

**TOWN OF SHERBORN**

# HOUSING PRODUCTION PLAN

**FUNDING PROVIDED BY  
THE TOWN OF SHERBORN**

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**Adopted 6/1/17**

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# ACKNOWLEDGEMENTS

This Housing Production Plan was created under the direction of the Sherborn Housing Partnership and Planning Board.

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### The Housing Partnership and Planning Board gratefully acknowledge the following individuals for their contributions to this study:

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## Acronyms

<b>ACS</b>	US Census Bureau's American Community Survey
<b>AMI</b>	Area Median Income
<b>DHCD</b>	MA Department of Housing and Community Development
<b>MAPC</b>	Metropolitan Area Planning Council
<b>MOE</b>	Margins of Error

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## Key Definitions

The following definitions are for key terms used throughout the document and are based on information from the U.S. Census Bureau, unless otherwise noted:

**Comprehensive Permit** – a local permit for the development of low- or moderate- income housing issued by the Zoning Board of Appeals pursuant to M.G.L. c.40B §§20-23 and 760 CMR 56.00.

**Cost Burdened** – Households who pay more than 30 percent of their income for housing.

**Disability** – The American Community Survey defines disability as including difficulties with hearing, vision, cognition, ambulation, self-care, and independent living.

**Family** - A family is a group of two people or more (one of whom is the householder) related by birth, marriage, or adoption and residing together; all such people (including related subfamily members) are considered as members of one family.

**Household** – A household includes the related family members and all the unrelated people, if any, such as lodgers, foster children, wards, or employees who share the housing unit. A person living alone in a housing unit, or a group of unrelated people sharing a housing unit such as partners or roomers, is also counted as a household. The count of households excludes group quarters.

**Median Age** – The age which divides the population into two numerically equal groups; that is, half the people are younger than this age and half are older.

**Median Income** – Median income is the amount which divides the income distribution into two equal groups, half having incomes above the median, half having incomes below the median. The medians for households, families, and unrelated individuals are based on all households, families, and unrelated individuals, respectively. The medians for people are based on people 15 years old and over with income.

**Millennials** – The demographic cohort following Generation X. There are no precise dates when the generation starts and ends. Researchers and commentators use birth years ranging from the early 1980s to the early 2000s. (en.wikipedia.org/wiki/millennials.)

**Housing Unit** - A housing unit is a house, an apartment, a mobile home or trailer, a group of rooms, or a single room that is occupied, or, if vacant, is intended for occupancy as separate living quarters.

**Poverty** – Following the Office of Management and Budget's (OMB's) Directive 14, the Census Bureau uses a set of money income thresholds that vary by family size and composition to detect who is poor. If a family's total income is less than that family's threshold, then that family, and every individual in it, is considered poor. The poverty thresholds do not vary geographically, but they are updated annually for inflation with the Consumer Price Index (CPI-U). The official poverty definition counts money income before taxes and excludes capital gains and noncash benefits (such as public housing, Medicaid, and food stamps). Thresholds by year and households size are found at this link:

<https://www.census.gov/hhes/www/poverty/data/threshld/>.

**Subsidized Housing Inventory** – a list compiled by the MA Department of Housing and Community Development containing the count of low- and moderate-income housing units in each city and town.

# CHAPTER I

## INTRODUCTION

The town of Sherborn, located eighteen miles southwest of Boston, is a country suburb with very low housing density and a modest town center. Sherborn is the smallest community in the immediate region, with a population of about 4,245 residents. Over the next 20 years the population of the surrounding communities of Framingham, Ashland, and Natick is projected to increase, while the population of Sherborn and other nearby small towns is projected to decrease. Although Sherborn has preserved its historical and agricultural heritage and is home to several working farms, both agricultural and equine, it is predominantly a residential community. The town values its exceptional scenic views, open space, and natural resources.

Sherborn is working towards a united vision for its future. While virtually all agree that the rural beauty of the town, its open space and its natural resources, including high quality drinking water, should be preserved and protected, the community has not yet resolved a long-held tension about future growth. There are different opinions about where new growth, if it happens at all, should be. Some feel strongly that the town center should be the focus of new growth to support economic goals as well as to create a more vibrant "downtown" while others prefer distribution throughout the town. The town has approved affordable housing development in both town center and on the periphery of town.

When considering locations for multi-unit affordable housing, some feel the town center location is preferable for walkability to Town resources while others feel just as strongly that new growth for affordable housing should be located on the periphery of town for possible access to neighboring towns' water infrastructure and access to transportation and commercial services.

The goals and strategies incorporated in this plan attempt to walk the line between these divergent visions, but lean more into the vision of focusing growth in the town center based on feedback gleaned from the stakeholder interviews and public forum, guidance from the Housing Partnership and Planning Board, and the draft update to the General Plan.

The challenges of addressing housing needs in Sherborn, especially given the town's rural character, environmental constraints, reliance on private wells and septic systems, high land values, high property taxes, and divergent community visions, are real, but not insurmountable. The community is highly engaged with a long-tradition of volunteerism and has supported two locally-initiated affordable housing communities – Leland Farms and Woodhaven – and potential multi-family housing developments through its Elderly/Affordable zoning district, and has approved a 48-unit development, Whitney Farms which is currently under construction.

This plan is written in accordance with State guidelines to lay out a strategy to achieve the state's goal under MGL c.40B for 10 percent of Sherborn's housing stock to be counted on the state's Subsidized Housing Inventory as affordable to low/moderate-income households and to more broadly increase housing choice to support the long-term social vitality, economic diversity, and environmental health of Sherborn.

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## Housing Production Plan Purpose

This Housing Production Plan (HPP) is a state-recognized planning tool that, under certain circumstances, permits the town to influence the location, type, and pace of affordable housing development. This HPP establishes a strategic plan for production of affordable 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. The HPP describes how the town plans to create and preserve affordable housing that will help the town to meet local housing needs as well as to achieve the state's goal that at least 10 percent of year-round housing stock be affordable.

When an HPP is certified by DHCD, then a denial of a Comprehensive Permit will be upheld if such denial is consistent with local needs on the grounds that the town has increased its affordable housing stock sufficiently for the relevant time period. The town would need to produce seven housing units that count on the Massachusetts Subsidized Housing Inventory (SHI) for a one-year certificate or fifteen SHI units for a two-year certificate.<sup>1</sup>

Under Massachusetts General Laws Chapter 40B Section 20-23 (MGL c.40B), the Commonwealth's goal is for all Massachusetts municipalities to have 10 percent of housing units affordable to low/moderate income

#### COMPREHENSIVE PERMIT DENIAL & 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)(I I), 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).

<sup>1</sup> Department of Housing and Community Development. Spreadsheet of 0.5% and 1.0% Thresholds for Each Community Based on 2010 Census Information. 2010.

households or affordable housing on at least 1.5 percent of total land area. As of December 2016, the state's Subsidized Housing Inventory (SHI) included 2.3 percent of Sherborn's year-round housing base of 1,479 units.<sup>2</sup>

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## Report Organization

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

1. Chapter 1 provides an overview of the purpose of the plan, a community overview, description of planning methodology, and summary of housing needs, vision, goals, and strategies included in this plan.
2. Chapter 2 describes Sherborn's five-year goals and housing strategies, both regulatory and local initiatives, to achieve the plan's goals.
3. Chapter 3 provides a demographic profile of the community.
4. Chapter 4 provides an analysis of local housing conditions including housing supply, residential market indicators, and affordable housing characteristics.
5. Chapter 5 describes Sherborn's development constraints and limitations including environmental constraints, infrastructure capacity, and regulatory barriers.
6. Chapter 6 describes local and regional capacity and resources to create and preserve affordable housing in Sherborn.

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## Community Overview<sup>3</sup>

Sherborn, Massachusetts, is on the southern edge of Middlesex County between three growing metropolitan areas: Boston is eighteen-miles northeast, Worcester is twenty-two miles west, and Providence is thirty miles south. Five miles long from north to south, and four miles from east to west, Sherborn has an area of about sixteen square miles, or 10,328 acres.

Three state numbered routes run through town (Routes 16, 27, & 115) and carry commuter and commercial traffic to the larger commercial centers outside of town. When driving into Sherborn, the open fields lined with stonewalls and single-family homes that distinguish Sherborn's character are immediately noted. The absence of public water and public sewer has slowed development in Sherborn. Wetlands, ledge, and soil constraints throughout town have limited the placement of private septic systems and, therefore, private wells, which must be a safe distance apart to maintain the quality of Sherborn's water supply.

Since the time of European settlers in the mid-1600s, Sherborn has been a farming community. Although many soils proved too rocky for tilling, apple orchards thrived and supplied what was advertised in the late 19<sup>th</sup> century as the largest refined cider mill in the world.

Historically, Sherborn's residents have responded to the need for preserving open space. For example, when the Shell Oil Company wanted to run a pipeline through Sherborn in the 1920s, Walter Channing, a town resident, negotiated an unusual arrangement whereby Shell Oil gave the land adjacent to the pipeline to the town. That land became the Town Forest, one of Sherborn's greatest assets. It also serves as part of the Bay Circuit Trail, Boston's outer "Emerald Necklace."

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<sup>2</sup> Department of Housing and Community Development. *Chapter 40B Subsidized Housing Inventory*. December 8, 2016.

<sup>3</sup> The community overview is excerpted from the Sherborn Open Space and Recreation Plan, 2007.

Sherborn experienced a substantial period of population growth and new housing construction from the mid 1950s to the early 1970s. In the 1950s, Main Street underwent a building boom as old homes were repaired and empty lots were developed.

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## Planning Methodology

### DATA SOURCES

The U.S. Census Bureau's Decennial Censuses of 2000 and 2010 and the 2011-2015 American Community Survey (ACS) were the primary sources of data for the needs assessment. The U.S. Census counts every resident in the United States by asking 10 questions, whereas the ACS provides estimates based on a sample of the population for more detailed information. It is important to be aware of the margins of error (MOE) attached to the ACS estimates because the estimate is based on a sample and not on a complete count, especially in smaller geographies, such as Sherborn. Data was also gathered from a variety of available sources including: The Warren Group; Massachusetts Department of Revenue; and the Massachusetts Department of Housing and Community Development. This report builds on past work, particularly the following plans and studies:

Town of Sherborn. *Sherborn General Plan*. 2001.

Town of Sherborn. *Sherborn Community Development Plan*. 2004

Town of Sherborn. *Sherborn Open Space and Recreation Plan*. 2007.

Town of Sherborn. *Sherborn Town Center: At a Crossroads Draft Plan*. 2011.

Town of Sherborn. *Sherborn Resident Survey*. 2014.

MAPC Town Center Housing Study 2017

### COMMUNITY ENGAGEMENT PROCESS

The Sherborn Housing Partnership held a public forum on March 7, 2017, facilitated by the consultant, to solicit community feedback on housing goals and prioritize implementation strategies to incorporate in this Plan.

The public forum took place at the Sherborn Community Center at 6:30 pm. Roughly seventy-five people attended, most of whom were Sherborn residents. The forum was interactive and informative, including an open house exercise, a presentation, and two group exercises where participants conversed in their individual tables. There were several means for participants to record their feedback including options for comments and dot voting on the three goals presented and space for comments discussed by the group on each of the eleven strategies presented.



Sherborn Public Forum, March 7, 2017

Several conclusions were drawn from the participants' responses on the open house exercise and within the group exercise. First, there is a high level of public interest among Sherborn residents in reaching the state's 10 percent goal or the incremental production goals to have greater local control over 40B comprehensive permit proposals. Participants felt strongly that the preservation of the community's character and natural surroundings is an important consideration when deciding on location of development, though there were mixed results on the development of the town center. Some advocated for a more vibrant town center while others questioned the feasibility of development in the town center, its economic

vitality, and effect on traffic. Participants were concerned about the vulnerability of clean groundwater resources. There was also concern regarding potential infrastructure development in town center — particularly water and sewer infrastructure— related to cost and uncertain consequences of development.

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## Summary of Key Housing Needs

Sherborn has a small population (only about 4,245 residents) that is older and wealthier than the average population in Middlesex County. Of the seven municipalities surrounding Sherborn, only Dover has a higher estimated median household income. Most Sherborn residents, about 92 percent of households (roughly 1,300), own their home, and about eight percent (roughly 118 households) rent their home. There is very little diversity of housing choice in Sherborn – about 92 percent of the housing stock is single-family detached homes. And, housing is expensive – roughly 85 percent of owner-occupied homes are valued at more than \$500,000. The median sales price for a single-family home in 2016 was \$746,000. In addition, property taxes are very high in Sherborn. The average single-family tax bill in FY17 was \$15,424, which was higher than the seven towns in the region, including Dover (\$14,527), whereas Dover's average single-family value was over \$1.1M and Sherborn's was significantly lower at about \$750,000. The lowest average single-family tax bill in the region was Framingham (\$6,138).

Sherborn has housing needs that are not served by the existing housing stock. Based on the needs assessment, which considered demographic trends and housing conditions, as well as interviews with a variety of community leaders, residents, and local professionals in real estate and development, the key housing needs in Sherborn are:

- A more diverse housing stock, including multi-family homes and barrier-free housing, with reduced maintenance requirements, at all market levels to help seniors stay in town
- Rental apartments, including accessory apartments and multi-family homes, at all market levels including for households with up to 80 percent of the area median income
- More affordable homeownership options including small cottage-style homes in cluster developments, condominiums, and townhouses.

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## Summary of Goals

Based on the assessment of housing needs and the town's desire to achieve the state's 10 percent goal under MGL c. 40B in a way that preserves and reinforces the environmental, historic, agricultural, and scenic character of the community, this plan establishes the following three five-year housing goals to guide the town's housing initiatives. These goals are consistent with the draft General Plan's housing goals.

**Goal 1:** Actively manage and guide development of affordable homes in a manner that:

- a. Maximizes local control
- b. Minimizes adverse impacts
- c. Incrementally achieves the state's 10 percent goal

Provide more affordable housing options for low/moderate income households with up to 80 percent of the area median income that will count on the state's Subsidized Housing Inventory (SHI) as well as middle-income households with incomes up the area median income.

*Numerical Goal:* Strive to create an average of seven homes annually that count on the Subsidized Housing Inventory (SHI) towards the state's 10 percent goal per MGL c.40B over the next five years. At this rate of production, the Town of Sherborn will achieve the 10 percent goal by 2034.<sup>4</sup>

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<sup>4</sup> See discussion regarding numerical goals in context of decennial census.

**Goal 2:** Increase Appropriately-Scaled Housing Options

- a. Increase residential options in Town Center
- b. Enable more diverse residential options throughout Sherborn

**Goal 3:** Ensure Residential Development Respects Semi-Rural Character and Critical Natural Resources.

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## Summary of Strategies

Guided by the three housing goals listed above, the Housing Partnership developed several strategies from various sources. The latter includes community forums, past studies, interviews, and multiple Town Boards. These include local initiatives that deal with the use of town resources as well as recommendations for regulatory changes that primarily suggest possible amendments to the town's zoning bylaw, local Board of Health and Conservation Commission regulations. They are described in detail in Chapter 2.

1. Foster locally-initiated development, learning from past local initiatives including Woodhaven and Leland Farms developments, by offering town-owned or acquired real property for appropriate development.
2. Consider the costs and benefits of using a private local non-profit or municipal housing entity to foster creation of locally-initiated, small scale affordable or mixed-income residential development.
3. Encourage new housing and mixed-use buildings in the town center area with the creation of a well-defined downtown water district and/or town center sewer infrastructure. The district would be legally constrained similar to that of the Dover town center.
4. Foster public-private conservation-based affordable housing development initiatives with the Sherborn Rural Land Foundation to acquire land for a combination of permanent open space and small-scale affordable housing development.
5. Foster regional cooperation to extend public water and/or sewer service from neighboring towns to support specific town-approved affordable housing development(s) near those town boundaries.
6. Work cooperatively with development entities to help shape existing and anticipated development proposals to best align with this plan and the 2017 General Plan guiding principles and goals.
7. Explore zoning amendments to allow mixed-use and small-scale multi-family housing to encourage development of new homes and mixed-use buildings in the town center area.
8. Consider amending the EA zoning provisions to allow a mix of senior and/or affordable housing and creating an inclusionary zoning bylaw.
9. Revise the accessory apartment bylaw to expand housing options. Consider revisions to allow more flexibility and adopt design guidelines to ensure that the single-family character of the property is maintained.
10. Consider adopting Natural Resources Protection Zoning (NRPZ) to encourage moderately sized and priced housing in cluster developments while preserving environmental health and scenic vistas.
11. Enable the Board of Health and Conservation Commission to investigate changes to local regulations and practices to facilitate cluster or multifamily development.



## CHAPTER 2

# HOUSING GOALS & STRATEGIES

### Five-Year Goals

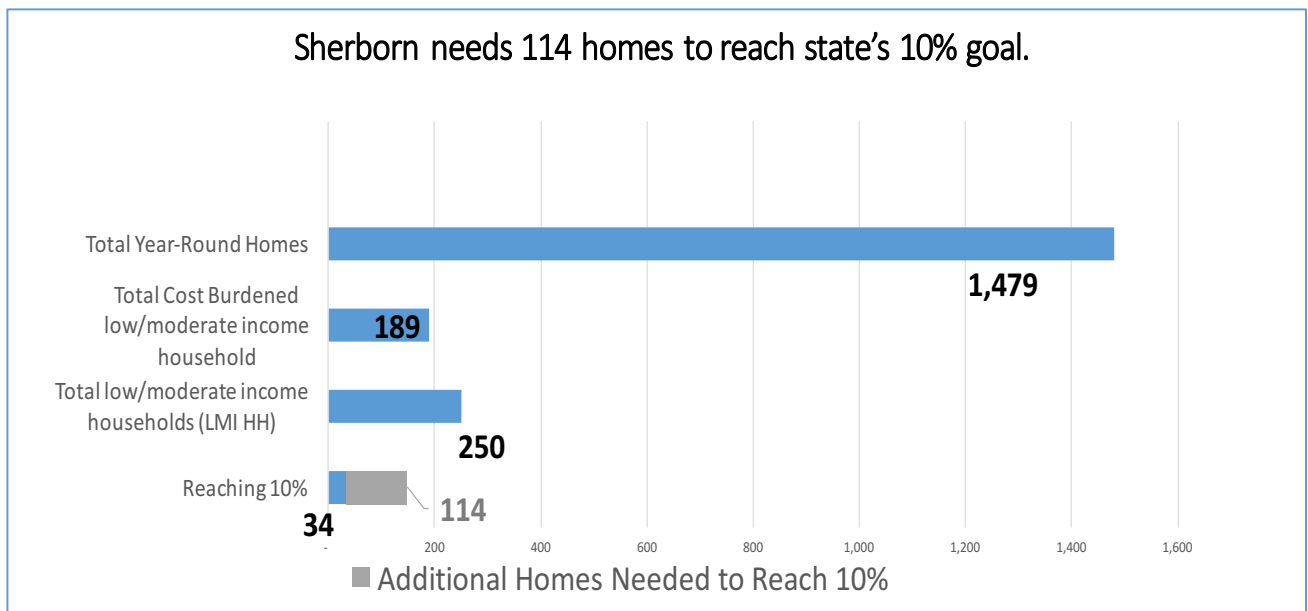
The following housing goals are based on the draft Master Plan goals, which were further vetted at the March 7<sup>th</sup> Public Forum. The goals are intended to describe the community's intentions to address its housing needs in a way that also preserves the special characteristics of the community's natural and built environment.

### GOAL 1: MANAGE & GUIDE RESIDENTIAL DEVELOPMENT

Actively manage and guide development of affordable homes in a manner that:

- Maximizes local control
- Minimizes adverse impacts
- Incrementally achieves the state's 10 percent goal

Provide more affordable housing options for low/moderate income households with up to 80 percent of the area median income that will count on the state's Subsidized Housing Inventory (SHI) as well as middle-income households with incomes up to the area median income.



*Numerical Goal:* Strive to create a minimum of seven homes annually that count on the SHI towards the state's 10 percent goal per MGL c.40B over the next five years. At this rate of production, the Town of Sherborn will achieve the 10 percent goal by 2034, assuming no change in the total housing stock.<sup>5</sup>

<sup>5</sup> Note: The absolute numerical goal is likely to change based on the updated total year-round units per the 2020 U.S. Census.



## GOAL 2: INCREASE APPROPRIATELY-SCALED HOUSING OPTIONS

Increase the diversity of residential options in Sherborn to address needs of residents of different ages, housing needs, and economic resources while ensuring new homes are sensitive in scale, character, and design to existing neighborhoods. Housing options should include homes appropriate for and affordable to low/moderate-income households, particularly seniors, young professionals, families, and individuals with disabilities.

- Increase residential options in Town Center
- Enable more diverse residential options throughout Sherborn



Visualization of Sherborn Town Center Possible Mixed-Use Development (credit: Metropolitan Area Planning Council, 2008)

## GOAL 3: ENSURE RESIDENTIAL DEVELOPMENT RESPECTS SEMI-RURAL CHARACTER AND ENVIRONMENTAL HEALTH

Preserve Sherborn's natural character by ensuring that the location, scale, and design of new homes is consistent with preservation of the Town's semi-rural character, scenic open space, natural resources, and environmental health.

### Sherborn character defined by rural features, scenic views, natural resources



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## Strategies

To achieve the community's five-year affordable housing goals will require the town's focused effort to implement a variety of local initiative strategies and local regulatory strategies. The strategies are presented as a package of strategies rather than a menu of choices because they are designed to work together to be most effective. They are like pieces of a puzzle that, when assembled and embraced holistically, can help the community accomplish its goals.

This section includes descriptions of local initiative strategies, local regulatory strategies, and an action plan. The strategies are listed immediately below and discussed in more detail on the following pages:

### Local Initiative Strategies

1. Foster locally-initiated development while learning from past local initiatives including the Woodhaven and Leland Farms developments by offering town-owned or acquired real property for appropriate development.
2. Consider the costs and benefits of using a private local non-profit or municipal housing entity to foster creation of locally-initiated, small scale affordable or mixed-income residential development.
3. Encourage new homes and mixed-use buildings in the town center area with the creation of a well-defined downtown water district and/or town center sewer infrastructure. The district would be legally constrained similar to that of the Dover town center.
4. Foster public-private conservation-based affordable housing development initiatives with the Sherborn Rural Land Foundation to acquire land for a combination of permanent open space and small-scale affordable housing development.
5. Foster regional cooperation to extend public water and/or sewer service from neighboring towns to support specific town-approved affordable housing development(s) near those town boundaries.
6. Work cooperatively development entities to help shape existing and anticipated development proposals to best align with this plan and the 2017 General Plan guiding principles and goals.

### Regulatory Strategies

7. Explore zoning amendments to allow mixed-use and small-scale multi-family to housing encourage development of new homes and mixed-use buildings in the town center area.
8. Consider amending the EA zoning provisions to allow a mix of senior and/or affordable housing and creating an inclusionary zoning bylaw.
9. Revise the accessory apartment bylaw to expand housing options. Consider revisions to allow more flexibility and adopt design guidelines to ensure that the single-family character of the property is maintained.
10. Consider adopting Natural Resources Protection Zoning (NRPZ) to encourage moderately sized and priced housing in cluster developments while preserving environmental health and scenic vistas.
11. Enable the Board of Health and Conservation Commission to investigate changes to local regulations and practices to facilitate cluster or multifamily development.

## LOCAL INITIATIVE 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.

### I. Foster locally-initiated development, learning from past local initiatives including Woodhaven and Leland developments, by offering town-owned or acquired real property for appropriate development.

Offering low/no cost land for development to developers with a track record of context-sensitive affordable housing developments can provide a significant subsidy to help make an affordable housing development feasible. The town could explore offering available town-owned or newly-acquired properties for development of affordable homes – as it did for the Woodhaven and Leland Farms affordable housing initiatives.

Opportunities for property acquisition could be tied with Strategy #4 to acquire property with the Sherborn Rural Land Foundation.



Leland Farms, 2017



Woodhaven, 2017

Such developments could include 100 percent affordable units for low/moderate-income (LMI) households or a mix of units affordable to LMI and middle-income households as well as market-rate units. Creating market-rate units in a development with affordable units can help make developments economically feasible by generating cross subsidies that help to offset the costs of providing affordable units. This can reduce the need for additional public or private subsidies.<sup>6</sup> The permitting mechanism for such a development would likely be through a comprehensive permit under MGL c. 40b, unless the town adopts zoning amendments that would accommodate such a development.

Local initiatives on municipally-owned property can provide the town enhanced local control over the design, density, and other characteristics of a development. For example, through a local initiative project the town could require additional low impact development methods, greater energy efficiency, and visitability or universal design standards beyond the minimum accessibility requirements for multifamily housing.<sup>7</sup>

<sup>6</sup> Subsidies for affordable housing developments could include local, state, federal, and private funding. For example, locally, a town can allocate Municipal Affordable Housing Trust funds, CPA funds (which Sherborn had not adopted), or general funds. State funds could include the Affordable Housing Trust Fund, Facilities Consolidation Fund (for rental housing for special needs populations), Housing Innovations Fund (for rental housing for special needs populations), and Housing Stabilization Fund. Federal funds could include Low Income Housing Tax Credit Program (a tax credit subsidy). Private funds could include Federal Home Loan Bank, Community Reinvestment Act, Ford Foundation.

