



Select Board

Meeting Packet

December 4, 2023

DRAFT

A. Granite Avenue Subdistrict

2. Applicability

An applicant may develop a multifamily or mixed-use project up to 6-10 stories on certain large parcels in the northern part of the district along the Neponset River and up to 4.3.5 stories on certain large parcels in the southern part of the district between Granite Avenue and Interstate 93.

5. **Table of Dimensional Standards.** Notwithstanding anything to the contrary in this Zoning, the dimensional requirements applicable in the Granite Avenue Subdistrict are as follows:

Standard	
Lot Size	
Minimum (SF)	none
Height (north)	
Stories (Maximum)	<u>610</u>
Feet (Maximum)	<u>75120</u>
Height (south)	
Stories (Maximum)	<u>4.53.5</u>
Feet (Maximum)	<u>6045</u>
Minimum Open Space	40%
Maximum Units per Acre	45

Standard	
Minimum Frontage (ft)	none
Front Yard Setback	
(ft.)	30
Side Yard Setback	
Minimum side setback (ft)	10
Minimum sum of both side setbacks (ft)	20
Rear Yard Setback	
(ft.)	20
Maximum Floor Area Ratio (FAR)	
North	<u>2.1</u>

<u>South</u>	<u>1.0</u>
--------------	------------

DRAFT

REQUEST FOR DESIGNER SERVICES (RFS)

Town of Milton, MA Milton Public Schools

New School Project

November 29, 2023

Invitation: The Town of Milton by and through the School Building Committee (“Owner”) is seeking the services of a qualified “Designer” within the meaning of M.G.L. Chapter 7C, Section 44 to provide professional design and construction administration services for a new Grade 7 and 8 Middle School with an early education section (Pre-K) in Milton, Massachusetts. Selection of a Designer will be made by the School Building Committee in accordance with the designer selection procedures established by the Town of Milton.

The Owner is seeking design services to conduct a Feasibility Study, which will include the development and evaluation of potential alternative solutions and continue through the Schematic Design Phase of the preferred alternative initially. The contract between the Owner and the Designer may be amended to include continued designer services through design development, construction contract documents, bidding, award of construction contract(s), construction administration, final closeout and warranty period of the potential Project.

The estimated construction budget for a potential Project may range from \$70,000,000 to \$80,000,000 depending upon the solution that is agreed upon by the Owner. The Fee for Basic Services will be negotiated. The budget for the fee is \$450,000.

A. Background:

The Town of Milton is located in Norfolk County and has a population of approximately 29,000 residents. The Town is governed by a Representative Town Meeting, with an elected five-member Select Board and an appointed Town Administrator. The Milton Public Schools are governed by an elected six-member school committee and an appointed Superintendent.

The Town of Milton is experiencing severe overcrowding in the school district. The Committee has decided to study the addition of a new Upper Middle School to address overcrowding. The contemplated new school will house grades 7-8 and include a new Pre-K early education wing. Grade 5 would be moved from the current elementary schools into the current middle school which would now house grades 5-6. The existing elementary schools would house grades K-4. The Committee is anticipating that the new School will accommodate approximately 750 students inclusive of Pre-K and will be a new School in order to alleviate overcrowding elsewhere in the district. The Town of Milton reserves the right to retain the architect for additional studies, modifications to this plan, or to continue into subsequent design phases.

Site Information: The School Building Committee is currently exploring the construction of a new School on 7.21 acres of land located between Blue Hills Parkway and Gile Road. A survey showing the proposed parcel is included as Attachment G. This site was the subject of Articles 31 and 32 of the 2023 Annual Town Meeting which authorized the Select Board to begin the process of removing the above-described land from Article 97 protection in exchange for other land within the Town not currently in Article 97 protection. This “land-swap” is currently subject to the Article 97 process and approval of the State Legislature. Article 33 of the 2023 Annual Town Meeting Warrant authorized the School Building Committee to expend up to \$275,000 to employ “owner’s project manager, architects, engineers, or other professionals for the purposes of conducting feasibility studies and/or preparing detailed plans, specifications, working drawings, and other necessary documents for the construction and furnishing of a school building”. This RFS is being issued in accordance with that authorization. Article 4 at the Special Town Meeting on December 4, 2023, requests an additional appropriation for the School Building Committee of \$400,000. Copies of Articles 31, 32 and 33 are included as Attachment H.

