

Probably not realistic future scenario
given construction costs and land value



Possible scenario allowed by Special Permit or Comprehensive Permit (40B)



Existing Annual Cost of Hancock Village to Town of Brookline

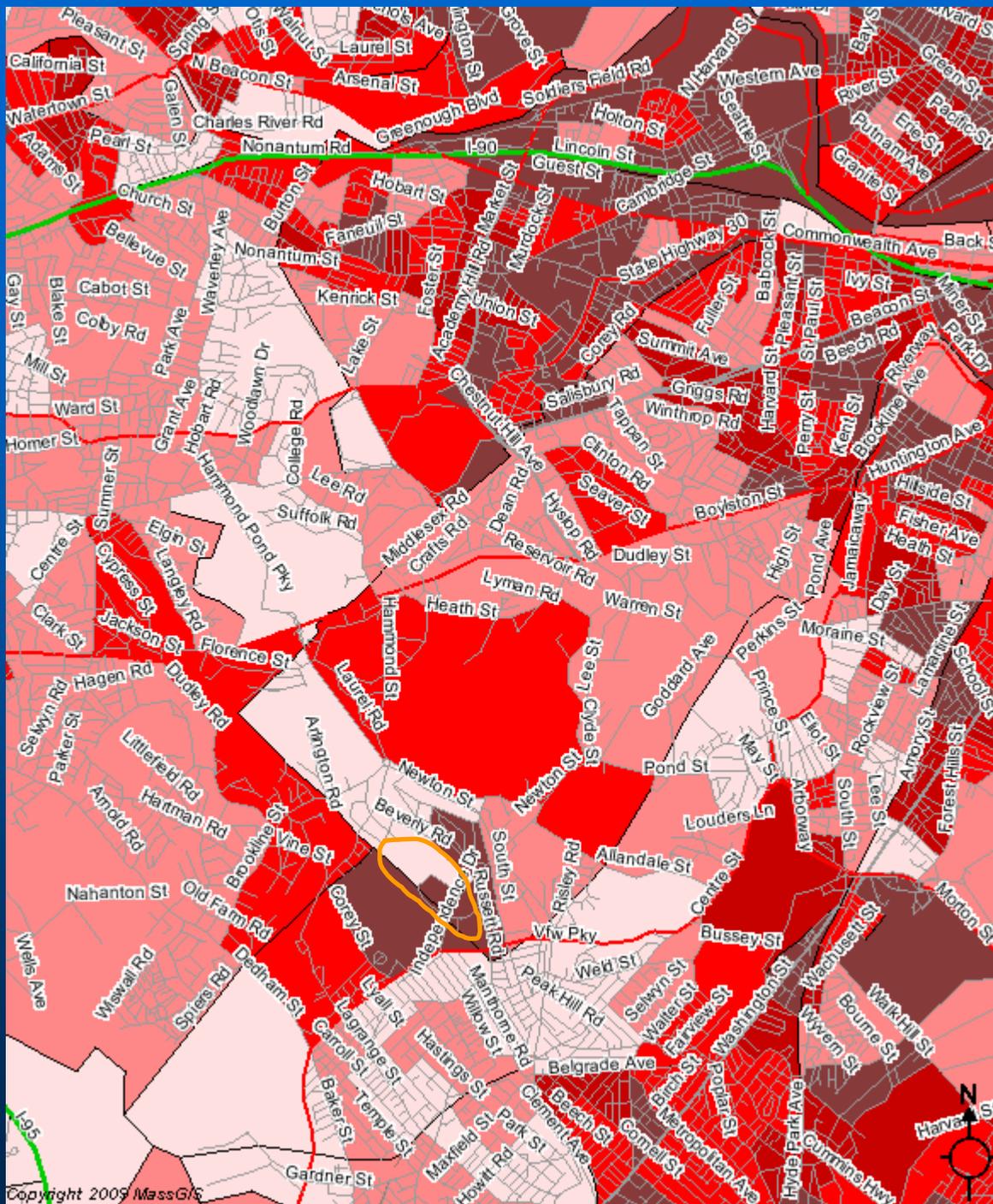
- FY09 Property Tax Revenue = \$850K
 - Est. Total Revenue = \$1.7M
 - Est. Total Cost to Town = \$3.9M
 - Est. NET Cost to Town = \$2.2M
-
- Could lose additional \$250,000-\$500,000/yr without control of unit mix

Note: All estimates of net revenue are +/- \$1M. The purpose of this chart is to show relative fiscal impacts between scenarios, not definitive fiscal results; this will be done by Fiscal Impact consultants.

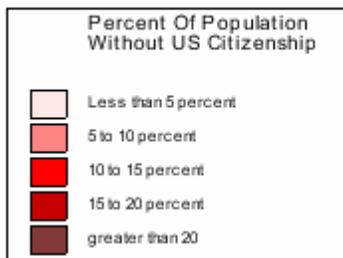
Why are we still listening?

- 1) History of Special Permit applications in Brookline more often than not ends up with a permitted development
- 2) Special Permit decisions cannot take into account impacts to schools or other fiscal considerations
- 3) Town needs to control mix of units to reduce impacts of school-aged children
- 4) Town needs to control phasing of additional development to adequately plan for change
- 5) Town needs to carefully understand what impacts and mitigation should be required of large developments
- 6) Town has the opportunity to ask the landowner to propose an alternative that has a significant and meaningful benefit to the Town than otherwise would be seen through Special Permit process

