

Wakefield Technical Assistance Panel Final Report



May 6, 2005

Background

ULI Boston, consistent with its mission to foster responsible land use, periodically convenes Technical Assistance Panels to provide pro bono assistance to public officials in evaluating issues related to the development or redevelopment of their community. Real estate experts spend a day tackling specific land use, planning and development issues – formulating realistic options to move revitalization projects forward.

ULI recently focused on Wakefield, a community to the north of Boston, which possesses several school buildings no longer used by the School Department. Faced with the ongoing costs of heating and maintaining these buildings, town officials asked ULI Boston to develop viable options for the Montrose, Hurd and Franklin Schools. Since the Hurd and Franklin Schools are currently leased to a non-profit organization, Wakefield asked for a special focus on the Montrose School – a property used only for storage. Heating and upkeep of this building continue to cause a strain on the town's budget.

The reuse of town properties is a contentious issue in Wakefield, according to Town Planner Paul Reavis. Developing a consensus among residents about the three vacant school buildings has proved difficult. The two-year-old Town Property Assessment Committee, formed for the purposes of assessing the future of the Town's surplus property, agreed that they would like to pursue the greatest benefit to the town as a whole while acknowledging the rights and interests of neighbors. However, the Committee had not been able reach consensus about either a reuse plan for the property or an implementation strategy. The Committee, along with town officials, requested assistance in delivering a deliberative and collaborative process to find the best reuse options for surplus school buildings and other town properties.

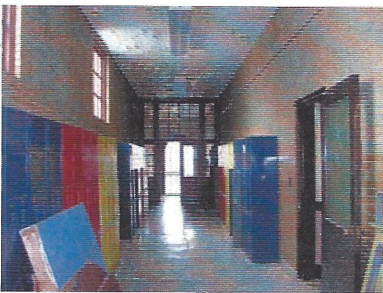
The ULI Boston Technical Assistance Panel convened on March 29, 2005 and consisted of five professionals with relevant experience in urban planning, design, development, traffic and the town meeting process. Panel members included:

- Steve Heikin (Chair), Vice President, ICON architecture, Inc.
- Fred Kramer, Principal, ADD Inc.
- Katy Lacy, Town Planner, Hingham
- Doug Prentiss, Senior Transportation Engineer, Judith Nitsch Engineering, Inc.
- Loryn Sheffner, Project Manager, GLC Development Resources

Panel activities included a bus tour of the Montrose, Hurd and Franklin School sites; interview sessions with several local leaders, residents and public officials; private panel deliberations; and a public presentation of findings on best uses and next steps.



The Montrose School is a valued neighborhood asset.



Critical Issues

Throughout the session, panelists heard consistent themes from the public officials and residents interviewed.

First the panelists heard about the need for affordable housing for Wakefield's senior citizens. According to figures from the 1990 U.S. Census, almost one-third of Wakefield's residents are age 50 or over. However, there is little or no inventory of one-to-two bedroom homes in Wakefield. Aging residents are forced to move elsewhere.

According to Wakefield's Master Plan, Housing Issues Report (January, 2001), the town addressed this issue by amending the zoning code to allow a special permit for accessory apartments. However, since it was adopted in 1993, less than 10 additional accessory units have been created. The report points out that the more popular large three-to-five-bedroom homes are being produced and quickly sold at an increased pace.

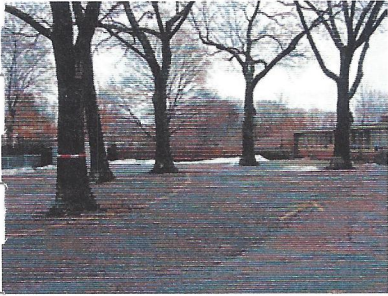
"Last year [the Town] lost 30 people who moved to age 55-plus condominiums," said Nancy Bertrand, chair of the Wakefield Historical Commission. "People can't afford the taxes anymore, or the upkeep on property. They're getting priced out," she said. "These are the people who were the core of the town. We need housing for them, or assisted living."

A second theme that emerged from discussions was a great concern in Town about the need for more revenue for the Town.

The third theme that emerged from panel interviews was the interest in preserving several aspects of the existing site: the ball field/open space; the mature trees on the site; and the original portion of the building structure itself. Nancy Bertrand said that her organization would like to see the Montrose School preserved in some way. While the building is not listed on the National Historic Register, the commission wants to preserve the building's architecture and use it for senior housing.