B. Project Goals and General Scope:

On or about April 9, 2023 the Owner submitted a Statement of Interest (Attachment A) to the MSBA for the purpose of building a new school to address system wide overcrowding. The MSBA is an independent public authority that administers and funds a program for grants to eligible cities, towns, and regional school districts for school construction and renovation projects. The district anticipates a decision from the MSBA Board of Directors in December 2023 or January 2024. The town is moving forward with the project in advance of the MSBA’s decision but may elect to move forward with the MSBA if selected. The Town previously submitted Statements of Interest to the MSBA in 2022, 2021, and 2020.

It is anticipated that the feasibility study will review the problems identified in the Statement of Interest.

The general scope of this project is to complete the tasks required during the Feasibility Study/Schematic Design of an MSBA project. The Feasibility Study will result in an educationally sound, cost-effective, and practical solution that satisfies the District’s educational program requirements.

The Feasibility Study shall include a study of all information required by 963 CMR 2.10 (8) and any other applicable rules, regulations, policies and guidelines as would generally be required under an MSBA project for this school which is planned to be built on the 7.21 acres of land located between Blue Hills Parkway and Gile Road

The Schematic Design shall include, but not be limited to a site development plan, environmental assessment, geotechnical assessment, geotechnical analysis, code analysis, utility analysis, schematic building floor plans, schematic exterior building elevations, narrative building systems descriptions, Northeast Collaborative for High Performance Schools (NE–CHPS) or US Green Building Council’s LEED for Schools Rating System (LEED-S) scorecard, outline specifications, cost estimates, project schedule and proposed total project budget.

Project objectives under consideration by the Owner include:

- Study potential use of a model school in order to reduce design and construction timeframes. Designers should be prepared to present a school in their portfolio that meets the project requirements. A model school proposed by the design firm does **not** need to be an approved MSBA Model School. The Town will consider using a model previously designed and built by the designer that fits the program requirements.
- Minimize impact to the High School community throughout the duration of the project
- Identification of community concerns that may impact study options
- Develop a design that is efficient, cost effective, and in conformance with NE-CHIPS or LEED-S Certification
- Evaluation of both MGL Chapter 149 and 149A construction delivery methods
- Assist District as appropriate with Article 97 processes and MEPA site review
- Understanding and incorporating the District's educational program and goals into the project design. Aid the district in drafting their educational plan.
- Assist the district in reprogramming/master plan of the entire school system.
- Provide our students, faculty, and community a building to support an optimal learning environment with an energy efficient, educationally sound school completed on or under budget.
- Identification of specific milestone requirements and/or constraints of the District – e.g. Town votes, swing space, phasing and occupancy issues.
- Provide life cycle cost analysis of operations as it relates to future operating budgets
- Planning for current design enrollment and potential future enrollment growth
- Solicit input and comments as appropriate from the Town Departments.
- Designing to budgeted construction cost.

The Town of Milton considers the following criteria relevant to the project and requests that interested firms highlight their relevant experience for each of the following:

- Experience with studies of and designs for locations with highly restrictive site access that could include boundaries comprised of residential street limitations, wetlands, and major roadways.
- Designing for work around fully occupied and normal functioning schools.
- Experience with projects procured under MGL Chapter 149A: CM-at-Risk delivery method.
- Experience designing within limitations resulting from nearby wetlands and flood zones.

