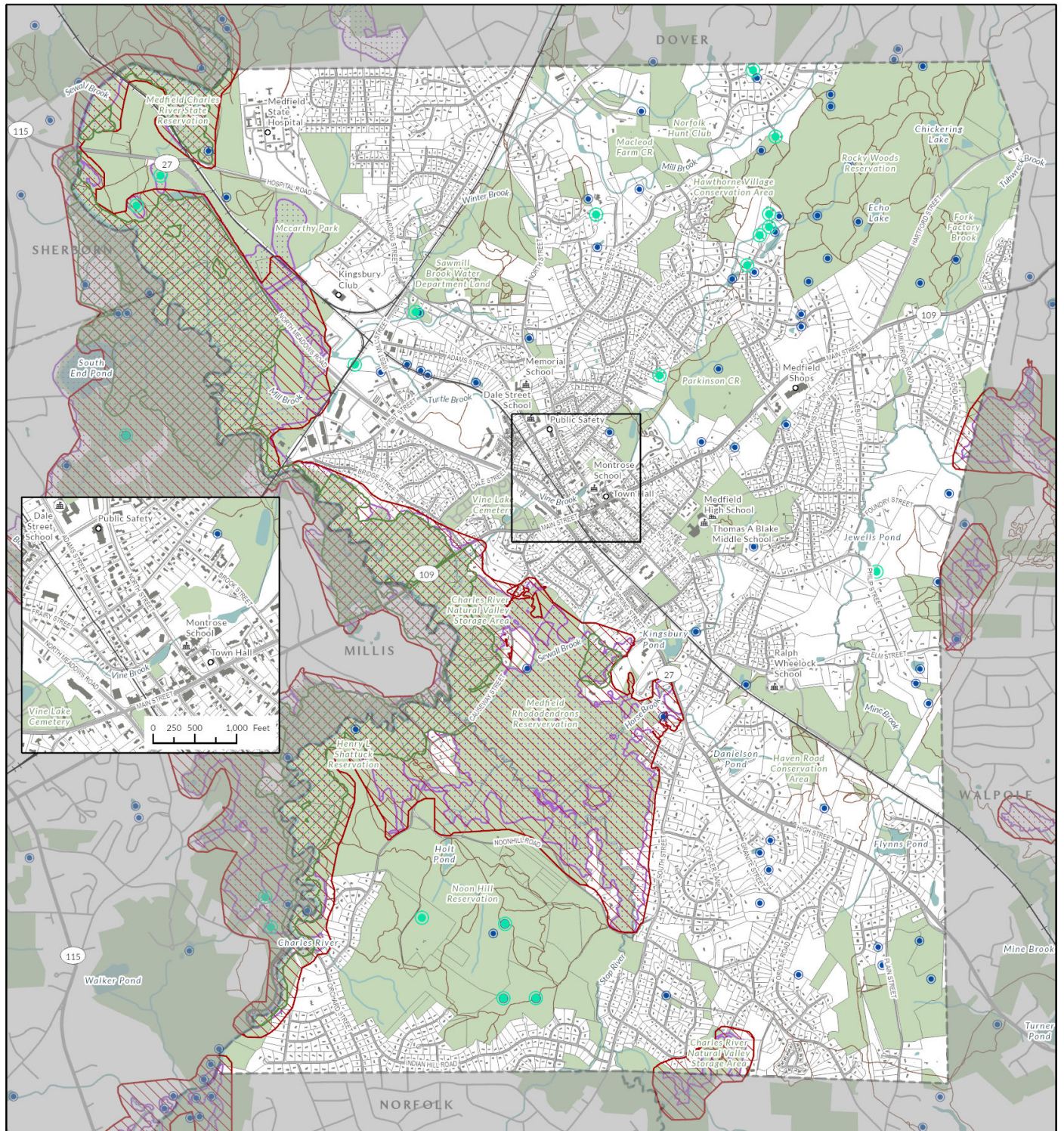
<sup>42</sup> MassWildlife. BioMap2 Town Report: Medfield. Accessed from: [http://maps.massgis.state.ma.us/dfg/biomap/pdf/town\\_core/Medfield.pdf](http://maps.massgis.state.ma.us/dfg/biomap/pdf/town_core/Medfield.pdf)



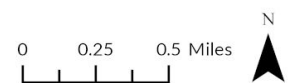
# TOWN OF MEDFIELD - HABITAT CONSTRAINTS

Prepared by JM Goldson LLC

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- Schools
- Buildings
- Parcels
- Trails
- Water bodies
- Open space
- Certified Vernal Pools
- Potential Vernal Pools
- Priority Habitats of Rare Species
- BioMap2 Critical Natural Landscape
- BioMap2 Core Habitat



Sources: Town of Medfield, MassGIS, MassDEP, MAPC Trailmap



## INFRASTRUCTURE

Medfield operates both municipal water and sewer systems, which cover most of the town. There are some areas along the borders where sewer mains are not present, specifically west of Rocky Woods Reservation, from Danielson Pond to Flynns Pond, and south along Plain Street (see map on the following page). The water and sewer infrastructure at the former Medfield State Hospital (MSH) is no longer functional; however, an evaluation was completed for the proposed water and sewer service to serve future development at the site.

*The anticipated redevelopment of Medfield State Hospital should be possible to accommodate under the existing water withdrawal permit, assuming the Town maintains a proactive approach to water conservation and there are no other significant increases in demand.*

Additional anticipated water demand can likely be accommodated if the Town's water conservation programs continue to be implemented. The existing sewer system on Hospital Road is also expected to have the capacity to handle projected sewer flow from the proposed MSH project. Further analysis of the existing system may be needed as more details on the proposed development become available, in addition to continuing work to address Inflow/Infiltration into the sewer system.<sup>43</sup>



*Medfield State Hospital (Source: Medfield State Hospital Strategic Reuse Master Plan)*