Through interviews with town officials, the panel also learned that the Montrose School would not be a likely candidate for reuse as a school, should that need arise. Montrose would require extensive renovations due to its age and years of vacancy. The town also possesses several other school buildings that could provide additional classroom space, including plans for an additional wing at the Greenwood School, one of the existing elementary schools.

Finally, the panel learned about the Town Meeting vote(s) that would be required to put the properties out for disposition. Any strategy for reuse of the school sites will need to pass through open town meeting, which takes place twice a year or by special session.



A reconfiguration of vehicular access could preserve existing trees.



The ball field behind the school can also be preserved.

Panel Recommendations

Reuse Plan

The panelist's recommendation for a reuse and implementation strategy focuses on the Montrose site. A similar implementation strategy could also be employed for the other two school sites discussed or for other surplus property as the need arises.

Based on the town's needs, Montrose's inadequacy to serve as a future school, and in keeping with the neighborhood's character, the panel recommended that the town commit to disposition of the school and issue an RFP for its reuse as a housing development, possibly a senior housing development. The original building would be retained, while the later addition – recently used a swing space for the town's Police Department – would be demolished to create space for parking. This parking could both serve residents and act as overflow parking for visitors to the playfield.

The plan calls for the creation of a small area of new family housing at the front of the property, which could range from three single-family lots to three duplex (two-family) units to as many as eight units in a small cluster. The family housing would serve as a transition between the neighborhood and the senior housing, and activate the front of the site. It would preserve neighborhood character and provide an additional inventory of first-time buyer homes. These lots also would serve as an additional incentive to developers.

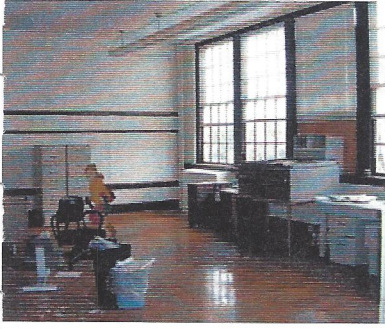
The plan also calls for the retention of major landscape features and recreational amenities on the site. The major trees on the front portion of the site would be largely preserved, with the large paved parking area relocated to the site of the current addition. The existing tot lot at the front of the site could also be retained, though slightly relocated. The ball field at the back of the property would also be retained, along with improved parking for active use.

Pros of this proposal include:

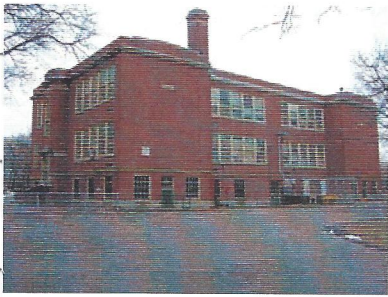
- Fills an existing need with 18 units of one- to two-bedroom housing suitable for seniors
- Appeals to a broad constituency
- Minimizes new construction
- Provides continuity with neighborhood
- Preserves the site's trees and recreational facilities

Challenges to this proposal include a lack of nearby amenities to support senior housing, a required zoning change that would be required to redevelop the building as multi-family residential, and the questionable desirability of a ball field adjacent to seniors. It was also noted that this proposal would probably not yield the highest return to the Town.

While this plan would probably be solid enough financially to attract multiple developer responses to an RFP, the most lucrative proposal on site would probably



School classrooms, with their large windows, make excellent one-bedroom apartments.



The rear of the school, including the basement, has excellent solar access.

be a standard single-family home development. Such a proposal could include up to 10 to 11 single-family homes as of right, which would provide the best financial return. However, it also would include the demolition of the school and a loss of open space.

As an intermediate alternative, the panel also considered a “cluster” scenario with 10 single-family homes at the front of the property and an “attached dwelling” scenario with eight units clustered on lots at the front of the property. Both scenarios would preserve open space, demolish the school and provide alternative housing types and density.

However, the panel projected that neither scenario would provide as much financial gain as the standard single-family-home plan.