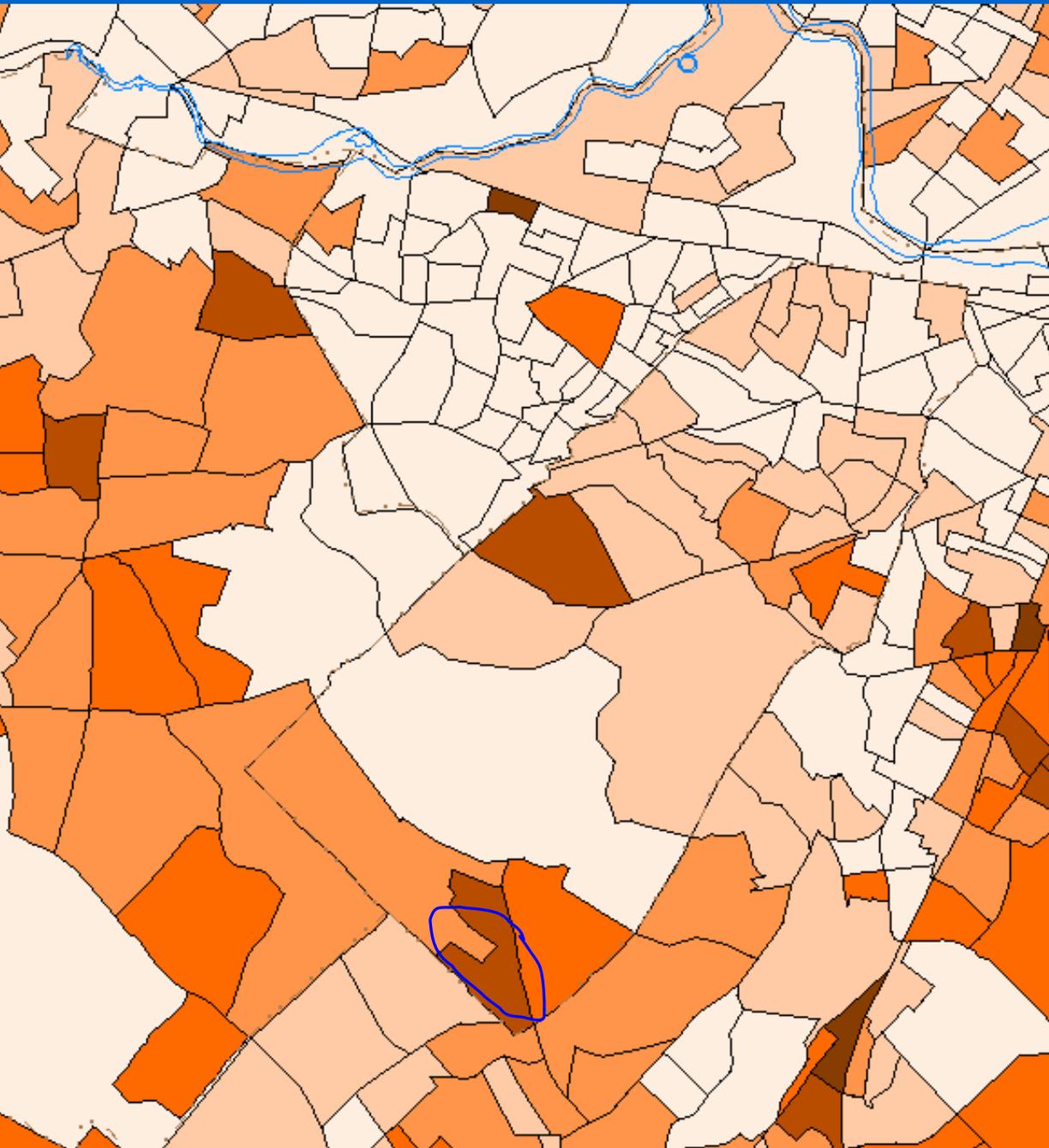
Demographics



Percent of Population Without US Citizenship



Demographics

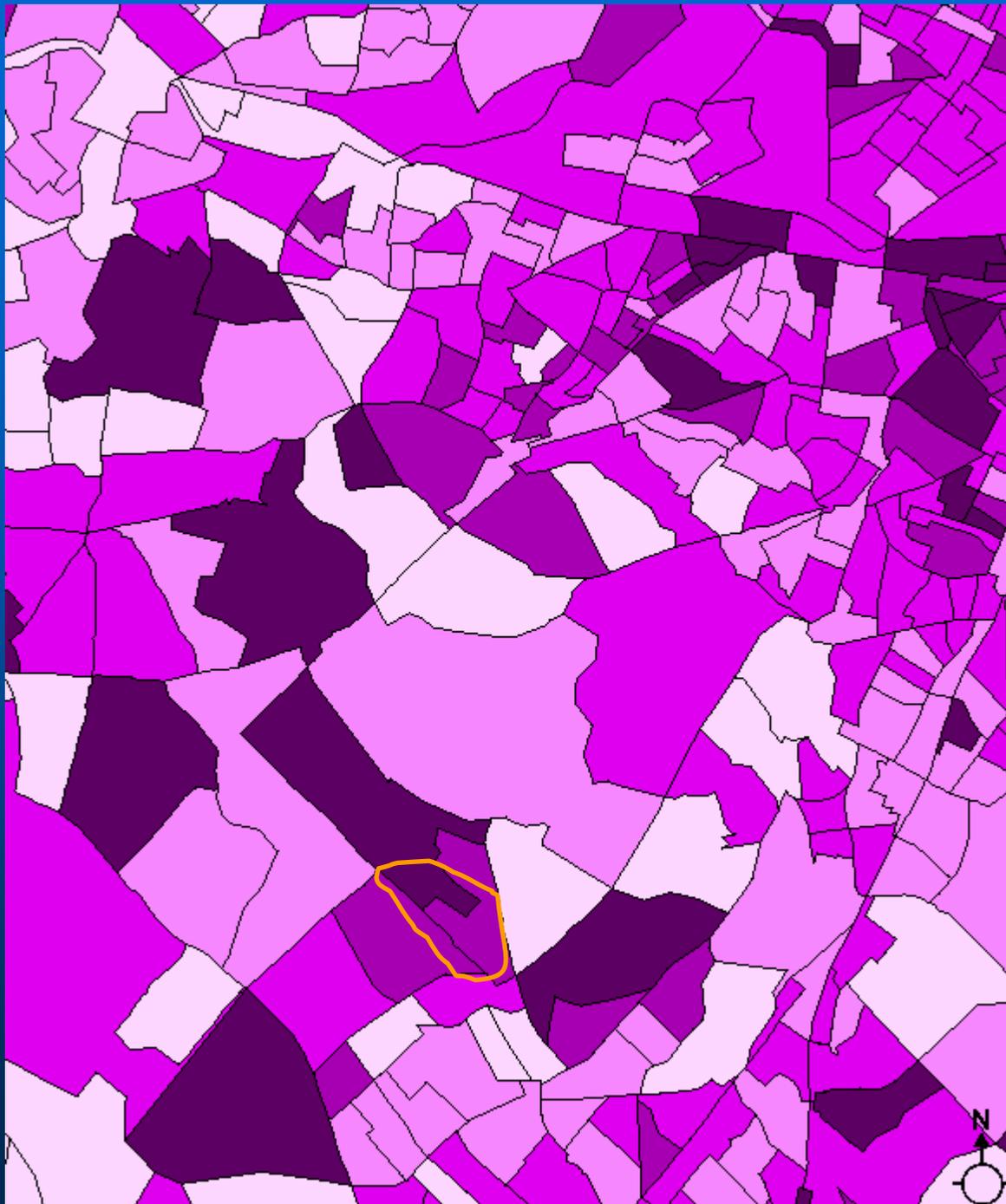


Percent of Population Under Age 18

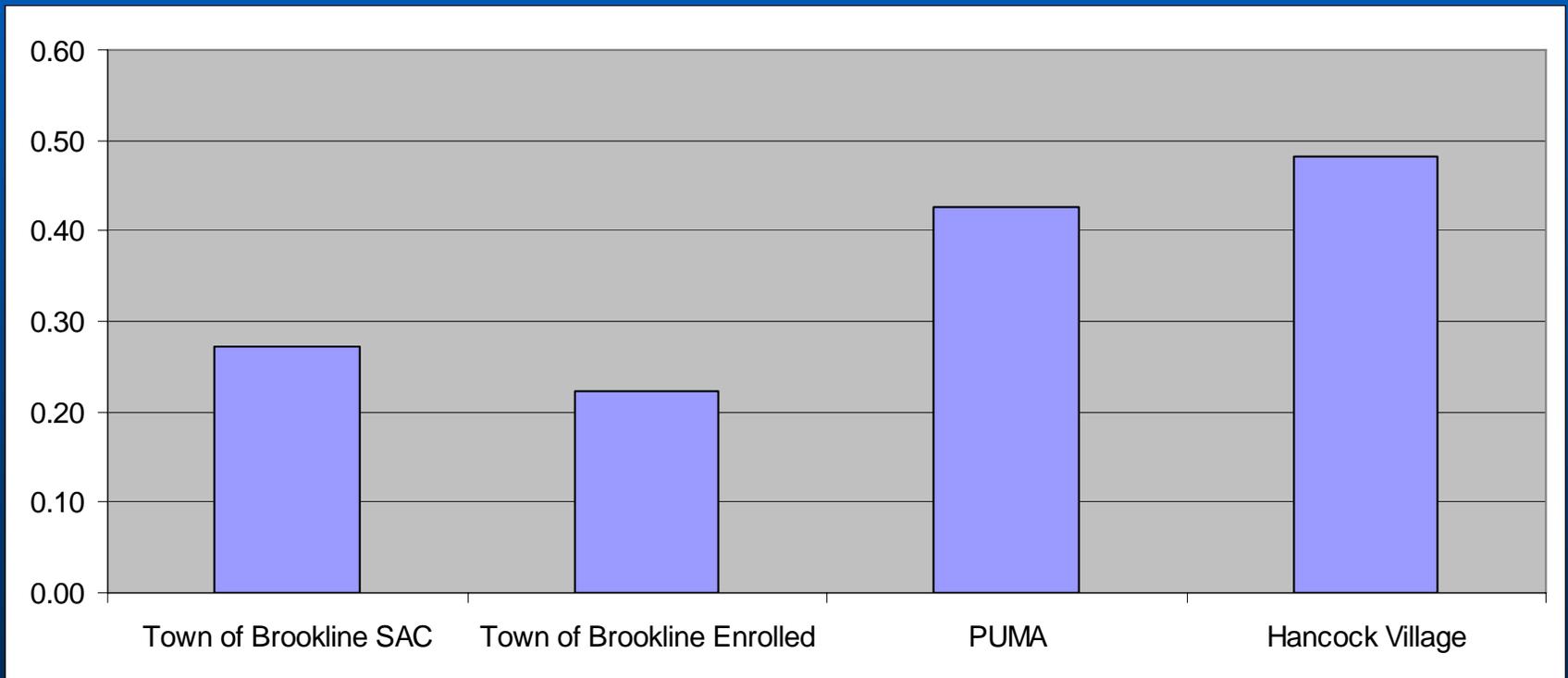
Percent of Population Under Age 18



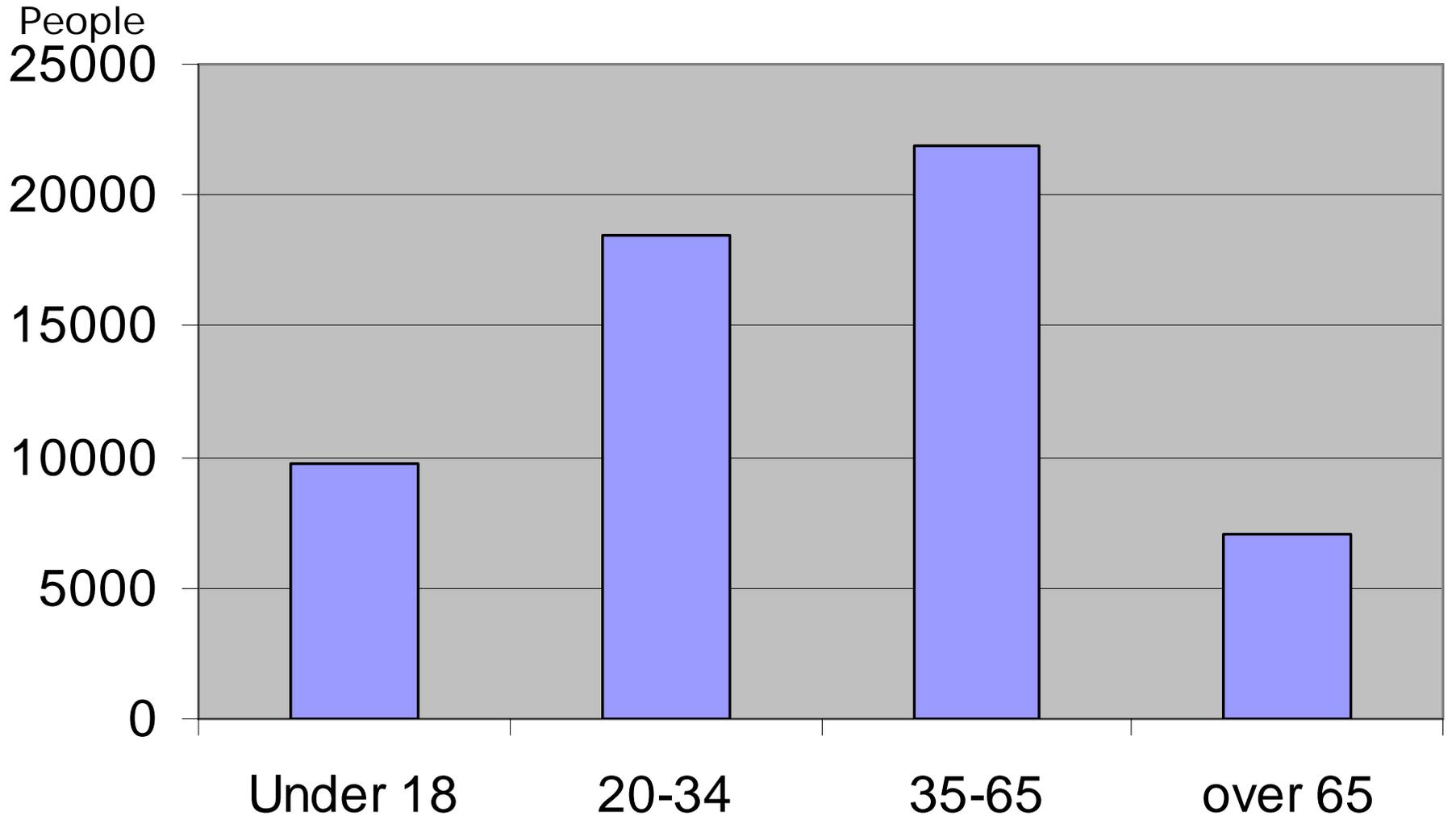
Demographics



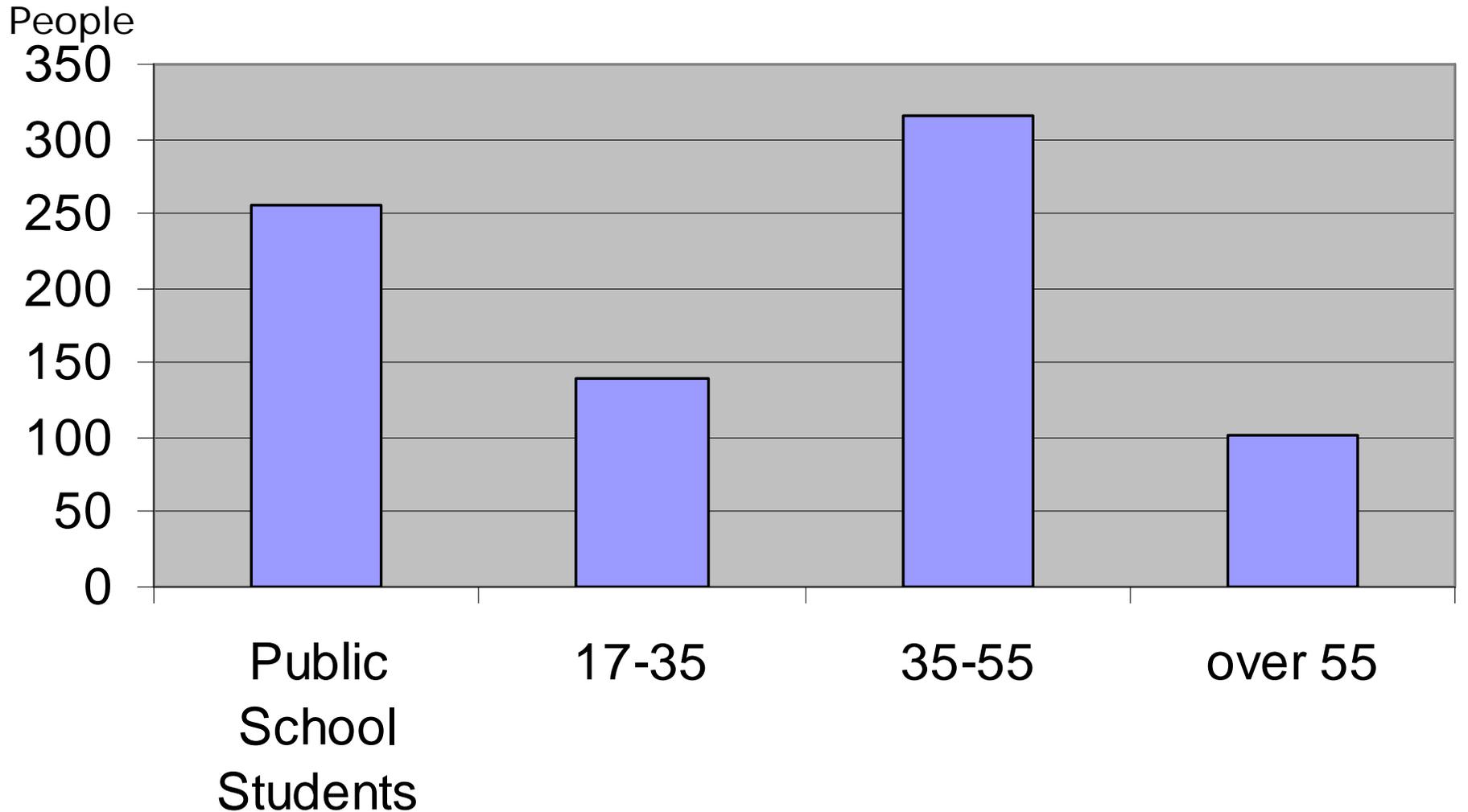
Comparison of School-Aged Children per Household



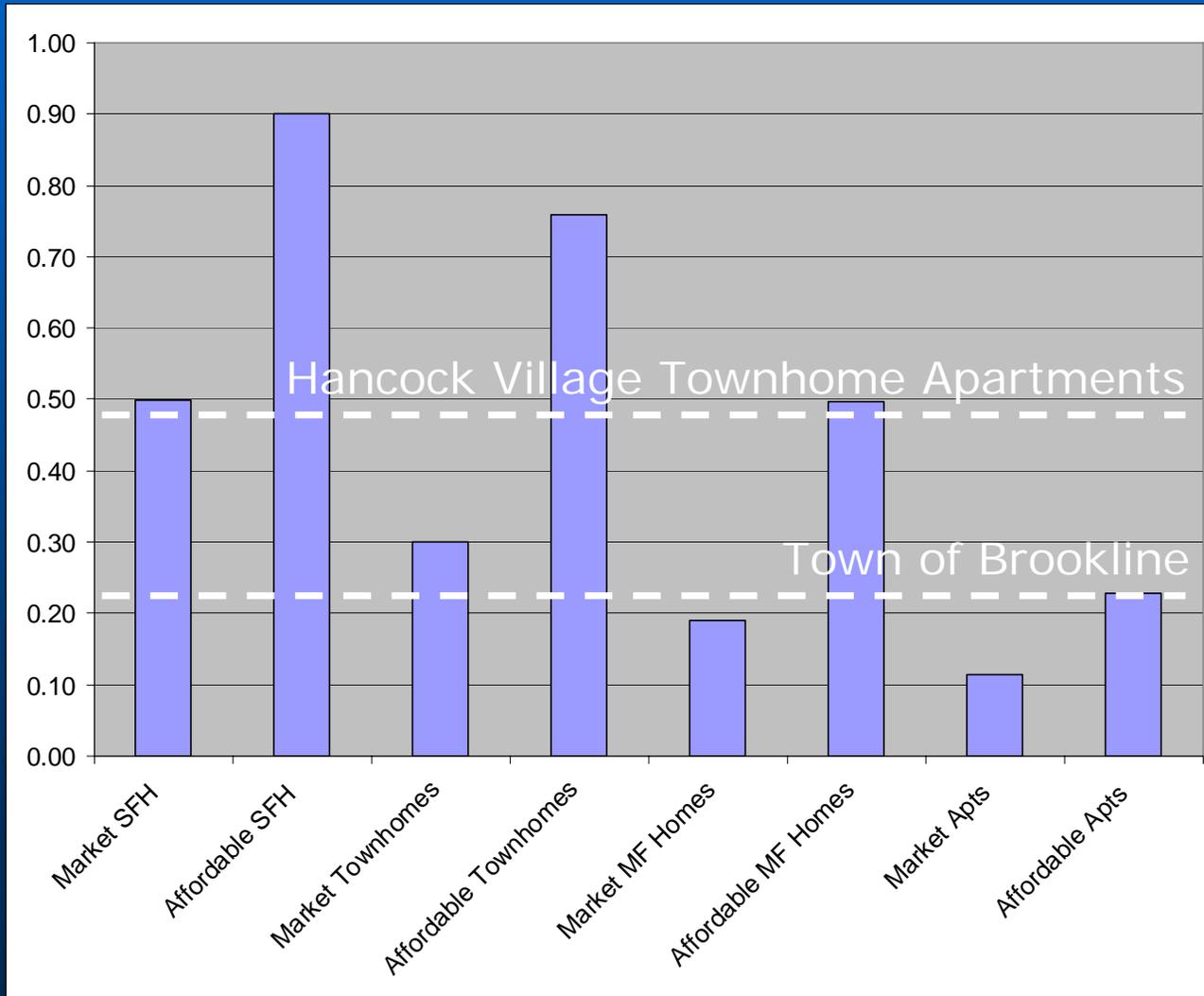
Town of Brookline Demographics by Age



Hancock Village Demographics by Age



School-Aged Children by Housing Type



Alternative Residential Scenarios

Plan	Name	Unit #	Aff Unit #	SAC	SAC/ HH	Pop	Pop/ HH	Comm (sq. ft.)	Net Revenue/ Cost	Net Revenue/ Cost per Unit	Net Revenue/ Cost per Aff Unit
A	Existing Conditions	530	0	256	0.48	811	1.53	0	(\$2,209,780)	(\$4,169)	---

Note: All estimates of net revenue are +/- \$1M. The purpose of this chart is to show relative fiscal impacts between scenarios, not definitive fiscal results; this will be done by Fiscal Impact consultants.

Do missing population segments have location preference?



Do missing population segments have location preference?

Age, Reported

✚ 17-35

✚ 55+



Rental tide hits schools

Big developments spike enrollment

boston.com

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LEXINGTON

The Boston Globe

Rental tide hits schools

Big developments spike enrollment

By **Connie Paige**, Globe Correspondent | June 4, 2009

In September, 60 children from a rental complex that opened two years ago in Lexington will move to another school in town, after officials crafted new borders for two elementary districts.

The decision, which left some bruised feelings, highlighted a challenge facing Lexington and other area communities with large new developments of rental housing - finding classroom space for an influx of students who had not been factored into the school district's long-range plans.

"People will rent because they want to have kids in the Lexington school system," said School Committee chairwoman Margaret Coppe. "Whenever there is a large housing development, it does have an impact on the school system. There's no getting around it."

In the past two decades, new apartment projects - some of them high-rises with hundreds of units - have dotted the region's landscape, leaving school administrators scrambling to accommodate new students.