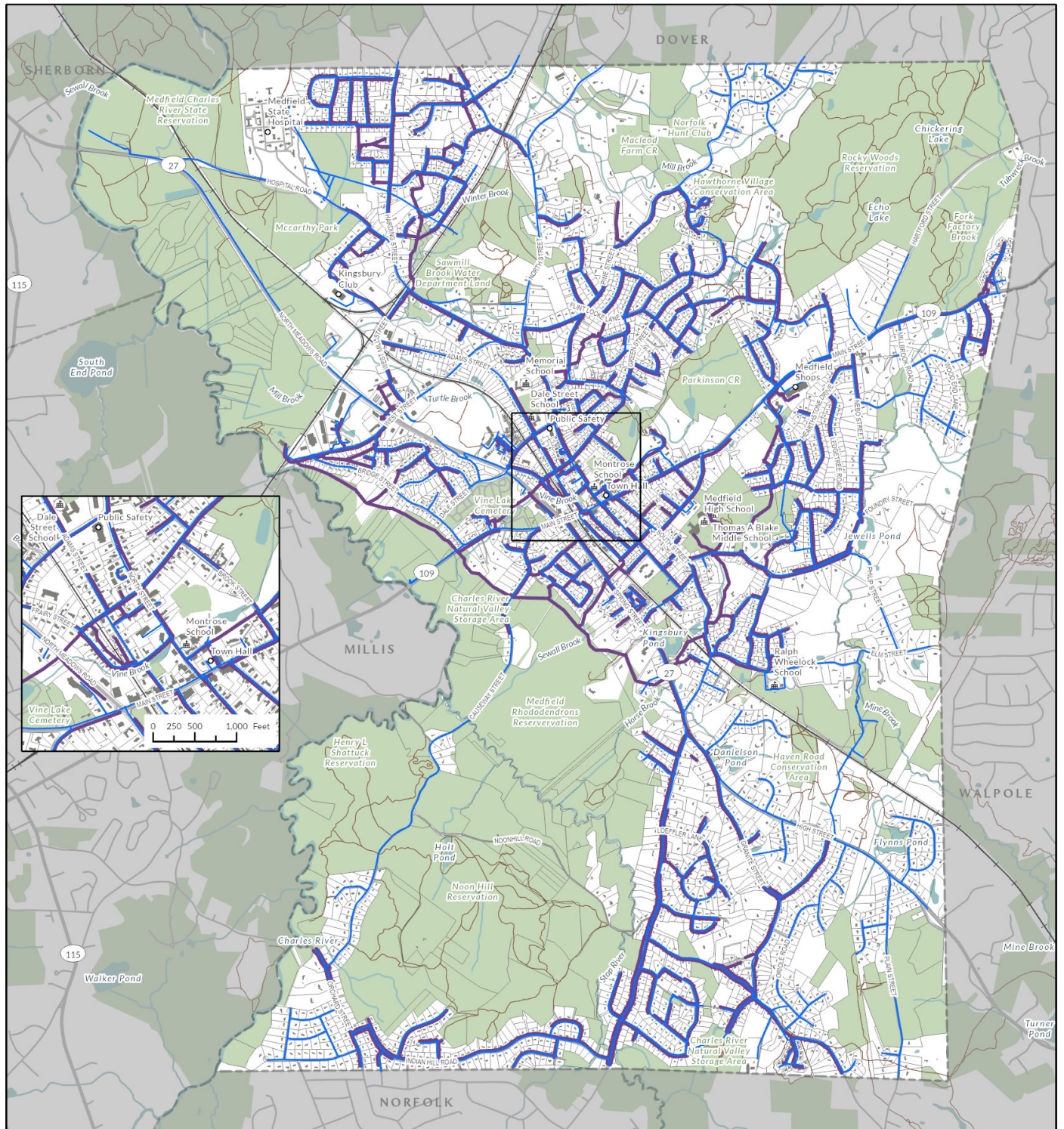
<sup>43</sup> Environmental Partners Group. *Medfield State Hospital Development: Review of Proposed Water and Sewer Utilities Plans* (technical memo).











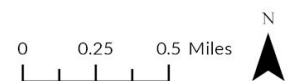
# TOWN OF MEDFIELD - WATER AND SEWER NETWORKS

Prepared by JM Goldson LLC

J M GOLDSON



-  Schools
-  Buildings
-  Parcels
-  Trails
-  Water bodies
-  Open space
-  Sewer mains
-  Water mains



Sources: Town of Medfield, MassGIS, MassDEP, MAPC Trailmap

# LOCAL BYLAWS

Land use regulations are another key element in determining the potential location and density of new residential development, including zoning bylaws and environmental protections such as the Wetlands Protection Act and wellhead protection regulations. Medfield's zoning ordinances establish use restrictions, define dimensional requirements such as minimum lot size and maximum height, and include provisions to protect the town's water and wetland resources.

## RESIDENTIAL ZONING

Medfield's zoning map defines the boundaries of the town's base and overlay zoning districts, as shown later in this chapter. There are four residential districts where certain housing types are allowed by right or by special permit. Single family dwellings are allowed by-right in each of these districts, as well as the A (Agricultural) district. Accessory dwelling units can be added inside an existing single-family dwelling by special permit in any of the residential districts. ADUs are only allowed in homes built prior to 1938 and must have a minimum floor area of 2,000 sq. ft. Family apartments, which are defined as an additional unit reserved for a family member, are allowed by right in the RU district and by special permit in the B district. Community residences for people with physical or cognitive disabilities are allowed by special permit in the RE, RT, RS, and RU districts.

Most of Medfield is zoned for single family residential development, requiring a minimum lot size of 40,000 sq. ft. in the RT district or 20,000 sq. ft. in the RS district to develop new housing by right. About 48 percent of residential parcels in the RT district are undersized relative to the current minimum lot area requirement.

All of the residential districts define a maximum height of 35 feet and allow a maximum of two and a half (2-1/2) stories. Additionally, the RU district allows two-family and multifamily residences if lot size minimums are met. A special permit from the Planning Board is required for multifamily and two-family housing in the RU district (where lot coverage is greater than or equal to 15%). Multifamily housing is also allowed by right in the Upper Spring Street Overlay District, contingent upon site plan approval by the Planning Board and a minimum lot size of 24,000 sq. ft. for three units (plus 6,000 sq. ft. for each additional unit). The minimum lot size and other dimensional requirements vary for each of the residential districts and the table below summarizes some of the key differences:

| District                    | Min. lot area  | Max. lot coverage (%) | Min. Frontage (ft.) |
|-----------------------------|----------------|-----------------------|---------------------|
| A (Agricultural)            | 10 acres       |                       |                     |
| RE (Residential Estate)     | 80,000 sq. ft. | 10%                   | 180                 |
| RT (Residential Town)       | 40,000 sq. ft. | 15%                   | 142                 |
| RS (Residential Suburban)   | 20,000 sq. ft. | 20%                   | 96                  |
| RU (Residential Urban) – 1F | 12,000 sq. ft. | 30%                   | 80                  |
| RU (Residential Urban) – 2F | 20,000 sq. ft. | 25% or 30%*           | 100                 |
| RU (Residential Urban) – MF | 30,000 sq. ft. | 35%                   | 200                 |

\* Historic preservation incentive

Open Space Residential Zoning is another option available in Medfield for new residential development that is designed to maintain more open space in a new subdivision by allowing smaller lots than required by the applicable zoning district. Minimum lot size is reduced to 12,000 sq. ft. if at least 25 percent of the total development area (excluding roads and parking) is reserved for open space, and the site is served by public water and sewer (or an on-site sewage disposal system). This option is rarely pursued in Medfield due to the lack of large developable parcels that meet the following required conditions:



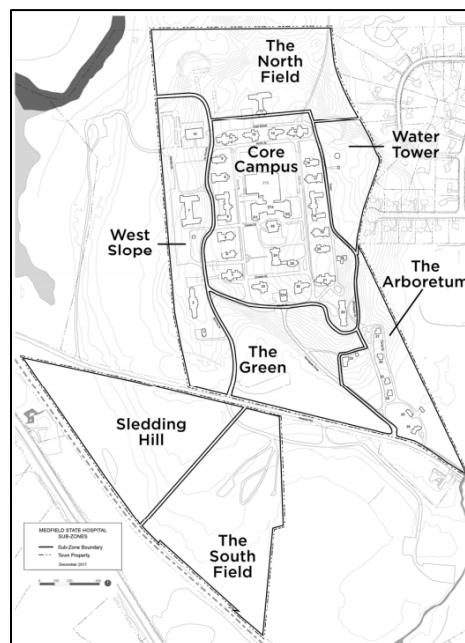
- No less than 10 times the minimum lot size required by the applicable zoning district
- No more than 25 percent of open land may be wetlands, Floodplain District, Watershed Protection District, or have a slope greater than 20 percent.