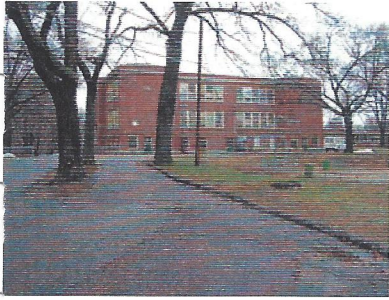
Process

The Town of Wakefield has already accomplished much to set the stage for the successful disposition of the Montrose School through the preparation of a Housing Issues Report and the adoption of new, more flexible, residential zoning provisions. The existing Town Property Assessment Committee is another valuable community resource that could be strengthened and put to work on this project.

A key component in any disposition of municipal property is to keep the entire community informed throughout the process, through public meetings, events, and the media. Because Town-owned property is, indeed, owned by the entire community, it is absolutely essential that public input be sought prior to its disposition. Events such as this recent Charrette with the Urban Land Institute represent a great example of the Town’s commitment to due diligence, and its efforts to engage the entire community in the process. *Ongoing and honest public outreach is the most likely method of avoiding unexpected opposition at an open Town Meeting.*

An important aspect of successful public outreach is to fully utilize all in-house expertise, including all relevant Town Boards, Committees and staff, throughout the disposition process. Local volunteers represent some of the more committed members of the community, and frequently have useful insights, opinions, and technical information. They also tend to participate in Town Meeting, and will provide useful support if included in the process. Tapping into local boards and committees will have the added advantage of smoothing the permitting process once the project is approved by Town Meeting.

There are additional outside resources to assist Wakefield in the process of disposing of the Montrose School. Mass Housing Partnership provides technical support and limited funds through their Division of Community Housing Initiatives.



Existing access to the ball field can be maintained, but with a reduction of pavement.

Mass Housing, in conjunction with the Department of Housing and Community Development, provides grants for planning and construction of affordable housing through the Priority Development Funds (PDF). (The contact person for the PDF program is Miryam Bobadilla at DHCD, 100 Cambridge Street, Boston MA 02116)



The recommended plan provides space for a relocated playground.

Using grant funds or other monies, it would be wise to engage professional consultants to conduct a thorough pre-development site analysis, with the goal of identifying not only the best use for the property, *but to ensure that the Town gets the best deal for the property.* This analysis would include a property appraisal, pre-construction survey; identification of a model pro-forma, including site development costs, and financial feasibility analysis. It is very important that Town Officials have whatever information that they need to critically evaluate development proposals *before* they start talking to prospective developers. Ideally, such analysis will allow the Town to tell developers exactly what they want for the site, and not have the developers dictate the process.

It is important that the warrant article authorizing the disposal of the property, as well as the actual RFP to dispose of the property be sufficiently specific, so that voters can take comfort in having a basic idea of what the property will be used for, and what kinds of impacts can be expected. At the same time, the article, and the resulting RFP, must be flexible enough to allow the development community to respond with some creativity.

The following outline summarizes a recommended process that Wakefield could follow in the disposition of the Montrose property:



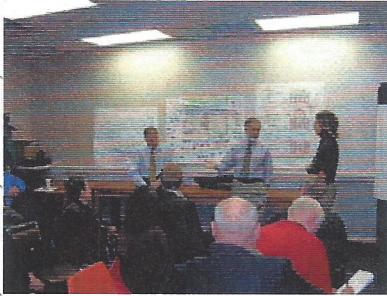
The land in front of the school could accommodate new family housing.

- Strengthen the existing Town Property Assessment Committee
 - Give the Committee a specific mandate and deadline to avoid committee fatigue. Affirm that these properties are surplus and available for potential disposition.
 - Throughout the process, meet with neighbors and permitting boards to engage the community and ensure that residents feel part of the decision-making process.
- Use grants to hire professional assistance
 - Contact the Mass Housing to look into grant funding through the Priority Development Fund.
 - Create a cost-benefit analysis of the different development scenarios
 - Determine engineering and development costs
 - Complete an impact analysis (traffic, etc.) Determine how best to address zoning issues.
 - Determine whether a sale or lease strategy is a better match for the Town's objectives (recognizing that for-sale housing will be very difficult to develop on most leases).
- By Fall Town Meeting:
 - Write and present a warrant article authorizing selectmen to dispose of the land as identified through the planning process. Must be specific, including type and number of units, unit costs and outlining necessary site work (improved entrances, screening, etc.).

- Write and issue an RFP soliciting development proposals in accordance with specified guidelines and criteria
 - Ask consultants to review
- Select Developer and Permit

It is important to note, however, that age restrictions cannot be placed on housing developments less than five acres in size without special legislation exempting the project from certain federal and state anti-discrimination laws.