One developer, AvalonBay Communities Inc. of Alexandria, Va., has built 26 apartment complexes in communities across Greater Boston, including Acton, Bedford, Lexington, Marlborough, Newton, Shrewsbury, and Westborough, with another going up in Northborough.

In Lexington, which like Newton has two AvalonBay developments, the recent experience with the company's second complex has been particularly painful, with residents of the apartments feeling pitted against parents of special-needs children for space in the schools.

Avalon at Lexington Hills, with 387 units, was approved in 2004 for the former Metropolitan State Hospital property, and opened its first phase in 2007.

In January 2007, Lexington had just redistricted its school system, based on projected overcrowding in some schools. The Fiske and Bridge elementary schools figured in the reshuffling. Since then, however, more students have showed up in the Fiske district than anticipated, and the reasons remain unclear.

Lexington's superintendent, Paul B. Ash, said the 60 elementary school children coming from Avalon played a role in the uptick, but the new apartments were not the only reason for the growth. Ash said he believes it could be a combination of the faltering economy, which has created a turnover in single-family homes and prompted more families to shift children from private schools to the public system, and the districtwide adoption of full-day kindergarten.

In December, Ash recommended redistricting the two schools again, based on new projections showing that by the 2011-12 school year, Fiske would have 500 students, putting it 10 over its recommended capacity, while Bridge, with a recommended capacity of 466, would have just 354 students.

At first, Ash suggested moving a program for children with special needs from Fiske to Bridge. While the program has only 18 students, they require three classrooms - enough space to have relieved overcrowding at Fiske. But parents of the special-needs children protested, saying the move could seriously harm their progress.

Carol Millard, whose child in the first grade is on the autism spectrum and has minimal language skills, said because of previous redistricting and the reconstruction of Fiske and other schools, her daughter had already gone through several disruptions.

"Every time we had to move . . . we'd get a major regression, particularly speech and self-help skills," she said. "When you see the backslide, it's devastating."

Other parents threatened to place their children in private schools, Ash said, leaving the public school district to cover fees that can reach hundreds of thousands of dollars.