## MIXED-USE ZONING

Mixed-use development, combining residential uses with commercial or other uses, is allowed under limited circumstances in Medfield. Specifically, a single-family or two-family dwelling can be approved as a secondary use by special permit in the B district. The Medfield State Hospital District (MSHD), adopted in 2019, also allows by-right mixed-use redevelopment in certain sub-zones. The following table summarizes the types of residential uses allowed by-right (YES) or by special permit (SP) in each sub-zone.

| Use  | A. The Green | B. Cottage/Arboretum | C. Core Campus | D. North Field | E. West Slope | F. Water Tower |
|--|--------------|----------------------|----------------|----------------|---------------|----------------|
| Single-family cottages                             | NO           | YES                  | NO             | NO             | NO            | NO             |
| Two- and three-family dwellings                    | NO           | YES                  | SP             | NO             | NO            | NO             |
| Multi-family dwellings                             | NO           | NO                   | YES            | NO             | YES           | NO             |
| Senior housing with or without supportive services | NO           | YES                  | YES            | NO             | SP            | NO             |
| Artist live/work dwelling                          | NO           | NO                   | YES            | NO             | YES           | NO             |
| Live/work dwelling                                 | NO           | YES                  | YES            | NO             | YES           | NO             |
| Mixed-use  | NO           | NO                   | YES            | NO             | YES           | NO             |

The following map shows the boundaries of the sub-zones described in the MSHD use table.



*Medfield State Hospital District and Sub-Zones<sup>44</sup>*

<sup>44</sup> Town of Medfield. Article 20. Medfield State Hospital District Zoning Amendment.

## INCLUSIONARY ZONING

The Town of Medfield also adopted an Inclusionary Zoning bylaw in 2017, which applies to any project that requires a special permit or site plan approval and results in a net increase of six or more housing units. Under these regulations affordable housing units are required as a condition of approval for a special permit, and the proportion of affordable units increases with the size of the project as follows:

- 15% affordable units in projects with 6 to 20 total units
- 20% affordable units in projects with 21 to 49 total units
- 25% affordable units in projects with 50 or more total units

*As of the writing of this plan, no development projects have been subject to the Inclusionary Zoning requirements, but it is expected to apply to the anticipated redevelopment of the Medfield State Hospital campus.*

## WATER RESOURCE OVERLAY DISTRICTS

In addition to its base zoning districts, Medfield has several overlay districts related to water resource protection. These overlay districts impose a few other limitations on residential development, namely:

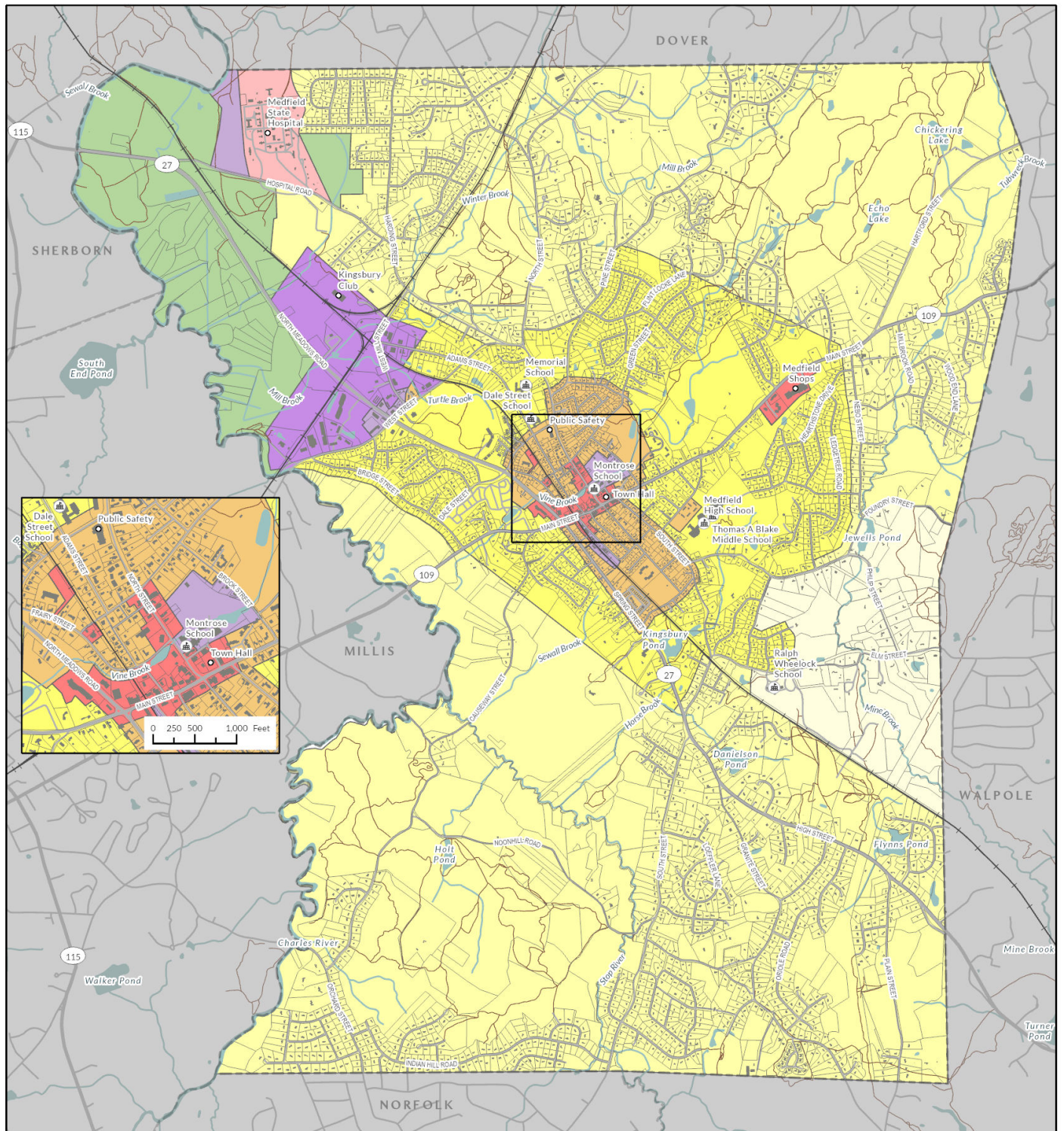
- Well Protection District (Zone 1): no construction within 400 ft. of public well, residential construction must be connected to Town sewer, and special permit required
- Primary Aquifer Zone: single family dwellings on 40,000 sq. ft. minimum lot, residential development must be connected to Town sewer
- Secondary Aquifer Zone (Zone 2): land use may not render impervious more than 15% or 2,500 sq. ft. (whichever greater) unless an artificial recharge system is approved
- Floodplain District: in flood zones A and AE, where no floodway has been designated, development may not increase flood levels in the community, and a special permit is required for any buildings or other structures, filling or excavation of earth, and creation of new ponds or changes in watercourses.