C. Scope of Services:

The required scope of services is set forth in the Town's Standard Contract for Designer Services (Contract), a copy of which is attached hereto and incorporated herein by reference. If the Owner decides to proceed with the Project beyond the Schematic Design Phase and when the project delivery method is decided (Design/Bid/Build or Construction Manager at Risk), the Contract will be amended accordingly. Unless specifically excluded, the Designer's Basic Services consist of the tasks described in the Contract for Designer Services as amended and this RFS including all investigative work (to the extent provided for in the Contract), feasibility study, schematic design, and, at the Owner's option, design work, preparation of construction documents, bidding period administration, construction

administration, and other related work reasonably inferred in the opinion of the Owner as being necessary to meet the project's stated scope and goals.

This RFS will be appended to and become part of the Contract for Designer Services. Any Designer selected as a result of this RFS will be required to execute the Contract for Designer Services and applicable amendment that are attached hereto.

Basic Services include, but are not limited to, verification of existing record information including building dimensions, details and general existing conditions, site investigations as necessary at the 7.21 acres of land located between Blue Hills Parkway and Gile Road, cost estimating, architecture, civil, sanitary, mechanical, electrical, plumbing, fire protection, structural, site planning and landscape architecture, basic environmental permitting, graphics, lighting design, acoustics, data and communication, educational consultants, any specialty consultants for sustainable design (LEED-S/NE-CHPS), laboratory, library/media center and kitchen space, code consultants, accessibility, energy evaluations, detailed cost estimates; preparation of construction documents; bidding and administering the Construction Contract Documents and other design and consulting services incidental and required to fulfill the project goals. Please refer to the Contract and amendments for a complete summary of Basic Services.

The designer shall assist the town in reviewing storm water mitigation and traffic studies early in the design process.

D. Project Schedule:

Work under this RFS is divided into the Project Phases as listed in Section 1 and Exhibit A of the Contract as amended and as may be augmented in this RFS. Each Project Phase will consist of one or more required submissions, and may include site visits, meetings with the Owner, Owner's Project Manager, the Authority and others, and other tasks as described.

The milestone dates listed below are estimates only. Actual dates may vary depending upon the agreed upon solution, the extent of required document revisions, the time required for regulatory approvals, and the construction contractor's performance. Such variances will not, in and of themselves, constitute a justification for an increased Fee for Basic Services.

<u>Milestone</u>	<u>Projected Date</u>
Site Visit.....	12/8/2023
Question due	12/15/2023
Designer RFS Submissions Received	01/12/2024
Short list	01/15/2024
Designer Interviews	week of 01/29/2024
Letter of Intent/ Designer Contract Executed	02/05/2024
Local Project Funding Authorization.....	TBD

Construction Start	TBD
Substantial Completion of Construction.....	TBD
Move-In.....	TBD

The durations for the Bidding and Construction Administration Phases are estimates only. Actual durations may vary depending upon the agreed upon solution, the extent of required document revisions, the time required for regulatory approvals, and the construction contractor's performance.

Such variances in estimated time will not, in and of themselves, constitute a justification for an increased Fee for Basic Services, nor are they a substitute for the performance time requirements shown below.

The Designer performance times listed in the table below are requirements, not estimates. The Owner, through the Owner's Project Manager will review each submission and, if acceptable, provide notice to the Designer to proceed to the next phase.

The Designer's adherence to the performance times listed below will be part of the Owner's performance evaluation of the Designer's work, which will be conducted at the end of the Project.

Within/Weeks		
• Attend a "Kick-Off" meeting	3	Execution of a contract with the Owner
• Preliminary Program	8	Kick Off
• Development of Alternatives	2	Preliminary Program
• Preliminary Evaluation of Alternatives	3	Approval of Alternatives
• Final Evaluation of Alternatives	8	Approval of Preliminary Evaluation
• Recommendation of Preferred Solution	2	Approval of Final Evaluation
• Final Design Program	7	Approval of Preferred Solution
• Schematic Design	TBD	Approval of the Final Design Program
• Design Development	TBD	Approval of the Schematic Design
• 60% Construction Documents	TBD	Approval of Design Development
• 100% Construction Documents	TBD	Approval of Design Development

The Town is looking to have a schematic design program complete, with a comprehensive construction cost estimate in early May 2024.