So Ash then recommended shifting children from the Avalon apartments from Fiske to Bridge. The School Committee approved a plan that would have 12 Avalon kindergartners attend Bridge this fall, and 48 children now at Fiske shift to Bridge in fall 2010. "Avalon Hills is a compact geographic area, and can be accommodated at Bridge without overcrowding Bridge," Coppe said.

But some Avalon parents don't see it that way.

Flavius Chircu said he moved to the Avalon development to get his daughter, now in kindergarten, into the Lexington schools. He said that during the many meetings concerning redistricting, he felt Avalon children were being singled out as easy targets.

"The problem is, you kind of get a feeling that you are not welcome at Fiske," Chircu said.

MIT grad student Chad Tidd said he believes officials pitted the special-education students against the Avalon families.

Coppe said she does not view the decision as pitting one group against another, but she can see why the Avalon parents might.

Elizabeth O'Neil, copresident of the Bridge Parent Teacher Association, said she hopes the controversy is over. "We're looking forward to welcoming these families," O'Neil said.

Now, the number of Avalon students is beginning to rise, Ash said. Wary of such upsurges, local officials had negotiated an arrangement with the developer that if the numbers of Avalon students at all grade levels topped 111, the town would receive a surcharge of \$7,100 per child out of a \$750,000 fund set aside by AvalonBay. This month, Ash said, he will work with school officials to determine the exact numbers and the amount of the surcharge.

Still, Ash said, he does not expect Avalon children will be redistricted again "in the foreseeable future."

Adjusting to student increases from rental units has proven easier in Newton and Acton.

In Newton, the Avalon at Newton Highlands complex brought 63 students into the public schools when it opened in 2003, while Avalon at Chestnut Hill, opened in 2006, brought in 40, according to a report issued in November by district officials.

Sandy Guryan, assistant superintendent for finance in the Newton system, said the city did redistrict but placed the Avalon children in schools with plenty of space, so they did not have to switch later.

However, Guryan said, officials are still evaluating the effect of Arborpoint at Woodland Station, a large apartment complex not built by Avalon. The developer had estimated Arborpoint would bring 18 children into the public schools but the number is now 33.

Meanwhile, both Lexington and Newton are facing new developments likely to bring more children into the schools. While Lexington has no more multistory projects on the drawing boards, Newton has several, among them Chestnut Hill Square on Route 9, Northland on Needham Street, and Kessler Woods at La Grange Street.

Acton had an even easier time than the other two communities. Schools had only to add a school bus after the development of Avalon Acton, which straddles the Acton-Westford border and brought 66 students into the Acton-Boxborough regional district, officials said.

"What is the easiest and cheapest way to get into the best school in the state?" said Jonathan Chinitz, chairman of the Acton-Boxborough Regional School Committee. "It's a rental."

Connie Paige can be reached at connie_paige@yahoo.com ■

Rental tide hits schools

Big developments spike enrollment

□ In September, 60 children from a rental complex that opened two years ago in Lexington will move to another school in town.

□ Lexington has seen large new developments of rental housing - finding classroom space for an influx of students who had not been factored into the school district's long-range plans.

□ "People will rent because they want to have kids in the Lexington school system," said School Committee chairwoman Margaret Coppe.

□ "The problem is, you kind of get a feeling that you are not welcome at Fiske," Chircu said. [a resident and parent of the apartment complex]

□ In Newton, at Arborpoint at Woodland Station, the developer had estimated Arborpoint would bring 18 children into the public schools but the number is now 33.

□ "What is the easiest and cheapest way to get into the best school in the state?" said Jonathan Chinitz, chairman of the Acton-Boxborough Regional School Committee. "It's a rental."

"Every time I go to a meeting, I see a major responsibility placed on my shoulders," she said. "When you see a plan that would have 12 Avalon kindergartners attend Bridge this fall, and 48 children now at Fiske shift to Bridge in fall 2010, it's not overcrowding Bridge," Coppe said.

So Ash then recommended shifting children from the Avalon apartments from Fiske to Bridge. The School Committee approved a plan that would have 12 Avalon kindergartners attend Bridge this fall, and 48 children now at Fiske shift to Bridge in fall 2010. "It's not overcrowding Bridge," Coppe said.

"The problem is, you kind of get a feeling that you are not welcome at Fiske," Chircu said. "I don't see why the Avalon parents might be so angry," she said. "I can see why the Avalon parents might be angry," she said. Elizabeth O'Neil, copresident of the Bridge Parent Teacher Association, said she hopes the controversy is over. "We're looking forward to welcoming these families," O'Neil said.

Now the number of Avalon students is beginning to rise, Ash said. Wary of such upsurges, local officials had negotiated an arrangement with the developer that if the numbers of Avalon students at all grade levels topped 111, the town would receive a subsidy of \$1,000 per child out of a \$750,000 fund set aside by AvalonBay. This month, Ash said, he will work with school officials to determine a "reasonable future."

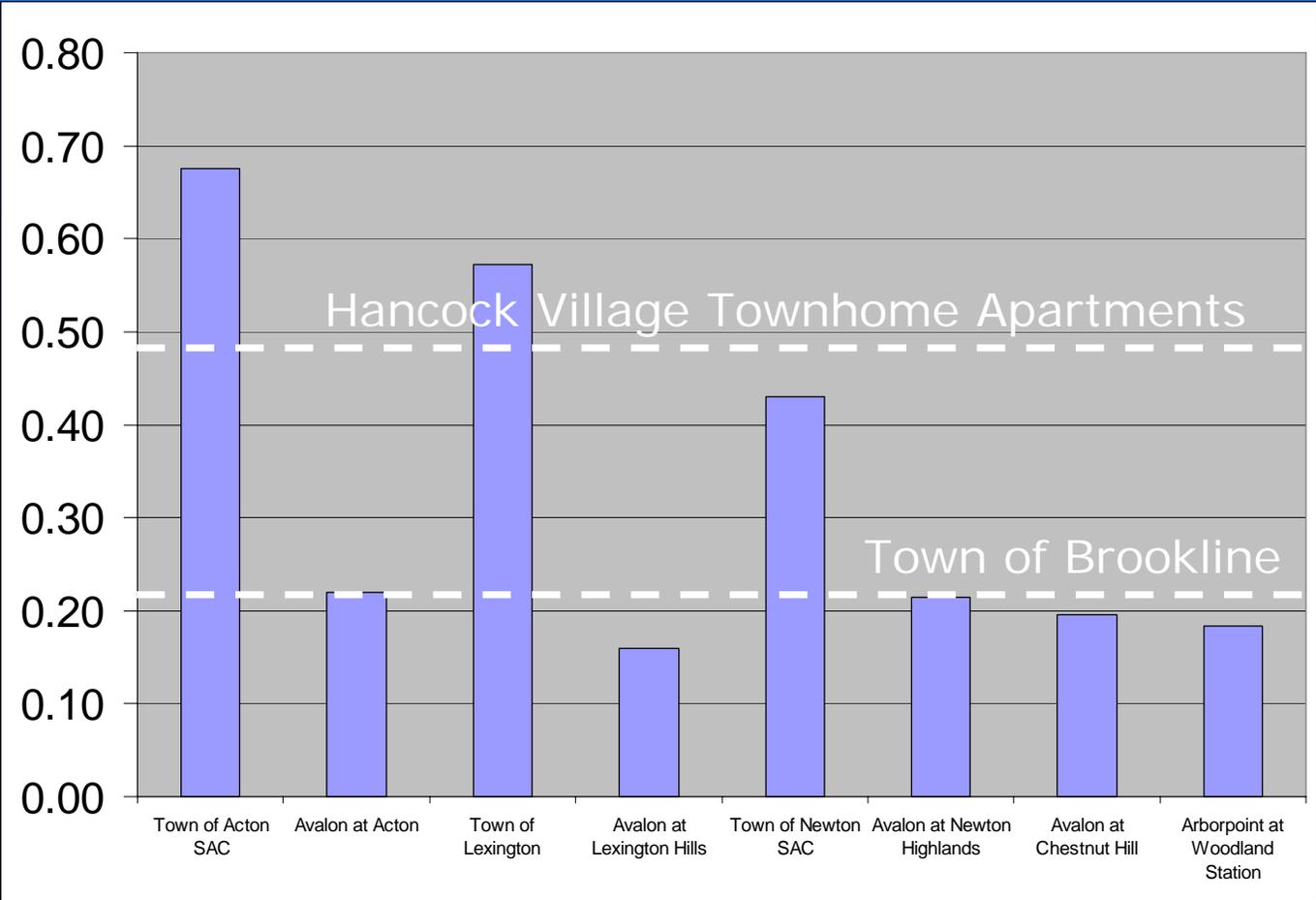
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In January 2007, Lexington had just opened a new elementary school, and the district had anticipated, and the result was a large apartment complex not far from Woodland Station, a large apartment complex not far from Woodland Station. The developer had estimated Arborpoint would bring 18 children into the public schools but the number is now 33.

Meanwhile, both Lexington and Newton are facing new developments likely to bring more children into the schools. While Lexington has no more multi-story projects on the drawing boards, Newton has several, among them Chestnut Hill Square on Route 2, Northland on Hedgesham Street, and Hessler Woods at La Grange Street. "It's a rental," said Jonathan Chinitz, chairman of the Acton-Boxborough Regional School Committee. "It's a rental."

Connie Paige can be reached at connie_paige@verizon.com #

School-Aged Children in Apartments versus Town-wide



Cluster Townhomes



Cluster Townhomes

- Assumes 59 units, 15% affordable
- 20,000 sf retail at value of \$150 psf
- Same People per Household as PUMA area (2.59)
- Similar SAC as Existing Townhomes
- Assumes assessed value of \$600K-\$675K

Alternative Residential Scenarios

Plan	Name	Unit #	Aff Unit #	SAC	SAC/ HH	Pop	Pop/ HH	Comm (sq. ft.)	Net Revenue/ Cost	Net Revenue/ Cost per Unit	Net Revenue/ Cost per Aff Unit
A	Existing Conditions	530	0	256	0.48	811	1.53	0	(\$2,209,780)	(\$4,169)	---
B	Single-Family Cluster Townhomes	59	9	25	0.42	153	2.59	20,000	\$95,202	\$1,614	\$10,757

Note: All estimates of net revenue are +/- \$1M. The purpose of this chart is to show relative fiscal impacts between scenarios, not definitive fiscal results; this will be done by Fiscal Impact consultants.