Maps of the current base zoning and overlay zoning districts are provided for reference on the following pages.

# TOWN OF MEDFIELD - BASE ZONING

Prepared by JM Goldson LLC

J M GOLDSON



Schools



Buildings



Parcels



Trails



Water bodies



Open space

## Base Zoning Districts

A - Agricultural

MSH - Medfield State Hospital

B - Business

BI - Business Industrial

IE - Industrial Extensive

RE - Residential Estate

RT - Residential Town

RS - Residential Suburban

RU - Residential Urban

0 0.25 0.5 Miles



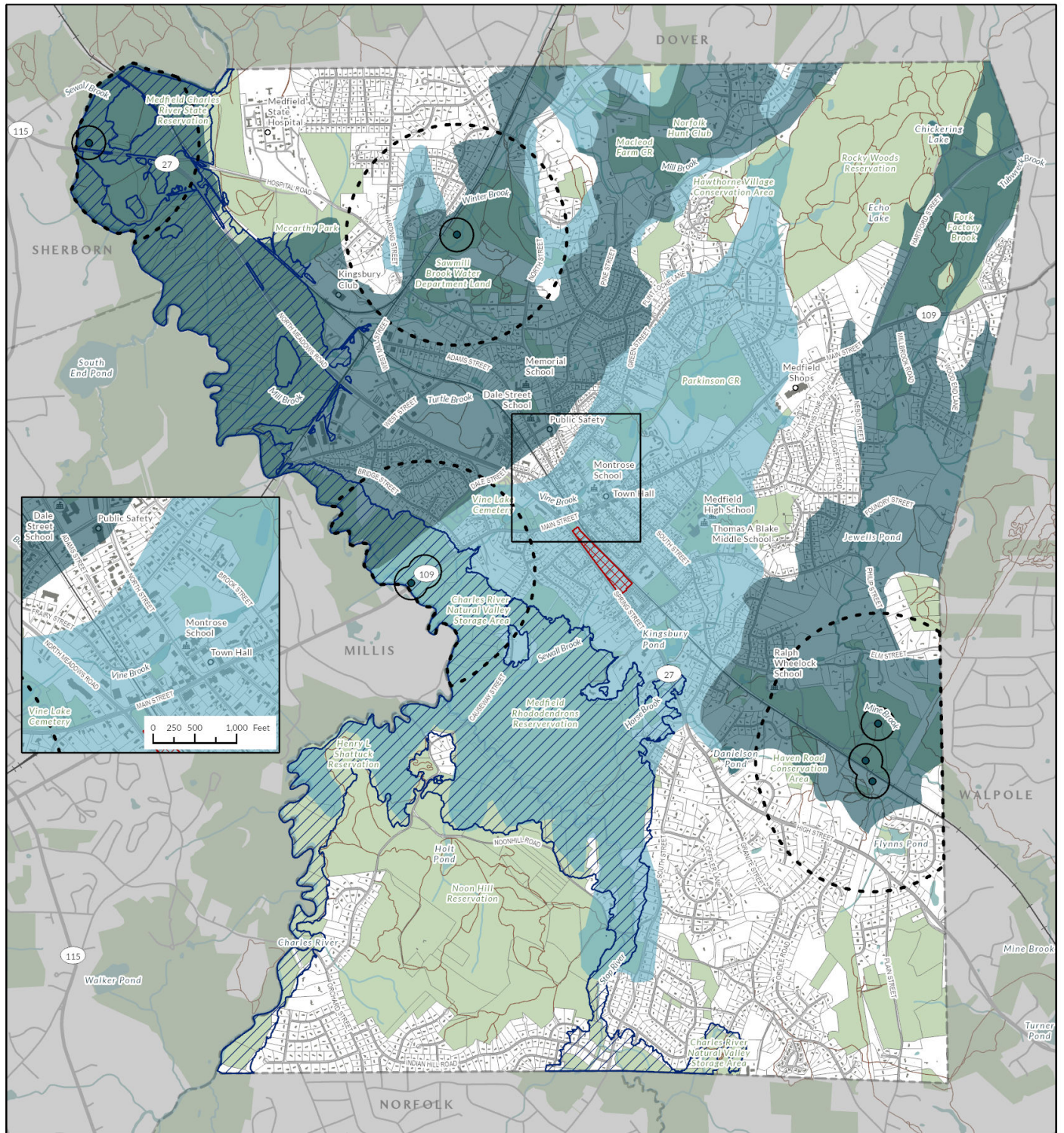
Sources: Town of Medfield, MassGIS, MassDEP, MAPC Trailmap



# TOWN OF MEDFIELD - OVERLAY ZONING

Prepared by JM Goldson LLC

J M GOLDSON



- Schools
- Buildings
- Parcels
- Trails
- Water bodies
- Open space

## Overlay Zoning Districts

- Public wells
- Well Protection District (2000 ft.)
- No Construction (400 ft.)
- Floodplain District