<sup>7</sup> Visitability and Universal Design Standards would go above and beyond the minimum accessibility requirements of the Massachusetts Architectural Accessibility regulation (CMR 521), Fair Housing Act, Section 504 of the Rehabilitation Act of 1973, the Americans with Disabilities Act and the Architectural Barriers Act of 1968. Note, these requirements are complex, however for some basic examples per 521 CMR, townhouses and single-family houses are exempt from accessibility requirements and only 5% of units must be accessible in multifamily buildings with over 20 rental units. Visitability standards can be applied in addition to these minimum requirements (including for townhouses and single-family houses) by requiring three

To implement this strategy, the town (or other housing entity, as described below) would issue a Request for Proposals (RFP) for the disposition of municipal or trust property (per MGL c.30B municipal property disposition requirements) that specifies a minimum number (or percentage) of units that should be affordable and the target household income level. The minimum affordability requirement should be established by testing development feasibility – by estimating how many units the site can yield per environmental and other site development constraints and how the affordable minimum may impact project feasibility and the need for project subsidies. In crafting the density and affordability requirements for the RFP, the town should seek assistance from a professional with development expertise to help ensure that the RFP results in a successful development initiative.

The town/trust may sell the property under town/trust ownership or retain ownership and lease it to a developer through a long-term ground lease. With a ground lease arrangement, the developer builds, owns, and manages the building but the town can establish certain criteria for the project that become restrictions and provisions in the ground lease. This ownership structure allows the town to create housing without having to administer the construction or management of the housing itself and provides strong assurances for long-term affordability of the units.

One example of a town-owned site that may merit further investigation regarding development feasibility is 23 Washington Street (the former Kostic property), abutting the west side of Town Hall. This site was discussed with some mixed opinions at the public forum.

### **23 Washington Street**

- +/- 2.17 acres; vacant; frontage on Washington Street (Route 16) and Sawin Street
- Per MassGIS data, the property entirely within an Interim Wellhead Protection Area (IWPA) and partially within Zone I Wellhead Protection Area. The MA Department of Environmental Protection has adopted the IWPA as the primary protected recharge area for public water supply (PWS) groundwater sources.<sup>8</sup>
- Per MassGIS data, the property appears to have no other environmental constraints.<sup>9</sup>

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characteristics: 1) a zero-step entrance; 2) wider interior doors, and a half-bathroom on the ground floor. Universal Design is another way municipalities and developers can increase accessible housing and encourages design of products and environments to be usable by all people to the greatest extent possible without need for adaption. (Source: Metropolitan Area Planning Council, <http://www.mapc.org/VisibilityHousingToolkit>, accessed 5/15/17.)

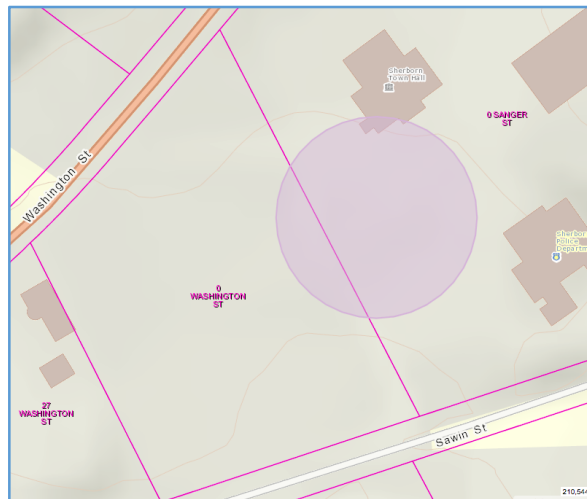
<sup>8</sup> The IWPA contains a buffer for both approved community and non-community groundwater sources that do not have an approved Zone II Wellhead Protection Area. The Zone I designation provides a protective radius around a public water supply well or wellfield.

<sup>9</sup> Property screened via MassGIS for the following physical/regulatory constraints, which are not indicated for this property: Natural Heritage and Endangered Species Program (NHESP) Eco Region, Estimated Habitat, Natural Communities, Priority Habitat of Rare Species; certified and potential vernal pools; Scenic Landscape Inventory; MA Department of Environmental Protection (DEP) Activity and Use Limitation (AUL) Sites; aquifers; DEP Tier Classified 21E sites; FEMA Flood Hazard areas; wetlands and Title 5 buffers; surface water protection area; and Drinking Water Protection Zone II.





23 Washington Street Property, MassGIS, accessed April 17, 2017



Zone I Wellhead Protection Area, MassGIS, accessed April 17, 2017

## 2. Consider the costs and benefits of using a private local non-profit or municipal housing entity to foster creation of locally-initiated, small scale affordable or mixed-income residential development.

This strategy is to create a new funded housing entity. Whether creating a new private non-profit trust or corporation or municipal affordable housing trust (MAHT) through MGL c.44 s.55C, an affordable housing entity can expand the town's capacity to spearhead local initiative projects utilizing town-owned or acquired property, as described in Strategy #1. Such an entity would have the power to acquire, sell, lease, and improve property for the purposes of creating and preserving affordable housing. There are multiple factors to consider regarding the costs and benefits of a non-profit trust versus a MAHT, some of which are described below. The town should consider these factors to determine if one of these forms of housing entities could help the town effectively pursue further local initiatives.

### **MAHT**

As enabled by MGL c.44 s.55C, a municipality's local legislative body (i.e. Town Meeting in the case of Sherborn) can vote to create a Municipal Affordable Housing Trust that has the power to create and preserve affordable housing. The Board of Selectmen would appoint members to a Board of Trustees to oversee the use of MAHT funds and would have the power to acquire, sell, lease, and improve property with no further town approvals to allocate trust funds for these purposes. Trust funds can include allocations of the town's general funds, private donations, revenue from sale of property interest, Inclusionary Zoning payments, and Community Preservation Act funds, among other sources. Note, however, that Sherborn has not adopted the Community Preservation Act (CPA) or an Inclusionary Zoning bylaw to date (but will consider doing so). There are many MAHTs across the state; however most utilize CPA funds as the primary funding source. An MAHT is subject to the provisions of state procurement and prevailing wage laws including MGL c.30B.

### **Non-Profit Affordable Housing Trust or Housing Corporation**

A non-profit housing trust or housing corporation is formed as a 501c (3) non-profit charitable corporation and run by a private Board of Directors to engage in fundraising and the creation/preservation of affordable housing. One benefit of this model is that it enables tax benefits for charitable donations and could also accept town funds.

An active example of this type of non-profit housing trust is the Concord Housing Development Corporation (CHDC) in Concord, MA. CHDC is an interesting model of such a trust. It was established by a special act of the Massachusetts Legislature in 2006 and its bylaws were approved by the Board of Selectmen. It also has IRS approval as a 501c (3) non-profit charitable corporation. The CHDC is charged with facilitating the preservation and creation of affordable housing on behalf of the town and works closely with town boards, committees, and departments to support the town's goal of housing diversity. A private trust would not be subject to the provisions of state procurement and prevailing wage laws. The town used a similar approach to develop the Woodhaven and Leland Farms local initiative projects.

Either model could subsume the responsibilities of the Sherborn Housing Partnership and would act on behalf of the town to spearhead locally-initiated affordable housing development, however the town would likely consider continuing the Housing Partnership in the case of utilizing the non-profit approach.

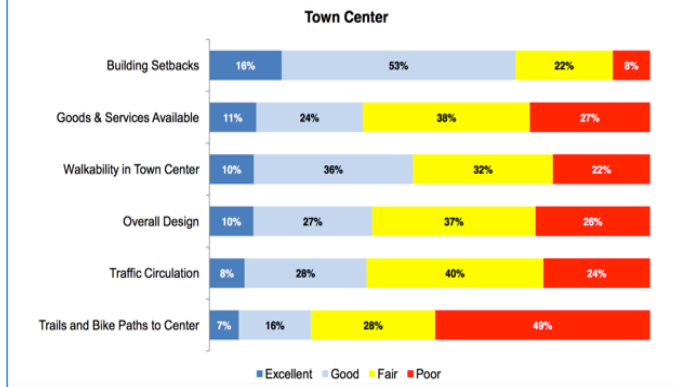
### From North Main Street, looking NW



Metropolitan Area Planning Council, *Visualization of Sherborn Town Center Possible Mixed-Use Development*, 2008

### Satisfaction 2014

- There is significant amount of fair and poor rating of the Town Center characteristics.
- There is particular dissatisfaction with non-driving access to the Town Center.



Community survey conducted as part of the General Plan preparation, 2014

characteristics including significant dissatisfaction indicated for the goods and services available, walkability, overall design, traffic circulation, and availability of trails/bike paths to the town center.

Water quality in the town center area is more compromised compared to other areas of town, and some wells in the town center require the use of bottled water or installation of treatment systems to meet drinking water standards. This strategy would entail the town revisiting its consideration of providing public water and/or sewer infrastructure in the town center area.

The town considered creating a town center water district about a decade ago (2007) and produced a report regarding this consideration.<sup>11</sup> The report documented the size and cost of a water system that would be required to service the area. As a follow-up to that report, the town conducted testing at the Price Woodlands property, which was acquired in 1997 for conservation and water supply purposes.<sup>12</sup> The testing resulted in the

3. Encourage new homes and mixed-use buildings in the town center area with the creation of a well-defined downtown water district and/or town center sewer infrastructure. The district would be legally constrained similar to that of the Dover town center.

Sherborn's town center consists of two sections: North Village and South Village.<sup>10</sup> North Village is located along North Main Street between Eliot Street and the state-owned railroad tracks including 18 North Main Street adjacent to the tracks. South Village, most of which is part of the Sherborn Center Local Historic District, includes the area south of the tracks including North Main Street to St. Theresa's Church and Washington Street to the Town Campus area. This recommendation would likely apply most to support development in North Village due to preservation goals in South Village.

Residents of Sherborn have discussed potential improvements to town center for over half a century, as documented in the 1958 town Master Plan. More recently, in preparing the town's General Plan, a community survey demonstrated that there are still mixed feelings about town center, with a significant amount of fair and poor rating of town center

<sup>10</sup> Draft *Sherborn Town Center: At a Crossroads*, 2011.

<sup>11</sup> *Final Report of the Town Center Water District Workgroup*, 2007.

<sup>12</sup> . The Price Woodlands is conservation land and a well would likely require permitting by the Conservation Commission under the Massachusetts Wetlands Protection Act and/or the Sherborn General Wetlands Bylaw.

positive finding that sufficient capacity could likely be achieved; however, iron and manganese exceeded threshold levels. A later report found that pH, manganese, and sodium were slightly above thresholds, but the former two can be easily treated.

#### 4. Foster public-private conservation-based affordable housing development initiatives with the Sherborn Rural Land Foundation to acquire land for a combination of permanent open space and small-scale affordable housing development.

This strategy suggests that the town (or housing trust per Strategy #2) work closely with the Sherborn Rural Land Foundation to jointly purchase or negotiate donated private property or bargain sales for development of affordable housing and land conservation. The Sherborn Rural Land Foundation private non-profit was founded in 1974 to acquire and preserve land in or around Sherborn and acquires buildings with historic or architectural significance. Conservation-based affordable housing model provides the “opportunity to develop housing for low- and moderate-income residents and protect natural and working landscapes.”<sup>13</sup>

*For decades, proponents of land conservation and affordable housing have rarely seen the common ground they might occupy. Instead of collaborating, principals from these two interests competed over development proposals and scarce funding. Thankfully, new approaches are helping communities move away from an “us-versus-them” debate and toward recognition of the connections, and even the benefits, of integrating land conservation and development.<sup>14</sup>*

As an example of such a partnership, the Martha's Vineyard Land Bank is open to encouraging these types of partnership to further both their core mission of land conservation as well as affordable housing and has adopted an affordable housing policy, as follows:

*Throughout much of its recent history, Martha's Vineyard Island has experienced a shortage of affordable, year-round housing. It represents a public policy dilemma of significant proportions. A variety of organizations has been chartered to plan for and develop affordable housing units for the Vineyard. The land bank has assisted these groups in the past . . . and wishes to continue to do so, even through the land bank performs an unrelated public duty and exerts no discernible impact on the unavailability of such housing.*

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<sup>13</sup> Briechle, Kendra J., The Conservation Fund, *Conservation-Based Affordable Housing*, no date.

<sup>14</sup> Ibid.



## 5. Foster regional cooperation to extend public water and/or sewer service from neighboring towns to support specific town-approved affordable housing development near those town boundaries.

The town can play an active role in fostering cooperation from neighboring towns to bring water/sewer extension to support development of affordable housing on properties near Sherborn's town borders. Exploration would include legal guidance to address concern of hostile leveraging of such infrastructure extensions.

Surrounding Towns	Public Water	Public Sewer
Ashland	Yes	Yes
Dover	Town Center Water District	No
Framingham	Yes	Yes
Holliston	Yes (95% of residents/properties)	No
Medfield	Yes (most of town)	Yes (1/3 of residents) with capacity for expansion
Millis	Yes	Yes
Natick	Yes	Yes
Source: MassGIS; Town of Ashland <a href="http://www.ashlandmass.com">www.ashlandmass.com</a> ; Dover Open Space and Recreation Plan, 2011; Holliston Open Space and Recreation Plan, 2013; Medfield Draft Open Space and Recreation Plan, 2016; Town of Natick <a href="http://www.natick.ma.gov">www.natick.ma.gov</a> ;		

## 6. Work cooperatively with development entities to help shape existing and anticipated development proposals to best align with this plan and the 2017 General Plan guiding principles and goals.

This plan sets out goals for production of housing, including affordable housing, in Sherborn and the General Plan (in draft at the time of this writing) will set out the town's guiding principles and goals to preserve Sherborn's most valued assets while working toward positive change, including greater diversity of housing options. The town should work cooperatively with development entities to ensure that future residential developments contribute to these goals and principles. The Housing Partnership can play a vital role to advocate for developments that will help further the town's development and preservation goals.

## REGULATORY STRATEGIES

Regulatory strategies refer to recommendations that entail amendments to the local zoning bylaws or other local development regulations to help encourage development of more housing options including affordable housing.

### 7. Explore zoning amendments to allow mixed-use and small-scale multi-family to encourage development of new homes and mixed-use buildings in the town center area.



Sherborn Zoning Districts

This strategy is closely tied with Strategy #3 regarding public water infrastructure. It suggests the town explore zoning amendments to create a more vibrant, mixed-use town center with appropriately scaled, located, and designed mixed-use buildings and small scale-scale multi-family homes. The town center area currently includes multiple zoning districts including the Business G (general), Business P (professional, Residence A, and Residence EA (Elderly and Affordable) districts. Only the EA district permits multi-family by special permit and the properties zoned as EA in the town center area are already developed as age-restricted housing.

As recommended in past planning studies, the town could consider adopting a cohesive zoning district for the town center area that permits mixed-use commercial/office/residential development. As such, the town could consider adopting a village district to reinforce town center vibrancy and the community vision for this area. Such a district should have special dimensional regulations and design standards to reinforce the historic development pattern.

### 8. Consider amending the EA zoning provisions to allow a mix of senior and/or affordable housing and creating an inclusionary zoning bylaw.

The town created the EA (Elderly and Affordable) district in 1991 and has amended it since to clarify intent. The current bylaw (Section 5.6.5(c)) allows either age-restricted or affordable, but not both, and requires at least 25 percent of the units be affordable (if not elderly). Furthermore, the bylaw requires a minimum lot size of six acres, restricts density to no more than four units per acre and eight units per building, and restricts units to no more than three bedrooms. The town could consider amending the EA district provisions in a few ways:

- providing more flexibility to allow both elderly and affordable units in a development allow more flexibility regarding underlying density, units per building, and bedrooms per unit
- provide inclusionary zoning options including voluntary density bonuses for developments that include more than the minimum number of affordable units
- incorporate design criteria in the zoning provisions that ensure sensitive design and site planning to harmonize with the character of the immediate neighborhood and the broader community character – such design criteria could encourage design of small farmplex-type development

With these changes to the EA provisions, the town may consider rezoning certain areas of town proactively to provide more attractive development alternatives than under MGL c.40B. These areas may include properties considered at the public forum such as Coolidge Crossing on Coolidge Street and 41 N. Main Street.

The town may also consider creating an inclusionary zoning bylaw in addition to amendments to the EA zoning provisions. The purpose of inclusionary zoning provisions is to ensure that production of affordable housing units keeps pace with construction of new dwelling units. Many variations of inclusionary zoning provisions have been adopted in Massachusetts communities with varying levels of success at producing affordable units. It will be important to examine the most current information regarding best practices for Inclusionary Zoning provisions and to customize a Sherborn bylaw to ensure successful outcome. The Town should consider allowing cash payments and donated buildable land as an alternative in lieu of construction of units, which could be allocated to an MAHT (discussed earlier).

#### **The Case for Accessory Apartments**

The average number of people per household has decreased significantly over the last decades. Yet, new homes continue to be built, suggesting that there is increased capacity in the existing housing stock. This has occurred while the value of homes and the resulting tax burden continues to rise.

Homeowners are often forced to sell a house that is too big for their needs, especially for fixed income, often older, residents. This issue further exacerbates the already existing scarcity of affordable housing options, and the land consumption and new infrastructure required for a standard single-family subdivision.

Accessory apartments can provide owners the additional income necessary to maintain a home when the structure becomes more than they need or can afford.

A household may wish to provide a new self-contained unit within their property to receive additional income, provide social and personal support to a family member, or obtain greater security. Additional income can further have the benefit of additional income for home improvements, such as accessibility and safety improvements to facilitate aging in place.

New, young workers in a community may decide that home ownership is a longer-term goal, and a smaller rental apartment is more appropriate now. Accessory units can provide housing for single, independent workers who will then contribute to the local labor force.

Source: Massachusetts Smart Growth Smart Energy Toolkit: Accessory Dwelling Units.

[http://www.mass.gov/envir/smart\\_growth\\_toolkit/pages/mod-ww.html](http://www.mass.gov/envir/smart_growth_toolkit/pages/mod-ww.html). Accessed 1/19/15.

### **9. Revise the accessory apartment bylaw to expand housing options. Consider revisions to allow more flexibility and adopt design guidelines to ensure that the single-family character of the property is maintained.**

The current zoning provisions regarding apartments are restrictive as they permit units only for family members or domestic employees and rent is prohibited for these units. In addition, the accessory units, which are permitted by special permit, terminate upon sales, transfer, or other change in ownership and are restricted to 800 square feet or 30 percent of gross floor area of the dwelling. As the local population ages, it will be especially important to revisit these restrictive provisions to help provide greater opportunities for aging in place and aging in community (see sidebar regarding “The Case for Accessory Apartments”).

The current Low or Moderate Income apartment bylaw found in section 3.2.27 under schedule of use regulations permits low- or moderate-income accessory apartments in all districts through a special permit for the duration of occupancy and requires recertification of compliance under Mass General Law 40B every two years. The bylaw appears to anticipate that these units will count on the SHI as “Local Initiative Unit,” however it is unclear if they would qualify.

The town could amend the zoning provisions to allow more flexibility to create accessory apartments within single-family houses by allowing homeowners to collect rent and to rent to people not in the owner’s family or domestic employees and to allow them to remain after sale or transfer of property. The town should consider striking the allowance for low- and moderate-income accessory apartments as it is not practical and very rarely produces affordable units.

### **10. Consider adopting Natural Resources Protection Zoning (NRPZ) to encourage moderately sized and priced housing in cluster developments.**

Adopting a Natural Resource Protection bylaw would: encourage smaller house lots and/or cluster developments with a greater percentage of conserved open space; enable duplex housing units and possibly small multi-family developments; and provide density bonus as incentive for inclusion of affordable homes in NRPZ development.

*When cluster development options or requirements are introduced and based upon the underlying conventional zoning, the results have proven unsatisfactory. While a more aesthetically pleasing way to subdivide land that affords marginally better protection for wetlands, the remainder lands preserved by most cluster development are inadequate to fulfill their resource protection purposes, whether to sustain farming or forestry or protect habitats, scenic views, or water supplies. Reliance on the underlying zoning for purposes of determining allowable lot counts often yields too many housing units, an insufficient amount of protected open land, and layouts that destroy the natural resource and environmental value of the remaining land.<sup>15</sup>*

*One lower - density technique, inspired by some successful out-of-state models and dubbed by the authors as Natural Resource Protection Zoning (NRPZ), has already gained a toehold in Massachusetts. Versions recently have passed overwhelmingly at town meetings in Shutesbury, Brewster, and Wendell, and similar bylaws are under development in a several other towns.*

*NRPZ borrows on successful programs used elsewhere to accomplish what its name suggests by linking meaningful land conservation to land development.<sup>16</sup>*

Some of the key components of NRPZ:

- There is no underlying zoning – NRPZ is the zoning for the selected area(s)
- Subdivisions must comply with NRPZ to be a use by-right; deviations from NRPZ (like conventional subdivisions) would require a special permit.
- Number of dwelling units is calculated by an up-front formula – there are no yield plans<sup>17</sup>.
- Percentages of required open space are high, from 65 to 90 percent.
- And, greater design flexibility is offered for public benefits such as the provision of affordable homes that count on the SHI.

Similar to other types of cluster design, NRPZ developments would likely require shared or clustered septic systems (multiple homes on one septic system), innovative and alternative septic systems, or small sewage treatment plants. The Board of Health will continue to review technologies to ensure safe development.

## **11. Enable the Board of Health and Conservation Commission to investigate changes to local regulations and practices to facilitate cluster or multifamily development.**

Shared/clustered septic systems and other innovative/alternative (I/A) septic systems support development of affordable housing and housing options while protecting Sherborn's water resources. <sup>1</sup> An I/A system is any septic system or part of one that is not designed or constructed in a way consistent with a conventional Title 5 system. Some examples of alternative systems are recirculating sand filters, aerobic treatment units, Wisconsin mounds, peat filters, humus/composting toilets, and intermittent sand filters. Present septic system standards provide for the separation of water supply and septic effluent but do not provide feasible alternatives to support development of clustered and multi-family housing options.

While considering allowances for shared or I/A septic systems, it is important to recognize that much of Sherborn has constrained soils, with seasonal high water table, hardpan, and bedrock close to the surface

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<sup>15</sup> Lacy, Jeffrey R., Ritchie, Robert W., Russell, Joel S., *Natural Resource Protection Zoning*, December 2010, page 2.

<sup>16</sup> Ibid, page 4.

<sup>17</sup> A yield plan requires a developer to create a conventional subdivision plan to determine the total number of units such a plan would yield – this then becomes the basis for the density limit for the cluster/open space residential site plan

making the siting of septic systems difficult. Due to the fragile nature of the water supply, the Town's water bearing soils must be protected from septic effluent contamination.

Through the Board of Health and Conservation Commission, the town should investigate ways to both ensure protection of water resources and enable development of more diverse housing options that support the housing and development goals of this plan as well as the General Plan.

## Action Plan

The Housing Partnership, having spearheaded this planning effort, will be the natural entity to oversee all aspects of its implementation and to provide regular updates on progress to the Board of Selectmen and Planning Board. The matrix below provides more specific assignment of responsible entity, supporting entity, and timeframe to implement the housing strategies.

#	Housing Strategies	FY2018	FY2019	FY2020	FY2021	FY2022	Responsible Entity	Supporting Entities
1	Foster locally-initiated development, learning from past local initiatives including Woodhaven and Leland developments, by offering town-owned or acquired real property for appropriate development.						Housing Partnership/Trust	Town Meeting/BOS
2	Consider the costs and benefits of using a private local non-profit or municipal housing entity to foster creation of locally-initiated, small scale affordable or mixed-income residential development.						Housing Partnership	Town Meeting/BOS
3	Encourage new homes and mixed-use buildings in the town center area with the creation of a well-defined downtown water district and/or town center sewer infrastructure. The district would be legally constrained similar to that of the Dover town center.						BOS/Town Center Options Committee	Town Meeting
4	Foster public-private conservation-based affordable housing development initiatives with the Sherborn Rural Land Foundation to acquire land for a combination of permanent open space and small-scale affordable housing development.						Housing Partnership/Trust	Town Meeting/BOS
5	Foster regional cooperation to extend public water and/or sewer service from neighboring towns to support affordable housing development(s) near those town boundaries.						Board of Selectmen	Town Administrator
6	Work cooperatively with development entities to help shape existing and anticipated development proposals to best align with this plan and the 2017 General Plan guiding principles and goals.						Zoning Board of Appeals	Housing Partnership & Planning Board
7	Explore zoning amendments to allow mixed-use and small-scale multi-family to encourage development of new homes and mixed-use buildings in the town center area.						Planning Board & Town Planner	Town Meeting
8	Consider amending the EA zoning provisions to allow a mix of senior and/or affordable housing and creating an inclusionary zoning bylaw.						Planning Board & Town Planner	Town Meeting
9	Revise the accessory apartment bylaw to expand housing options. Consider revisions to allow more flexibility and adopt design guidelines to ensure that the single-family character of the property is maintained.						Planning Board & Town Planner	Town Meeting
10	Consider adopting Natural Resources Protection Zoning (NRPZ) to encourage moderately sized and priced housing in cluster developments while preserving environmental health and scenic vistas.						Planning Board & Town Planner with BOH and Con Com	Town Meeting
11	Enable the Board of Health and Conservation Commission to investigate changes to local regulations and practices to facilitate cluster or multifamily development.						BOH & Con Com	BOS & Planning Board

BOS = Board of Selectmen; BOH = Board of Health; Con Com = Conservation Commission

Note: lighter shade indicates strategies that are ongoing and/or should be implemented as opportunities arise, rather than a specific schedule.