**Preliminary Zoning Analysis – Hancock Village
(in Brookline)**

	Total	West of Independence Drive			East of Independence Drive		
		M-0.5	S-7	Total	M-0.5	S-7	Total
Land Area (s.f.)	2,165,803	1,134,738.0	123,710.4	1,258,448.4	705,672.0	201,682.8	907,354.8
Existing Dwelling Units	530	338	0	338	192	0	192
Existing Gross Floor Area (s.f.)	531,380	357,400.0	0	357,400.0	173,980.0	0	173,980.0
Total Allowed Gross Floor Area (s.f.)	1,034,093	567,369.0	43,298.6	610,667.6	352,836.0	70,589.0	423,425.0
"Available" Gross Floor Area (s.f.)	502,713	209,969.0	43,298.6	253,267.6	178,856.0	70,589.0	249,445.0
New Dwelling Units <u>Allowed</u> Considering Lot Area Per Dwelling Unit	436	228.9	17.7	246.5	160.3	28.8	189.1
SCENARIO 1: New Dwelling Units <u>Estimated</u> Considering Estimated Size of Units (1500 sf & at least 20% of S-7 land used for vehicular access and lot layout)	296	140.0	14.0	154.0	119.2	23.0	142.2
SCENARIO 2: New Dwelling Units <u>Estimated</u> Considering Estimated Size of Units (1000 sf & at least 20% of S-7 land used for vehicular access and lot layout)	426	210.0	14.0	224.0	178.9	23.0	201.9
Parking Spaces (if all 1BD & 2BD units) <u>Allowed Units</u>	871	457.7	35.3	493.1	320.7	57.6	378.3
Parking Spaces (if all 1BD & 2BD units) <u>Estimated Units SCENARIO 1</u>	592	280.0	28.0	308.0	238.5	46.0	284.5
Parking Spaces (if all 1BD & 2BD units) <u>Estimated Units SCENARIO 2</u>	852	419.9	28.0	447.9	357.7	46.0	403.7

This analysis suggests that the site could sustain up to an additional 300-500 new units under the existing zoning. However, it is possible that existing site planning issues might make that number of units difficult to attain without one or more Special Permits. Specifically, the interpretation of the height section of the Zoning Bylaw by the Building Commissioner would limit any new height on the site to 35 feet above grade without a Special Permit. This interpretation would result in any "by right" development on the site being 3 story buildings covering a significant portion of the existing open space. Its likely, however, that the site could see the development of 200-300+ units in 3 story buildings 'by right'. Note that even a 'by right' development would be subject to design review and inclusionary housing provisions

Special Permit I – 3 stories



<u>Brookline East</u>
Total New Parking=450 Spaces
Total New Units= 221 Units 172
<u>Brookline West</u>
Total New Parking=492 Spaces
Total New Units= 246 Units

Total New
Units = 393

Special Permit I

- Up to 3 stories
- No transfer of units between two properties
- Assumed 393 units of typical suburban unit mix at median value of \$200K each
- Assumed 2.0 people per household (ave. Brookline renter-occupied)
- SAC between Apt. study & Hancock Village

Special Permit II – 6 stories

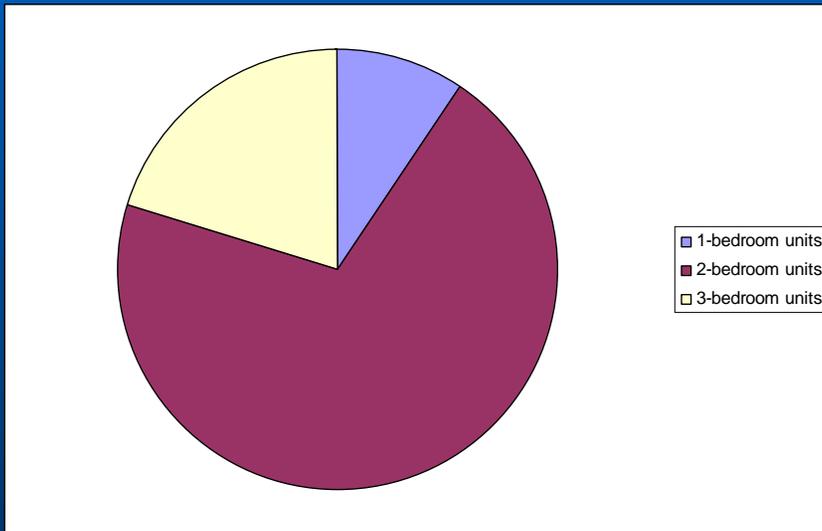


Special Permit II - 6 stories

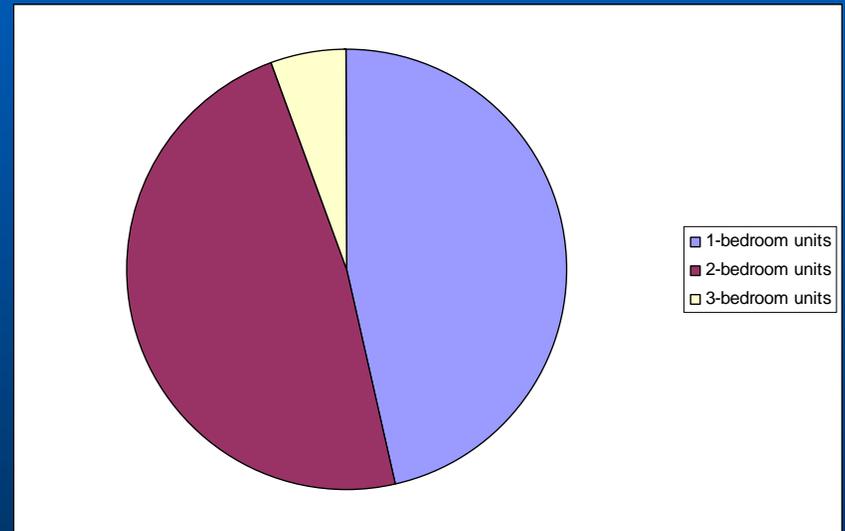
- Up to 6 stories
- No transfer of units between two properties
- 467 units at median value of \$200K each
- Looked at 2 different mix of units
- Assumed 2.0 people per household (ave. Brookline renter-occupied)
- SAC between Apt. study & Hancock Village

Special Permit II - 6 stories

Typical Mix of Suburban Apts.



Mix of Hancock Village Apts.



Extended Stay Hotel, Apartments & Community Center

- Up to 3 stories
- No transfer of units between two properties
- 237 units

“Back of Envelope” Fiscal Study

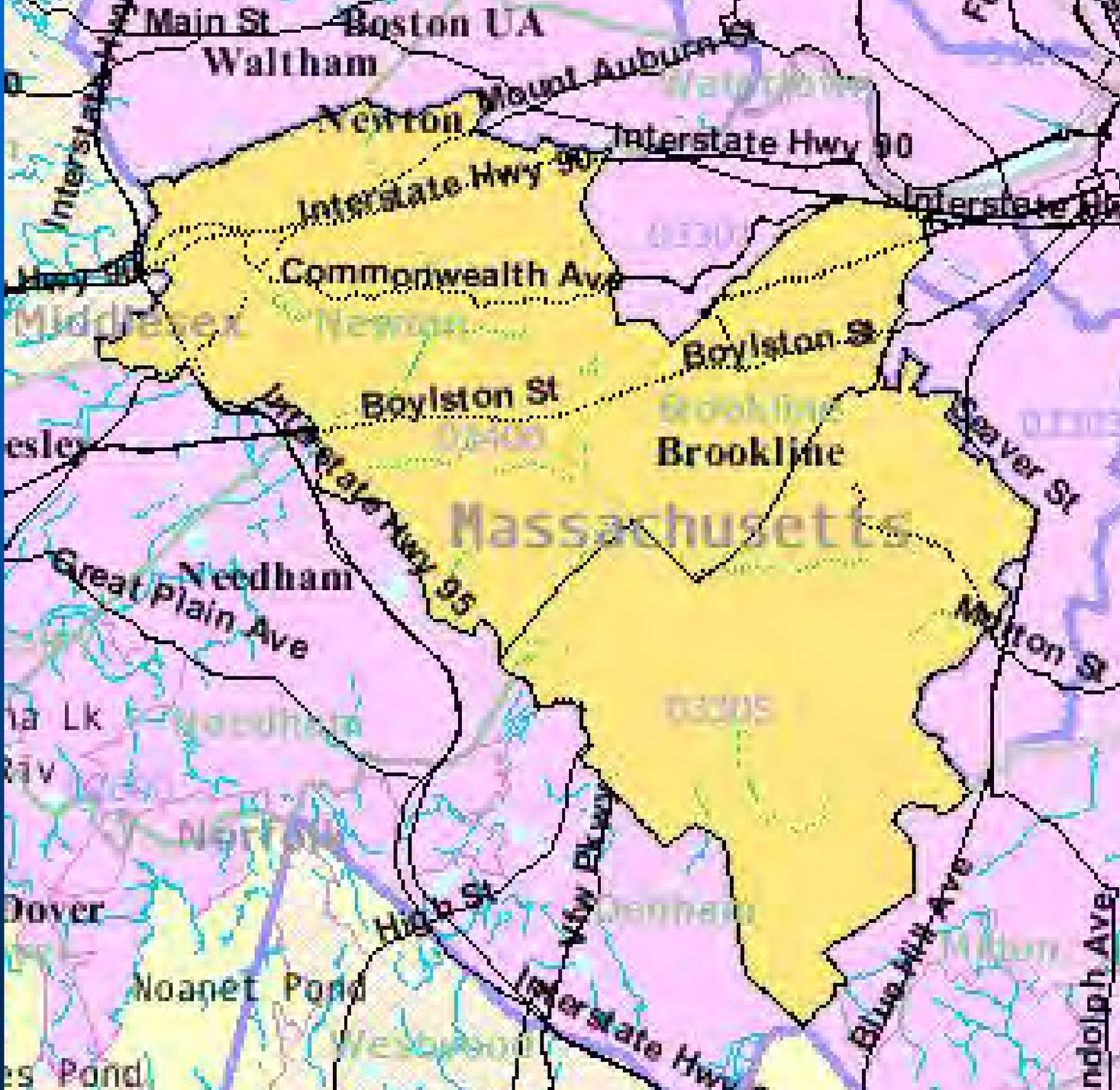
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B	Single-Family Cluster Townhomes	59	9	25	0.42	153	2.59	20,000	\$95,202	\$1,614	\$10,757
C	Special Permit I	393	59	112	0.28	786	2.00	0	(\$847,591)	(\$2,157)	(\$14,378)
D	Special Permit II, Typ. Unit Mix	467	70	133	0.28	934	2.00	0	(\$1,007,188)	(\$2,157)	(\$14,378)
E	Special Permit II, Same Bdrm Mix as Current	467	70	73	0.16	934	2.00	0	(\$539,993)	(\$1,156)	(\$7,709)
F	Apartments, 20% Age-Restricted	432	65	99	0.23	828	1.92	0	(\$677,435)	(\$1,554)	(\$10,358)
G	Apartments, 49% Age-Restricted	487	37	70	0.14	854	1.75	0	(\$240,479)	(\$494)	(\$6,517)
H	Infill Units with 25 extended stay	237	36	67	0.28	474	2.00	6,000	(\$344,642)	(\$1,453)	(\$9,687)