- Primary Aquifer Zone
- Secondary Aquifer Zone
- Upper Spring Street Overlay

0 0.25 0.5 Miles

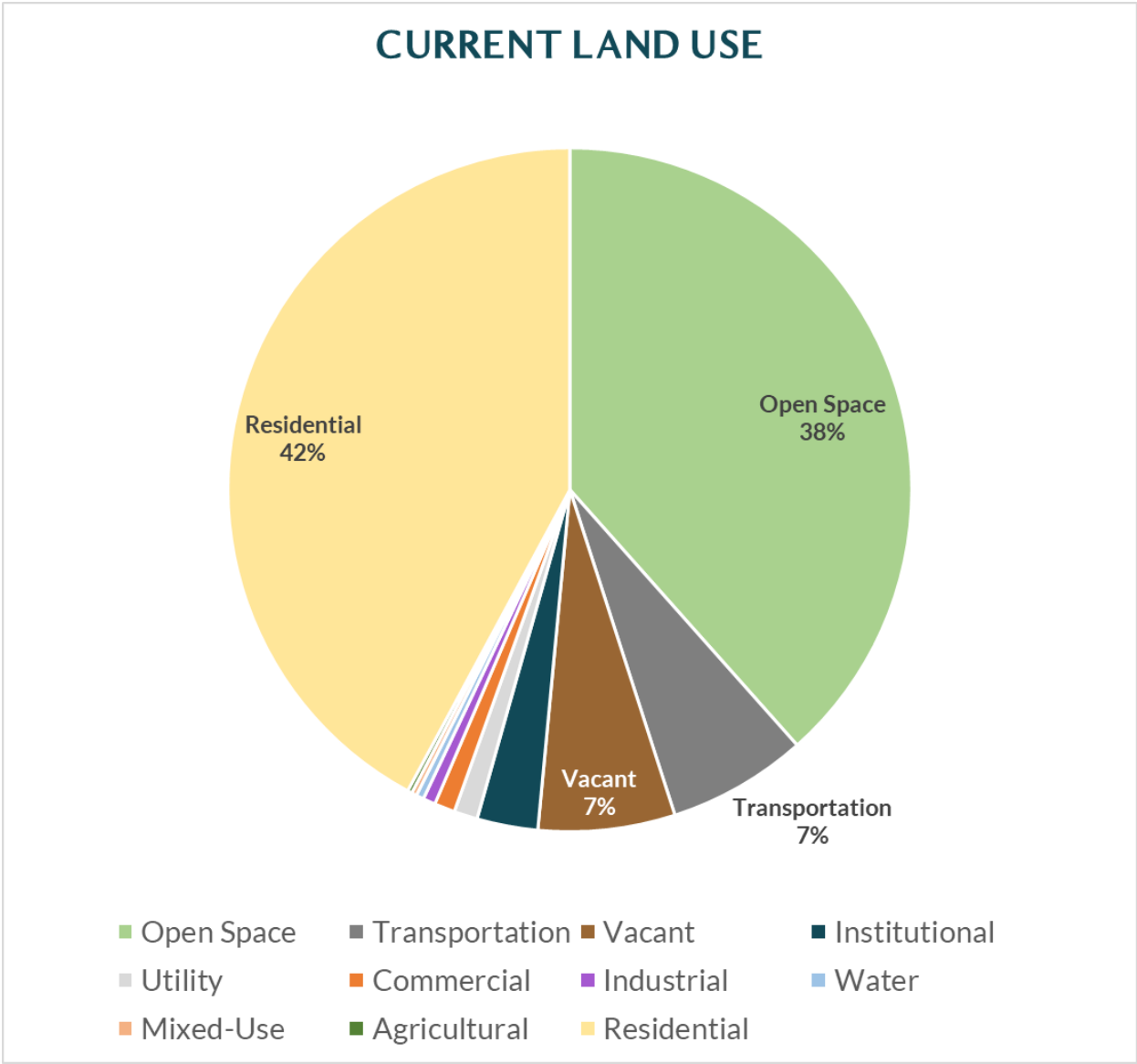


Sources: Town of Medfield, MassGIS, MassDEP, MAPC Trailmap



# LAND USE

Current land use in Medfield is summarized in the graph below. About 42 percent of the parcels are residential, nearly all of which are single-family dwellings. Protected open space makes up the next largest proportion, with 38 percent of total land. Transportation (road and rail right-of-way) covers 7 percent of Medfield, and another 7 percent is vacant land. Most vacant land is town-owned, but has environmental constraints, primarily wetlands.



*Note: categories are derived from assessor’s land use codes and MassGIS open space data.*

# HISTORIC RESOURCE PROTECTION

Medfield has many historic resources, particularly concentrated around the State Hospital campus and the Town center. The Town's Historic Districts Bylaw defines the boundaries of the local historic districts, including:

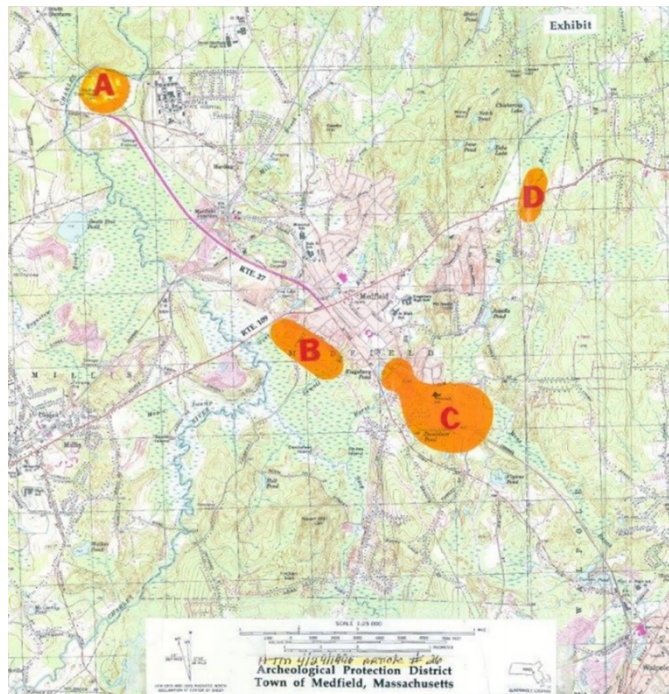
- John Metcalf Historic District
- Hospital Farm Historic District
- Clark-Kingsbury Farm Historic District
- Town Center Historic District

The Historic District Commission reviews submissions for proposed construction, demolition, and alteration of buildings within the local districts. Approval of the District Commission is required prior to issuance of a permit by the Building Inspector. The Commission has all the powers established under MGL C. 40C, as well as the ability to propose changes in historic district boundaries.

Additional historic sites and inventoried historic resource areas are highlighted on the map on the following page. The Vine Lake Cemetery also has a Preservation Restriction in place

## DEMOLITION DELAY BYLAW

The Town of Medfield also has a Demolition Delay Bylaw, which applies to buildings, structures, and sites listed on the State Register or National Register of Historic Places, buildings constructed more than 50 years prior to the application date, as well as archaeological sites within the Archeological Protection District (see map below). If the Historic District Commission determines a building to be historically significant and that it would be preferable to preserve, no demolition permit may be issued for at least 18 months following the determination.<sup>45</sup>