## CHAPTER 3

# DEMOGRAPHIC PROFILE

Sherborn is a small town with a wealthy, older population that lacks the socio-economic diversity of the regional population. Sherborn's population is decreasing, while surrounding towns are gaining population. In addition, the population is older than the population of the county and is anticipated to continue to age. These demographic trends indicate a need for more housing options to provide housing for a more diverse population as well as to support the needs of older residents.

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### Key Findings

- Sherborn has the smallest population compared to the seven towns that surround its borders. Sherborn's estimated population of 4,245 makes it the third smallest of the 54 towns in Middlesex County (only Dunstable and Ashby were smaller), with only about 0.27 percent of the total estimated population for the county.
- Sherborn's total population is projected to decrease by approximately 12 percent between 2015 and 2035, while the population of Middlesex County is projected to increase by approximately 7 percent during this timeframe.
- The age composition of the Sherborn population is older than the county as a whole, and the percentage of older adults (sixty-five years and older) continues to increase while the percentage of children nineteen years and under and that of working age adults continues to decrease.
- The average household size and average family size in Sherborn is estimated to have decreased slightly between 2000 and 2015.
- An estimated ninety-two percent of households in Sherborn own their home. Homeowners in Sherborn have an estimated median household income of \$164,740, more than four times greater than the estimated median household income of renters in Sherborn at \$37,241.
- About 18 percent of Sherborn's households have low/moderate income. The thresholds for low/moderate income are based on household size – in the Middlesex County area, the income threshold for a two-person household to have low/moderate income, for example, would be \$58,450.

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### Population Growth & Change

As previously stated in this plan, the U.S. Census Bureau's Decennial Censuses of 2000 and 2010 and the 2011-2015 American Community Survey (ACS) were the primary sources of data for the needs assessment. It is important to be aware of the margins of error (MOE) attached to the ACS estimates, especially in smaller geographies, such as Sherborn, because the estimate is based on a relatively small sample and not on a complete count.

#### TOTAL POPULATION CHANGE

Per the 2011-2015 American Community Survey (estimate), Sherborn is home to 4,245 residents, an increase of approximately 1 percent from 2000. Sherborn's estimated population of 4,245 (per the 2015 ACS) comprises roughly 0.27 percent of the total estimated population of Middlesex County (1,585,139). Only two towns in Middlesex County, Ashby and Dunstable, have smaller populations than Sherborn's.

According to the Decennial Census of 1970-2010, the population of Sherborn grew from 3,309 people in 1970 to 4,119 people in 2010. The decade with the sharpest increase in total population was between 1970

and 1980 when population increased 22 percent from 3,309 people to 4,049. Since 1980, however, Sherborn's population has fluctuated with slight decreases and increases (between a 2 percent decrease to a 5 percent increase in population over 10 years). The county's population has fluctuated even less than that of Sherborn between 1970 and 2010, decreasing in population only between 1970 and 1980 (2 percent decrease) and increasing anywhere between 2 percent (between 1980 and 1990) and 5 percent (between 1990 and 2000).

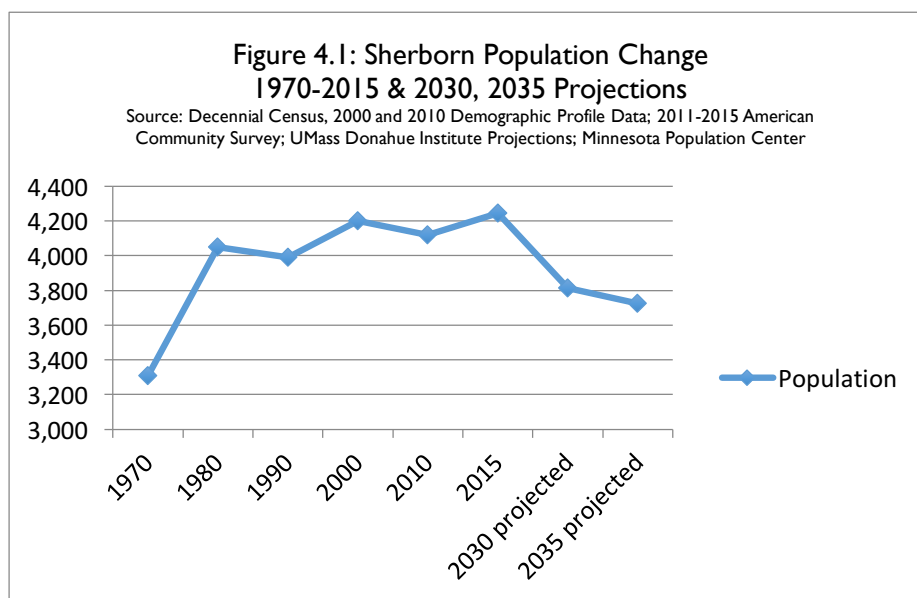
Between 2010 and 2015, the ACS estimates indicate a 3 percent population increase in Sherborn from 4,119 in 2010 to 4,245 in 2015, and a 5 percent increase throughout the county from 1,503,085 in 2010 to 1,585,139 in 2015.

UMass Donahue projections indicate that Sherborn's population may decrease by 10 percent between 2015 and 2030 to 3,814 and then further decrease by 2035 to 3,724 people. The county projections anticipate modest growth of 6 percent and 1 percent in total population respectively between 2015 and 2030 and 2030 and 2035.

TABLE 4.1: POPULATION CHANGE 1970-2015 & 2030, 2035 PROJECTIONS

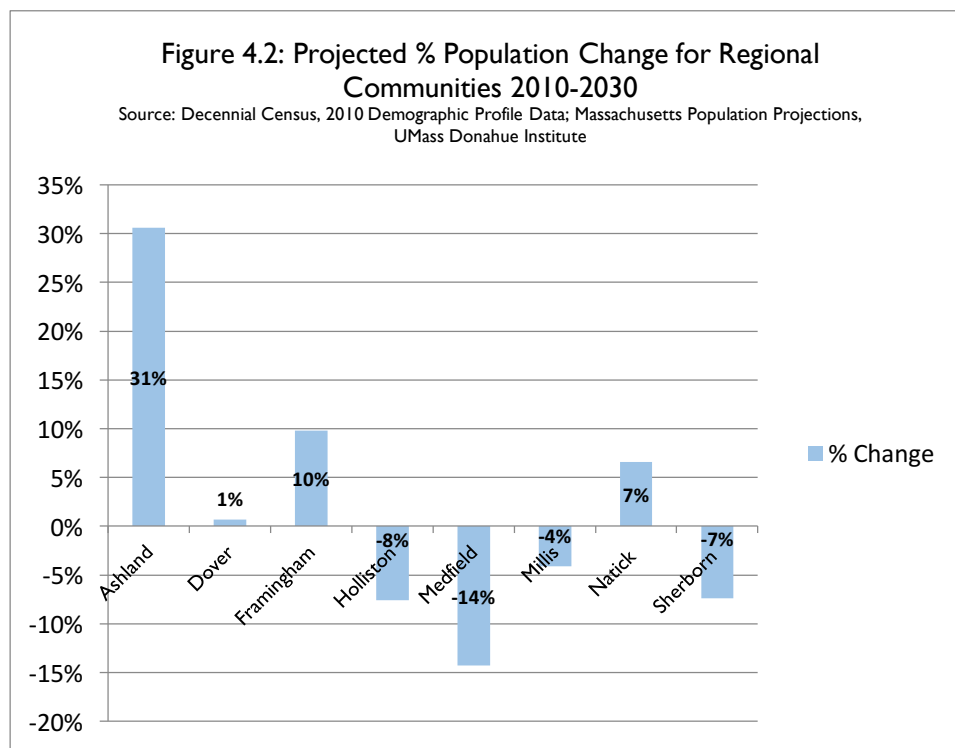
	Sherborn			Middlesex County	
Year	Population	% Change		Population	% Change
1970	3,309	n/a		1,397,268	n/a
1980	4,049	22%		1,367,034	-2%
1990	3,989	-1%		1,398,468	2%
2000	4,200	5%		1,465,396	5%
2010	4,119	-2%		1,503,085	3%
2015 estimated	4,245	3%		1,585,139	5%
2030 projected	3,814	-10%		1,673,074	6%
2035 projected	3,724	-2%		1,694,670	1%

Source: Decennial Census, 2000 and 2010 Demographic Profile Data; 2011-2015 American Community Survey; Massachusetts Population Projections; UMass Donahue Institute; Minnesota Population Center. National Historical Geographic Information System: Version 11.0 [Database]. Minneapolis: University of Minnesota. 2016. <http://www.nhgis.org>; Note: ACS data based on samples and are subject to variability





Four of the seven towns surrounding Sherborn are projected to experience population growth between 2010 and 2030. These increases range from a 31 percent increase in Ashland to a 1 percent increase in Dover. The other three surrounding towns are projected to experience population decreases between 2010 and 2030, from a 4 percent decrease projected for Millis to a 14 percent population decrease projected for Medfield.



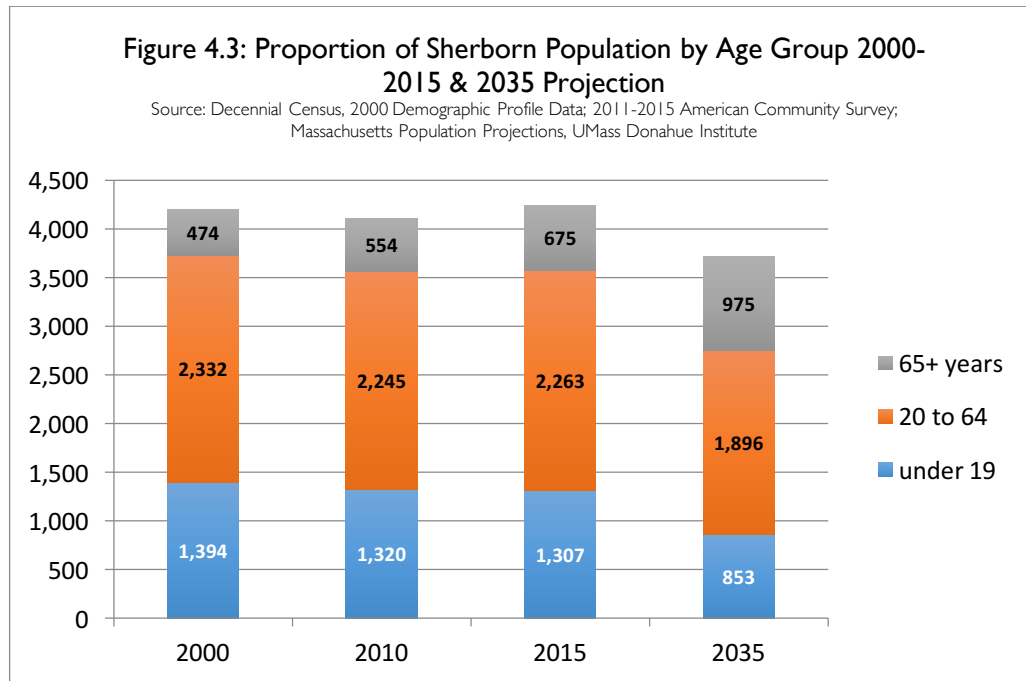
## AGE COMPOSITION

The age composition of Sherborn is older than that of the county population as a whole. The estimated Sherborn median age of 45.8 years per the 2015 ACS is significantly older than the county median of 38.5. In 2000, Sherborn's median age was 41.1 and the county's was 36.4.

In 2000, 33 percent of the Sherborn population was age nineteen and younger. In 2015, estimates indicate that the share of population age nineteen and younger in Sherborn decreased slightly to 31 percent of total population. The 2035 projections indicate that this younger age cohort will continue to decrease to 23 percent of the population.

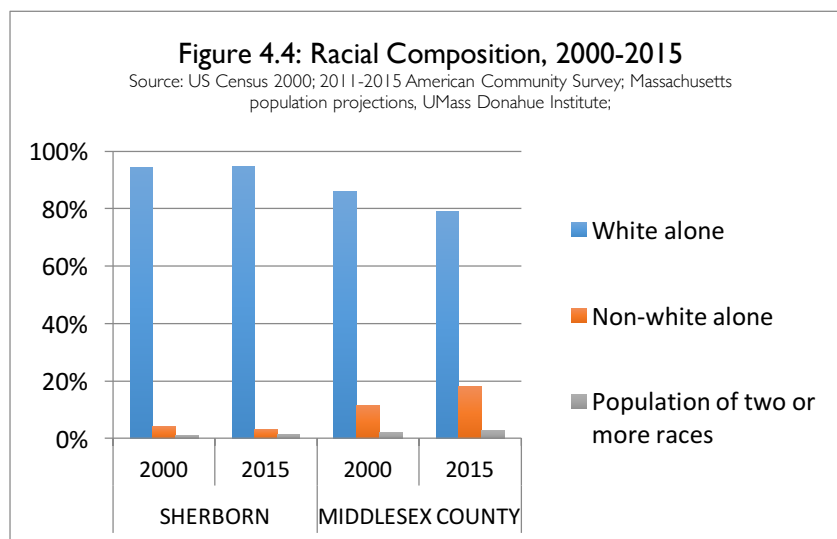
In 2000, 56 percent of the population was between ages twenty and sixty-four years. In 2015, the twenty to sixty-four age cohort is estimated to have decreased slightly to 53 percent of the total population. The 2035 projections indicate the percentage of population age twenty to sixty-four years will continue to decrease to 51 percent of the population.

In 2000, 11 percent of the total Sherborn population was age sixty-five years and over, but in 2015, this cohort is estimated to have grown to 16 percent of the population. According to the UMass Donahue population projections, the older adult population sixty-five years and over is expected to continue to grow to 26 percent of the total population by 2035. The 2035 projections for the county indicate the over age sixty-five population will constitute 22 percent of the total population.



## RACIAL COMPOSITION

The racial composition of Sherborn's population is primarily persons who identify as white. Only about 6 percent of the total population is estimated per the 2015 ACS to identify as non-white alone including Asian or two or more races. About 21 percent of the total county population identifies as non-white alone. Between 2000 and 2015, the population identifying as white grew about 3 percent in Sherborn and decreased 2 percent in the county. In the same period, the population identifying as non-white alone increased in the county 58 percent, due to the large increase in population of those identifying as black or African American, and Asian alone (54 percent and 78 percent increase, respectively). However, the population of people identifying as American Indian and Alaska Native, and Native Hawaiian and Other Pacific Islander decreased by 6 percent and 21 percent, respectively.



Although, the 2015 ACS reports that the population in Sherborn identifying as black or African American, American Indian and Alaska Native, and some other race decreased by 100 percent to zero, local residents attest that some residents are black. The ACS estimates that population identifying as Asian alone grew 9 percent, and the population identifying as two or more races grew 25 percent.

## FOREIGN-BORN POPULATION

Housing analysis review data for foreign-born population along with race/ethnicity because national origin is a protected class under the federal Fair Housing Act and is often not captured under the analysis of race and ethnicity. This analysis further demonstrates Sherborn's lack of diverse population compared with the county population.

The 2015 estimated population of foreign-born residents in Sherborn was 8 percent of the town's total population, while the estimated population of foreign-born residents in Middlesex County was 19 percent of the county's total population. Almost half of the foreign-born population in Sherborn originated in Europe, while 28 percent originated in Asia and 15 percent originated in Latin America. The foreign-born population in the county is largely Asian (40 percent of total foreign-born population) and Latin American (29 percent of total foreign-born population).

TABLE 4.2: NATIONAL ORIGIN OF FOREIGN-BORN POPULATION, 2015

	SHERBORN		MIDDLESEX COUNTY	
	Estimate	%	Estimate	%
<b>Total Foreign Born Persons:</b>	337	100%	308,711	100%
Europe	155	46%	62,861	20%
Asia	95	28%	124,052	40%
Africa	16	5%	19,998	6%
Oceania	10	3%	1,591	1%
Latin America	52	15%	90,640	29%
Non-US Northern America	9	3%	9,569	3%
Source: 2011-2015 American Community Survey; Note: ACS data based on samples and are subject to variability				

## RESIDENCE ONE YEAR AGO

Per the 2015 ACS estimate, 93 percent of Sherborn's total population lived in the same house one-year prior. 87 percent of the total county population lived in the same house one-year prior to the 2015 ACS estimate. In Sherborn and the county, most of the population that moved to their current home in the past year moved from within Middlesex County.

TABLE 4.3: GEOGRAPHIC MOBILITY: RESIDENCE ONE YEAR AGO, 2015

	SHERBORN		MIDDLESEX COUNTY	
	Units	%	Units	%
<b>Total</b>	4,228	100%	1,538,497	100%
Same Home	3,951	93%	1,330,983	87%
Same County	152	4%	108,071	7%
Same State	55	1%	39,718	3%
Different State	41	1%	38,935	3%
Abroad	29	1%	20,790	1%
Source: 2011-15 American Community Survey; Note: ACS data based on samples and are subject to variability				

## Household Characteristics

The overall number of households in Sherborn is estimated to have increased between 2000 and 2015 by 3 percent from 1,423 households in 2000 to 1,461 households in 2015, while average household size decreased from 2.95 to 2.91 persons per household. Total households in the county also increased (4 percent) and the average household size increased slightly from 2.52 to 2.56 persons per household.

Sherborn has a larger percentage of family households with children under eighteen (44 percent of total family households) than in the county (29 percent), fewer single-person households (11 percent in Sherborn and 27 percent in the county), and a smaller percentage of older adults living alone (6 percent in Sherborn and 10 percent in the county).

The number of family households with children declined slightly from 2000 to 2015, from 657 to 644 (46 percent of total households in 2000 to 44 percent in 2015). County-wide, the percentage of family households also decreased slightly from about 30 percent to 29 percent of total households, while the absolute number of family households with children in the county increased from 169,433 family households with children in 2000 to 171,925 in 2015.

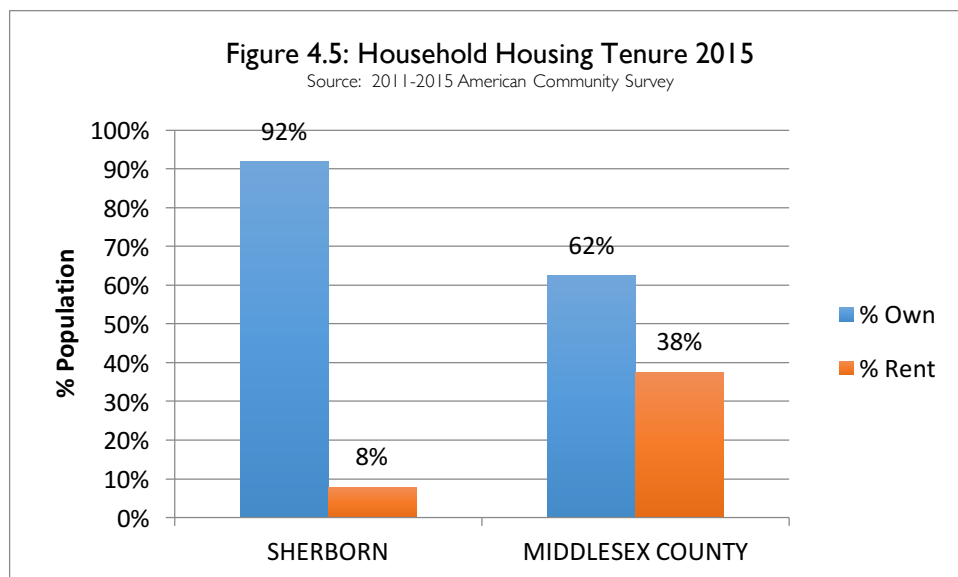
TABLE 4.4: HOUSEHOLD CHARACTERISTICS, 2000 & 2015

Household Type	SHERBORN				MIDDLESEX COUNTY			
	2000		2015		2000		2015	
	#	%	Est.	%	#	%	Est.	%
Total households	1,423	100%	1,461	100%	561,220	100%	585,642	100.00%
Total family households	1,223	86%	1,263	86%	361,076	64%	376,456	64%
Family households with related children under 18 years	657	46%	644	44%	169,433	30%	171,925	29%
Male householder, no wife present with own children	n/a	--	18	1%	n/a	--	8,183	1%
Female householder, no husband present with own children	51	4%	78	5%	27,467	5%	32,573	6%
Nonfamily households	200	14%	198	14%	200,144	36%	209,186	36%
Householder living alone	176	12%	162	11%	152,301	27%	159,880	27%
65 years and over living alone	85	6%	86	6%	53,405	10%	60,906	10%
Average household size	2.95	--	2.91	--	2.52	--	2.56	--
Average family size	3.22	--	3.17	--	3.11	--	3.16	--

Source: US Census 2000; 2011-15 American Community Survey; Note: ACS data based on samples and are subject to variability

## HOUSEHOLD TENURE

The 2011-2015 ACS estimates that 92 percent of households in Sherborn own their home and 8 percent rent their home. In Middlesex County, as well as in the state, however, 62 percent of households own their home and 38 percent rent their home.



## HOUSEHOLD INCOME DISTRIBUTION

Sherborn's median household income, per the 2015 ACS estimates, was \$155,956, significantly higher than the Middlesex County median household income of \$85,118, and slightly higher than Sherborn's 2010 median household income of \$145,250. Of the seven towns surrounding Sherborn, the only other town with a higher estimated 2015 median household income than Sherborn is Dover (\$185,542). Behind Dover and Sherborn, Medfield has the third highest median household income of these eight communities at \$138,036. Framingham has the lowest median household income of \$68,219. The Massachusetts median household income is estimated to be \$68,563 per the 2015 ACS.

TABLE 4.5: MEDIAN HOUSEHOLD INCOME 2010-2015

Median Household Income								
	Ashland	Dover	Framingham	Holliston	Medfield	Millis	Natick	Sherborn
2010	\$92,974	\$164,583	\$64,061	\$103,600	\$126,048	\$85,472	\$87,568	\$145,250
2015	\$102,911	\$185,542	\$68,219	\$108,869	\$138,036	\$92,042	\$100,469	\$155,956

Source: US Census 2010 and 2011-15 American Community Survey; Note: ACS data based on samples and are subject to variability

Seventy-three percent of Sherborn households have incomes of \$100,000 or over, which is much greater than the county at 43 percent. 14 percent of Sherborn households have incomes of \$35,000 to \$74,999, while 23 percent of total households in the county have incomes in this range.

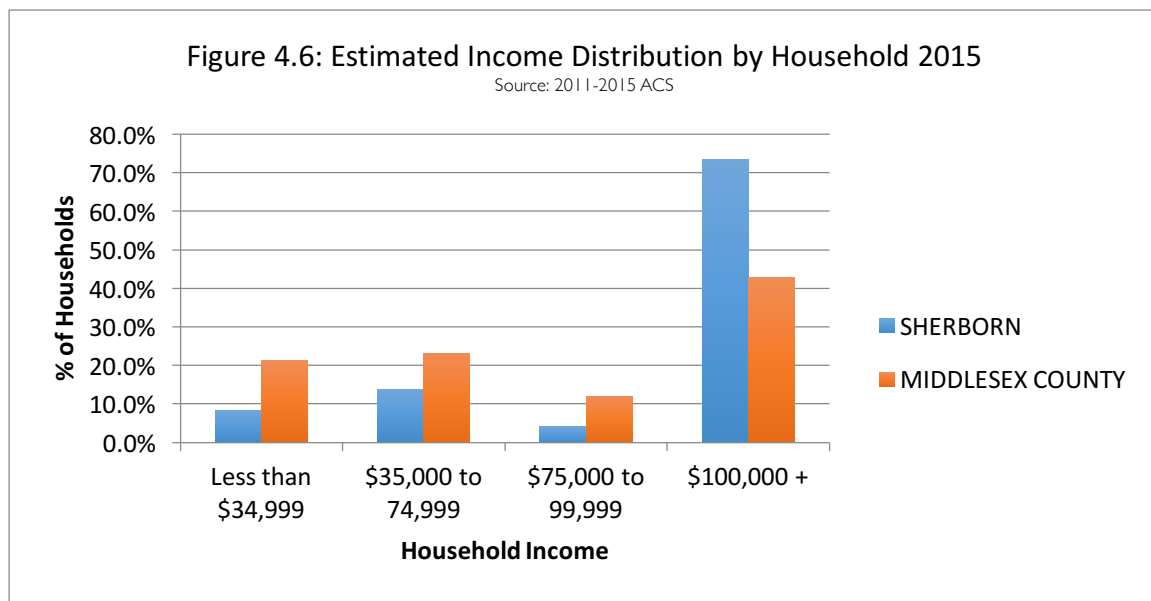
TABLE 4.6: ESTIMATED INCOME DISTRIBUTION BY HOUSEHOLD 2015

Income Level	SHERBORN		MIDDLESEX COUNTY	
	# of Households	% of Households	# of Households	% of Households
Less than \$34,999	124	9%	125,389	21%
\$35,000 to 74,999	202	14%	136,534	23%
\$75,000 to 99,999	63	4%	71,918	12%
\$100,000 +	1,072	73%	251,801	43%
<b>Total</b>	<b>1,461</b>	<b>100%</b>	<b>585,642</b>	<b>100%</b>

Source: 2011-15 American Community Survey; Note: ACS data based on samples and are subject to variability

Figure 4.6: Estimated Income Distribution by Household 2015

Source: 2011-2015 ACS



Households with younger and/or older householders will typically have lower incomes than households with householders in the middle (between twenty-five and sixty-four years of age). As seen in the table below, Median Household Income Distribution by Age of Householder, the estimated median income for all households in Middlesex County is \$85,118, while households with a householder less than twenty-five years of age have an estimated median income of \$42,823, and those with a householder over sixty-five years have an estimated median income of only \$47,949 – a gap of about \$42,300 and \$37,200, respectively.