E. Minimum qualifications:

Selection will be made by the Town of Milton Designer Selection Process in accordance with the Authority's Designer Selection Procedures, attached hereto as Attachment E. The Respondent must certify in its cover letter that it meets the following minimum requirements. Any Respondent that fails to include such certification in its response, demonstrating that these criteria have been met,

will be rejected without further consideration. To be eligible for selection, the Designer must meet all of the following qualifications.

1. Be a qualified Designer within the meaning of M.G.L. Chapter 7C, Section 44, employing a Massachusetts registered **architect** responsible for and being in control of the services to be provided pursuant to the Contract.
2. The Massachusetts registered **architect** responsible for and in control of the services to be provided has successfully completed the Massachusetts Certified Public Purchasing Official Program (“MCPPO”) seminar “Certification for School Project Designers and Owner’s Project Managers” as administered by the Office of the Inspector General of the Commonwealth of Massachusetts, and must maintain certification by completing the “Recertification for School Project Designers and Owner’s Project Managers” seminar every three years thereafter. Proof of recertification or registration in the next recertification seminar for which space is available must be provided.
3. Applicants shall subcontract with MBEs and WBEs, as certified by the SDO.

F. Selection Criteria:

In evaluating proposals, the Owner will consider the members of the proposed design team. Identify those member(s) of the proposed design team who will be responsible for the following categories of work: (Firm’s name, individual’s name and professional registration or license number, as applicable, must be listed in the application for each category of work, as well as whether the firm is SDO certified as an MBE and/or WBE).

1. **Architecture**
2. **Educational Programming**
3. **Civil Engineering**
4. **Landscape Architecture**
5. **Structural Engineering**
6. **Fire Protection Engineering**
7. **Plumbing Engineering**
8. **HVAC Engineering**
9. **Electrical/Lighting**
10. **Data/Communications**
11. **Environmental Permitting**
12. **Geotechnical Engineering**
13. **Geoenvironmental Engineering**
14. **Hazardous Materials**
15. **Cost Estimating**
16. **Kitchen/Food Service Consultant**
17. **Acoustical Consultant**
18. **Specifications Consultant**
19. **Library/Media**
20. **Technology Consultant/Audio Visual Consultant**
21. **Sustainable/Green Design/Renewable Energy Consultant**
22. **Code Consultant**
23. **Accessibility Consultant**
24. **Traffic Consultant**
25. **Furniture, Fixtures and Equipment Consultant**

26. Site Surveying

27. Security Consultant

Applicants must address each category of work listed above in their application whether it is to be performed by in-house staff or by sub-consultant(s).

The members of the team for each of the categories of work listed above must be identified including the firm's name, individual's name and professional registration or license number, as applicable, as well as whether the firm is SDO certified as an MBE and/or WBE.

Failure to address each category may result in the elimination of the applicant from consideration on this project.

Applicants should not list any consultants other than those for the categories of work listed above.

The Select Board has designated the School Building Committee ("SBC") to serve as the Designer Selection Committee to conduct the designer selection process. The SBC will designate a subcommittee of four members of the SBC and four individuals at large to conduct an initial review of responses. The subcommittee will recommend at least three applicants to the SBC for interviews. The SBC will conduct interviews and make a recommendation to the Select Board.