*Medfield Archaeological Protection District*

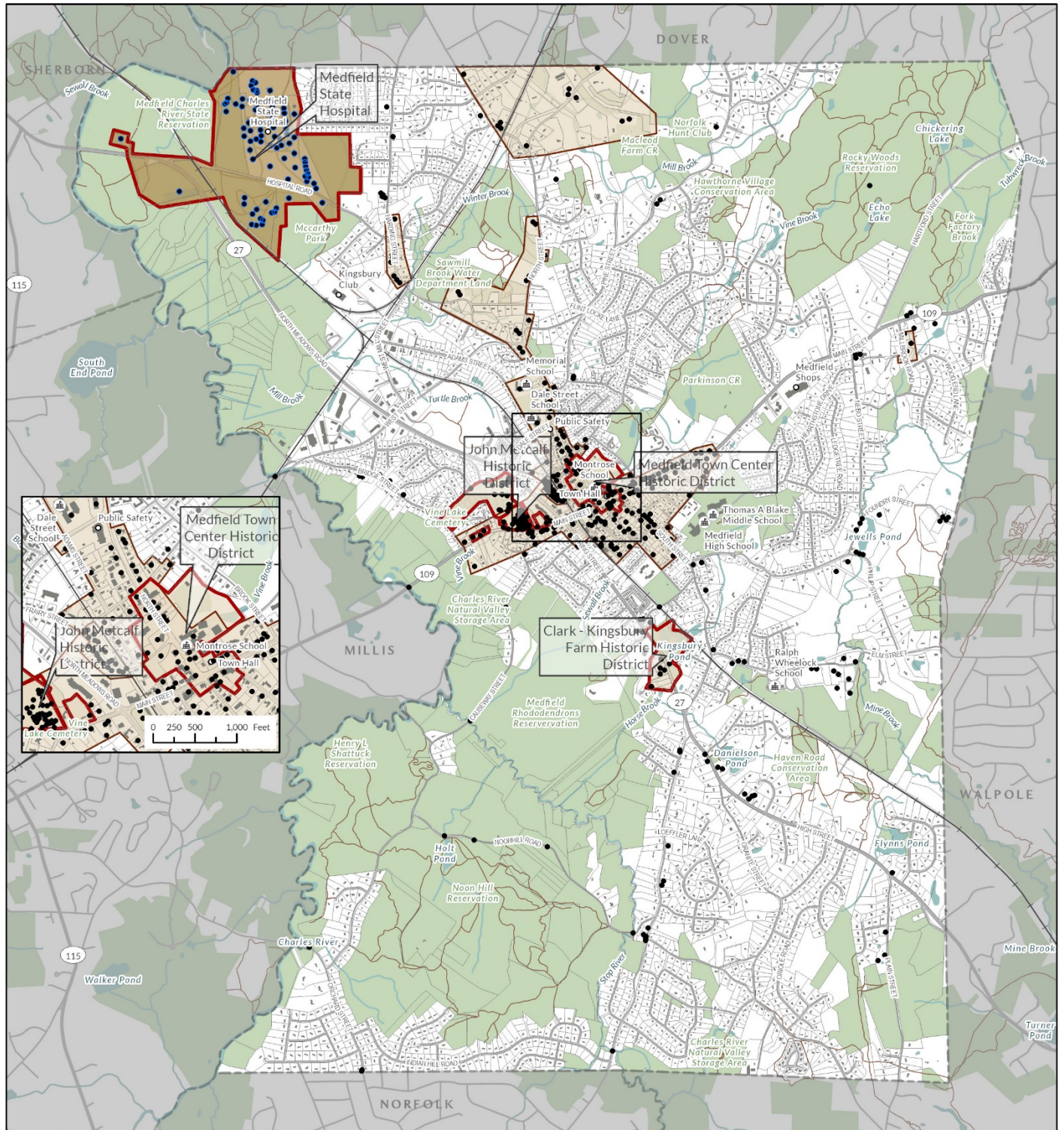
<sup>45</sup> Town of Medfield. *Historic Preservation Bylaws*. Accessed from: <https://ecode360.com/27373753>



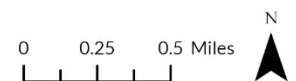
# TOWN OF MEDFIELD - HISTORIC RESOURCES

Prepared by JM Goldson LLC

J M GOLDSON



- Schools
- Buildings
- Parcels
- Trails
- Water bodies
- Open space
- National Register District Site
- Historic Sites
- Local Historic District
- National Register District
- Historic Area



Sources: Town of Medfield, MassGIS, MACRIS, MAPC Trailmap

# CHAPTER 5: IMPLEMENTATION CAPACITY

This chapter describes local and regional capacity and resources for the implementation of affordable housing initiatives, including local and regional housing organizations and funds. The Town of Medfield has several organizations with a focus on supporting community housing, including local government entities and non-profit organizations, as well as regional agencies that facilitate housing initiatives. In addition to the Affordable Housing Trust, Medfield's Housing Authority works in collaboration with Ashland Housing and Millis Housing to provide senior housing and housing for people with disabilities.

## KEY FINDINGS

- The Medfield Affordable Housing Trust, established in 2017, is a significant force in the creation and preservation of affordable housing in Medfield.
- The Medfield Council on Aging and the survey released to understand housing needs of senior residents are indicators that Medfield's aging population is being considered in the production of future affordable housing.
- There is opportunity for Medfield to work with nonprofit housing developers in the region to further the creation of affordable housing in the town.

## LOCAL CAPACITY AND RESOURCES

### MEDFIELD AFFORDABLE HOUSING TRUST

The Town of Medfield established the Medfield Affordable Housing Trust (MAHT) at the 2017 Annual Town Meeting. The purpose of the Trust is to provide for the creation of affordable and community housing for the benefit of low- and moderate-income households.

The MAHT is overseen by a Board of Trustees, comprised of seven voting members. The Trust is funded through a \$1M general bond approved at Town Meeting, as well as through the Inclusionary Zoning Bylaw's "payment-in-lieu" option.

The MAHT 2018-2020 action plan identified priority actions to support their efforts in increasing affordable housing, including the following:

- **Facilitate successful applications for Local Initiative Projects**
- **Provide professional services to support the planning and administration of affordable housing, such as the preparation of Fair Housing Marketing Plans, administration of housing lotteries, feasibility studies, design, or other planning services to advance specific development projects.**
- **Provide funding to facilitate the creation or preservation of affordable housing units, for example:**
- **Provide support to overcome cost barriers for homeownership to income-qualified low/moderate and middle-income households.**
- **Expand capacity to support affordable housing development.**

In 2018, the Medfield Affordable Housing Trust identified affordable housing projects that were anticipated to be added in the next five years.

### MAHT ANTICIPATED AFFORDABLE HOUSING DEVELOPMENTS<sup>46</sup>

| Anticipated Projects                         | Tenure    | Population Served | Total Units  | Affordable Units | SHI Units | Status          |
|--|-----------|-------------------|--|------------------|-----------|-----------------|
| 71 North Street                              | Rental    | All               | 8  | 2                | 8         | Completed       |
| 80 North Meadows Road                        | Rental    | All               | 16   | 4                | 16        | Completed       |
| Tilden Village Expansion                     | Rental    | Senior/Disabled   | 35   | 35               | 35        | Planning        |
| 41 Dale Street                               | Mixed     | All               | 36   | 9                | 27        | In Construction |
| Group Home #1                                | Rental    | Disabled          | 5  | 5                | 5         | Planning        |
| American Legion (a.k.a. Aura)                | TBD       | All               | 56   | 14               | 56        | In Construction |
| Group Home #2 (MSH)                          | Rental    | Disabled          | 5  | 5                | 5         | Planning        |
| Hinkley Farm Property (a.k.a. Hinkley South) | Ownership | Senior            | 24   | 6                | 6         | Planning        |
| Medfield State Hospital Campus               | TBD       | TBD               | 334 (Trinity proposal)<br>175/602/702 (Pulte proposal) | 79               | 79        | Planning        |

Since the MAHT identified these properties, the units at 71 North Street, 80 North Meadows Road, and 41 Dale Street have either been fully built or are in the pipeline. The project at Tilden Village was withdrawn from ZBA due to issues with original procurement, and at the time of writing the Medfield Housing Authority is close to releasing a new RFP for the development. As identified in the 2016 Housing Production Plan, the Medfield State Hospital campus is anticipated to provide 309 housing units.