In Sherborn, the estimated median income for all households is \$155,956, while households with a householder over sixty-five years have an estimated median income of \$101,932 – a difference of approximately \$54,000. Median income data was not available for households with a householder less than twenty-five years of age in Sherborn.

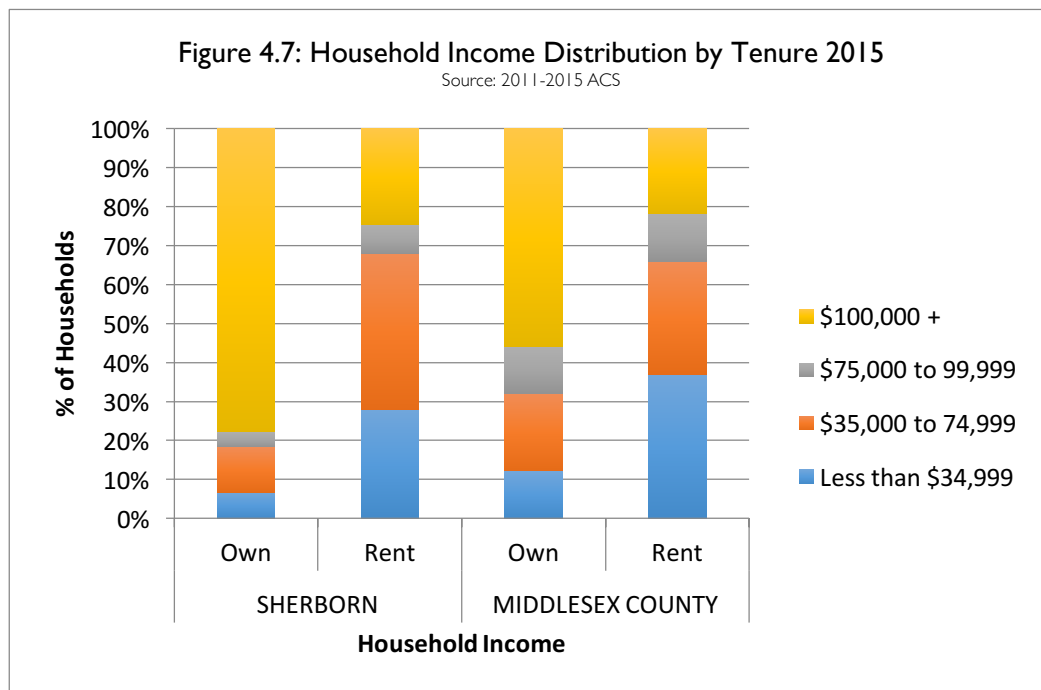
TABLE 4.7: MEDIAN HOUSEHOLD INCOME DISTRIBUTION BY AGE OF HOUSEHOLDER 2015

Age of Householder	SHERBORN	Middlesex County
	Estimate	Estimate
Under 25 years	-	\$42,823
25 to 44 years	\$156,094	\$95,464
45 to 64 years	\$246,250	\$104,218
65 years and older	\$101,932	\$47,949
Median income all	\$155,956	\$85,118
Source: 2011-15 American Community Survey; Note: ACS data based on samples and are subject to variability		

The median income for renter households is often lower than that for owner households and this holds true at both the local and county level. The estimated 2015 median homeowner household income in Sherborn is \$164,740 and in the county is \$111,439; the estimated median income for renter households in Sherborn is \$37,241 and in the county it is \$51,383.

TABLE 4.8: MEDIAN HOUSEHOLD INCOME BY TENURE 2015

Tenure	SHERBORN	Middlesex County
Owner	\$164,740	\$111,439
Renter	\$37,241	\$51,383
Source: 2011-15 American Community Survey; Note: ACS data based on samples and are subject to variability		



## Disability

Per the 2015 ACS, Sherborn and county estimates of population with physical or cognitive disabilities, with 6 percent in Sherborn and 9 percent in the county, were less than the estimated statewide population with disabilities (about 12 percent).

TABLE 4.9: POPULATION BY ESTIMATED DISABILITY STATUS 2015

Age	SHERBORN			MIDDLESEX COUNTY		
	Non-institutionalized civilian population, estimated	With a disability, estimated	% of population with a disability, estimated	Non-institutionalized civilian population, estimated	With a disability, estimated	% of population with a disability, estimated
Under 18	1,196	35	1%	321,884	11,023	1%
18-64	2,374	74	2%	1,011,846	63,702	4%
65 +	675	148	3%	206,739	63,846	4%
Total	4,245	257	6%	1,540,469	138,571	9%

## Economic Characteristics

Roughly 60 percent of Sherborn's total labor force is employed in the services sector, which includes professional, scientific, management, administrative, entertainment, food, accommodations, and other services. About 58 percent of Middlesex County labor force is employed in the services sector. About 14 percent in Sherborn are employed in finance, insurance, or real estate, versus about 7 percent in the county. About 11 percent both in the town and in the county are employed in wholesale/retail trade.

The unemployment rate in Sherborn is less than that county wide, and both the Sherborn and county unemployment rates are less than that of the state – per the EOLWD 2016 figures, Sherborn's unemployment rate was 2.31 percent, the county was 3.08 percent and the state was 3.78 percent.

TABLE 4.10: AVERAGE EMPLOYMENT 2016

	Sherborn	Middlesex County
Labor Force	2,201	865,414
Employed	2,150	838,751
Unemployed	51	26,662
Area Unemployment Rate	2.31%	3.08%
MA Rate	3.78%	3.78%
Source: MA Executive Office Of Labor And Workforce Development		

## EDUCATIONAL ATTAINMENT

Per the 2015 ACS estimates, Sherborn residents have attained higher education levels than residents countywide and statewide. About 82 percent of Sherborn's population twenty-five years and over has a Bachelor's degree or higher; whereas about 52 percent countywide has a Bachelor's degree or higher. About 41 percent of the statewide population twenty-five years and over has a Bachelor's degree or higher.



# CHAPTER 4

## LOCAL HOUSING CONDITIONS

Sherborn has very limited housing options, high property values, high local property taxes, and many existing low/moderate income Sherborn residents spend too much for housing relative to household income. These findings indicate need for greater housing options, including affordable units, multi-family rental units, townhouses, and cottage-style single family houses on smaller lots.

### Key Findings

- Ninety-two percent of Sherborn's housing stock is single-family detached homes
- About 94 percent of all residential units in Sherborn are owner-occupied and there are estimated to be no vacant units for rent, indicate a significant shortage of rental units.
- The average assessed value of a single-family home in Sherborn is \$753,929, the second highest value (behind Dover) of the communities surrounding Sherborn. The median sale price for a single-family home in 2016 was \$746,000.
- Close to 60 percent of owner-occupied households in Sherborn moved into their current homes between 1990 and 2009, and 86 percent of renter households moved in to their current unit sometime after 2000.
- Approximately 60 percent of renter households in Sherborn are sixty-five years and over.
- Approximately 68 percent of renter households in Sherborn have incomes of less than \$50,000.
- Of the 80 renters in Sherborn with income at or below 80 percent area median income (AMI), about 48 households (60 percent) spend too much (greater than 30% of income) for housing. Of the 170 owners in Sherborn with income at or below 80 percent AMI, 135 households (80 percent) spend too much for housing.

### Housing Supply and Vacancy Trends

#### OVERVIEW

Compared to the seven towns that surround it, Sherborn has the fewest number of estimated total housing units at 1,554. Of these units, 1,461 units (94 percent) are owner-occupied. Most of Sherborn's housing stock (92 percent) is single-family detached homes, and approximately half of the total housing stock was built prior to 1970.

#### VACANCY RATES

Vacancies are an essential measure of the state of the housing market. Vacant units represent the supply of homes that exceeds demand, which is related to economic trends. Vacancy rates are measured as a percent of total housing units. A low vacancy rate can result in pressure on housing prices. A 1.5% vacancy rate for ownership and 7% for rental units are considered natural vacancy rates in a healthy market.

Source: Metropolitan Area Planning Council, *Basic Housing Needs Assessment*, Sept 2014 – in consultation with Barry Bluestone, Dukakis Center at Northeastern University.

The 2011-2015 ACS estimates report Sherborn as having twenty-eight vacant units available for sale (roughly 1.8 percent vacancy) and no vacant units available for rent. However, there are roughly 28 vacant units that are already rented (but not occupied). The ACS reports no vacant units that are for seasonal, recreational, or occasional use.<sup>18</sup> The estimated lack of vacant units for rent and lack of rental housing overall in Sherborn, indicates a significant shortage of rental units.

<sup>18</sup> US Bureau of the Census, American Community Survey Five-Year Estimates (2011-15), "B25004: Vacancy Status", and "B25001: Housing Units".

## PERMIT ACTIVITY

In 2015, the Sherborn Building Department issued a total of three new single family construction permits and zero multifamily construction permits. The total reported construction cost of these residential units was \$1,591,581.<sup>19</sup> Over the past ten years, the number of new units permitted by the town has been quite low, with an annual low of zero units in 2009 and 2011, and an annual high of eight units in 2013, and there has been a 13 percent decrease in the reported average construction cost per unit, from \$609,827 in 2006 to \$530,527 in 2015 (Figure 5.1).

TABLE 5.1: RESIDENTIAL CONSTRUCTION PERMITS FOR NEW DWELLING UNITS 2006-2015

Year	Total	Single Family Units	Multi Family Units	Total Construction Cost	Average Construction Cost Per Unit
2006	3	3	0	\$1,829,480	\$609,827
2007	4	4	0	\$2,504,580	\$626,145
2008	6	6	0	\$3,300,920	\$550,153
2009	0	0	0	\$0	\$0
2010	4	4	0	\$1,961,350	\$490,338
2011	0	0	0	\$0	\$0
2012	5	5	0	\$4,220,953	\$844,191
2013	8	8	0	\$4,604,830	\$575,604
2014	3	3	0	\$1,591,581	\$530,527
2015	3	3	0	\$1,591,581	\$530,527
<b>Total</b>	36	36	0	\$21,605,275	\$600,146.53

Source: U.S. Census Bureau, Building Permit Survey 2015, Estimates with Imputation

## RESIDENTIAL PROPERTY CHARACTERISTICS

Sherborn's land is divided into 1,633 parcels. Table 5.2 shows that most of residential land in Sherborn consists of single-family properties (95 percent), followed by condominiums at 3 percent.

TABLE 5.2: RESIDENTIAL LAND USE

Use Type	Number of Parcels	% of Land
Single-Family	1,323	81%
Multi-Family	15	1%
Condominium	48	3%
Apartments	0	0%
Other Non-Residential Uses	247	15%
<b>Total</b>	1,633	100%

Source: DOR Municipal Databank, Parcel Counts by Usage Code, 2016

<sup>19</sup> Per the U.S. Census Bureau, construction costs include: 1) new buildings and structures; 2) mechanical and electrical installations; 3) site preparation and outside construction of fixed structures and facilities including sewer and water; 4) installation of equipment including boilers and blast furnaces; 5) site-fabricated equipment including storage tanks; 6) cost and installation of construction materials placed inside a building and used to support machinery. Land acquisition is not included in construction costs.

## TRENDS IN RESIDENTIAL PROPERTY VALUES

A review of trends in residential property values provides some perspective on what is occurring with housing costs in the local real estate market. Data from the Massachusetts Department of Revenue (DOR) and other sources offer insights about aggregated residential assessed values, average single-family home values, tax rates, and tax bills for each municipality in the Commonwealth. For this analysis of residential property trends, a twelve-year period, 2006 – 2017) has been used to understand how values have changed, particularly before, during, and after the Great Recession (2007-2009).

TABLE 5.3: TAX RATES AND AVERAGE TAX BILLS, REGIONAL COMMUNITIES FY17

Municipality	Residential Assessed Values	Single-Family Parcels	Single-Family Average Value	Residential Tax Rate	Average Single-Family Tax Bill
Ashland	\$2,258,966,961	3,776	\$419,948	16.70	\$7,013
Dover	\$2,351,519,338	1,806	\$1,113,148	13.05	\$14,527
Framingham	\$6,447,434,328	13,454	\$367,321	16.71	\$6,138
Holliston	\$2,102,147,508	4,402	\$436,914	18.52	\$8,092
Medfield	\$2,391,021,224	3,523	\$623,374	16.89	\$10,529
Millis	\$977,361,759	2,169	\$359,864	18.42	\$6,629
Natick	\$6,001,827,900	8,517	\$529,607	13.49	\$7,144
Sherborn	\$1,114,133,970	1,321	\$753,929	20.46	\$15,425

Source: DOR Municipal Databank, FY17

In FY17, the total assessed value of all residential parcels in Sherborn was \$1,114,133,970, and the average value of a single-family home was \$753,929, the second highest value (behind Dover) of the communities surrounding Sherborn. Sherborn has the highest residential tax rate and highest average single-family tax bill of the eight regional communities. Residential assessed values in Sherborn fluctuated between 2006-2016 with a decline of five percent (2012-2013) and increase of three percent (2014-2015). Total values are lower in 2017 than 2006.

TABLE 5.4: SHERBORN RESIDENTIAL VALUE BY YEAR

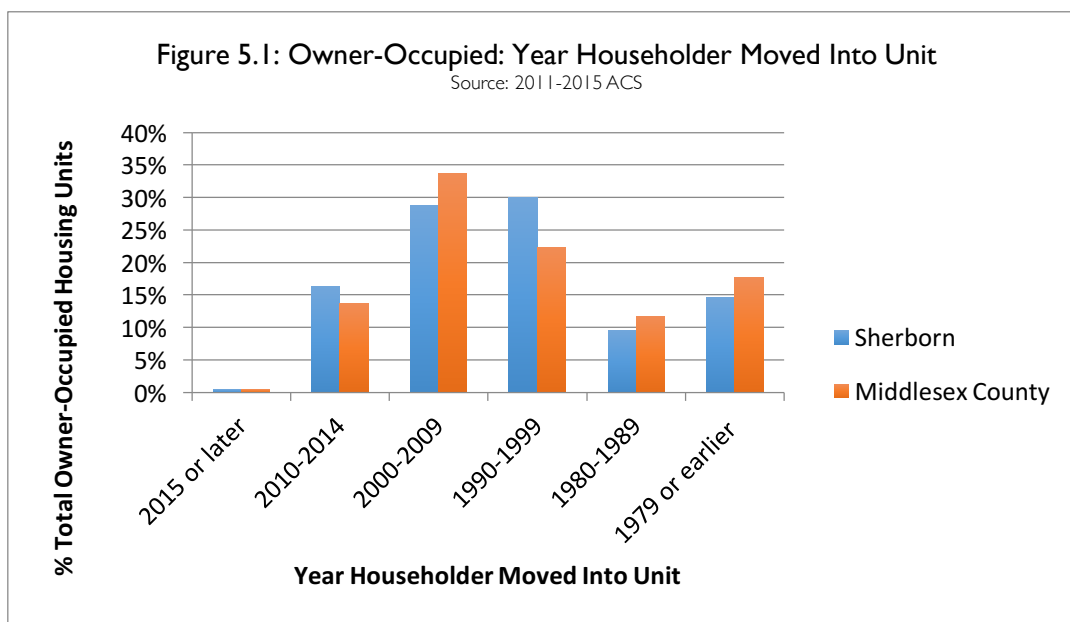
Year	Residential Assessed Values	% Change
2006	\$1,135,253,545	-
2007	\$1,155,743,310	2%
2008	\$1,131,638,969	-2%
2009	\$1,107,234,110	-2%
2010	\$1,064,520,747	-4%
2011	\$1,087,926,150	2%
2012	\$1,088,870,695	0%
2013	\$1,032,074,310	-5%
2014	\$1,036,704,830	0%
2015	\$1,069,189,410	3%
2016	\$1,086,183,540	2%
2017	\$1,114,133,970	3%

Source: DOR Municipal Databank, Property Tax Trend Report

## OWNER-OCCUPIED HOUSING CHARACTERISTICS

Sherborn has a total of 1,343 owner-occupied housing units (note: associated figures for household tenure is reported in the demographics chapter, however this section is regarding units rather than households). Figure 5.1 shows that the majority (close to 60 percent) moved to their current homes between 1990 and 2009. This

trend is somewhat comparable to the county, where approximately 60 percent moved into their current homes during this timeframe.



## HOMEOWNER HOUSEHOLDS BY AGE

The distribution of homeowners by age in Sherborn somewhat mirrors that of Middlesex County across all age cohorts (Table 5.6). One slight difference is the segment of homeowners between 45 and 54 years. The most recent ACS estimates show this age group makes up approximately 37 percent of the total owner-occupied units in Sherborn, and only 25 percent countywide.<sup>20</sup>

TABLE 5.6: HOMEOWNERS BY AGE 2015

Householder Age	Sherborn Owners		Middlesex County Owners	
	Estimate	%	Estimate	%
15 to 24 years	0	0%	935	0%
25 to 34 years	41	3%	27,812	8%
35 to 44 years	196	15%	64,656	18%
45 to 54 years	451	34%	91,174	25%
55 to 59 years	206	15%	45,186	12%
60 to 64 years	135	10%	39,161	11%
65 to 74 years	174	13%	53,515	15%
75 to 84 years	94	7%	30,203	8%
85 years and over	46	3%	12,859	4%
<b>Total</b>	<b>1,343</b>	<b>100.0%</b>	<b>365,501</b>	<b>100.0%</b>
Source: 2011-15 American Community Survey; Note: ACS data based on samples and are subject to variability				

<sup>20</sup> US Bureau of the Census, American Community Survey 2011-15, "B25007: Tenure by Age of Householder".

## OWNER-OCCUPIED HOUSING VALUES

Home values in Sherborn are quite high, with approximately 85 percent of owner-occupied housing units valued at more than \$500,000, compared to about 35 percent countywide. The availability of modestly priced housing in good condition is limited in Sherborn. Only 11 percent of owner-occupied housing units in Sherborn are valued between \$200,000 and \$499,999; 57 percent of owner-occupied housing units county wide are valued in this price range.<sup>21</sup>

TABLE 5.8: OWNER-OCCUPIED HOME VALUES 2015

Home Value	Sherborn		Middlesex County	
	Estimate	%	Estimate	%
Less than \$50,000	27	2%	7,431	2%
\$50,000 to \$99,999	0	0%	3,618	1%
\$100,000 to \$149,999	0	0%	6,869	2%
\$150,000 to \$199,999	8	1%	13,757	4%
\$200,000 to \$299,999	19	1%	55,062	15%
\$300,000 to \$499,999	153	11%	151,290	41%
\$500,000 to \$999,999	872	65%	105,254	29%
\$1,000,000 or more	264	20%	22,220	6%
<b>Total</b>	<b>1,343</b>	<b>100%</b>	<b>365,501</b>	<b>100%</b>
Source: 2011-15 American Community Survey; Note: ACS data based on samples and are subject to variability				

## FOR-SALE MARKET

### Housing Sales

Between January and November of 2016, the median sale price for a residential property in Sherborn was \$740,000, according to the Warren Group. The median sale price for a detached single-family home in 2016 was \$746,000; no data were provided for the median sale price of a condominium in Sherborn during this period.<sup>22</sup> Table 5.9 further presents the median sale prices for residential units (detached single-family, condominium and all residential units) in Sherborn between 2010 and 2016. From 2011 to 2012, the median sale price for all residential units decreased by about 14 percent; however, from 2012 to 2013, it increased by 20 percent. From 2015 to 2016, the median sale price for all residential units in Sherborn decreased by approximately 0.5 percent.

<sup>21</sup> US Bureau of the Census, American Community Survey 2011-15, "B25057: Value".

<sup>22</sup> Warren Group, 2016

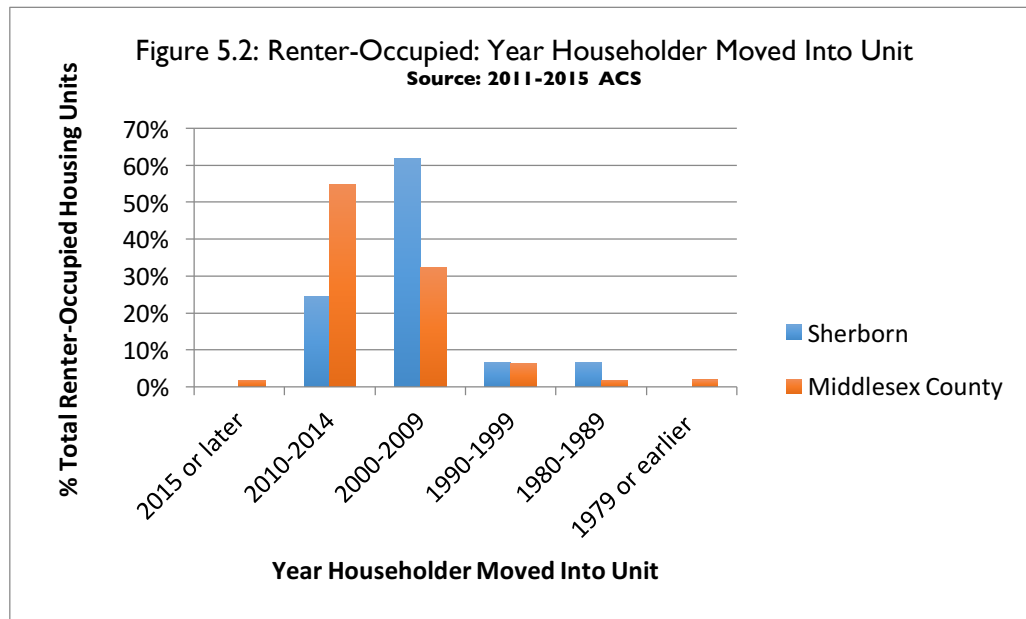
TABLE 5.9: SHERBORN MEDIAN SALES PRICE BY CALENDAR YEAR 2010-2016

Year	Detached Single-Family		Condominium		All	
	Median Sales Price	% Change	Median Sales Price	% Change	Median Sales Price	% Change
2010	\$717,000	-	\$212,500	-	\$710,000	-
2011	\$725,000	1.12%	\$215,000	1.18%	\$700,250	-1.37%
2012	\$660,000	-8.97%	-	-	\$600,000	-14.32%
2013	\$745,000	12.88%	\$243,750	-	\$720,000	20.00%
2014	\$745,000	0.00%	\$256,300	5.15%	\$741,000	2.92%
2015	\$743,452	-0.21%	-	-	\$743,452	0.33%
2016 (Jan. - Nov.)	\$746,000	0.34%	-	-	\$740,000	-0.46%

Source: Warren Group, 2016

## RENTER-OCCUPIED HOUSING CHARACTERISTICS

According to the most recent ACS estimates, there are a total of 118 renter households in Sherborn. Approximately 86 percent moved in to their current unit sometime after 2000, somewhat comparable to the 90 percent of renter households countywide that moved into their current unit during this time period. However, the percentage of renter households who moved into their present home between 2000 and 2009 was much higher (62 percent) than that of renter households in the county overall (33 percent).<sup>23</sup>



### Renter Households by Age

The distribution of renters by age in Sherborn differs greatly from that of Middlesex County. While 60 percent of renter households in Sherborn are sixty-five years and over, only 16 percent of renter households county-

<sup>23</sup> US Bureau of the Census, American Community Survey 2011-2015, "B25038: Tenure by Year Householder Moved into Unit".

wide are in this age group. 32 percent of renter households in Sherborn are between twenty-five and fifty-four years old, while 67 percent of renter households countywide are in this age group.<sup>24</sup>

TABLE 5.11: RENTERS BY AGE 2015

Householder Age	Sherborn Renters		Middlesex County Renters	
	Estimate	%	Estimate	%
15 to 24 years	0	0%	13,286	6%
25 to 34 years	0	0%	66,804	30%
35 to 44 years	10	9%	42,873	20%
45 to 54 years	28	24%	37,021	17%
55 to 59 years	0	0%	14,039	6%
60 to 64 years	9	8%	11,370	5%
65 to 74 years	25	21%	16,273	7%
75 to 84 years	37	31%	10,989	5%
85 years and over	9	8%	7,486	3%
<b>Total</b>	<b>118</b>	<b>100.0%</b>	<b>220,141</b>	<b>100.0%</b>
Source: 2011-15 American Community Survey; Note: ACS data based on samples and are subject to variability				

## Rental Housing Costs

Table 5.13 shows that 73 percent of renter households in Sherborn pay between \$500 and \$1,999 in monthly gross rent (rent and basic utilities), which almost mirrors the county's percentage of 74 percent for this monthly gross rent distribution. In Sherborn, 27 percent of renter households pay between \$2,000 and \$2,499 in monthly gross rent, compared to only 9 percent in the county.