The SBC and subcommittee will consider the following additional criteria in evaluating proposals:

1. Prior similar experience best illustrating current qualifications for the specific project.
2. Past performance of the firm, if any with regard to public, private, DOE-funded, and MSBA funded projects across the Commonwealth, with respect to:
 - a. Quality of project design.
 - b. Quality, clarity, completeness and accuracy of plans and contract documents.
 - c. Ability to meet established program requirements within allotted budget.
 - d. Ability to meet schedules including submission of design and contract documents, processing of shop drawings, contractor requisitions and change orders.
 - e. Coordination and management of consultants.
 - f. Working relationship with contractors, subcontractors, local awarding authority and MSBA staff and local officials.
3. Current workload and ability to undertake the contract based on the number and scope of projects for which the firm is currently under contract.
4. The identity and qualifications of the consultants who will work on the project.
5. The financial stability of the firm.
6. The qualifications of the personnel to be assigned to the project.
7. Geographical proximity of the firm to the project site or willingness of the firm to make site visits and attend local meetings as required by the client.
8. Additional criteria that the Town of Milton Designer Selection Committee considers relevant to the project.

G. Proposal requirements

Persons or firms interested in applying must meet the following requirements:

- 1. Applicants must have an up-to-date Master File Brochure on file at the Massachusetts School Building Authority.**

2. Applications shall be on "Standard Designer Application Form for Municipalities and Public Agencies not within DSB Jurisdiction (Updated July 2016)" as developed by the Designer Selection Board of the Commonwealth of Massachusetts. **Applications (one original, and two (2) digital copies in PDF format on separate flash drives) must be received on or before 12:00PM, Friday, January 12, 2024.** Applications must be completed using no smaller than the same font size as in the application (10 font Arial Narrow). Applications should be printed double-sided and spiral bound on the left short edge, landscape orientation, in order that the pages lie and remain flat when opened. Applications should not be provided with acetate covers. . Three (3) hard copy Application Proposals must be accompanied by a concise cover letter that is a maximum of two pages in length. A copy of the cover letter should be attached to each copy of the application proposal. The cover letter must include the certifications as noted in Section E of this RFS. (A copy of the MCPPO certification should be attached to the cover letter as well as any SDO letters.) Three (3) electronic copies of the Application Proposal in pdf format on separate thumb drives shall also be submitted to the Town with the hard copy Application Proposals
4. Applicants may supplement this proposal with graphic materials and photographs that best demonstrate design capabilities of the team proposed for this project **subject to the page limitations as set forth in the Standard Designer Application Form. Electronic links to supplemental information are prohibited.**
5. Proposals shall be addressed to:

Milton School Building Committee
C/O Nicholas Milano
Milton Town Hall, Select Board Office, Second Floor
525 Canton Avenue
Milton MA 02186

6. Proposals must be clearly identified by marking the package or envelope with the following:

Milton School Project – Architect Services
“Name of Applicant”
7. The deadline for all questions is 5:00pm on December 15, 2023. All questions regarding this RFS should be addressed exclusively in writing, via email with “Milton RFS Questions” in the subject line, to:

Milton@pmaconsultants.com

H. Pre-Proposal Meeting

All interested parties should attend a non mandatory briefing session at the intersection of Gile Rd and Blue Hills Parkway scheduled for Friday, December 8, 2023 at 10:00 AM.

I. Withdrawal

Applicants may withdraw an application as long as the written request to withdraw is received by the Owner prior to the time and date of the proposal opening.

J. Public Record

All responses and information submitted in response to this RFS are subject to the Massachusetts Public Records Law, M.G.L. c. 66, § 10 and c. 4, § 7(26). Any statements in submitted responses that are inconsistent with the provisions of these statutes shall be disregarded.

K. Waiver/Cure of Minor Informalities, Errors and Omissions

The Owner reserves the right to waive or permit cure of minor informalities, errors or omissions prior to the selection of a Respondent, and to conduct discussions with any qualified Respondents and to take any other measures with respect to this RFS in any manner necessary to serve the best interest of the Owner and its beneficiaries.

L. Rejection of Responses, Modification of RFS

The Owner reserves the right to reject any and all responses if the Owner determines, within its own discretion, that it is in the Owner's best interests to do so. This RFS does not commit the Owner to select any Respondent, award any contract, pay any costs in preparing a response, or procure a contract for any services. The Owner also reserves the right to cancel or modify this RFS in part or in its entirety, or to change the RFS guidelines. A Respondent may not alter the RFS or its components.