<sup>46</sup> Medfield Affordable Housing Trust Action Plan, 2018, revised information provided by the Medfield Town Planner.





*October 2016 Board of Selectmen Meeting regarding the 200-unit proposal on Dale Street*



### **MEDFIELD HOUSING AUTHORITY**

The Medfield Housing Authority operates under the provisions of Chapter 121B of the Massachusetts General Law and is responsible to the Department of Housing and Community Development (DHCD) for the management of Tilden Village, which is a complex containing 60 units of elderly/disabled housing.

### **MEDFIELD COUNCIL ON AGING**

The Council on Aging (COA) provides a wide range of services targeted towards Medfield's aging population, including nursing services, health insurance counseling, financial counseling, veteran services, and more. Funds are raised for the COA by the Friends of Medfield Seniors (FOSI), which is a nonprofit organization. The COA also provides transportation to seniors for shopping and local medical appointments.

### **MEDFIELD SENIOR HOUSING SURVEY**

In 2016, the Medfield Senior Housing Committee developed a survey of senior households in town. This survey did not achieve enough responses to be statistically significant, so in 2018 the Medfield Board of Selectmen commissioned a second survey of 55+ households in town. The purpose of the survey was to give Medfield a clearer sense of the demand for senior housing, and the specifics of such housing including preferred location. 695 households replied to this survey to offer feedback to Medfield, helping the Town plan and act on its senior housing needs. Survey results conservatively estimated overall demand for senior housing of more than 400 units.

## **REGIONAL CAPACITY AND RESOURCES**

### **NONPROFIT AFFORDABLE HOUSING DEVELOPERS**

Compared with for-profit developers, public agencies and private non-profit housing organizations usually provide a larger percentage of affordable units in their developments as well as more deeply affordable units. Access to a variety of housing subsidies is the key to high levels of affordability. Since the mid-1980s, private nonprofit housing developers and community development corporations (CDCs) have become the preferred recipients of most of these subsidies.

Several experienced, successful non-profit developers have begun seeking opportunities to develop affordable housing in suburban and rural towns. The South Shore Habitat for Humanity has developed homes in the region with support from Medfield community members and is seeking available land to build affordable units in Medfield.<sup>27</sup> Another nonprofit, East Boston-based Neighborhood of Affordable Housing, Inc. (NOAH) has recently partnered with local governments and small non-profits to create new low-income housing in Holliston, Webster, and Carlisle. The Community Builders (TCB) has collaborated with small non-profits, too, as in Stow, where the Stow Affordable Housing Corporation was formed years ago to manage two low-income rental projects sponsored by TCB. South Middlesex Non-Profit Housing Corporation has developed family and transitional housing throughout the region, including a recent family housing development in West Boylston, as well as providing housing support and other services for low/moderate-income households. The Town should meet with some of these organizations and identify opportunities to collaborate.

## OTHER REGIONAL ORGANIZATIONS

Several other non-profit and regional organizations provide resources that help Weston to address local housing needs, including:

- **Metropolitan Boston Housing Partnership** – administers Housing Choice Voucher Program (Section 8) and other rental voucher programs, provides programs to address homelessness, support tenants, and help prevent eviction and foreclosure.
- **Metropolitan Area Planning Council** – regional planning agency for the Greater Boston area, MAPC provides information, data, and planning assistance to 101 communities, including Medfield.



*An affordable housing workshop held in April 2017*

# APPENDICES

MEDFIELD SUBSIDIZED HOUSING INVENTORY

DHCD AFFIRMATIVE FAIR HOUSING MARKETING GUIDELINES

INTERAGENCY BEDROOM MIX POLICY

COMPREHENSIVE PERMIT DENIAL AND APPEAL PROCEDURES

# MEDFIELD SUBSIDIZED HOUSING INVENTORY

## DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT CH40B SUBSIDIZED HOUSING INVENTORY

### Medfield

| DHCD ID #              | Project Name                    | Address                  | Type      | Total SHI Units | Affordability Expires                       | Built w/ Comp. Permit? | Subsidizing Agency |
|------------------------|---------------------------------|--------------------------|-----------|-----------------|---|------------------------|--------------------|
| 1890                   | Tilden Village                  | 30 Pound Street          | Rental    | 60              | Perp  | Yes                    | DHCD               |
| 1891                   | Allendale                       | Dale Street              | Ownership | 17              | Perp  | YES                    | DHCD               |
| 1892                   | The Village at Medfield         | Turtle Brook Way         | Ownership | 6               | Perp  | YES                    | DHCD               |
| 1893                   | Wilkins Glen                    | Wilkins Glen Road        | Rental    | 103             | 2042  | YES                    | MassHousing        |
| 4360                   | DDS Group Homes                 | Confidential             | Rental    | 5               | N/A   | No                     | DDS                |
| 9953                   | The Parc at Medfield            | One Drive                | Rental    | 92              | Perp  | YES                    | DHCD               |
| 10062                  | Country Estates                 | 21, 25, & 29 Hospital Rd | Ownership | 8               | Perp  | YES                    | MassHousing        |
| 10063                  | Cushman House aka Cushing House | 67 North Street          | Rental    | 8               | Perp  | YES                    | DHCD               |
| 10221                  | 71 North Street                 | 71 North Street          | Rental    | 8               | Perp  | YES                    | DHCD               |
| 10222                  | Hillside Village                | 80 North Meaows Road     | Rental    | 16              | Perp  | YES                    | DHCD               |
| 10290                  | Medfield Meadows                | 41 Dale St               | Mix       | 27              | Perp  | YES                    | DHCD               |
| 10461                  | Aura at Medfield                | 50 Peter Kristof Way     | Rental    | 56              | Perp  | YES                    | DHCD               |
| <b>Medfield Totals</b> |                                 |                          |           | 406             | <b>Census 2010 Year Round Housing Units</b> |                        | 4,220              |
|                        |                                 |                          |           |                 | <b>Percent Subsidized</b>                   |                        | 9.62%              |

6/23/2021

Medfield  
Page 1 of 1

This data is derived from information provided to the Department of Housing and Community Development (DHCD) by individual communities and is subject to change as new information is obtained and use restrictions expire.

# DHCD AFFIRMATIVE FAIR HOUSING MARKETING GUIDELINES

The Commonwealth of Massachusetts has a compelling interest in creating fair and open access to affordable housing and promoting compliance with state and federal civil rights obligations. Therefore, all housing with state subsidy or housing for inclusion on the SHI shall have an Affirmative Fair Housing Marketing Plan. To that end, DHCD has prepared and published comprehensive guidelines that all agencies follow in resident selection for affordable housing units.