TABLE 5.13: RENTER HOUSEHOLDS BY GROSS RENT PER MONTH 2015

Gross Rent	Sherborn		Middlesex County	
	Estimate	%	Estimate	%
Less than \$500	0	0%	22,883	11%
\$500 to \$999	29	29%	36,106	17%
\$1,000 to \$1,499	35	35%	70,752	33%
\$1,500 to \$1,999	10	10%	51,507	24%
\$2,000 to \$2,499	27	27%	19,642	9%
\$2,500 to \$2,999	0	0%	7,960	4%
\$3,000 or more	0	0%	5,246	3%
<b>Total Occupied Units Paying Rent</b>	<b>101</b>	<b>100.0%</b>	<b>214,096</b>	<b>100.0%</b>
Source: 2011-15 American Community Survey; Note: ACS data based on samples and are subject to variability				

<sup>24</sup> US Bureau of the Census, American Community Survey 2011-15, "B25007: Tenure by Age of Householder".



# Housing Affordability in Sherborn

## HOUSING COST BURDEN

As defined by the U.S. Department of Housing and Urban Development, “housing cost burden” occurs when low- or moderate-income households have to spend more than 30 percent of their monthly income on housing costs. For homeowners, “housing costs” include the monthly cost of a mortgage payment, property taxes, and insurance. For renters, it means monthly rent plus basic utilities (heat, electricity, hot water, and cooking fuel). When housing costs exceed 50 percent of a low- or moderate-income household’s monthly income, the household meets the definition of “severely cost burdened.”

The 2009-2013 ACS estimates indicate that 26 percent (250) of Sherborn’s total households have income at or below 80 percent of the Area Median Income (AMI). The FY2013 US Department of Housing and Urban Development (HUD) income limits for a household of four with up to 80 percent AMI was \$67,350 and for a household of one person was \$47,150. The FY2017 HUD income limits for a household of four with up to 80 percent AMI is \$78,150 and for a household of one person is \$54,750. At the time of this writing, FY2017 was the most recent income limits published by HUD. Current income limits for households of one to eight persons are available at [www.huduser.gov](http://www.huduser.gov).

About 46 percent (80) of Sherborn’s renter households have income below 80 percent AMI and nine percent (170) of owners have income below 80 percent AMI.

TABLE 5.14: HOUSEHOLD INCOME DISTRIBUTION OVERVIEW

Household Income	Homeowners	% Homeowners	Renters	% Renters	Total	% Total
Very Low Income (less than or equal to 30% AMI / ≤30%)	35	3%	30	17%	65	5%
Low Income (greater than 30%, but less than or equal to 50% AMI / >30% to ≤50%)	55	4%	15	9%	70	5%
Moderate Income (greater than 50%, but less than or equal to 80% AMI / >50% to ≤80%)	80	6%	35	20%	115	8%
Median Income (greater than 80%, but less than or equal to 100% AMI / >80% to ≤100%)	45	4%	10	6%	55	4%
Income greater than 100% AMI (>100%)	1,035	82%	85	49%	1,120	79%
Total	1,255	100%	175	100%	1,425	100%

Source: HUD, Comprehensive Housing Affordability Strategy (CHAS), based on 2009-2013 ACS Estimates

About 355 (28 percent) of total owner households and 63 (36 percent) of renter households in Sherborn pay more than 30 percent of their income toward housing. An analysis of cost burden by housing type indicates that about 20 percent of all elderly family households and almost 30 percent of elderly non-family households (including elders living alone) are cost burdened. About 24 percent of small family households and 18 percent of large family households are cost burdened.<sup>25</sup>

<sup>25</sup> Source for cost burden by household type: MAPC’s housing.ma, accessed 1/30/17. Note, the margins of error for these figures are high.

TABLE 5.15: COST BURDENED OWNERS AND RENTERS IN SHERBORN

	Owner		Renter		Total	
	Est.	%	Est.	%	Est.	%
Cost Burden <=30%	890	71%	89	51%	979	69%
Cost Burden >30% to <=50%	215	17%	44	25%	259	18%
Cost Burden >50%	140	11%	19	11%	159	11%
Cost Burden not available	10	1%	10	6%	20	1%
<b>Total</b>	<b>1,255</b>	<b>100%</b>	<b>175</b>	<b>100%</b>	<b>1,425</b>	<b>100%</b>

Source: HUD, Comprehensive Housing Affordability Strategy (CHAS), based on 2009-2013 ACS Estimates

Of the estimated 250 households in Sherborn with income at or below 80 percent AMI, there are 189 households (76 percent) that have housing cost burdens and 120 (48 percent) with severe housing cost burdens.

TABLE 5.16 TOTAL COST BURDENED HOUSEHOLDS BY INCOME

Income by Cost Burden (Owners and Renters)	Cost burden > 30%	Cost burden > 50%	Total
Household Income <= 30% HAMFI	40	40	65
Household Income >30% to <=50% HAMFI	69	65	70
Household Income >50% to <=80% HAMFI	80	15	115
Household Income >80% to <=100% HAMFI	30	15	55
Household Income >100% HAMFI	205	30	1120
<b>Total</b>	<b>424</b>	<b>165</b>	<b>1425</b>

\*HAMFI is defined as the HUD Area Median Family Income calculated by the federal Department of Housing and Urban Development to determine Fair Market Rents. HAMFI will not necessarily be the same as other calculations of median incomes due to a series of adjustments that are made.  
Source: HUD, Comprehensive Housing Affordability Strategy (CHAS), based on 2009-2013 ACS Estimates

Of the 80 renters in Sherborn with income at or below 80 percent AMI, about 48 households (60 percent) are cost burdened. Of the 170 owners in Sherborn with income at or below 80 percent AMI, about 135 households (80 percent) are cost burdened. All renters and owners with income below 30 percent AMI are severely cost burdened. In addition, all owners with income between 30 and 50 percent AMI are severely cost burdened.

TABLE 5.17 TOTAL COST BURDENED RENTER HOUSEHOLDS BY INCOME

Income by Cost Burden (Renters only)	Cost burden > 30%	Cost burden > 50%	Total
Household Income <= 30% HAMFI*	15	15	30
Household Income >30% to <=50% HAMFI	8	4	15
Household Income >50% to <=80% HAMFI	25	0	35
Household Income >80% to <=100% HAMFI	0	0	10
Household Income >100% HAMFI	15	0	85
<b>Total</b>	<b>63</b>	<b>19</b>	<b>175</b>

\*HAMFI is defined as the HUD Area Median Family Income calculated by the federal Department of Housing and Urban Development to determine Fair Market Rents. HAMFI will not necessarily be the same as other calculations of median incomes due to a series of adjustments that are made.  
Source: HUD, Comprehensive Housing Affordability Strategy (CHAS), based on 2009-2013 ACS Estimates

TABLE 5.18 TOTAL COST BURDENED OWNER HOUSEHOLDS BY INCOME

Income by Cost Burden (Owners only)	Cost burden > 30%	Cost burden > 50%	Total
Household Income <= 30% HAMFI	25	25	35
Household Income >30% to <=50% HAMFI	55	55	55
Household Income >50% to <=80% HAMFI	55	15	80
Household Income >80% to <=100% HAMFI	30	15	45
Household Income >100% HAMFI	190	30	1035
<b>Total</b>	<b>355</b>	<b>140</b>	<b>1255</b>
<p>HAMFI is defined as the HUD Area Median Family Income calculated by the federal Department of Housing and Urban Development to determine Fair Market Rents. HAMFI will not necessarily be the same as other calculations of median incomes due to a series of adjustments that are made.</p> <p>Source: HUD, Comprehensive Housing Affordability Strategy (CHAS), based on 2009-2013 ACS Estimates</p>			

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## Affordable Housing Characteristics

For the purposes of this analysis, affordable housing is housing that is restricted to individuals and families with qualifying incomes and asset levels, and who receive some manner of assistance to bring down the cost of owning or renting the unit, usually in the form of a government subsidy, or results from zoning relief to a housing developer in exchange for the income-restricted unit(s). Affordable housing can be public or private. Public housing is managed by a public housing authority, established by state law to provide affordable housing for low-income households. Private income-restricted housing is owned and operated by for-profit and non-profit owners who receive subsidies in exchange for renting to low- and moderate-income households.

The Massachusetts Department of Housing and Community Development (DHCD) maintains a Subsidized Housing Inventory (SHI) that lists all affordable housing units that are reserved for households with incomes at or below eighty percent of the area median income (AMI) under long-term legally binding agreements and are subject to affirmative marketing requirements. The SHI also includes group homes, which are residences licensed by or operated by the Department of Mental Health or the Department of Developmental Services for persons with disabilities or mental health issues.

The SHI is the state's official list for tracking a municipality's percentage of affordable housing under M.G.L. Chapter 40B (C.40B). This state law allows developers of projects that include a sufficient level of subsidized low/moderate-income housing to apply for a Comprehensive Permit from the local Zoning Boards of Appeals (ZBA). Through a Comprehensive Permit, which is a single application to the ZBA, developers of qualified housing developments can request waivers of local bylaws. The ZBA may approve the application as submitted, approve with appropriate conditions or changes, or it can deny the application. However, if the ZBA denies that application or imposes uneconomic conditions, the developer may appeal the decision to the Housing Appeals Committee if less than 10 percent of year-round housing units in a town consist of income-restricted or subsidized housing for low-moderate income households. The law was enacted in 1969 to address the shortage of affordable housing statewide by reducing barriers created by local building permit approval processes, local zoning, and other restrictions.

### SHERBORN AFFORDABLE UNITS

As of December 2016, there were 34 units in Sherborn listed on the SHI.

TABLE 5.19: SHERBORN AFFORDABLE UNITS BY TYPE

SHI	
Rental	24
Group Home	0
Ownership	10
Total	34

Leland Farms on Leland Drive has ten affordable ownership units with an affordability term of 99 years (or until the town's Ground Lease terminates) per the Regulatory Agreement.<sup>26</sup> Woodhaven on Village Way has 24 rental units with a perpetual affordability restriction.

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<sup>26</sup> Leland Farms affordability term reported here is based on email communication from Margaux LeClair, MA Department of Housing and Community Development, and Gino Carlucci, Town Planner, on May 5, 2017.

## PIPELINE

According to DHCD's tracker of application notices and project eligibility letter notices, there is one pending project: Whitney Farm. Whitney Farm, consisting of 48 units including 12 affordable, was originally applied for in 2001. Although the project was stalled for an extended period, recent construction activity has resumed on the site.

In addition, four other 40B proposals are pending:

- 59 North Main Village: Per the site approval application to MassHousing, dated November 2, 2016, the proposed development includes twelve ownership single-family units (3\three affordable); On February 21, 2017, MassHousing issued a Project Eligibility Letter and the ZBA has opened the public hearing.
- Coolidge Crossing at 104 Coolidge Street – proposal consists of 88 townhouse style units on 20.2-acre site, including 22 affordable units. The ZBA has opened the public hearing on the Coolidge Crossing project. (Note, a proposal, The Villages at Sherborn, for an abutting property from the same developer has been withdrawn.)
- The Fields at 247A Washington Street (Route 16) – Zoning Board of Appeals approved with conditions the comprehensive permit application on May 3, 2016 for 32 home ownership units on 17.55 acres. The developer is appealing the decision to the Housing Appeals Committee due to the ZBA's conditions of approval. Appeal is pending.

# CHAPTER 5

## DEVELOPMENT CONSTRAINTS ANALYSIS

This chapter was compiled and written by the Sherborn Housing Partnership. The focus of this chapter is to detail Sherborn's development constraints and limitations. This chapter also includes analysis of environmental constraints, infrastructure capacity, and regulatory barriers. The information presented in this section is largely based on other planning documents, including the 2007 Open Space and Recreation Plan. Note, Appendix F provides maps of water-related and non-water related development constraints, which were prepared by the town planner.

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### Summary

Sherborn residents have expressed a strong desire to develop affordable housing that is consistent with the rural character of Sherborn and supports the social vitality, economic diversity and environmental health of the town. To meet the state mandate of 10% affordable housing, Sherborn must address a number of environmental, economic, infrastructure, and regulatory issues. Chief among these are protecting natural resources, especially the water supply; addressing the high cost of land, high taxes, and lack of funds for town-initiated housing projects; developing zoning regulations permitting mixed use, multifamily, and cluster developments and encouraging low-impact developments; and establishing a housing trust or authority to propose specific housing projects, develop town-wide support, and negotiate, coordinate and manage projects.

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### Environmental Constraints

Specific environmental elements that impact housing development include landscape character, geology, soils, topography, groundwater, freshwater ponds and lakes, plant communities and wetlands, rare and endangered species, critical habitat, scenic views, and hazardous waste sites, as further described below.

#### LANDSCAPE CHARACTER

Since its settlement in the 1600s Sherborn has been a farming community. Most of Sherborn's soils were untillable, so dairy farming and apple production became the main types of farming. Apple trees grew well in the rocky soils, and by the 1890s one of the town's cider mills was advertised as the largest refined cider mill in the world. Over forty thousand barrels of cider were pressed in one season. "Champagne" cider from the mills of Sherborn was shipped as far away as Europe and Texas. A railroad line was built into town to supply the large volume of apples needed. To this day, the Dowse family continues to own and farm Dowse Apple Orchards as they have done for more than 230 years.

Agricultural activities and open space are allowable in all of Sherborn's districts. Existing farm types include produce farms and commercial stables. Both non-profit and for-profit farms are allowed. Large commercial stables and commercial greenhouse-nurseries are also permissible in all districts, however neither of these types of operations are extant in Sherborn. Under special uses relating to agriculture, horticulture, and floriculture, such activities may take place with few restrictions on parcels over five acres in size. These uses may also take place on parcels smaller than five acres with a minimum setback of one hundred feet from any lot line for related buildings.

Farm Pond, a major feature in Sherborn, is a "Great Pond," a legal term established by the Great and General Court in 1649 to indicate a natural pond greater than 10 acres in size that reserved fishing rights for all settlers. This statute remains in effect today; "Great Ponds," and therefore Farm Pond, must remain open to the public for fishing. Historically, Farm Pond was also an important source for ice cutting. In the late 1800s, up to 3,000

tons of ice per year were cut and stored in several double-walled barns insulated with sawdust. Farm Pond was a water source for the Medfield State Hospital; for that reason, Sherborn's Selectmen were given unusual powers to regulate access to it. Motorboats are not allowed. Today, Farm Pond remains a favored recreation spot where residents swim, fish, sail, and skate.

## GEOLOGY

Sherborn's surficial geologic features were formed by glacial deposition and erosion from the advance and retreat of continental ice sheets. The forms of glacial deposition are: glacial till; sand, gravel, and alluvium (sand and gravel mixed with silt and/or clay); and silt and clay. Glacial erosion exposed bedrock at numerous locations throughout town.

## SOILS

Sherborn's soils comprise about sixty soil classifications that can be grouped into four major categories, based on the type of glacial deposits that form them: glacial till; well drained soils over glacial outwash deposits of alluvium, and sand and gravel; wetland soils over lake bottom deposits; excessively drained soils over silt and clay deposits.

Glacial till soils are generally situated on uplands, have hardpan fifteen to forty inches below the surface, and have high water tables during the wet seasons. Well drained glacial outwash soils vary in thickness and depth to ground water. Some soil types within this group are suitable for septic systems. Wetland soils (hydric soils) are found along rivers, streams, intermittent streams and marshes, and are wet for all or most of the year.

Much of Sherborn has constrained soils, with seasonal high water table, hardpan, and bedrock close to the surface making the siting of septic systems difficult.

In evaluating suitability of soils for septic systems, a previous study has classified 60 percent of Sherborn soils as constrained (40 percent) or highly constrained (20 percent), with the remaining 40 percent classified as moderately constrained (10 percent), partially constrained (10 percent), or unconstrained (20 percent).

This finding is consistent with that of the Soil Survey of Middlesex County, which identifies three major soil map units within Sherborn. All three soil map units present "severe limitations for onsite sewage disposal." Some of Sherborn's soils are suitable for agriculture – approximately half of Sherborn's agricultural soils lie over the town aquifer recharge areas where conventional crop treatments could pollute the groundwater supplies.

## TOPOGRAPHY

Sherborn lies in the Coastal Lowlands of Middlesex County, generally characterized by rolling hills. The lowest areas in town are in the southeast along the Charles River, with a low point at about elevation 108 feet above sea level where the river exits Sherborn and enters Natick. The highest point in town is Brush Hill in the north central part of town, at about elevation 396 feet above sea level. Steep slopes (greater than 20 percent) are scattered throughout town at hillsides, including Bare Hill, Nason Hill, Pine Hill, Perry Hill, Peter's Hill, and Rocky Narrows. Other areas of town have slopes between 15 percent and 20 percent. Parcels with slopes greater than 15 percent present challenges to development, including storm water management and erosion, transport of sediments and pollutants, and increased risk of septic system failure.

## WATERSHED

Sherborn drains surface water to two watersheds. About 18 percent of the land area to the north lies in the Sudbury River watershed. The remaining 82 percent of the land area lies in the Charles River watershed. The Dopping, Bogastow, Dirty Meadow, Sewall, and Indian Brooks flow to the south and east, feeding the Charles River, which forms the southeast boundary of the town as it flows northeast to Boston Harbor. Beaver Dam



Brook and Course Brook flow north, eventually feeding the Sudbury River, which is part of the Sudbury/Assabet/Concord River watershed. Protection of all water resources in Sherborn will help to minimize pollution of these two watersheds.

## AQUIFER

Sherborn relies entirely on private wells to supply its water and regards protection of groundwater as one of its highest priorities. A 1989 study of Sherborn aquifers found that the town's northern and western regions were likely to support wells yielding between 50 and 250 gallons of water per minute (low to moderate yield). According to the study, most of Sherborn serves as an aquifer recharge area, with wetlands and sand and gravel deposits contributing the most recharge, and glacial till contributing less recharge. A 2003 study found that two areas in town have high yielding (more than 300 gallons per minute) aquifers: the southeastern area of town along the Charles River, and the area around Farm Pond. The town center area does not have high yield aquifers.

The 2007 Open Space and Recreation Plan identified several risks of contamination of groundwater as follows:

- The Waste Transfer Station just across the Holliston border;
- The area near the Framingham border where a fire station, Framingham's highway department garage, and the Adesa vehicle auction facility are located.
- The Cadillac Paint site (a brownfield site) just over the Ashland border
- Framingham's General Chemical site (a hazardous waste cleanup site) on Leland Street
- Two solid waste facilities at the Natick town line; one in Sherborn, and one in Natick

## SURFACE WATER BODIES

Five ponds and the Charles River are the major surface water bodies in Sherborn. Farm Pond and Little Farm Pond are glacial kettle ponds formed when glaciers receded from the area 10 to 14 thousand years ago.

Farm Pond (125 acres) has at its southwest corner a popular town recreational facility offering swimming, fishing, and boating. Skating is popular during colder winters. The pond measures a maximum depth of sixty feet. No power boats are allowed.

Little Farm Pond (23 acres) has two-thirds of its shoreline protected as part of Massachusetts Audubon Society's Broadmoor Sanctuary. Around Little Farm Pond there are opportunities for hiking, viewing wildlife, boating, and fishing.

Ward Parks Pond, a small pond managed by Sherborn's Conservation Commission, is in the center of town and provides limited habitat for wildlife. Water quality has been an issue due to adjacent land uses.

Lower and Upper Mill Ponds are located on the Leland Reservation, managed by Sherborn's Conservation Commission. These two ponds were once home to saw mills. Today, the two ponds and associated wetlands offer excellent wildlife habitat, as well as recreational uses such as hiking and ice-skating in the winter.

The Charles River forms Sherborn's southeast boundary with the neighboring towns of Medfield and Dover. Much of the Sherborn bank of the river is protected as public land, Trustees of Reservations land, or by conservation restriction on private property. This stretch of the river offers excellent canoeing and kayaking both upstream and downstream. Two locations allow access to the river: the Dover side of the Farm Road/Bridge Street Road bridge, and along Route 27 South on the Medfield side.

## WATER QUALITY

Wetlands and ledge throughout town have limited the placement of private septic systems and, therefore, private wells, which must be a safe distance apart to maintain the quality of Sherborn's water supply.

The assessment and management of water quality for surface water bodies in Sherborn and all of Massachusetts is a complex program involving federal, state and local agencies, including the Environmental Protection Agency (EPA), Massachusetts Department of Environmental Protection (MassDEP), the Charles River Watershed Association (CRWA), and others.

MassDEP conducts a periodic assessment of major surface water bodies under 314 CMR: Division of Water Pollution Control. In the latest edition – 2013 – the Charles River is designated as a Class B inland water body. Class B waters “are designated as a habitat for fish, other aquatic life, and wildlife, including for their reproduction, migration, growth and other critical functions, and for primary and secondary contact recreation,” i.e., swimming and boating. Class B water is suitable as a source of public water supply with appropriate treatment, shall be suitable for irrigation and other agricultural uses, and shall have consistently good aesthetic value. For comparison, Class A waters are designated as a source of public water supply without treatment, provide “excellent” wildlife habitat and have “excellent” aesthetic value. Therefore, this assessment rates the water quality of the Charles River around Sherborn as good, but not excellent.

A 2011 report that provided the basis for the environmental classification of the stretch of the Charles that borders Sherborn states in part, the following:

- “The Upper/Middle Charles River does not currently meet Massachusetts Water Quality Standards, and is impaired by excessive nutrients, organic enrichment/low dissolved oxygen and noxious aquatic plants, among other impairments.”

The excessive nutrients result in “excessive algae blooms and large extents of aquatic plant growth.” Elevated phosphorus levels are of particular concern, as phosphorus is considered “the controlling nutrient in many surface waters.” The report establishes Total Maximum Daily Loads (TMDLs) to be allowed for phosphorus from various sources, as well as estimates of current phosphorus loads from these sources. For Sherborn, the major phosphorus source is storm water runoff. Good storm water management practices that can help reduce phosphorus levels in the Charles River include increased infiltration (minimizing impervious cover), proper design of storm water drainage systems, managing construction site runoff, and proper management of fertilizer application.

MassDEP together with the Executive Office of Energy and Environmental Affairs and the Bureau of Water Resources also periodically publishes an Integrated List of Waters, which shows the “Condition of Massachusetts’ Waters” pursuant to sections of the Clean Water Act. The latest list, published in 2014, shows the following information about three of Sherborn's surface water bodies:

- Farm Pond is classified as a Category 2 water, “attaining some uses; other uses not assessed.” Farm Pond has attained use in the aesthetic category, but was not assessed for aquatic life, swimming or boating.
- Little Farm Pond is classified as a Category 3 water, no uses assessed.
- The Charles River from Outlet Populatic Pond, Norfolk/Medway to South Natick Dam is classified as a Category 5 water, i.e., “requiring a Total Maximum Daily Load”<sup>27</sup> for dissolved oxygen saturation,

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<sup>27</sup> A TMDL, or Total Maximum Daily Load, is a calculation of the maximum amount of a pollutant that a water body can receive and still meet its water quality standards.

excess algal growth, nutrient/eutrophication biological indicators, dissolved oxygen, phosphorus, and turbidity.

## FLOOD HAZARD AREAS

Areas in Sherborn that are subject to flooding lie along the Charles River and in locations on several of its brooks. Sherborn rarely has been subject to flooding, due to adequate flood storage capacity in its floodplains and wetlands. Areas within the 100-year floodplain are regulated and require the protection of flood storage capacity.

Principal floodplains within Sherborn lie along the Charles River, the lower portion of Sewall Brook, Dopping Brook, and the tributaries of Boggastow Brook. Serious effects from floods have been limited in Sherborn due to the ability of floodplains and wetland areas to store flood waters.

Flooding results when the headwaters no longer have the ability to retain water due to an increase in impervious surfaces, lack of vegetative cover or loss of flood storage area. Preserving the flood preventive aspects of the Charles River headwaters – its floodplains and wetlands – is vitally important to protecting the lower portions of the river from flooding. The Army Corps of Engineers owns or has easements on 250 acres in Sherborn along Dopping and Sewall Brooks. These lands, which have no dams or other flood control structures, are maintained as part of a program to protect important natural flood storage areas in the headwater region of the Charles River.

Areas within the 100-year floodplain fall under the jurisdiction of the Sherborn Conservation Commission. Development in the floodplain is not prohibited, but under the Massachusetts Wetlands Protection Act building in the floodplain requires creating a flood storage area that fully compensates for flood storage replaced by development.

## WETLANDS

Approximately 20 percent of Sherborn's land is occupied by wetlands, which are protected resource areas in Massachusetts. Wetlands are valuable to both humans and other species and fulfill a variety of important functions. Sherborn's wetland protection by-law allows the Town to control activities that may have a significant effect on wetland values. The protected values include public and private water supply, groundwater, flood control, erosion control, storm damage, water pollution, and wildlife and wildlife habitat.

Wetlands are found throughout Sherborn in low-lying areas and areas of poor drainage. Sherborn's wetlands are important as animal habitat, for flood control, for filtering out pollutants, for some types of recreation, and as legally protected open space. Sherborn's wetlands are emergent wetlands, forested wetlands, scrub-shrub wetlands, river corridors, and vernal pools.

Major wetland areas in Sherborn include Broadmoor (owned by the Massachusetts Audubon Society), the Charles River, Dirty Meadow Brook, Dopping Brook, and Sewall Brook.