While the panel focused primarily on Montrose, the panel concluded that the Franklin and Hurd schools could easily be converted to senior housing, mainly because the size of the classrooms easily transfer into one-bedroom units. Panelists recommended using the same process outlined under the first scenario for the Montrose School when determining the future of the Franklin and Hurd Schools.

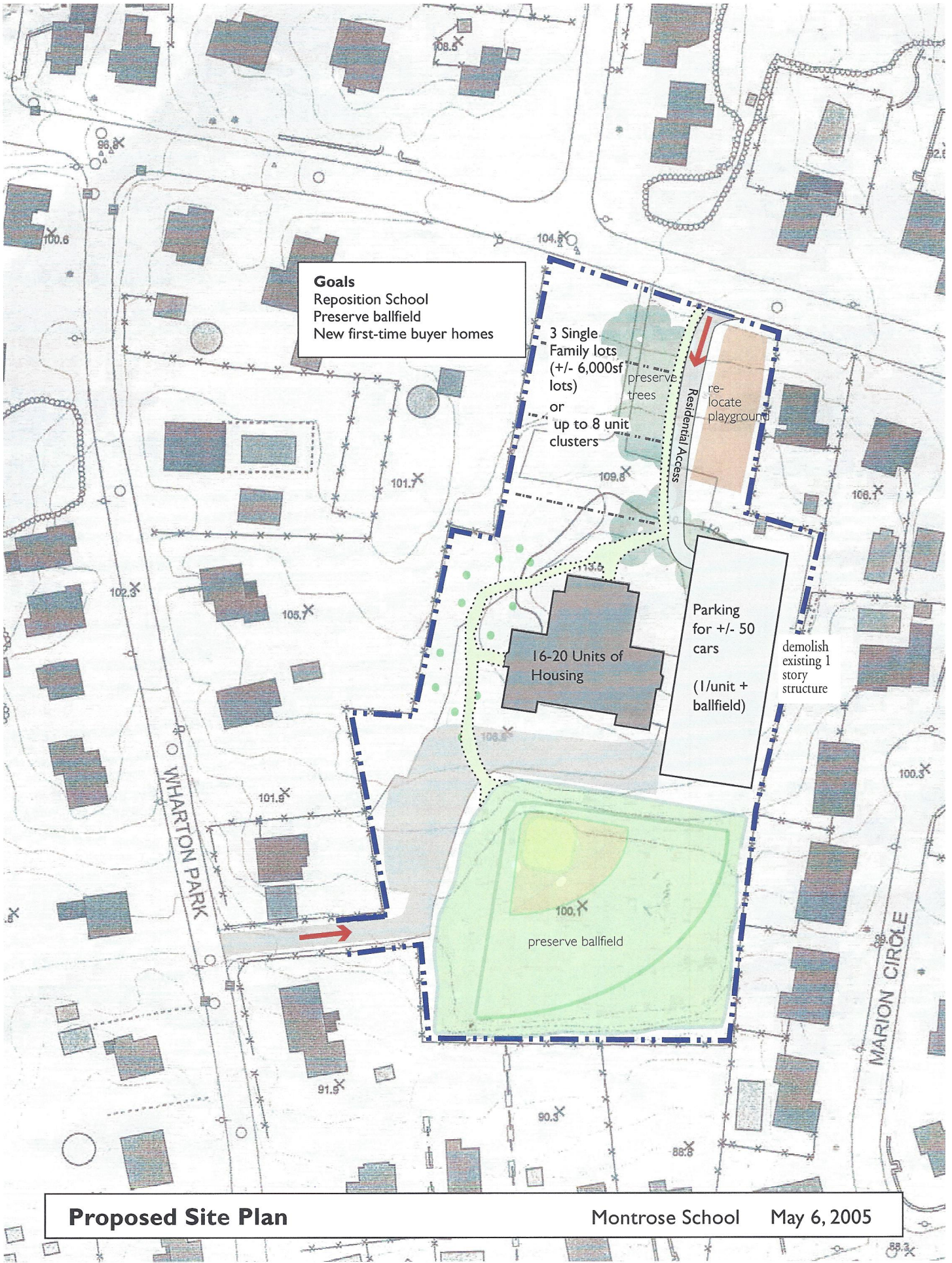


The ULI Technical Assistance Panel presents its recommendations.