In particular, the local preference allowable categories are specified:

- *Current Residents.* A household in which one or more members is living in the city or town at the time of application. Documentation of residency should be provided, such as rent receipts, utility bills, street listing, or voter registration listing.
- *Municipal Employees.* Employees of the municipality, such as teachers, janitors, firefighters, police officers, librarians, or town hall employees.
- *Employees of Local Businesses.* Employees of businesses located in the municipality.
- *Households with Children.* Households with children attending the locality's schools.

These were revised on June 25, 2008, removing the formerly listed allowable preference category, "Family of Current Residents."

The full guidelines can be found here: <http://www.mass.gov/hed/docs/dhcd/hd/fair/afhmp.pdf>.

# INTERAGENCY BEDROOM MIX POLICY

## INTERAGENCY AGREEMENT

### Regarding Housing Opportunities for Families with Children

This Interagency Agreement (this "Agreement") is entered into as of the 17th day of January, 2014 by and between the Commonwealth of Massachusetts, acting by and through its Department of Housing and Community Development ("DHCD"), the Massachusetts Housing Partnership Fund Board ("MHP"), the Massachusetts Housing Finance Agency (in its own right and in its capacity as Project Administrator designated by DHCD under the Guidelines for Housing Programs in Which Funding is Provided By Other Than a State Agency, "MassHousing"), the Massachusetts Development Finance Agency ("MassDevelopment") and the Community Economic Development Assistance Corporation ("CEDAC"). DHCD, MHP, MassHousing, MassDevelopment and CEDAC are each referred to herein as a "State Housing Agency" and collectively as the "State Housing Agencies".

### Background

A. DHCD's 2013 Analysis of Impediments to Fair Housing Choice ("AI") includes action steps to improve housing opportunities for families, including families with children, the latter being a protected class pursuant to fair housing laws, including the federal Fair Housing Act, as amended (42 U.S.C. §§ 3601 *et seq.*) and Massachusetts General Laws Chapter 151B. In order to respond to development patterns in the Commonwealth that disparately impact and limit housing options for families with children, such steps include requiring a diversity of bedroom sizes in Affordable Production Developments that are not age-restricted and that are funded, assisted or approved by the State Housing Agencies to ensure that families with children are adequately served.

B. The State Housing Agencies have agreed to conduct their activities in accordance with the action steps set forth in the AI.

C. This Agreement sets forth certain agreements and commitments among the State Housing Agencies with respect to this effort.

### Definitions

1) "Affordable" - For the purposes of this Agreement, the term "Affordable" shall mean that the development will have units that meet the eligibility requirements for inclusion on the Subsidized Housing Inventory ("SHI").

2) "Production Development" - For purposes of this Agreement "Production Development" is defined as new construction or adaptive reuse of a non-residential building and shall include rehabilitation projects if the property has been vacant for two (2) or more years or if the property has been condemned or made uninhabitable by fire or other casualty.





### Agreements

NOW, THEREFORE, DHCD, MHP, MassHousing, MassDevelopment and CEDAC agree as follows:

#### Bedroom Mix Policy

- 1) Consistent with the AI, it is the intention of the State Housing Agencies that at least ten percent (10%) of the units in Affordable Production Developments funded, assisted or approved by a State Housing Agency shall have three (3) or more bedrooms except as provided herein. To the extent practicable, the three bedroom or larger units shall be distributed proportionately among affordable and market rate units.
- 2) The Bedroom Mix Policy shall be applied by the State Housing Agency that imposes the affordability restriction that complies with the requirements of the SHI.
- 3) The Bedroom Mix Policy shall not apply to Affordable Production Developments for age-restricted housing, assisted living, supportive housing for individuals, single room occupancy or other developments in which the policy is not appropriate for the intended residents. In addition, the Bedroom Mix Policy shall not apply to a Production Development where such units:
  - (i) are in a location where there is insufficient market demand for such units, as determined in the reasonable discretion of the applicable State Housing Agency; or
  - (ii) will render a development infeasible, as determined in the reasonable discretion of the applicable State Housing Agency.
- 4) Additionally, a State Housing Agency shall have the discretion to waive this policy (a) for small projects that have less than ten (10) units and (b) in limited instances when, in the applicable State Housing Agency's judgment, specific factors applicable to a project and considered in view of the regional need for family housing, make a waiver reasonable.
- 5) The Bedroom Mix Policy shall be applicable to all Production Developments provided a Subsidy as defined under 760 CMR 56.02 or otherwise subsidized, financed and/or overseen by a State Housing Agency under the M.G.L. Chapter 40B comprehensive permit rules for which a Chapter 40B Project Eligibility letter is issued on or after March 1, 2014. The policy shall be applicable to all other Affordable Production Developments funded, assisted, or approved by a State Housing Agency on or after May 1, 2014.



# COMPREHENSIVE PERMIT DENIAL AND APPEAL PROCEDURES

(a) If a Board considers that, in connection with an Application, a denial of the permit or the imposition of conditions or requirements would be consistent with local needs on the grounds that the Statutory Minima defined at 760 CMR 56.03(3)(b or c) have been satisfied or that one or more of the grounds set forth in 760 CMR 56.03(1) have been met, it must do so according to the following procedures. Within 15 days of the opening of the local hearing for the Comprehensive Permit, the Board shall provide written notice to the Applicant, with a copy to the Department, that it considers that a denial of the permit or the imposition of conditions or requirements would be consistent with local needs, the grounds that it believes have been met, and the factual basis for that position, including any necessary supportive documentation. If the Applicant wishes to challenge the Board's assertion, it must do so by providing written notice to the Department, with a copy to the Board, within 15 days of its receipt of the Board's notice, including any documentation to support its position. The Department shall thereupon review the materials provided by both parties and issue a decision within 30 days of its receipt of all materials. The Board shall have the burden of proving satisfaction of the grounds for asserting that a denial or approval with conditions would be consistent with local needs, provided, however, that any failure of the Department to issue a timely decision shall be deemed a determination in favor of the municipality. This procedure shall toll the requirement to terminate the hearing within 180 days.

(b) For purposes of this subsection 760 CMR 56.03(8), the total number of SHI Eligible Housing units in a municipality as of the date of a Project's application shall be deemed to include those in any prior Project for which a Comprehensive Permit had been issued by the Board or by the Committee, and which was at the time of the application for the second Project subject to legal appeal by a party other than the Board, subject however to the time limit for counting such units set forth at 760 CMR 56.03(2)(c).

(c) If either the Board or the Applicant wishes to appeal a decision issued by the Department pursuant to 760 CMR 56.03(8)(a), including one resulting from failure of the Department to issue a timely decision, that party shall file an interlocutory appeal with the Committee on an expedited basis, pursuant to 760 CMR 56.05(9)(c) and 56.06(7)(e)(11), within 20 days of its receipt of the decision, with a copy to the other party and to the Department. The Board's hearing of the Project shall thereupon be stayed until the conclusion of the appeal, at which time the Board's hearing shall proceed in accordance with 760 CMR 56.05. Any appeal to the courts of the Committee's ruling shall not be taken until after the Board has completed its hearing and the Committee has rendered a decision on any subsequent appeal.

Source: DHCD Comprehensive Permit Regulations, 760 CMR 56.03(8).