M. Additional Information

ATTACHMENTS:

Attachment A: Statement of Interest

<https://www.townofmilton.org/DocumentCenter/View/3299/Milton-Statement-of-Interest---MSBA-April-2023>

Attachment B: Milton design services contract - School Designer December 2023

Attachment C: Standard Designer Application Form for Municipalities and Public Agencies not within DSB Jurisdiction (Updated July 2016)
(https://www.mass.gov/files/citiestownsapplication2016_1.doc)

Attachment D: Certifications

Attachment E: [Milton Designer Selection Procedures](#)

Attachment F: School Building Committee Meeting Recordings

<https://www.youtube.com/@miltonaccesstv/search?query=%22School%20Building%20Committee%22>

Attachment G: Parcel Information

Article 97

Land survey

Attachment H: 2023 Annual Town Meeting Articles 31, 32, 33

End of Request for Designer Services

Massachusetts School Building Authority

Next Steps to Finalize Submission of your FY 2023 Statement of Interest

Thank you for submitting an FY 2023 Statement of Interest (SOI) to the MSBA electronically. **Please note, the District's submission is not yet complete if the District selected statutory priority 1 or priority 3.** If either of these priorities were selected, the District is required to mail the required supporting documentation to the MSBA, which is described below.

ADDITIONAL DOCUMENTATION FOR SOI STATUTORY PRIORITIES #1 AND #3: If a District selects Statutory priority #1 and/or priority #3, the District is required to submit additional documentation with its SOI.

- If a District selects statutory priority #1, Replacement or renovation of a building which is structurally unsound or otherwise in a condition seriously jeopardizing the health and safety of the school children, where no alternative exists, the MSBA requires a hard copy of the engineering or other report detailing the nature and severity of the problem and a written professional opinion of how imminent the system failure is likely to manifest itself. The District also must submit photographs of the problematic building area or system to the MSBA.
- If a District selects statutory priority #3, Prevention of a loss of accreditation, the SOI will not be considered complete unless and until a summary of the accreditation report focused on the deficiency as stated in this SOI is provided.

ADDITIONAL INFORMATION: In addition to the information required above, the District may also provide any reports, pictures, or other information they feel will give the MSBA a better understanding of the issues identified at a facility.

If you have any questions about the SOI process please contact the MSBA at 617-720-4466 or SOI@massschoolbuildings.org.

Massachusetts School Building Authority

School District Milton

District Contact TEL:

Name of School Cunningham School

Submission Date 4/7/2023

SOI CERTIFICATION

To be eligible to submit a Statement of Interest (SOI), a district must certify the following:

- The district hereby acknowledges and agrees that this SOI is NOT an application for funding and that submission of this SOI in no way commits the MSBA to accept an application, approve an application, provide a grant or any other type of funding, or places any other obligation on the MSBA.
- The district hereby acknowledges that no district shall have any entitlement to funds from the MSBA, pursuant to M.G.L. c. 70B or the provisions of 963 CMR 2.00.
- The district hereby acknowledges that the provisions of 963 CMR 2.00 shall apply to the district and all projects for which the district is seeking and/or receiving funds for any portion of a municipally-owned or regionally-owned school facility from the MSBA pursuant to M.G.L. c. 70B.
- The district hereby acknowledges that this SOI is for one existing municipally-owned or regionally-owned public school facility in the district that is currently used or will be used to educate public PreK-12 students and that the facility for which the SOI is being submitted does not serve a solely early childhood or Pre-K student population.
- Prior to the submission of the SOI, the district will schedule and hold a meeting at which the School Committee will vote, using the specific language contained in the "Vote" tab, to authorize the submission of this SOI. This is required for cities, towns, and regional school districts.
- Prior to the submission of the SOI, the district will schedule and hold a meeting at which the City Council/Board of Aldermen or Board of Selectmen/equivalent governing body will vote, using the specific language contained in the "Vote" tab, to authorize the submission of this SOI. This is not required for regional school districts.
- The district hereby acknowledges that current vote documentation is required for all SOI submissions. The district will use the MSBA's vote template and the required votes will specifically reference the school name and the priorities for which the SOI is being submitted.
- The district hereby acknowledges that it must upload all required vote documentation on the "Vote" tab, in the format required by the MSBA. All votes must be certified or signed and on city, town or district letterhead.
- The district hereby acknowledges that this SOI submission will not be complete until the MSBA has received all required supporting documentation for statutory priority 1 and statutory priority 3. If statutory priority 1 is selected, your SOI will not be considered complete unless and until you provide the required engineering (or other) report, a professional opinion regarding the problem, and photographs of the problematic area or system. If statutory priority 3 is selected, your SOI will not be considered complete unless and until you provide a summary of the accreditation report focused on the deficiency as stated in this SOI. The documentation noted above must be post-marked and submitted to the MSBA by the Core Program SOI filing period closure date.