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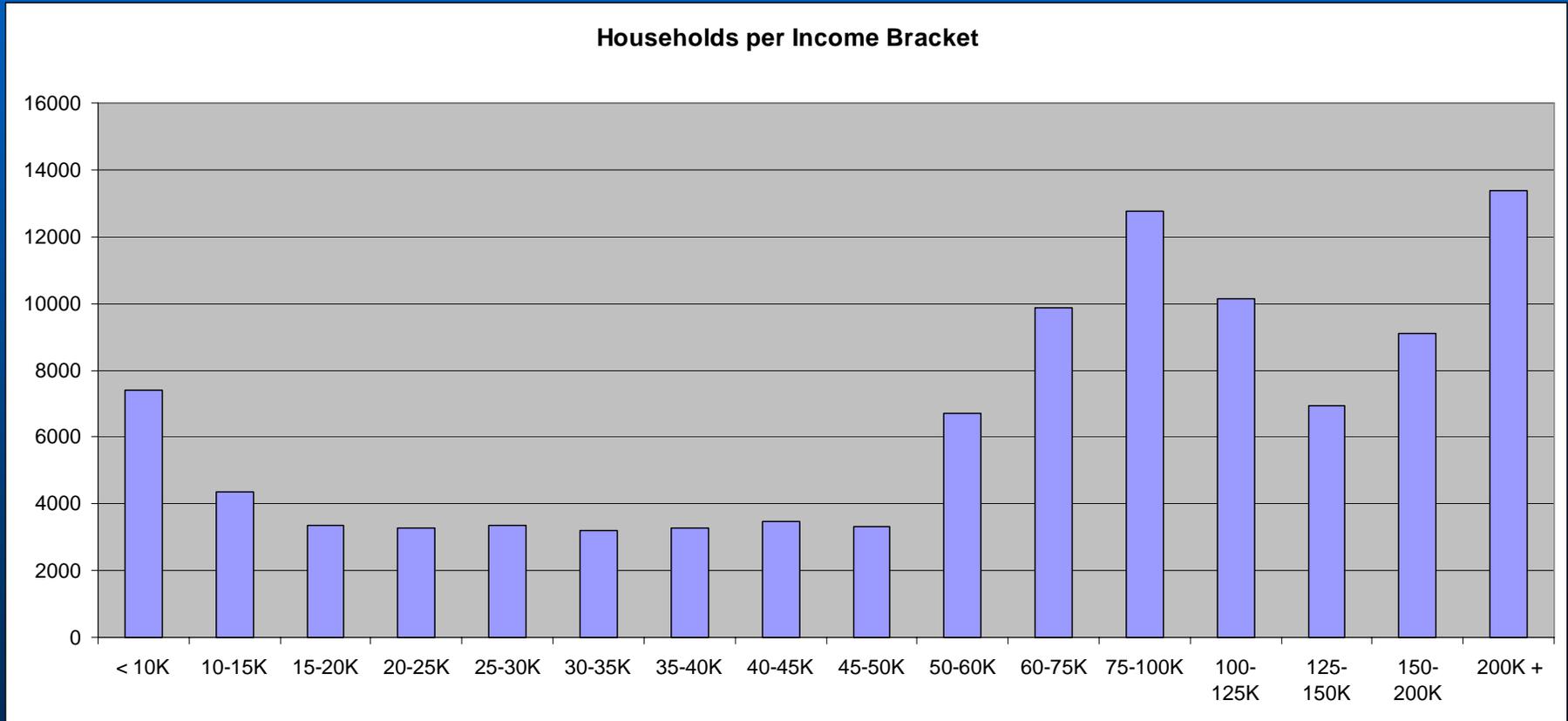
“Back of Envelope” Fiscal Study

1. Even lower unit proposal could be revenue negative if the Town does not have control over unit mix.
2. The outcome of apartment proposals will hinge on the mix of unit types (and school-aged children).
3. Although senior housing will not have school-aged children, it is unclear how much of a positive fiscal impact these units would have compared to non-restricted rental units. Note that these scenarios assumed population per household is lower in senior housing, which resulted in lost revenues from fees, excise taxes.
4. Potential commercial space would have minimal impact to revenue generation.