Existing Site Plan

Montrose School May 6, 2005



Proposed Site Plan Montrose School May 6, 2005

Basement

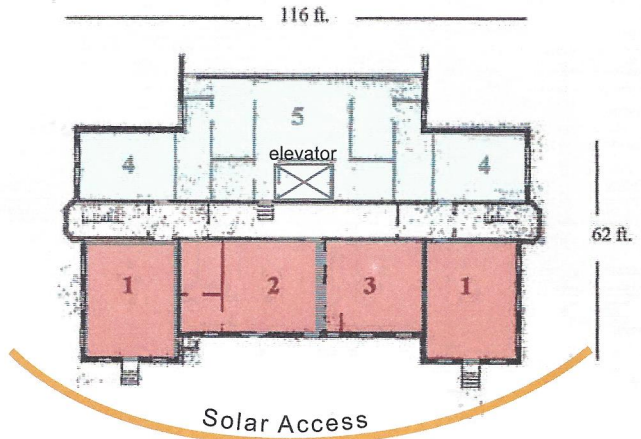
Existing Use

- 1 Classroom – 2 in the basement
- 2 Boiler Room
- 3 Storage
- 4 Restrooms
- 5 Storage

7,200 square feet

Proposed Use

4
Units



First Floor

Existing Use

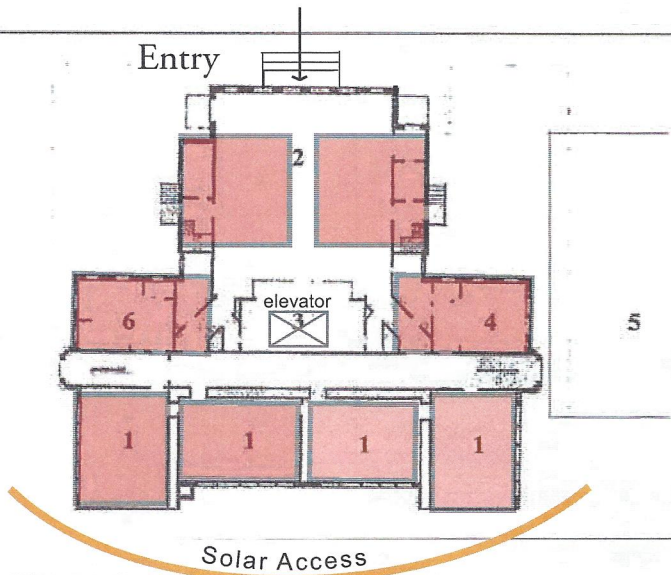
- 1 Classroom – 4 on first floor
- 2 Auditorium
- 3 Stage
- 4 Restrooms & Storage
- 5 Addition – 4 one-story rooms
- 6 Kitchen

11,700 square feet

3,100 square feet (4 rooms)

Proposed Use

8
Units



Second Floor

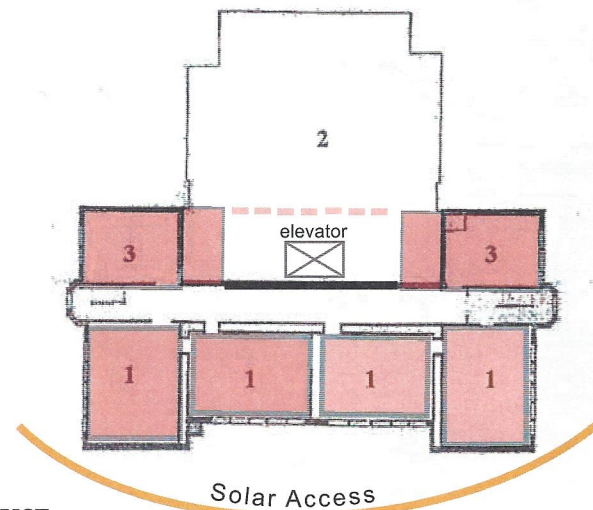
Existing Use

- 1 Classroom – 4 on second floor
- 2 Roof
- 3 Restrooms & Storage

7,200 square feet

Proposed Use

6
Units



Typical Classroom: 710 sq. ft. (32' x 22')

Total Building Area: 29,200 sq. ft.

TOTAL PROPOSED USE

18 Units