The Army Corps of Engineers has purchased wetland areas surrounding the headwaters of Sewall Brook to protect flood storage capacities in this brook basin and reduce the potential effects of flooding along the Charles River. These areas provide additional benefits as important habitats for wetland wildlife.

Sherborn's wetlands roughly form a series of bands that follow the northwest-to-southeast trend of valleys and ridges in the town. Prior to the passage of the Massachusetts Wetland Protection Act some wetlands were filled for development purposes. Now wetlands are protected open space. Under the Wetlands Protection Act, wetland areas and the 100-foot buffer zones that exist around most types of wetlands are the jurisdiction of the Massachusetts Department of Environmental Protection, which is represented locally by the regulatory

work of the town Conservation Commission. In 1981 Sherborn added a Wetlands Protection By-Law to its General By-Laws, and in 1994 regulations were promulgated by the Conservation Commission to implement and enforce the Wetlands By-Law. The most recent substantive revision of those regulations took place early in 2017. The regulations establish that the first fifty feet laterally outward from a wetland boundary is a No-Alteration Zone that carries a rebuttable presumption that any significant alteration to this zone will have significant adverse effects on adjacent wetlands.

Sherborn may have over 100 vernal pools, or isolated wetlands, which fill with water only during the wettest times of the year. Vernal pools are critical habitat for frogs and other amphibians. Sherborn has nine state-certified vernal pools and dozens of locations that are potential vernal pools.

While some towns have adopted by-laws that require new building lots to contain a certain percentage of upland, Sherborn currently has no such requirement.

## VERNAL POOLS

The importance of vernal pools to the conservation of amphibian and invertebrate wildlife, as well as biodiversity more generally across the state, has also been recognized in recent years. Vernal pools that have been officially “certified” by the Massachusetts Division of Fisheries and Wildlife (DFW) receive important protection under several state wetland protection regulations. Since the certification program relies on the public to collect documentation, it has led to a considerable increase in public awareness and participation in the protection of these important wildlife habitats, as well as the state’s other wetland resources, by individuals, community groups, and non-government organizations.<sup>28</sup>

Two types of vernal pool designation are used in the MassGIS data. The first, referenced above, are those that are certified at the state level and protected under several state laws and regulations. To gain certification, Burne (2001) states that, “Evidence of amphibians or invertebrates using a vernal pool, in addition to proof that the pool does not support an established, reproducing fish population must be presented to the Natural Heritage & Endangered Species Program for certification to obtain official standing as a certified vernal pool under state wetlands protection laws” (p.13). Again, there are currently 9 certified vernal pools in Sherborn.

Certified vernal pools are protected under the Massachusetts Wetlands Protection Act regulations (310 CMR 10.00), Surface Water Quality Standards (314 CMR 4.00), subsurface sewage disposal regulations (Title 5: 310 CMR 15.000) and the Forest Cutting Practices Act regulations (304 CMR 11.00). Burne also states, “Many communities across the Commonwealth have also enacted additional protection through local bylaws (see Appendix A) that can significantly increase the protection of vernal pools beyond that which state regulations provide” (p. 14). While Sherborn doesn’t currently offer any added protection to certified or potential vernal pools, the town’s Conservation Commission is still in the process of revising their regulations and will assess local interests as they relate to vernal pools to see if any added protections are warranted.

The second type of designation in MassGIS data is a “potential vernal pool”, i.e. a likely vernal pool that has not been formally certified by the state. These are not protected by any state regulations. They have been identified in MassGIS through an extensive effort by NHESP at aerial photo interpretation identifying certain tell-tale characteristics.

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<sup>28</sup> Excerpted from Massachusetts Aerial Photo Survey of Potential Vernal Pools published in 2001 By Natural Heritage and Endangered Species Program ecologist Matthew R. Burne

## VEGETATION

Sherborn's variety of open fields, woodland, and wetland vegetation constitute approximately 80 percent of the town and offer great recreational opportunities, as well as ideal habitats for wildlife, water filtration and recharge, and atmospheric cooling. Many open lands are reverting to forest. Rare plant species have been identified in Sherborn and there have been sightings of plant species of special concern. Invasive exotics are proliferating and threaten to dominate some of Sherborn's landscapes.

By 1850, Sherborn's land area was almost entirely deforested. Today approximately 5,500 acres are forested, representing over half of Sherborn's 10,328 acres. Non-forested wetlands, including the areas of Farm Pond and Little Farm Pond, equal approximately 1,000 acres. Open fields, meadows and farmland constitute approximately 1,700 acres.

The upland areas of the town are primarily red oak, white oak, and white pine forests, yet also include hemlock, red maple, black birch, pignut hickory, white ash, American beech, American hop hornbeam, and black oak. The understory vegetation includes witch hazel, American chestnut, lowbush blueberries, flowering dogwood, and poison ivy. The larger trees of the upland forests offer excellent canopy for woodland wildlife and relatively clear understories through which the town's network of trails can easily be enjoyed.

Sherborn's once prolific marsh hay meadows and cranberry bogs have for the most part become forested wetlands that now support such trees as red maple, hemlock, elm, swamp oak, willow, and black gum. The drier sandy edges of these low wet areas may also support white pine. The shrubs highbush blueberry, sweet pepperbush, speckled alder, swamp azalea, and spicebush are prevalent in the understories.

Open wetland area edges are vegetated with buttonbush, poison sumac, winterberry, and rose. The emergent wetland species include cattail, cowslip, and sedge rush. Purple loosestrife and phragmites, invasive exotics, are found in Sherborn's wetlands.

Sherborn's forests are fragmented by fields, roads, and developed areas. The town's inactive pasturelands are reverting to forest through the natural process of plant community succession. Common juniper, eastern red cedar, meadow sweet, grasses, wildflowers, and lowbush blueberry grow in the open areas, while the edge plant communities include poplar, gray birch, dogwoods, raspberry, and blackberry. These edge regions provide an excellent source of food and cover for wildlife. Where protected open fields are valued for their scenic qualities, maintenance to keep these areas open will need to be ongoing. The town has contracted with private farmers to hay some town fields in an ongoing attempt to maintain them as fields.

There are eleven rare plant species known to be native to Sherborn that are included in the Massachusetts Division of Fisheries and Wildlife National Heritage & Endangered Species Program: Andrews' bottle gentian (*Gentiana andrewsii*), adder's-tongue fern (*Ophioglossum vulgatum*), Britton's violet (*Viola Brittoniana*), bush's sedge (*Carex bushii*), dwarf bulrush (*Lipocarpa micrantha*), lion's foot or cankerweed (*Prenanthes serpentina*), long's bulrush (*Scirpus longii*), purple milkweed (*Asclepias purpurascens*), resupinate bladderwort (*Utricularia resupinata*), river bulrush (*Scirpus fluviatilis*), and wild senna (*Cassia hebecarpa*).

It is apparent that some of Sherborn's native vegetation is adversely affected by the invasive plant species such as purple loosestrife and bittersweet. If unchecked, invasive exotic species out-compete native vegetation, reduce habitat, and dominate the landscape. Once invasive plants are established, on-going maintenance is required for their control. The following is an up-to-date list of invasive exotic species identified in Sherborn: multi-flora rose (*Rosa multiflora*), common buckthorn (*Rhamnus cathartica*), Japanese knotweed (*Polygonum cuspidatum*), Phragmites, purple loosestrife (*Lythrum salicaria*), garden loosestrife (*Lysimachia vulgaris*), Japanese honeysuckle (*Lonicera japonica*), yellow iris (*Iris pseudacorus* L.), winged euonymus (*Euonymus alatus*), leafy spurge (*Euphorbia esula*), autumn olive (*Elaeagnus umbellata*), Oriental bittersweet (*Celastrus orbiculatus*), Norway maple (*Acer platanoides*), and goutweed (*Aegopodium* L.).



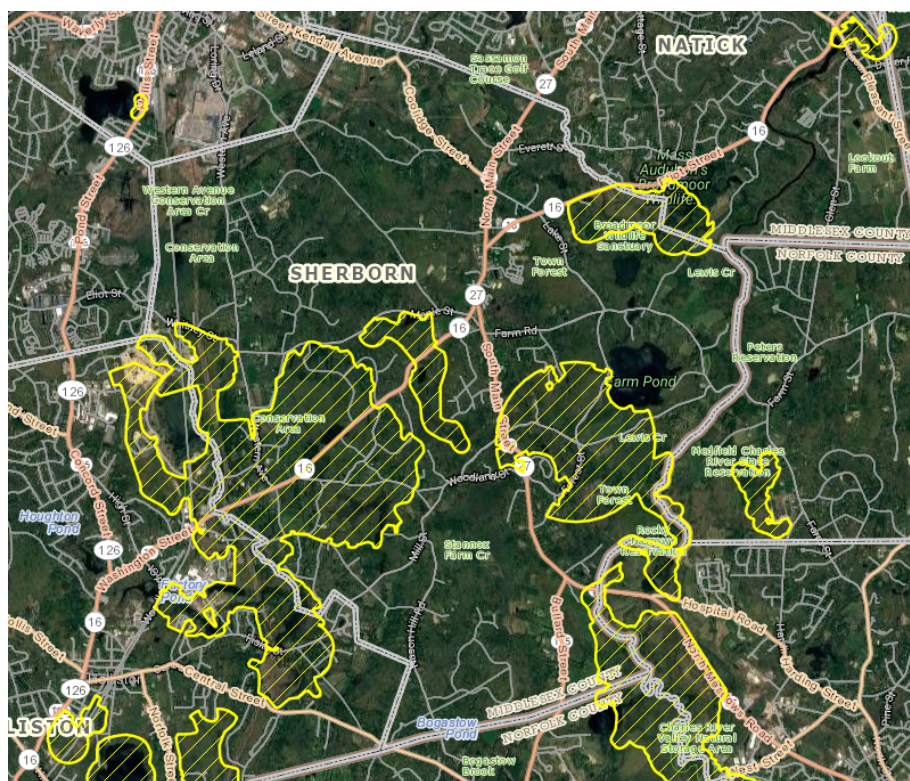
Poison ivy is problematic when it conflicts with human recreational use of town trails. Appropriate control measures will need to be implemented to allow continued use of these outdoor resources. There is currently discussion in town of CM&D potentially using pesticides, but no specific or clear policy has yet been formed. Where poison ivy is a problem on trails, re-routing them may be an option since poison ivy berries are a major source of winter food for thirty-five or more species of birds and mammals.

## RARE AND ENDANGERED SPECIES

Rare and endangered species in Massachusetts come under the purview of the Natural Heritage and Endangered Species Program (NHESP). In the state, two habitat types have been designated to cover the habitat used by these species. "Priority Habitat" is habitat based on the known geographical extent of habitat for all state-listed rare species, both plants and animals, and is codified under the Massachusetts Endangered Species Act (MESA). "Estimated Habitats" are a subset of the Priority Habitats, and are based on the geographical extent of habitat of state-listed rare wetlands wildlife and is codified under the Wetlands Protection Act, which does not protect plants. Each habitat area has particular species associated with it.

Projects that propose actions within Priority Habitat of Rare Species and Estimated Habitat of Rare Wetland Species must file with NHESP for review and approval. Those actions include, but are not limited to, soil or vegetation alteration, grading, excavation, construction of buildings or structures, conversion of agricultural land, dock installation, dredging, pond vegetation management, beach nourishment, bank stabilization, and construction or removal of dams.

The map below shows crosshatched areas in yellow that are Priority or Estimated Habitat, which comprises approximately 20 percent of the town's area.



Source: OLIVER: MassGIS's Online Mapping Tool. [http://maps.massgis.state.ma.us/map\\_ol/oliver.php](http://maps.massgis.state.ma.us/map_ol/oliver.php)

NHESP provides the following list of rare and endangered species documented in Sherborn:

Taxonomic Group	Scientific Name	Common Name	MESA Status*	Most Recent Observation
Vascular Plant	<i>Scirpus longii</i>	Long's Bulrush	T	2008
Amphibian	<i>Ambystoma laterale</i>	Blue-spotted Salamander	SC	2007
Reptile	<i>Terrapene carolina</i>	Eastern Box Turtle	SC	2007
Reptile	<i>Emydoidea blandingii</i>	Blanding's Turtle	T	2005
Reptile	<i>Glyptemys insculpta</i>	Wood Turtle	SC	1986
Butterfly/Moth	<i>Satyrus favonius</i>	Oak Hairstreak	SC	1964
Beetle	<i>Cicindela purpurea</i>	Cow Path Tiger Beetle	SC	1950
Vascular Plant	<i>Nabalus serpentarius</i>	Lion's Foot	E	1946
Beetle	<i>Cicindela duodecimguttata</i>	Twelve-spotted Tiger Beetle	SC	1935
Vascular Plant	<i>Asclepias purpurascens</i>	Purple Milkweed	E	1917
Vascular Plant	<i>Carex bushii</i>	Bush's Sedge	E	1913
Vascular Plant	<i>Gentiana andrewsii</i>	Andrews' Bottle Gentian	E	1911
Vascular Plant	<i>Lipocarpha micrantha</i>	Dwarf Bulrush	T	1911
Vascular Plant	<i>Senna hebecarpa</i>	Wild Senna	E	1911
Vascular Plant	<i>Utricularia resupinata</i>	Resupinate Bladderwort	T	1911
Beetle	<i>Cicindela rufiventris hentzii</i>	Eastern Red-bellied Tiger Beetle	T	1894
Vascular Plant	<i>Ophioglossum pusillum</i>	Adder's-tongue Fern	T	1876
Mussel	<i>Alasmidonta varicosa</i>	Brook Floater (Swollen Wedgemussel)	E	Historic
Amphibian	<i>Ambystoma jeffersonianum</i>	Jefferson Salamander	SC	Historic
Butterfly/Moth	<i>Metarranthia apicaria</i>	Barrens Metarranthia	E	Historic

\*SC = Special Concern, T = Threatened, E = Endangered

## SCENIC RESOURCES

Sherborn is a small New England town, whose early history as a farming community has shaped, and continues to guide, its later development as a residential "commuter community" of Boston. This blend of rural and residential is seen in the town's natural and built environments. Sherborn's rural heritage is everywhere apparent: winding "scenic roads", stone walls, open fields, woods, wetlands, farms, stables, orchards, and historic cemeteries. The town center, which extends along North and South Main Street and upper Washington Street, includes a small business district, public buildings and facilities, a municipal campus, three churches, and an historic district. Private residences are interspersed throughout the town center; most are historic homes. Many 18th and 19th century homes still stand along the oldest roads in Sherborn, and the 20th century homes built in Sherborn's residential neighborhoods are predominantly traditional capes, colonials, or farmhouses.

Because the town is entirely dependent on private wells and septic systems, house lots are large, which also preserves the town's rural character. Over half the town is undeveloped open space: there is town-owned forest, conservation land, and outdoor recreation areas; privately owned forest, agricultural and recreational lands established through tax abatements (MGL chapters 61, 61A and 61B0), as well as privately owned land with easements or conservation restrictions; and large tracts of land are owned and conserved by non-profits – the Trustees of Reservation, the Massachusetts Audubon Society, and the Rural Land Foundation. Whether publicly held or privately owned, almost all the open space in Sherborn is publicly accessible: there are extensive networks of walking and riding trails throughout Sherborn's woods, conservation lands, and recreation areas, including a section of the Bay Circuit Trail (a 200-mile recreational trail and greenway through eastern Massachusetts). Equally important, the open space in Sherborn provides abundant wildlife habitats, and it is easy to observe a wide variety of birds and animals. The Charles River forms the eastern boundary of Sherborn; together with Farm Pond, a "great pond" of Massachusetts and Little Farm Pond, these three bodies of water are perhaps the most treasured scenic resources of Sherborn, offering ever-changing waterscapes and countless opportunities for recreation and reflection. The overall character of Sherborn is that of an oasis in the midst of rapid development.



## HAZARDOUS WASTE SITES

According to the MA Department of Environmental Protection online database, Sherborn has had twenty-two reportable releases of hazardous materials at nineteen locations. Remediation work has occurred at all sites: at fifteen sites remediation is complete and no further action is required; at two sites (26 North Main Street and 21 South Main Street) remediation is complete and monitoring continues; at one site (intersection of Farm and Forest Streets) remediation is complete with an activity and use limitation; and at one site (237 Washington Street) remediation work is ongoing.

There are hazardous waste sites in neighboring towns that may impact Sherborn, among them: General Chemical Corporation on Leland Street and ADESA Boston on Western Avenue in Framingham; Cadillac Paint and Varnish Company on Eliot Street in Ashland; several sites on Washington Street and vicinity in Holliston; the Recycling Center on West Street in Natick and Medfield State Hospital on Hospital Road in Medfield.

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## Infrastructure Capacity

### SCHOOLS

The Sherborn public schools are among the highest-ranked in the Commonwealth and are the primary reason many move to Sherborn. The public schools, both local (Pine Hill Elementary School, located in Sherborn), and regional (Dover-Sherborn Regional Middle and High Schools, located in Dover), receive strong support from all residents because of the widely shared commitment to education, and because the excellence of the public schools supports residential property values.

The Pine Hill Elementary School was built in 1957 and was most recently renovated and enlarged in 1999. Further expansion at the current site is not deemed feasible. Pine Hill's current enrollment<sup>29</sup> is 430 students; in the past ten years, the peak enrollment was 470 students (2007-9); in the next five years, enrollment is projected<sup>30</sup> to increase by 20 students. Pine Hill's official occupancy capacity is 550.

The Dover-Sherborn Regional Schools and campus were extensively renovated and expanded through a building project from 2001- 2006; the Middle School's current enrollment is 527 and the High School's is 652, for a total of 1179; in the past ten years, the peak enrollment was 550 at the Middle School (2010-11) and 664 at the High School (2015-16); in the next five years, enrollments at the Middle and High Schools are projected to decrease slightly. This year 44.2 percent of the regional schools' students are from Sherborn. The current regional school buildings can accommodate moderate increases in enrollments; the regional school campus is spacious and could accommodate further facilities development.

### TRANSPORTATION

Sherborn is centered along well-trafficked regional roads and is near interstate highways and the commuter rail system, although no commuter rail stations are in Sherborn.

#### Roadways

Sherborn has three different levels of roadways: regional, farm-country roads, and newer subdivision streets. Routes 16 (east-west) and 27 (north-south) both travel through downtown converging into one very congested street in the center of town and then splitting into their respective routes again just south of the town center. route 115 joins route 27 just south of town and routes traffic into Millis and Route 109. route 16 routes traffic east to Natick and Wellesley and to route 128-95 and west to Holliston and Milford and route

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<sup>29</sup> All enrollment numbers and projections are taken from the Dover Sherborn Administration's 2016 October enrollment reports and five year projections.

<sup>30</sup> Sherborn school enrollment projections are not accurately predicted by the most commonly used metrics, as the most significant factor affecting school age population is real estate sales, specifically the turn-over of "empty-nests" to families with school-age children.

495. Route 27 routes traffic southbound to Medfield, route 109, and eventually I-95 and northbound to Natick and route 9. Sherborn's farm-country roads are very narrow, winding, and usually lined with shade trees and stone walls. Subdivision streets were created beginning in the early 1960s and are found primarily off the farm-country roads. Many of these subdivision streets end in cul-de-sacs. The majority of Sherborn's roadway system is governed by the town. Routes 16 and 27 are under Mass Highway jurisdiction.

Sherborn experiences peak hour traffic very similar to its small neighboring towns of Medfield and Dover. All of these towns have one to two primary thoroughfares that take traffic to and from the Massachusetts Turnpike (I-90), Route 9, Route 495, Route 128, or to downtown Boston. Three major congestions occur all focused on Route 27 and Route 16 with minor congestion at three other locations. There is only one full signal that controls the convergence of Routes 16 and 27 just north of the town center, a stop sign controlling the divergence of these 2 routes just south of the town center, and only a stop sign controlling traffic at Route 115 and Route 27. Adding further to the morning peak hour congestion is the town's elementary school that sits at the Route 16 - Route 27 convergence on the north side. The town has performed various traffic studies over the years to address the peak hour traffic volume without any further action. Three other farm-country roads help feed the traffic into Route 16-27 intersection: Farm Road, the only direct road from Dover to Sherborn, feeds into Route 27, south of town; Coolidge Street, intersecting with Route 27 north of town, feeds traffic to and from West Natick-Framingham and is the key road leading to the Mass Pike; and Maple Street which feeds traffic indirectly from Ashland onto Route 16 just south of town.

Finally, there are some small tributary streets that create shortcuts from Route 16 and Route 27 including the most troublesome, which is Sanger Street. Sanger intersects Route 16 only about 100 yards from the southern junction of Route 16 and Route 27, at the intersection of Route 16 and Maple Street, and also at Route 27 at another bisecting street, Sawin, and only a hundred feet from Farm Rd. creating a bottleneck. It also passes the town's Library parking access and access to other high frequency parking-access areas creating a safety hazard.

MassHighway's last formal traffic counts are dated and sporadic. 2004 was the last formal traffic count showing average daily traffic of 26,300 vehicles. By means of comparison, traffic counts taken on Route 9 in Natick and Framingham in 2005 indicated an ADT of over 50,000 to 60,000 in the Framingham-Natick corridor. On Route 109 in Medfield a 2001 count east of Route 27 totaled 28,500 and almost 16,000 ADT east of Route 115.

High traffic counts can be indicative of traffic congestion. On the other hand, high traffic counts are attractive to most retail businesses because they increase both visibility and the pool of potential customers.

## Rail

There is one active rail line in town. This is a freight line that runs a maximum four times per day traveling just along the backside of the town center crossing at grade just south of the town's center. The line is owned by the Mass DOT and is leased long term to CSX Transportation, who in turn has sublet the line for freight to Mass Coastal, which operates on Cape Cod and Southeastern MA. Longer term, the state could allow periodic passenger trains from the Framingham line to run to Gillette Stadium in Foxborough for sports and concert events.

There is, however, no plan for a new commuter train. In the medium term, the state has invested in upgrading the railroad track's weight and speed capacities, but has given no definitive reason for the upgrade except for the MBTA commuter rail segment running from Walpole to Gillette. One possible reason might be to provide transportation capacity from the Fall River and New Bedford shipping ports to the main national east-west bound Framingham freight line. This could lead to increased rail traffic passing through the town.

The closest commuter rail station is at West Natick and Natick Center.

## Bus

There is no public transportation available in Sherborn. In 2009-2010, there was a pilot program tested for a downtown stop operating twice per day by the MetroWest Regional Transit Authority ("MWRTA")<sup>31</sup> shuttle van service. This test showed insufficient ridership and was discontinued after 6 months. Citizens can access MWRTA in Natick, by driving just a couple miles north of Sherborn.

## Walking and Bicycling

Sherborn only has a partial sidewalk system in the town center located on one side of the Rte. 27-Rte.16 main street and a few segments nearby. There have been periodic discussions for building a more complete system including a Planning Board discussion in 2012, but as of this report date no concrete plans exist. In addition, additional funding would most likely pressure the town's already high-pressure fiscal situation. There are no bike paths or lanes in the town center or leading to nearby neighborhoods. The town's farm-country roads are relatively bike friendly on the weekends due to low traffic, but they have no shoulders for increased safety.

According to Walk Score ([www.walkscore.com](http://www.walkscore.com)), Sherborn has a walk score of 26, which indicates that it is a very car-dependent community where errands require a car.

## DRINKING WATER SUPPLY

The residents of Sherborn obtain their water supply solely from ground water through on-site privately owned wells. There is no public water supply system operated either by the town or by any private water company. Older homes generally depend on shallow "point" or driven wells, which were installed in shallow sands, gravels, and glacial tills overlying bedrock. Well depths of point wells are generally up to twenty feet. Shallow drilled wells are typically thirty to seventy-five feet in depth (Town of Sherborn 1996). Yield and quality of the shallow wells depend on the type of strata and land use around the wells.

On-site water supply wells associated with new construction are usually drilled into fractured bedrock. The yield and well-depth are quite variable depending on the extent and intensity of the fractures, or by the chance of a particular well intersecting a strongly fractured rock or a large open fracture system. Well depths typically vary from 150 feet to 500 feet or more. Well yields may be as low as one-half gallon per minute or as high as twenty gallons per minute or greater (Town of Sherborn 1996). The town's private on-site wells are fed in most cases by recharge via the water in overlying soils and also from a regional groundwater flow system of unknown source or extent.

The Sherborn Board of Health regulations require all new wells provide a minimum yield of two gallons per minute at the well head. Water quality testing is required at the time of drilling for a series of bacterial, chemical, and physical characteristics which include thirty-five volatile organic compounds and two heavy metals. Water quality must comply with U.S. Environmental Protection Agency and State standards for all parameters measured, or otherwise be treated to obtain approved water quality. If volatile organics or excessive heavy metals or sodium are detected, an instrument must be recorded at the Registry of Deeds, which runs with the property and provides notice to any future owners of the water quality characteristics and the need for proper operation and maintenance of a treatment system. Ongoing testing of water quality for private wells is not required.