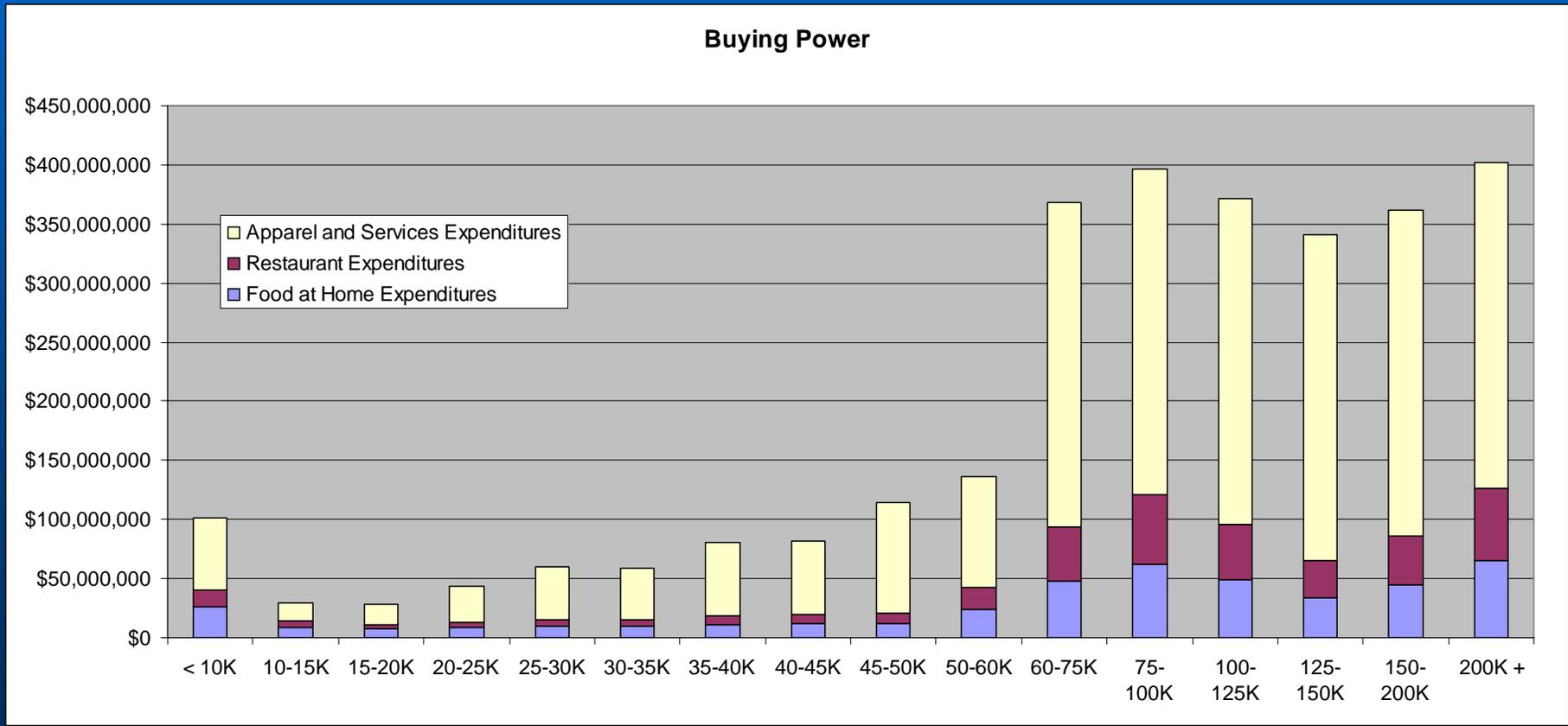
Study Area for
Retail Potential



Buying Power for Potential Retail

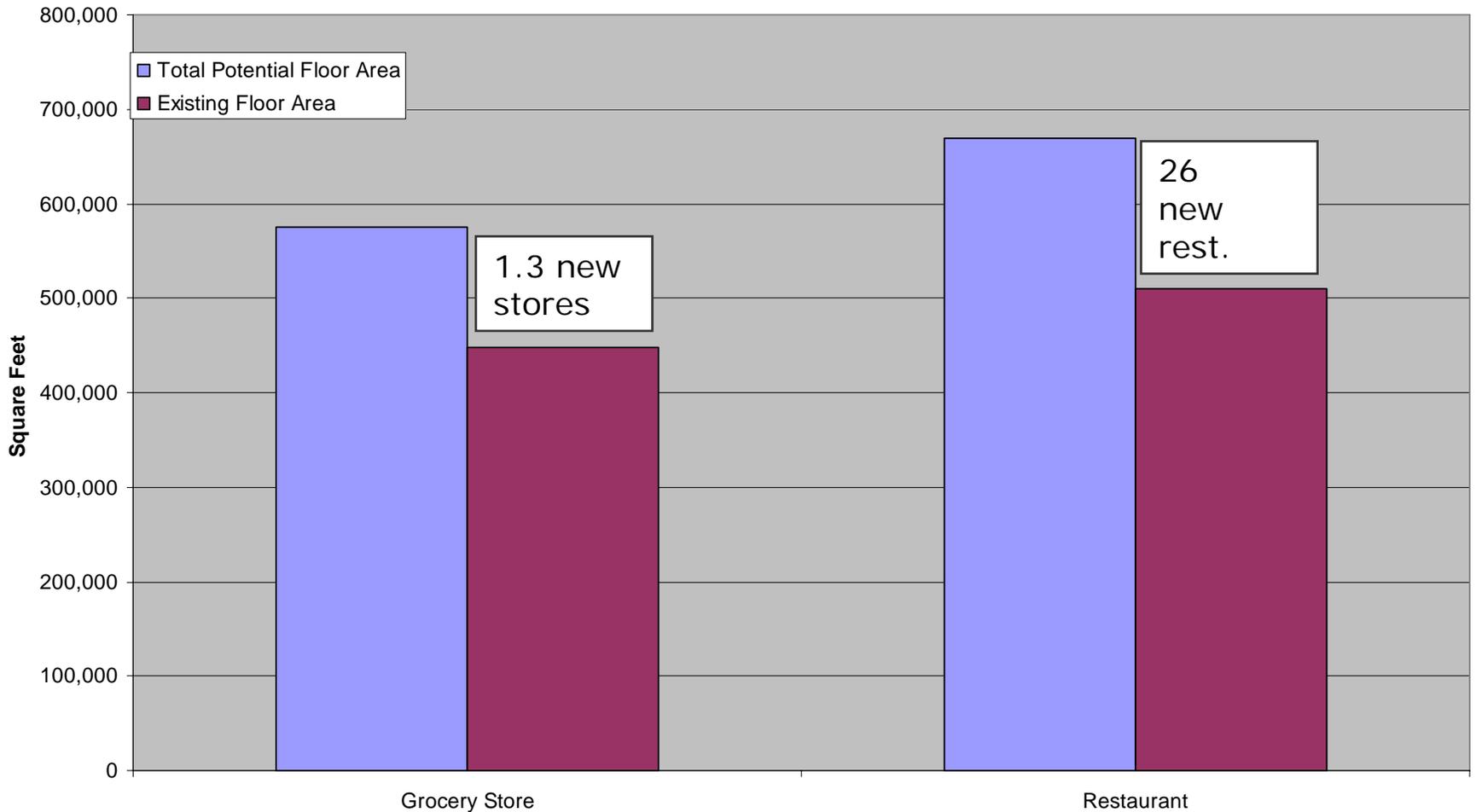


Buying Power for Potential Retail



Potential for New Retail

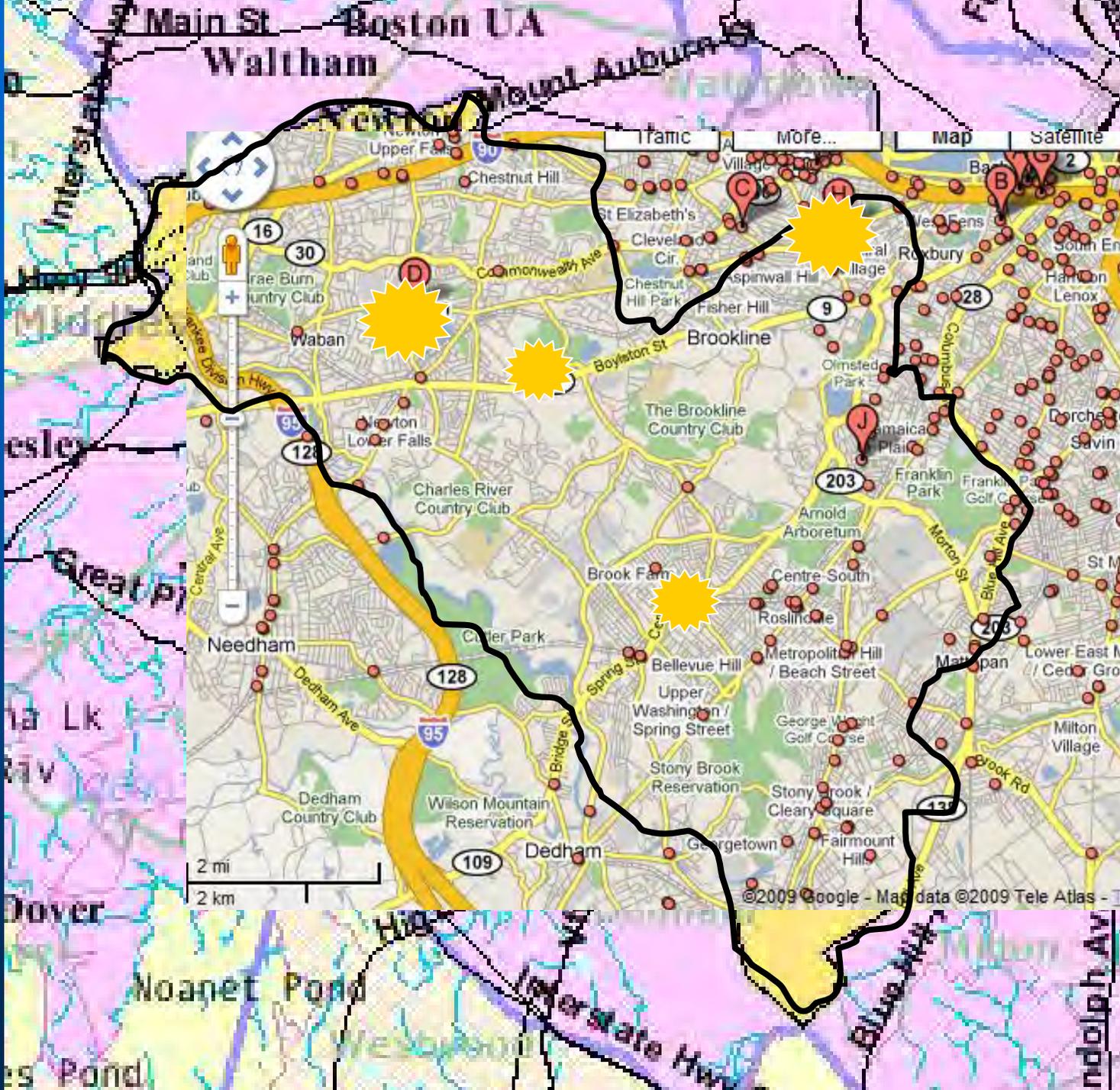
Potential Grocery & Restaurant Floor Area