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<sup>31</sup> The MWRTA was formed in 2006 by the state legislature to help serve the public transportation needs of the 32-town corridor known as the I-495/MetroWest corridor and is the successor system to the LIFT Public Transit System and the MBTA Ride. The MWRTA is funded by Federal and State Agencies, local assessments and fare box recovery. The MWRTA is responsible for fixed bus routes and para-transit routes, which mimic the normal bus routes, but provide a smaller bus with lift capability for the disabled and physically challenged individual. Para-transit transportation is a shared ride, origin to destination service required by the Americans with Disabilities Act (ADA). The system primarily serves Natick, Southborough, Framingham, Marlborough, and Hudson with general schedules that reach many stops in these towns along with specialized schedules geared to employees of Boston Scientific and Mathworks. It makes peak hour stops at the commuter rail stations in Framingham, Natick, and Southborough. It also runs 3 time per week serving the Longwood area hospitals and the V.A. hospitals.

Due to the fragile nature of the water supply, the town's upper soils must be protected against contamination from septic systems, surface run-off, road salt, and hazardous chemicals. Present septic system standards, existing zoning, and local Board of Health regulations currently provide mechanisms for sufficient treatment and dilution of wastewater contaminants, and for the separation of water supply and contaminated waters in the residential areas. The more densely developed business and commercial area is not as protected, and some wells in the town's business center do not meet drinking water standards, requiring the use of bottled water or the installation of treatment systems.

The town has seven wells that are classified as "non-transient, non-community" public water supplies and are, therefore, periodically monitored by the state. These include individual wells at the Town Offices and Pine Hill Elementary School, three wells at the Woodhaven elderly housing complex, and one well at Leland Farms affordable housing complex. Because of the scarcity of high yield aquifers, the entire town must be considered a water supply area and protected from contaminants.

At the same time, the possibility that a municipal water system may be considered in the long term obliges the town to take steps to protect the high yield aquifers on its northeastern, eastern, and southeastern borders, the moderate yielding aquifers on its northwestern and western boundaries, and in the central area and Farm Pond.

## WASTEWATER TREATMENT

Currently Sherborn does not have a municipal sewer system. The town has embarked on a study to determine the feasibility and cost of municipal water and sewer utilities in the town center. It is looking to determine if any benefits arising from such a system outweigh the costs. The lack of a municipal system constrains existing businesses such as restaurants and medical practices from adding additional seating capacity or restrooms. In addition, this problem might be preventing additional businesses from locating in the town center.

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## Regulatory Barriers

The Sherborn zoning bylaw promotes low density housing development with minimal provisions for encouraging diversity of housing options or affordable housing, except the multidwellings provisions. The Sherborn zoning bylaw has five residential districts (RA, RB, RC, EA, and M) and two business districts (B-P and B-G).

- Residence A (RA) has one-acre minimum lot size
- Residence B (RB) has two-acre minimum lot size
- Residence C (RC) has three-acre minimum lot size
- Residence Elderly Affordable (EA) was added in 1991 and allows affordable as well as age-restricted housing
- Residence Multifamily (M) was added in 1979, amended 2008 (Note: This district was intended to allow age-restricted housing only; however, no land has been zoned as this district. Subsequently, the town created the EA district which has since been merged with this Multifamily district.)

Most of the town's land is zoned RA, RB, and RC with small pockets of business districts and EA and M. The following description of Sherborn's zoning districts is excerpted from the 2004 Sherborn Community Development Plan:

The town's zoning districts reflect the varying character of its natural resources and pattern of development. The zoning districts divide the town into four major districts and a variety of smaller commercial and mixed use zones. With minor exceptions, single family zoning predominates.

The Main Street Town Center zone (RA) encompasses North and South Main Street (Route 27) and a portion of Route 16, with a minimum lot size of one acre. Within the Town Center are two commercial districts, General Business and Business Professional, as well as a Residence EA (Elderly and Affordable), the latter permitting 4 units per acre density.

The sector to the east of the Town Center is the Farm Pond Scenic Zone (RC). This is the area of town with the most historic and scenic resources. It is also the locus of the town's major aquifer, and has a minimum lot size of 3 acres.

The Charles River Southern Glacial Till Zone District is located to the west of Route 27 and south of Route 16. In the interests of protecting the DEP Zone II for Medfield, this district also has RC designation, with a minimum lot size of 3 acres.

The fourth residential zoning district is the Western Meadow and Forest Glacial Till zone (RB), which has a minimum lot size of 2 acres.

**Single family** detached dwellings are permitted in all districts as are **accessory apartments**, but only for family members or domestic employees, and rent is prohibited for these units. In addition, the accessory units, which are permitted by special permit, terminate upon sales, transfer, or other change in ownership and are restricted to the lesser of 800 square feet or 30 percent of gross floor area of the dwelling.

**Low or Moderate income apartments** are permitted in all districts as an accessory unit up to the lesser of 1200 square feet or up to 30 percent of gross floor area of the dwelling, permitted through a special permit that expires automatically in two years and may be extended for two year increments. The bylaw appears to anticipate that these units will count on the SHI as "Local Initiative Unit"; however, these units would not appear to be eligible under current provisions for this program, now called a "Local Action Unit" program, because the special permit expiration would not provide long-term affordability (at least 30 years), and there is no requirement or procedures to assure the units are affirmatively and fairly-marketed.

The bylaw permits **renting rooms** for up to four unrelated persons.

**Multidwellings** (a building with two or more units) are permitted by special permit in the EA districts for elderly households (at least one member of the household is 55 years of age or older) or for affordable units with at least 25 percent of units restricted as affordable and meeting the requirements to be included on the SHI. The purpose of the EA district is to provide elderly housing and/or affordable housing and to allow greater flexibility in land use planning.

There are two small areas designated as an EA district – one is in the northernmost section of town near the Framingham line, and the other is near the town center. Lots must have at least six acres to be rezoned for EA district and must be within one mile from the intersection of Main and Washington Streets and at least 25 percent of the property is in the B-G or B-P district.

Density requirements limit the EA district to no more than four units per acre and no more than eight dwelling units in one building. The provisions also restrict the unit size to no more than three bedrooms. The Planning Board may waive the eight-unit maximum per building with respect to the requirements for ADA and handicapped access if the building is "harmonious and appropriate for the particular location and consistent with the architectural traditions of the Town."

**Open Space Special Permit:** Per Section 4.5 of the bylaw, the town allows cluster subdivisions to preserve open space through a special permit as an alternative to conventional subdivisions. Eligible properties must be at least four times the minimum lot area for a single-family house and at least six acres. The bylaw provides

certain flexibility to vary dimensional requirements; however front yard setbacks must be at least 30 feet, have at least 100 foot offsets from principal buildings on adjacent lots, have at least 50 feet of frontage, and lots must have a minimum of one acre. There are no density bonuses offered for public benefits and no incentives offered for inclusion of affordable units.

**Planned Unit Development (PUD):** PUD's are permitted by special permit to provide an alternative to traditional business development in the Town Center or providing other public benefits through greater flexibility in site design and mix of uses. Front yard setbacks may be reduced to 20 feet or to equal a pre-existing nonconforming building on the lot, and side and rear setbacks may be reduced to 30 feet. There are no provisions or incentives offered for inclusion of affordable units.

**Assisted Living Facility:** The bylaw permits assisted living facilities in the Business G District and EA districts for which Town Meeting Preliminary Development Plan Approval has been granted. This provision was added in 1998 and amended in 2013.

## HISTORIC DISTRICTS

Sherborn has one Local Historic District – Sherborn Center Local Historic District – that is bounded by North Main, South Main, and Washington Streets and consists of fifteen properties. The Town established this district in 1983, and the Sherborn Historic District Commission administers the district under Section 8 of the Zoning bylaw. Towns may establish local historic districts to protect historic resources. Property owners must submit any exterior changes that are visible from a public way, park, or body of water to a local district commission for approval. A variety of exterior features are often exempt such as air conditioning units, storm doors, storm windows, paint color, and temporary structures. The decision on which features are exempt from review depends on the specifics of the local bylaw.

In addition, the town has two National Register Districts (The Sherborn Center Historic District and the Edwards Plain-Dowse's Corner Historic District). National Register Districts do not restrict private use or changes to properties but do provide rehabilitation tax incentives for owners of income-producing properties and provide limited protection from adverse effects of federal and state projects.

## LOCAL WETLANDS BYLAW

The Town of Sherborn has a local wetlands protection bylaw (Chapter 17) and associated regulations that are more protective of the 100-foot buffer zone than state regulations and require varying levels of permitting depending on the extent of work in this zone and wetland resource impacts. Nevertheless, the local regulations do provide exemptions for minor activities.

## CHAPTER 6

# IMPLEMENTATION CAPACITY & RESOURCES

Sherborn's capacity and resources for implementation of affordable housing initiatives is extremely limited. The town has not adopted the Community Preservation Act, does not receive any federal Community Development or HOME funds, and does not have a municipal affordable housing trust or similar entity. The primary town entities that can provide implementation for housing initiatives are the Sherborn Housing Partnership Committee, Board of Selectmen, Town Planner, and Planning Board. In addition, the regional planning agency has provided additional capacity for planning initiatives in general and may be an additional resource the town can tap into for help with implementation of housing initiatives.

The Town of Sherborn executive body is a five-member elected Board of Selectmen. The Town is managed by a Town Administrator, who is appointed by the Board of Selectmen. The legislative body is a Town Meeting.

### **Sherborn Housing Partnership**

In 2016, Sherborn reconstituted the Housing Partnership, which had been inactive for several years. The Housing Partnership consists of seven members, appointed by the Board of Selectmen, who are all residents of the town. Most serve on other boards and commissions including the Planning Board and Conservation Commission. The Housing Partnership works closely with the Planning Board on housing policy including providing input for the housing element of the General Plan. The Housing Partnership meets regularly and is actively overseeing the creation of this Housing Production Plan. Earlier in its history, the Housing Partnership was instrumental in spearheading the Leland Farm local initiative affordable housing development. The Housing Partnership's role is focused on providing information to the community regarding local housing needs and initiatives as well as providing leadership to advocate for local adoption of housing policies and allocation of local resources to support housing initiatives. The Housing Partnership will oversee implementation of this Housing Production Plan.

### **Sherborn Planning Board**

The Planning Board consists of five members who are elected to three-year terms and an associate member who is appointed by the Town Moderator for a two-year term. The Board reviews and approves applications for permits as required by the Town's bylaws, reviews and approves subdivisions and developments, and conducts site plan reviews. From time to time the Planning Board proposes and amends zoning bylaws for Town Meeting approval. The Planning Board is leading the town's effort to prepare an updated General Plan, per MGL c.41A s.81D.

### **Sherborn Town Planner**

The Planning Board is staffed with a part-time town planner. The Town Planner provides technical expertise to town officials and property owners regarding development review, impact, and mitigation, as well as community development policies including affordable housing and economic development.

### **Metropolitan Area Planning Council**

The Metropolitan Area Planning Council (MAPC) is the regional planning agency serving the people who live and work in the 101 cities and towns of Metropolitan Boston. Its mission is to promote smart growth and regional collaboration. Its regional plan, MetroFuture, guides its work as it engages the public in responsible stewardship of the region's future.<sup>32</sup>

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<sup>32</sup> Excerpted from [www.mapc.org](http://www.mapc.org).



Sherborn is part of the SouthWest Advisory Planning Committee, a subregion within the Metropolitan Area comprised of ten communities southwest of Boston. The purpose of the committee is to foster cooperation among the communities, particularly regarding transportation, land use, economic development, housing, historic preservation, water resources, and environmental issues.

MAPC provides technical assistance to help promote regional collaboration, economic development, better land use and zoning, and environmental protection that is funded through the District Local Technical Assistance (DLTA) and Planning for MetroFuture Technical Assistance (PMTA).

# APPENDIX A

## 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>.

# APPENDIX B

## 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.



MASSDEVELOPMENT

#### 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.



# APPENDIX C

## COMPREHENSIVE PERMIT DENIAL & 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).

# APPENDIX D

## SUBSIDIZED HOUSING INVENTORY

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

#### Sherborn

DHCD ID #	Project Name	Address	Type	Total SHI Units	Affordability Expires *	Built w/ Comp. Permit?	Subsidizing Agency
2764	Leland Farms	Leland Drive	Ownership	10	2019 *	No	DHCD
2765	Woodhaven	Village Way	Rental	24	perp	No	DHCD
4454	DDS Group Homes	Confidential		0	N/A	No	DDS
Sherborn Totals				34	Census 2010 Year Round Housing Units		1,479
					Percent Subsidized		2.30%

**\*Per DHCD email of 8/23/18, “ The affordability end date was changed in the SHI database last year from 2019 to 2098\* based on the 1999 HDSP Regulatory Agreement the Town provided, which contains a term of 99 years (\*unless terminated earlier based on termination of the ground lease).**

12/8/2016

Sherborn  
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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.

# APPENDIX E

## SUMMARY OF PUBLIC FORUM RESULTS

### SUMMARY

The purpose of the public forum in Sherborn on March 7, 2017 was to conduct an interactive forum to solicit public opinion on a set of strategies and goals to include in the Housing Production Plan.

- There is a high level of public interest among Sherborn residents in reaching the state's 10 percent goal or the incremental production goals to have greater local control over 40B comprehensive permit proposals.
- The preservation of the community character and natural surroundings is an important consideration when deciding on location of development.
- The public forum yielded mixed results on the development of the town center into a space for housing and retail, with proponents advocating for a more vibrant town center and others doubting the feasibility of an economically vibrant town center in Sherborn.
- The infrastructure of the town—particularly water and sewer infrastructure—and environmental protection is a major concern among residents of Sherborn when it comes to increasing development.

### Strategies

*The four following strategies were generally supported by participants:*

- Foster locally-initiated development, based on successful locally-initiated projects of Woodhaven and Leland developments, by offering town owned or acquired real property to developers, such as Habitat for Humanity or other such non-profit development organizations.
- Foster public-private conservation development initiatives with the Sherborn Rural Land Foundation to acquire land for a combination of permanently open space and development small-scale mixed-income homes.
- Provide density incentives through an inclusionary zoning bylaw that permits development of cottages, duplexes, and small-scale multi-family homes in exchange for a minimum percentage of affordable homes. Bylaw could encourage creation of multifamily homes designed to look like traditional rambling farmhouses.
- Consider adopting Natural Resources Protection Zoning (NRPZ) to encourage moderately sized and priced housing in cluster developments. Bylaw would encourage smaller house lots and/or cluster developments with a greater percentage of conserved open space; enable duplex housing units and possibly small multi-family; and provide density bonus as incentive for inclusion of affordable homes in NRPZ development.

### Development Sites

*The following development sites/areas were identified as meriting further consideration for development by multiple groups in the group discussion period.*

- Coolidge Crossing site
- Cluster Housing in various locations
- Town Center

### WORKSHOP DESIGN

The public forum took place at the Sherborn Community Center at 6:30 pm on March 7, 2017. Roughly seventy-five people attended and a great majority were Sherborn residents. The forum was interactive and informative, including an open house exercise, a presentation, and two group exercises where participants conversed in their individual tables. There were several means for participants to record their feedback

including options for comments and dot voting on the three goals presented and space for comments discussed by the group on each of the eleven strategies presented. The recorded comments are transcribed in the Appendix.

## METHODS

Attendees were given a nametag and a table to sit at upon registration. Seven tables lettered A-G had about 10-12 people at each. Before the presentation there was time for attendees to participate in the open house exercise. This exercise involved a board for comments about the community's housing vision and boards with the three goals for the plan and accompanying boards to record comments on the goals and dot voting on the importance of each goal.

After all attendees were seated, Jennifer Goldson began her presentation. First, a few questions were asked of the crowd, including why they came to the public forum, what relation they had to the town of Sherborn, and how familiar they were with housing concepts. Then, several definitions were run through in the presentation along with the current SHI units in Sherborn. Jennifer answered questions that were brought up by participants in this segment.

In the second half of the presentation, eleven strategies were presented and described to the participants. Then, in the first group exercise, each table was given a copy of the set of the strategies discuss, identify strengths and opportunities, and identify weaknesses and concerns. After thirty minutes of discussion on the strategies, the groups were given a map of Sherborn and the second group exercise worksheet to fill out as a table. The second exercise asked participants to identify sites that merit further consideration for creation of affordable/mixed income homes in the next five years. After the thirty minutes devoted to part 2 of the discussion exercise, Jennifer asked each group for brief comments on the strategies and the sites that they came up with.

## OPEN HOUSE EXERCISE

The open house exercise was open for the first fifteen minutes of the forum and stayed up for the entire night, so participants could revisit if they wished. The three goals proposed each had a board and an accompanying board where participants were asked to vote with dots if they found this goal to be "Very Important", "Somewhat Important", or "Not Important". Also on each board was a space for participants to add comments on post-it notes on the strengths and weaknesses of each goal.

Overall, participants showed the greatest support for Goal 1, with about 90 percent of participants indicating that the goal was very important. About 68 percent indicated Goal 2 was very important and 88 percent for Goal 3.

**Goal 1: Actively manage and guide development of affordable homes in a manner that:**

- d. Maximizes local control
- e. Minimizes adverse impacts
- f. Incrementally achieves the state's 10% goal

**Numerical Goal:** Strive to create an average of seven homes annually that count on the SHI towards the state's 10% goal over the next five years. At this rate of production, the Town of Sherborn will achieve the 10% goal by 2034.

**90 percent said this goal was very important**



Participants were asked to vote with dot stickers on whether this goal was “Very Important”, “Somewhat Important”, or “Not Important”. Out of 50 voters, 45 people (90%) voted “Very Important” on Goal 1. Five people (10%) voted that Goal 1 was “Somewhat Important”, and 0 voters voted that the goal was “Not Important”.

Comments indicated that participants are enthusiastic about the high levels of public interest in this goal and want to see rental housing as part of it. Some concerns are that the goal of 2034 would be moving too slow, and that meeting the goal can likely be done faster than that. One comment urged consideration of the effect that meeting this goal will have on taxes and stated that “we need to meet our minimum requirements without adding more than necessary to the housing stock”.

**Goal 2: Increase the diversity of residential options in Sherborn to address needs of residents of different ages, housing needs, and economic resources while ensuring new homes are sensitive in scale, character, and design with the existing neighborhoods.**

- Increase residential options in Town Center
- Enable more diverse residential options throughout Sherborn

### **68 percent said this goal was very important**

Out of 50 voters, 34 people (68%) voted “Very Important” on Goal 1. Fifteen (30%) voted that Goal 1 was “Somewhat Important”, and 1 voter (2%) voted that the goal was “Not Important”.

Comments on Goal 2 indicated that participants were concerned about the infrastructure of the town, particularly in regards to water. Other concerns were in regards to the desire to maintain the town’s rural character and the fear that town center development may not be realistic when there’s no evidence of maintained retail spaces in Sherborn. One comment suggested that use of current subsidized space (in-law apartments, rental units, etc.) be incentivized.

**Goal 3: Preserve Sherborn’s natural character by ensuring that the location, scale, and design of new homes is consistent with preservation of the Town’s semi-rural atmosphere, scenic open space, natural resources, and environmental health.**

### **88 percent said this goal was very important**

Out of 52 voters, 46 people (88%) voted “Very Important” on Goal 1. Six (12%) voted that Goal 1 was “Somewhat Important”, and 0 people voted that the goal was “Not Important”.

Commenters expressed that this goal is very important to them and that local interest in solving housing problems is very high. One person expressed that the town’s character was the reason they bought and moved here, and they don’t want it taken away. Some concerns were about traffic, environmental health, and the planning of the permanent conservation of open space.

**Envision Sherborn 2027—As far as housing options go, what is great now in Sherborn that should be preserved? What could be better? What’s missing that could help Sherborn continue to thrive?**

Participants left comments on sticky notes with some ideas to answer these questions. Some suggestions for improving Sherborn’s future included better traffic management, the protection of water quality, cluster housing, more diversity, trails and open space preservation, and creating a “real” town center.

## DISCUSSION EXERCISE PART I—STRATEGIES

In the first discussion exercise, each table was given a matrix with the eleven strategies and space to summarize the discussion that their group had. Each proposed strategy and a summary of participant response is written below. A check mark indicates general agreement or support of a strategy, a pencil indicates that the strategy needs revision, and an X mark indicates low or no support for a strategy.



1. *Foster locally-initiated development, based on successful locally-initiated projects of Woodhaven and Leland developments, by offering town owned or acquired real property to developers, such as Habitat for Humanity or other such non-profit development organizations.*

Strengths of this strategy identified by participants included the aspect of local control, the possibility of fostering cluster communities, and the ability to look at past experiences in the town to make decisions. Some weaknesses and concerns identified were the affordability of this strategy, the potential of using town forests or trails for development, the slow nature of the project, and more general concerns about where these projects would take place. In the discussion that took place after this exercise, many tables agreed that this strategy was important because of the aspect of local control.



2. *Support creation of a private local non-profit or municipal housing trust to foster creation of locally-initiated, small scale residential and/or mixed-use development.*

Some strengths that were identified are that the process could move quickly, that it might be easier to get the process moving and things done, and that it would create an autonomous entity to pursue housing goals, thus acting more efficiently. Several groups had concerns about funding and how to raise the money, and other concerns were that the private non-profit or trust may not respond to the wishes of the general public, and that the advantage of having the trust is not clear. One group agreed that a private local nonprofit would be more feasible than the municipal housing trust.



3. *Encourage new homes and mixed-use buildings in the Town Center area with installation of public water and/or sewer infrastructure and/or sewer infrastructure.*

Participants identified some strengths of this strategy in their table discussions, including that it could attract businesses to the area, that many people in the town would like to see a more vibrant town center with both shops and housing, and that this type of change in Sherborn has been discussed for a long time. Concerns with this strategy include the worry about traffic in the area, questions about the cost of having an economic downtown and installing public water, and that the creation of shops in the area may not yield positive results.



4. *Consider proposing special legislation to create local property tax incentives for development of affordable rental units to provide incentives for developers to include 25% affordable units in non-40B housing developments.*

Those who had concerns with this strategy claimed that it may be too difficult to pass, but as long as it can be controlled by community members it could work. Many seemed unclear on the concept, and one group questioned what the incentive would be.



5. *Foster public-private conservation development initiatives with the Sherborn Rural Land Foundation to acquire land for a combination of permanently open space and development small-scale mixed-income homes.*

Proponents of this strategy commented that a strength is that they would gain something in exchange for something that they need, and that it would be need to be done on a case-by-case basis. There were several enthusiastic remarks showing that multiple tables agreed with this strategy.



6. *Provide density incentives through an inclusionary zoning bylaw that permits development of cottages, duplexes, and small-scale multi-family homes in exchange for a minimum percentage of affordable homes. Bylaw could encourage creation of multifamily homes designed to look like traditional rambling farmhouses.*

There were not many direct comments on this strategy, but the tables that did have a chance to discuss it amongst themselves marked that they felt that the town should pursue the strategy over the next five years.



7. *Encourage new homes and mixed-use buildings in the Town Center area through zoning amendments to allow mixed-use and small-scale multi-family (this is tied with prior strategy regarding public water infrastructure).*

Few tables responded to this strategy, and while Table C said no to pursuing the strategy, Table D said “not sure”, stating concerns over the water infrastructure and the negative impacts to existing homeowners and landowners if zoning changes. Table F marked mixed responses within the group, but some favorability when it came to meeting affordable housing obligations.



8. *Amend the EA zoning bylaw to allow a mix of senior (55 and over) and/or affordable housing.*

No tables commented on this strategy.



9. *Review and, where appropriate, update local BOH regulations including consideration to allow shared septic systems to foster appropriate housing options while protecting the long-term health of residents and natural resources.*

Table D agreed that this strategy should not be pursued, and no other table commented on this strategy.



10. *Revise the accessory apartment bylaw to expand housing options. Consider revisions to allow more flexibility and adopt design guidelines to ensure that the single-family character of the property is maintained.*

Table G agreed that this strategy should be pursued, though advocated that transfers of property should be de-incentivized, and Table E stated concerns that the strategy will not help with the SHI and that septic capacity may not be enough.



11. *Consider adopting Natural Resources Protection Zoning (NRPZ) to encourage moderately sized and priced housing in cluster developments. Bylaw would encourage smaller house lots and/or cluster developments with a greater percentage of conserved open space; enable duplex housing units and possibly small multi-family; and provide density bonus as incentive for inclusion of affordable homes in NRPZ development.*

Comments on this strategy showed that several tables agreed that cluster housing was a good idea that should be pursued. Concerns were mostly regarding whether this strategy would change the character of the town and that placement is key. In the discussion after the exercise, several tables mentioned this strategy as one they were enthusiastic about.

## DISCUSSION EXERCISE PART II—DEVELOPMENT SITES/AREAS

This exercise asked participants to work in their tables to identify sites in the town that they believe should be considered for creation of affordable or mixed-income homes. They were asked to record on one sheet the areas of agreement, unresolved issues, and differing perspectives and to describe any concerns they had. They were also asked to think about the sites they had chosen to merit further consideration—what type of development/housing type might be appropriate for the site?

Several sites identified by participants in this section were Kendall Avenue, Coolidge Crossing, Fiske property, the town forest east and uphill from Pine Hill School, Barber reservation, and the town campus southwest of Town Hall.

However, there were several tables that pointed out problems with Coolidge Crossing and others that said no to the locations of Green Lake, Hunting Lane, and the town forest.

While some groups suggested development of cluster housing in the town forest, others warned against using any part of the forest for development. Cluster housing was mentioned favorably in most group discussions. Table A identified several sites suited for cluster housing to be 23 Washington Street abutting the west side of Town Hall, 41 N. Main Street, and a small portion of the Ward Park/ball field site, though members of the same table expressed concern about too much in the town center.