Study Area for Retail Potential

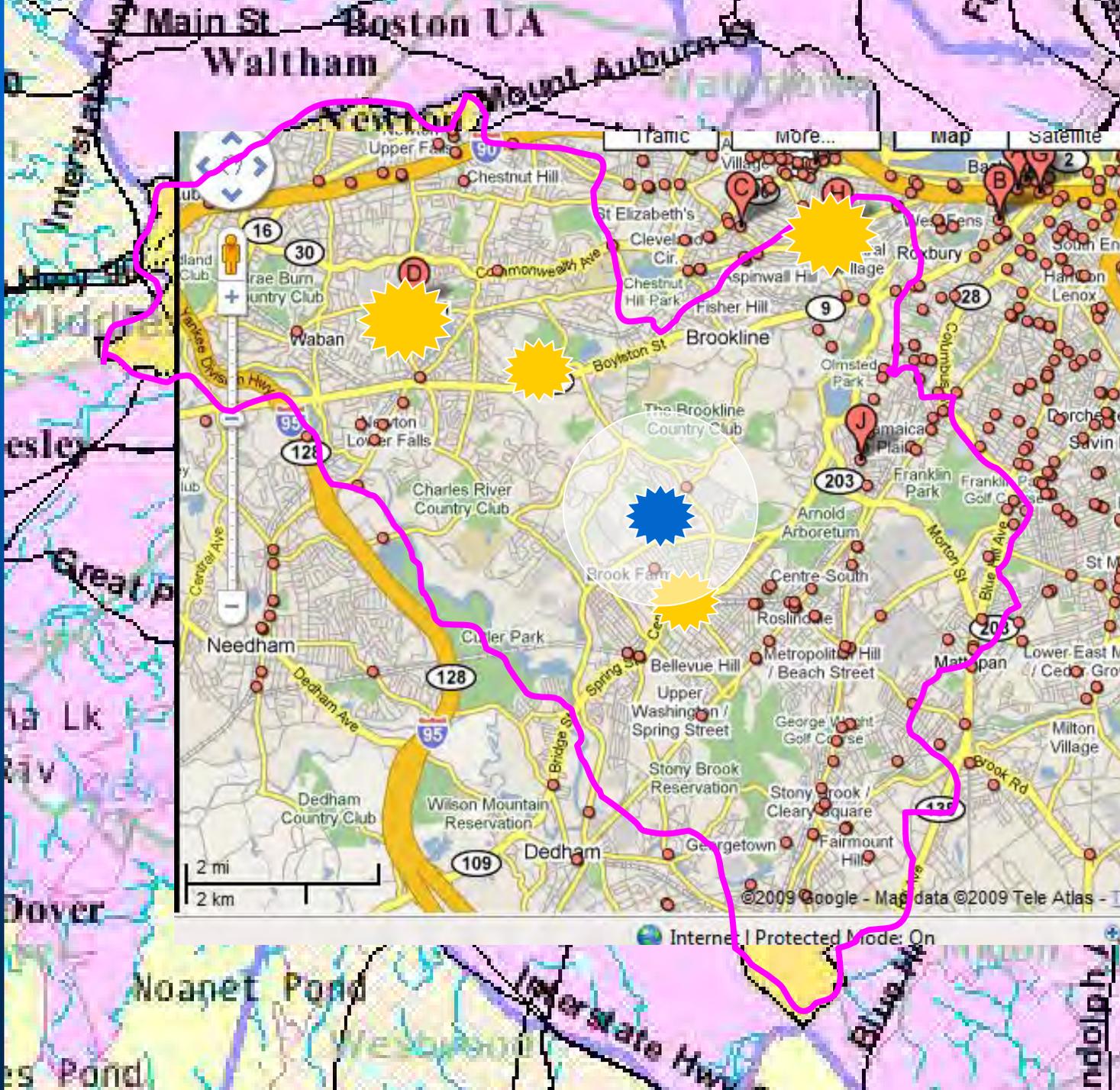


Existing Large Grocery Stores



Study Area for Retail Potential

-  Hancock Village
-  Existing Large Grocery Stores

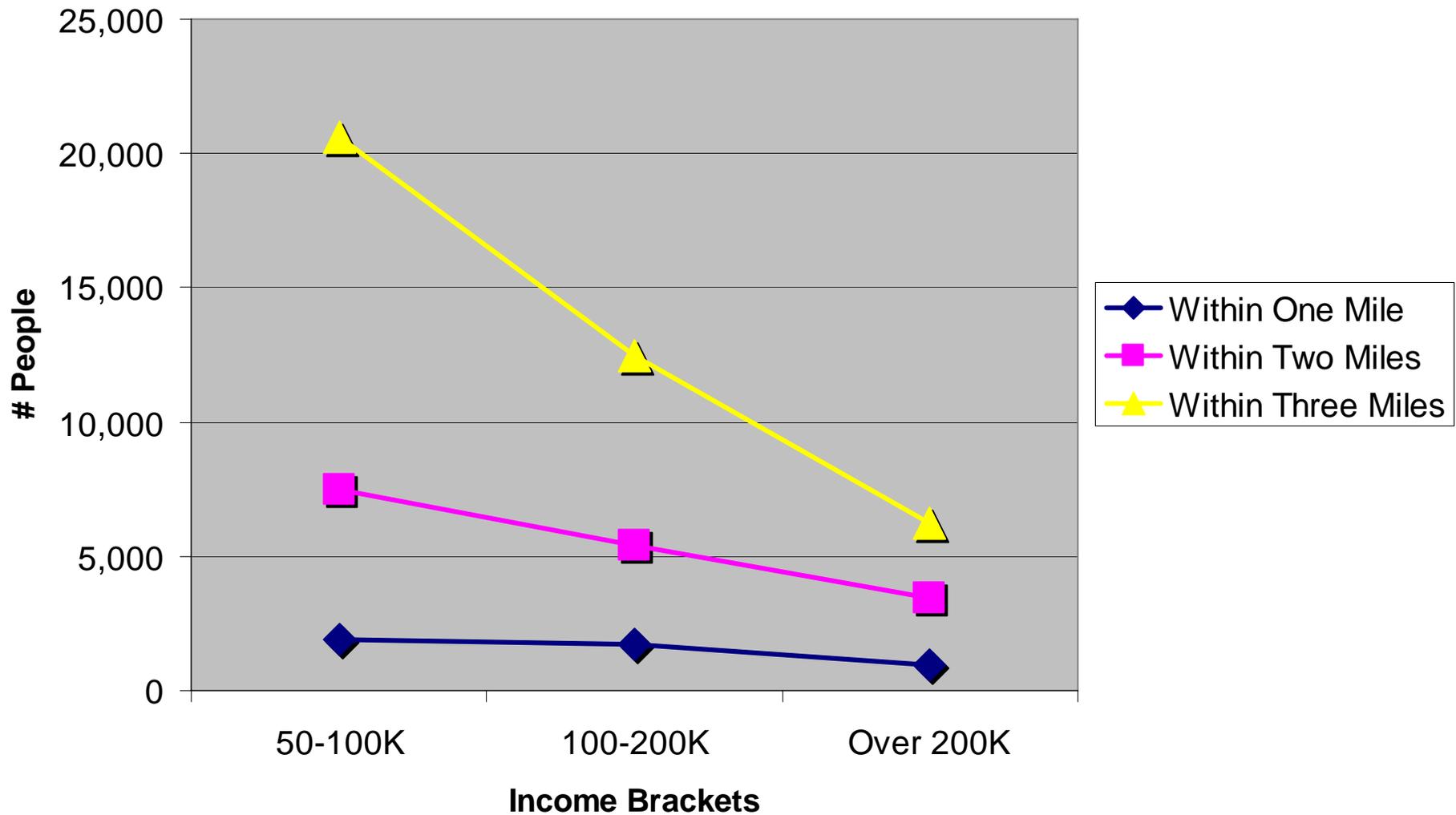


Study Area for Retail Potential: Average Daily Traffic Volumes

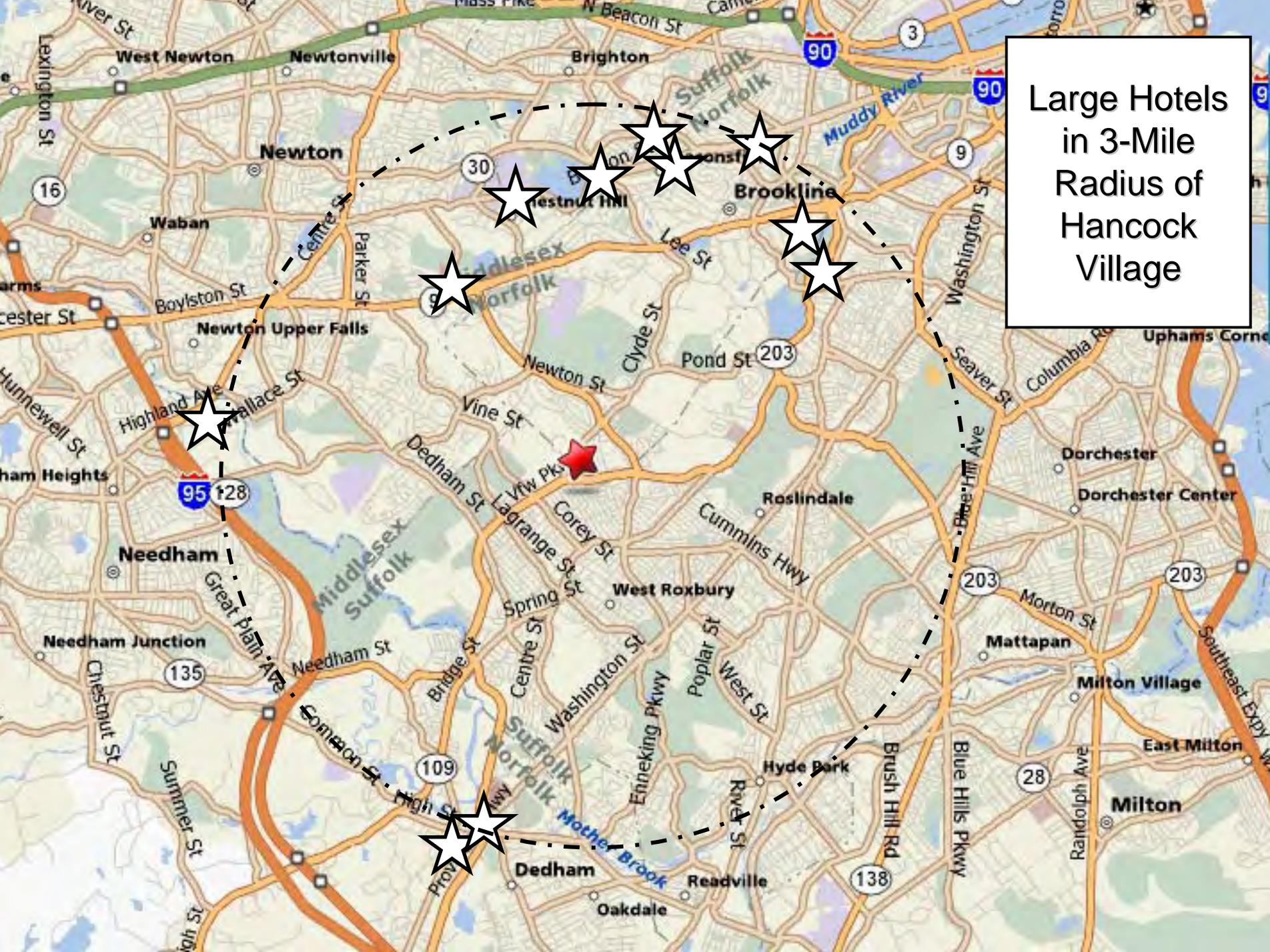


New Retail will prefer locations with larger average daily traffic volumes (i.e. VFW Parkway rather than Hancock Village)

Income Demographics near Hancock Village



Large Hotels
in 3-Mile
Radius of
Hancock
Village



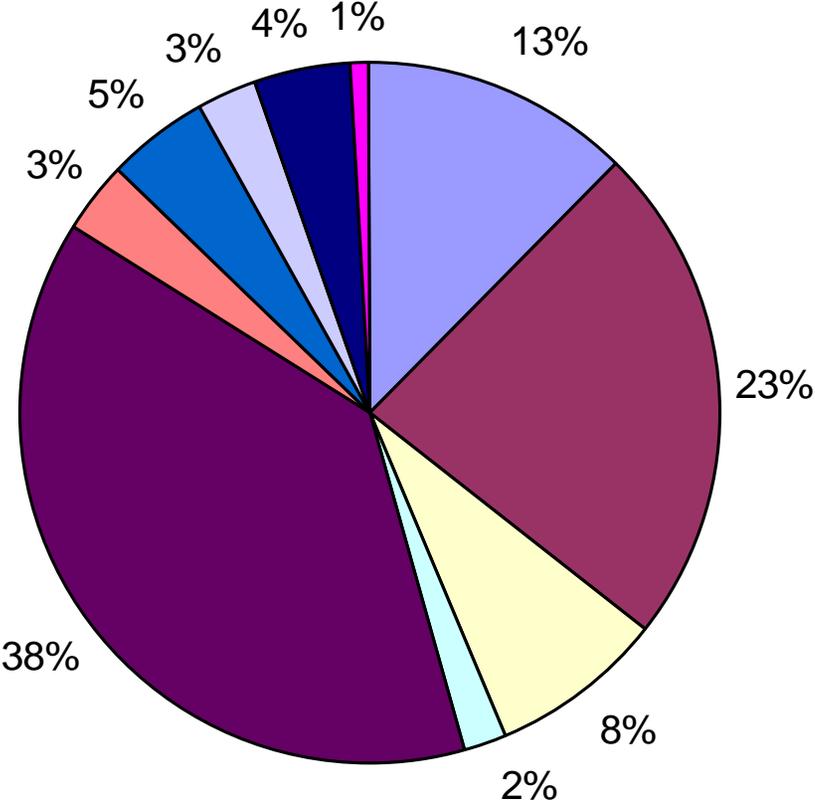
Commercial Possibilities

Potential Use	Who would it Serve?	Market Potential	Chestnut Hill Realty Goals	Relative Traffic Impact	Fiscal Impact
Hotel	Extended family of Brookline residents	Low	No	Low	Revenue Positive – also would include hotel taxes
Extended Stay within Apartment Format	Extended family, LMA families, other travelers who prefer quiet setting	Unknown	Possibly	Moderately Low	Revenue Positive – also would include hotel taxes if less than 90 days
Assisted Living	Regional Need, Brookline Need	Moderate	No	Low	Revenue Positive
Grocery Store	1.5 mile radius	Low	No	High	Moderate
Restaurant	1.5 mile radius	Moderate	No	High, but off peak hours	Minimal
Incidental Retail	Walking Distance	Moderate	Maybe	Low	Minimal
Commercial Business Center / Mail Room	1.5 mile radius	Unknown	Possibly	Moderately Low	Minimal

Thinking outside of the Box

1. Back to the Future: Corporate Sponsorship when Hancock Village was created – What's the modern version of that vision?
2. Partnering with Medical Institutions, assisted living, corporations looking for language immersion programming
3. Creating job training / language services / after-school site
4. Providing neighborhood amenities
5. Using model of financial set-aside for sharing risk of unpredictability of school-aged children
6. Substantial affordable rental housing, perhaps including workforce housing with J. Ron Terwilliger Center

Occupation of Hancock Village Residents



- MEDICAL
- EDUCATION
- BUSINESS
- FINANCE
- RETIRED/HOUSEWIFE/OTHER UNEMPLOYED
- ENG/ARCH
- COMPUTER
- ARTS
- OTHER
- HOSPITALITY

Need to know what the Developer's intention is relative to Brookline

1. What is the typical profile of Hancock Village residents?
2. Why are they attracted to this site?
3. What demographic trends are temporary, and which are long-term?
4. What commercial partnerships could be formed to create mixed-use site?