*The following development sites/areas were identified as meriting further consideration for development by multiple groups in the group discussion period.*

- Coolidge Crossing
- Cluster Housing in Town Forest
- Town Center

## ATTACHMENT I: OPEN HOUSE EXERCISE

### Goal I

*Actively manage and guide development of affordable homes in a manner that:*

- a. Maximizes local control*
- b. Minimizes adverse impacts*
- c. Incrementally achieves the state's 10% goal*

Participants were asked to vote with dot stickers on whether this goal was "Very Important", "Somewhat Important", or "Not Important". Out of 50 voters, 45 people (90%) voted "Very Important" on Goal I. Five people (10%) voted that Goal I was "Somewhat Important", and 0 voters voted that the goal was "Not Important".

Comments were divided into two categories: "Strengths and Opportunities" and "Concerns and Weaknesses".

### Strengths and Opportunities

- Public interest seems to be at an all-time high
- Rental key to hitting 10% and minimizing impact to town

### Concerns and Weaknesses

- The town center will not support the traffic that comes with the type of development that is being proposed
- Agree overall with the general goal, but prefer the approach of a large rental complex that will get us to goal and provide breathing room for "what's next?"
- There is sufficient land in Sherborn for additional housing without interrupting (and destroying) existing communities within the town—especially, to accrue to the benefit of developers (local or not)! Residents should not bear the cost to ensure developers make money.
- Still a very low achievement rate. Acceptable/tolerable to the state?
- 2034 is too slow
- Not increasing fast enough. What if there were 7 new two-family rentals added each year?
- Disagree with Item C

- The effect on taxes must be considered. More housing does not put us in a better situation with respect to taxes. We need to meet our minimum requirements without adding more than necessary to the housing stock.

## Goal 2

*Increase the diversity of residential options in Sherborn to address needs of residents of different ages, housing needs, and economic resources while ensuring new homes are sensitive in scale, character, and design with the existing neighborhoods.*

Out of 50 voters, 34 people (68%) voted “Very Important” on Goal 1. Fifteen (30%) voted that Goal 1 was “Somewhat Important”, and 1 voter (2%) voted that the goal was “Not Important”.

### Strengths and Opportunities

- The infrastructure and natural resources must be protected. Putting dense housing in an area w/o sufficient aquifer is a travesty
- Town build and manage rental units
- Incentivize use of current subsidized, assignable space—e.g. in-law apartments, rental units

### Concerns and Weaknesses

- Increasing diversity of housing options will be a challenge if we want to retain the town’s rural character
- Would these add to the affordable #'s?
- Any town center development should be fit for purpose and realistic. Selling the town on “aspirational” stores (market, bakery, etc) in town center when there is no evidence of the ability of Sherborn to attract or sustain such retail. Promised a book store—got a pot shop!

## Goal 3

*Preserve Sherborn’s natural character by ensuring that the location, scale, and design of new homes is consistent with preservation of the Town’s semi-rural atmosphere, scenic open space, natural resources, and environmental health.*

Out of 52 voters, 46 people (88%) voted “Very Important” on Goal 1. Six (12%) voted that Goal 1 was “Somewhat Important”, and 0 people voted that the goal was “Not Important”.

### Strengths and Opportunities

- Local interest in solving housing problems is very high
- This is absolutely important and the reason I bought and moved here. Don’t want it taken away not. I worked HARD to get here.

### Concerns and Weaknesses

- Traffic will always be a problem
- Environmental health, i.e., septic—big concern
- Permanent conservation of open space needs to be planned not opportunistic. Preserving the wrong parcel, even if well intended, could preclude desired development later or force it to a less desirable location

## Envision Sherborn 2027

Let’s think about housing options in Sherborn. What is great now that should be preserved? What could be better? What’s missing that could help Sherborn continue to thrive?

- Better traffic management
- “Flipped Cluster”. Would love to do a cluster that reflects cottage or small units—attracting folks who want to live with smaller ecological footprint.

- Pedestrian access to a real town center
- Water quality/protection—imperative!!
- Preserve open space, rural clear, trails
- Don't ruin what makes town special
- Can we finally get a sidewalk the length of Coolidge St?
- Will we need a traffic light elsewhere?
- Small "one floor living" quality homes (downsizing options)
- CPA established
- Small clusters of affordable near town center
- HPP
- Lots of farms and open space still here
- SRLF w/ BIG endowment
- Town center that is a center not linear
- Better traffic control
- Need more diversity
- Commercial options for farmers
- Volunteerism—it's in the culture
- Open space and trails
- Protect private open space and negotiate sharing and trails
- More diverse housing opportunities
- Water quality is paramount concern in town

## ATTACHMENT II: DISCUSSION EXERCISES

### Part I – Strategies

Table A

Draft Strategies (abbreviated)	Should town pursue this over the next 5 yrs?	Identify Strengths and Opportunities	Identify Concerns and Weaknesses
Foster locally-initiated development		Control # of units Make them rental Can look at experience to act Control—be ready to pay for it Spreads out burden of a few small projects	Poor maintenance Town may not own land or building Lack of town control—safe harbor
Support creation of a private local non-profit or municipal housing trust		Can move quickly Can act and work on other development proposal Private grants Place to put money	Trust advantage not clear Where would fund go?
Encourage new homes and mixed-use buildings in the Town Center (public water and/or sewer infrastructure.)		Could attract businesses A few smaller projects Low impact	Concern on who pays—users or town Fear of expansion Traffic is a nightmare
Consider proposing special legislation to create local property tax incentives			
Foster public-private conservation development initiatives with the Sherborn Rural Land Foundation.			
Provide density incentives through an inclusionary zoning bylaw.			

Encourage new homes and mixed-use buildings in the Town Center area through zoning amendments			
Amend the EA zoning bylaw to allow a mix of senior (55 and over) and/or affordable housing.			
Review and, where appropriate, update local BOH regulations.			
Revise the accessory apartment bylaw to expand housing options.			
Consider adopting Natural Resources Protection Zoning (NRPZ)			

**Table B**

Draft Strategies (abbreviated)	Should town pursue this over the next 5 yrs?	Identify Strengths and Opportunities	Identify Concerns and Weaknesses
Foster locally-initiated development	Yes—7 No—1	Must use prof. builder Good if have land Now on LAC radar Would have to be acquired land Gives us good options	Town land affordable Probably can't afford Against taking town forest or trail Choice of location critical
Support creation of a private local non-profit or municipal housing trust	+/-	Good in aspects	Who manages and makes decision?
Encourage new homes and mixed-use buildings in the Town Center (public water and/or sewer infrastructure.)	Yes—7 No—1	Would like more mixed-use in town center with shops and housing Like more vibrant TC, but limited to current TC Like mixed use development Rental units ideal—more community space	Permission to developer to do bad things to town H2O/Sewers. Would it spread to other parts of town? Cost of water and sewer? Traffic issue?
Consider proposing special legislation to create local property tax incentives			
Foster public-private conservation development initiatives with the Sherborn Rural Land Foundation.	Yes—8	Yes!	
Provide density incentives through an inclusionary zoning bylaw.	Yes—8		
Encourage new homes and mixed-use buildings in the Town Center area through zoning amendments			
Amend the EA zoning bylaw to allow a mix of senior (55 and over) and/or affordable housing.			
Review and, where appropriate, update local BOH regulations.			
Revise the accessory apartment bylaw to expand housing options.			
Consider adopting Natural Resources Protection Zoning (NRPZ)			

**Table C**

Draft Strategies (abbreviated)	Should town pursue this over the next 5 yrs?	Identify Strengths and Opportunities	Identify Concerns and Weaknesses
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Foster locally-initiated development	No	Could do with developer Not likely	Slow process Years Extremely difficult Not good at it Costs higher
Support creation of a private local non-profit or municipal housing trust	No	Costs higher for public	
Encourage new homes and mixed-use buildings in the Town Center (public water and/or sewer infrastructure.)	Yes/No	Walkable downtown with attractive features, desirable Businesses need support	Need collaboration from boards and committees to work Water must be done all at once
Consider proposing special legislation to create local property tax incentives			
Foster public-private conservation development initiatives with the Sherborn Rural Land Foundation.	Yes	Desirable goal	
Provide density incentives through an inclusionary zoning bylaw.	Yes		
Encourage new homes and mixed-use buildings in the Town Center area through zoning amendments	No		
Amend the EA zoning bylaw to allow a mix of senior (55 and over) and/or affordable housing.			
Review and, where appropriate, update local BOH regulations.			
Revise the accessory apartment bylaw to expand housing options.			
Consider adopting Natural Resources Protection Zoning (NRPZ)	Yes	Very Desirable	

**Table D**

<b>Draft Strategies (abbreviated)</b>	<b>Should town pursue this over the next 5 yrs?</b>	<b>Identify Strengths and Opportunities</b>	<b>Identify Concerns and Weaknesses</b>
Foster locally-initiated development	Yes—8	Fosters cluster communities Successful Local Control Most direct route Plenty of Land	"Not in my backyard"
Support creation of a private local non-profit or municipal housing trust	Not sure	May be easier to get things done	Where's the money coming from? May not respond to general public Don't like concentration of power
Encourage new homes and mixed-use buildings in the Town Center (public water and/or sewer infrastructure.)	Some yes's, on the fence	Have been talking about it for a long time	Traffic! Public water vs. sewer? Expensive Customer base not there—many have failed
Consider proposing special legislation to create local property tax incentives			

Foster public-private conservation development initiatives with the Sherborn Rural Land Foundation.			
Provide density incentives through an inclusionary zoning bylaw.			
Encourage new homes and mixed-use buildings in the Town Center area through zoning amendments	Not sure		Needs water/sewer Negative impact to existing home/landowners if zoning changes
Amend the EA zoning bylaw to allow a mix of senior (55 and over) and/or affordable housing.			
Review and, where appropriate, update local BOH regulations.	N		
Revise the accessory apartment bylaw to expand housing options.	Y		
Consider adopting Natural Resources Protection Zoning (NRPZ)			

**Table E**

Draft Strategies (abbreviated)	Should town pursue this over the next 5 yrs?	Identify Strengths and Opportunities	Identify Concerns and Weaknesses
Foster locally-initiated development	Yes—9 at table all agree but not necessarily built by town based on past experience	Maintain beyond initial development Leland farms was good because over 50% affordable This options is appealing because gives most control	After built who maintains? Leland farm took too long to complete—12 years? Will town have appetite to acquire land? Town build may be required to take lowest bid to construct
Support creation of a private local non-profit or municipal housing trust	Perhaps depending on how feasible due to raising funds	Would be nice to have CPA worth revisiting	Concerns about where to get funding
Encourage new homes and mixed-use buildings in the Town Center (public water and/or sewer infrastructure.)	Yes, as long as it's not too expensive Coffee shop and more places. Traffic would get worse in town center		
Consider proposing special legislation to create local property tax incentives	Seems too difficult		
Foster public-private conservation development initiatives with the Sherborn Rural Land Foundation.			
Provide density incentives through an inclusionary zoning bylaw.			
Encourage new homes and mixed-use buildings in the Town Center area through zoning amendments			
Amend the EA zoning bylaw to allow a mix of senior (55 and over) and/or affordable housing.			
Review and, where appropriate, update local BOH regulations.			

Revise the accessory apartment bylaw to expand housing options.	Maybe, seems like a good idea		Doesn't help with SHI Septic capacity might not be enough State regulations not written to accommodate this with septic
Consider adopting Natural Resources Protection Zoning (NRPZ)	Like preservation of open space	Close to neighbors Less yard to maintain Positive if for more moderate priced housing but not used widespread and change character	Shared septic who is responsible for ensuring South of Burlington, VT development identified where it didn't work if surrounded by lots of open space

**Table F**

Draft Strategies (abbreviated)	Should town pursue this over the next 5 yrs?	Identify Strengths and Opportunities	Identify Concerns and Weaknesses
Foster locally-initiated development	Yes	!!—local control, rural land partnership, LAC input, conservation strategies	Land availability Funds availability
Support creation of a private local non-profit or municipal housing trust	Long term but not immediate	General comments: private local non-profit more feasible	Something that bigger towns do Timing concerns—a long term strategy unlikely
Encourage new homes and mixed-use buildings in the Town Center (public water and/or sewer infrastructure.)	Strong favorability/strong mixed opinion but concerns about it being out of scale	Desirable but w/ concerns Concerns about public water and sewer	Cost of water and sewer daunting If development then yes to locating downtown
Consider proposing special legislation to create local property tax incentives	Doubtful		Further burdening the town (taxes)
Foster public-private conservation development initiatives with the Sherborn Rural Land Foundation.			
Provide density incentives through an inclusionary zoning bylaw.			
Encourage new homes and mixed-use buildings in the Town Center area through zoning amendments		Mixed but some favorability w/ meeting affordable housing obligations	Threat of 40B by right use of town infrastructure (sewer and water)
Amend the EA zoning bylaw to allow a mix of senior (55 and over) and/or affordable housing.			
Review and, where appropriate, update local BOH regulations.			
Revise the accessory apartment bylaw to expand housing options.			
Consider adopting Natural Resources Protection Zoning (NRPZ)	Yes, but only if tied to affordable housing		

**Table G**

Draft Strategies (abbreviated)	Should town pursue this over the next 5 yrs?	Identify Strengths and Opportunities	Identify Concerns and Weaknesses
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Foster locally-initiated development	Yes	Maximizes local control Control of size	Cost? Where? Limits rights of property owners
Support creation of a private local non-profit or municipal housing trust	Qualified yes	Local control but less than above Creates autonomous entity to pursue housing goals=efficient Easier to acquire town property	Ability to raise \$ How to fund? Must acquire land less valuable to town
Encourage new homes and mixed-use buildings in the Town Center (public water and/or sewer infrastructure.)	Divided	How can we get what we want there?	Who pays for sewer and well? Massing and scale Traffic Vulnerability to economic downturns—costly in long run
Consider proposing special legislation to create local property tax incentives	Unclear	As long as we can control	What's the incentive?
Foster public-private conservation development initiatives with the Sherborn Rural Land Foundation.	Yes—do we have this already?	We gain something in exchange for something we need	Case-by-case
Provide density incentives through an inclusionary zoning bylaw.			
Encourage new homes and mixed-use buildings in the Town Center area through zoning amendments			
Amend the EA zoning bylaw to allow a mix of senior (55 and over) and/or affordable housing.			
Review and, where appropriate, update local BOH regulations.			
Revise the accessory apartment bylaw to expand housing options.	Yes		Separate well required? De-incentivize transfers of property
Consider adopting Natural Resources Protection Zoning (NRPZ)	Clusters, yes	Control zoning	Placement

## DISCUSSION EXERCISE PART II – DEVELOPMENT SITES/AREAS

Identify one or more sites that merit further consideration for creation of affordable/mixed income homes in next five years.

1. Indicate areas of agreement, unresolved issues, and differing perspectives and describe any concerns.
2. For the sites that merit further consideration, what type of development/housing type might be appropriate for the site (e.g., cottages, small multi-family, duplexes, farm-plex style, mixed-use, cluster site-planning design, etc.)?

### Table A

1. Whitney Farms: effort should be spent on re-purposing Whitney Farms, preferably all rental units.
2. Small Sites: Find several small sites for clustered development preserving open space. The 59 N. Main 40B project is a good example. The property at 23 Washington Street abutting the west side of Town Hall should be considered.
2. a Clustered development sites in or near Town Center such as 41. N. Main (but don't blast rock) and the group did not want a large development on Hunting Lane. Two people said 12 units was a nice size.
3. Several at Table A suggested the Washington St 40B project should be renegotiated to have fewer units.

4. A small portion of the Ward Park/ball fields site may be a site for a small cluster development. Discussion about the large land parcel SE of Ward Park and east of the stables and Clark House got some interest. A member who is a rider strongly opposed changing the use of the land from its current equestrian use.
5. Some members expressed concern about too much in the Town Center and suggested working with a developer to find other sites in Town such as the Grey Property on Maple Street and some mention of the Coolidge site.

#### Table B

Can you go back and change Sherborn Meadows to be SHI? Go back to State, deed restrict, etc. Buy and flip into affordable?

Not on Green Lake

Problem of balancing H<sub>2</sub>O septic

Area of Kendall Ave would be close to transportation and shopping

Must be appealing—better appeal in town center

Cluster—59 N Main approaches it, but didn't do it

Candidates in cluster development—90 Maple smaller cluster

Small, moderately priced development—Coolidge Crossing Site

But would have to be designed to preserve best aspects of Natural site

[No Information from Table C on this Exercise]

#### Table D

Don't like Hunting Lane Development

Need aquifer map

Cluster Housing in Town Forest

Not unanimous agreement

Some people here for forest, not to build in it

#### Table E

Questioned how Coolidge crossing at 88 fits character of town

Like Fiske property for residential housing to group in town center

Likes Coolidge location like mixed part Senior

Concerns seniors would rather live in town

Like Coolidge location for greater density but not 88 town house units—maybe cluster or cottage style

Some like property next to town for small farmplex maybe six units. Others are concerned not enough water and town might need it.

Liked 2 ½ story vision for downtown mixed residential

#### Table F

To consider:

Fitzpatrick Upland Rental—Town side of the tracks

Density?

Potential Site: Town Campus, SW of Town Hall

Town buy Grey property and Jamison field swap and develop in the playing field

Town forest East and Uphill from Pine Hill School

Merit further consideration and what types of development

#### Table G

Identify properties at risk for 40B and try to get ahead

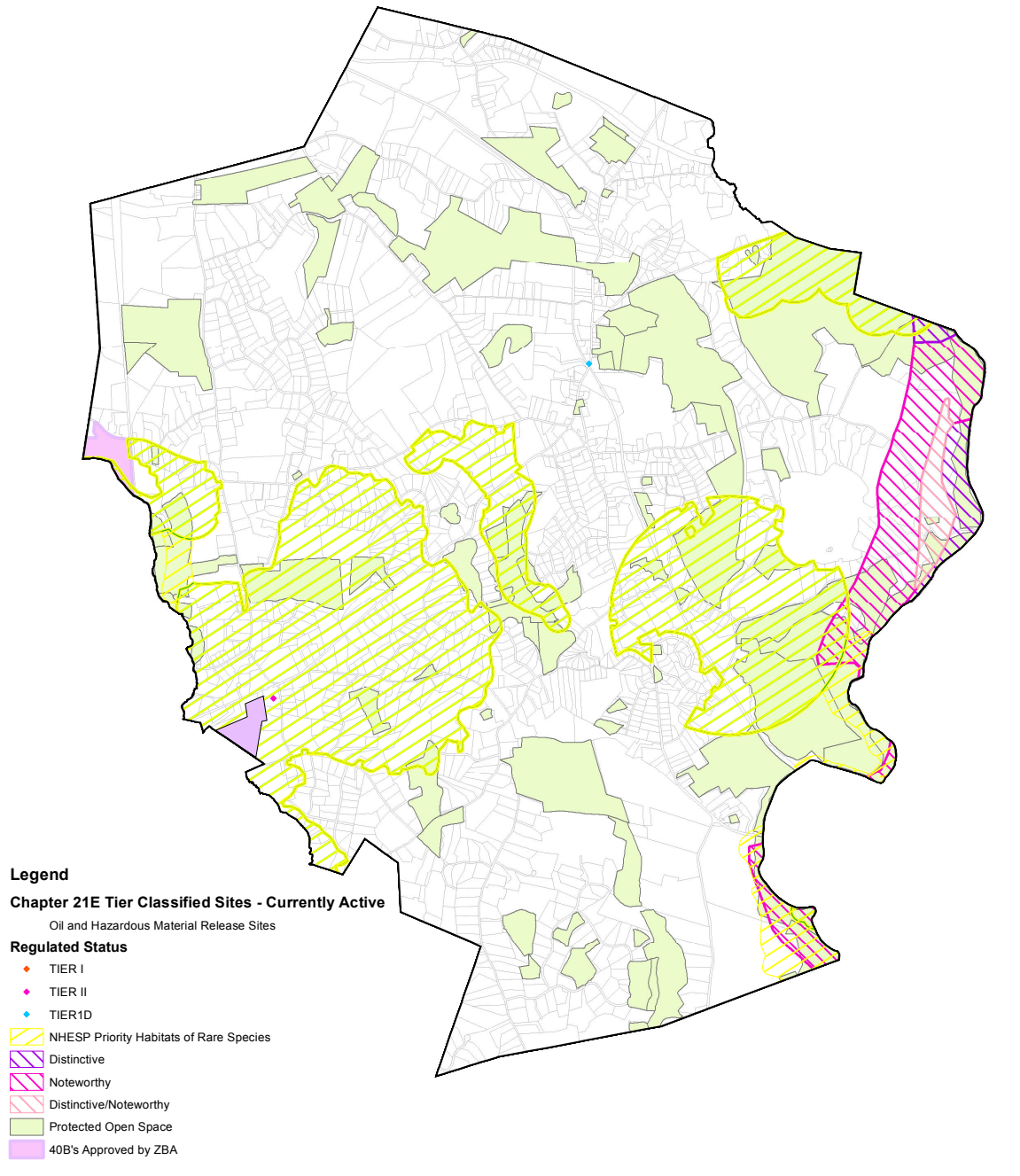
Next to Barber reservation? (marked on map)

Cluster zoning—maximizes apartments

# APPENDIX F

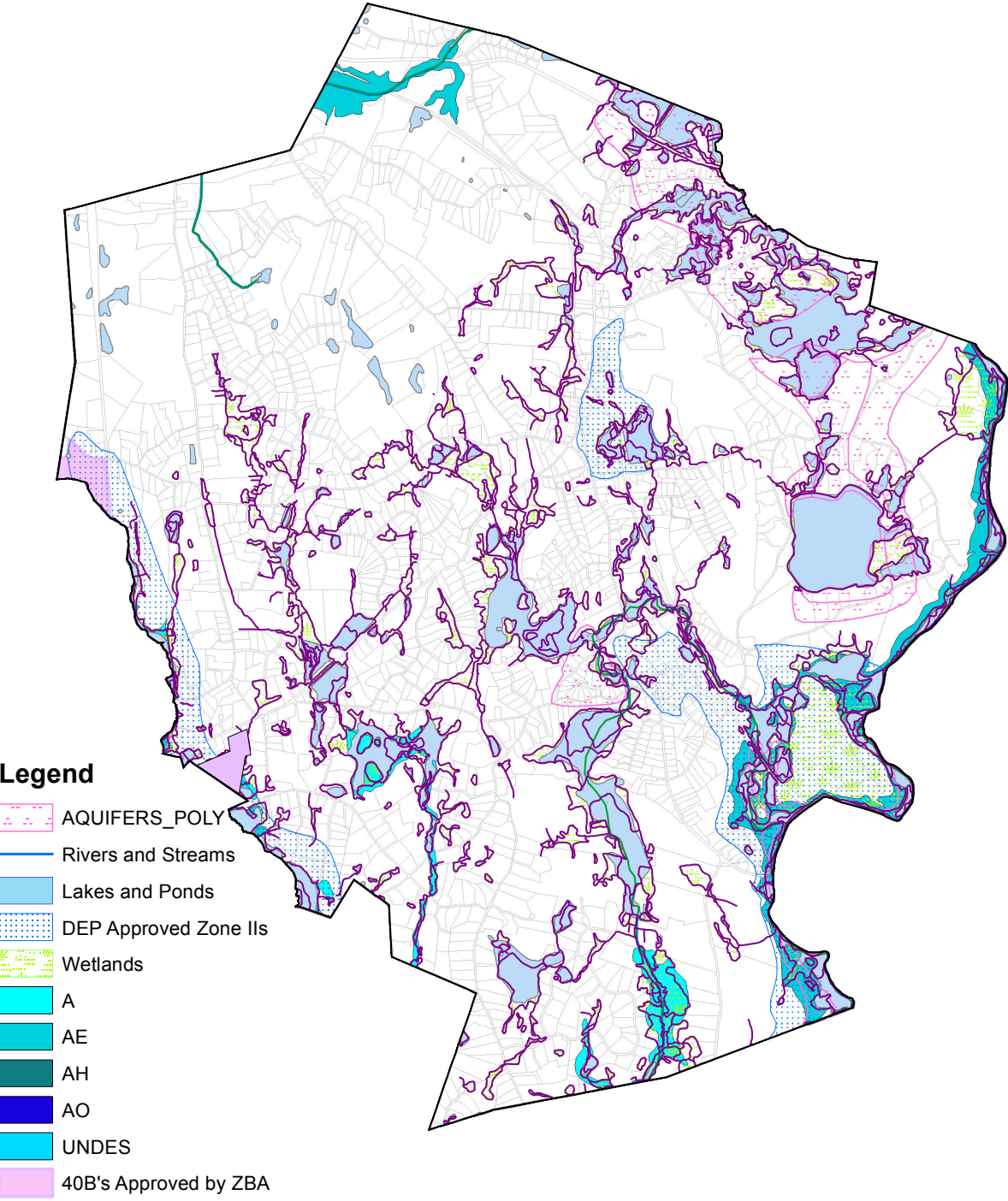
## DEVELOPMENT CONSTRAINTS MAPS

### Development Constraints - Non-Water Related





Development Constraints - Water Related





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