**LOCAL CHIEF EXECUTIVE OFFICER/DISTRICT SUPERINTENDENT/SCHOOL COMMITTEE CHAIR
(E.g., Mayor, Town Manager, Board of Selectmen)**

Chief Executive Officer * **School Committee Chair** **Superintendent of Schools**

(signature)

(signature)

(signature)

Date

Date

Date

* Local chief executive officer: In a city or town with a manager form of government, the manager of the municipality; in other cities, the mayor; and in other towns, the board of selectmen unless, in a city or town, some other municipal office is designated to the chief executive office under the provisions of a local charter. Please note, in districts where the Superintendent is also the Local Chief Executive Officer, it is required for the same person to sign the Statement of Interest Certifications twice.

Massachusetts School Building Authority

School District Milton

District Contact TEL:

Name of School Cunningham School

Submission Date 4/7/2023

Note

The following Priorities have been included in the Statement of Interest:

- Replacement or renovation of a building which is structurally unsound or otherwise in a condition seriously jeopardizing the health and safety of school children, where no alternative exists.
- Elimination of existing severe overcrowding.
- Prevention of the loss of accreditation.
- Prevention of severe overcrowding expected to result from increased enrollments.
- Replacement, renovation or modernization of school facility systems, such as roofs, windows, boilers, heating and ventilation systems, to increase energy conservation and decrease energy related costs in a school facility.
- Short term enrollment growth.
- Replacement of or addition to obsolete buildings in order to provide for a full range of programs consistent with state and approved local requirements.
- Transition from court-ordered and approved racial balance school districts to walk-to, so-called, or other school districts.

SOI Vote Requirement

I acknowledge that I have reviewed the MSBA's vote requirements for submitting an SOI, which are set forth in the Vote Tab of this SOI. I understand that the MSBA requires votes from specific parties/governing bodies, in a specific format using the language provided by the MSBA. Further, I understand that the MSBA requires certified and signed vote documentation to be submitted with the SOI. I acknowledge that my SOI will not be considered complete and, therefore, will not be reviewed by the MSBA unless the required accompanying vote documentation is submitted to the satisfaction of the MSBA. All SOI vote documentation must be uploaded on the Vote Tab.

SOI Program: Core

Potential Project Scope: Potential New School

Is this a Potential Consolidation? No

Is this SOI the District Priority SOI? Yes

School name of the District Priority SOI: Cunningham School

Is this part of a larger facilities plan? Yes

If "YES", please provide the following:

Facilities Plan Date: 6/30/2018

Planning Firm: None. Strategic Planning Advisory Committee

Please provide a brief summary of the plan including its goals and how the school facility that is the subject of this SOI fits into that plan:

The Milton Public Schools Strategic Plan 2018-23 (Attachment K) was approved by the School Committee in June, 2018. The Strategic Plan addresses six strategic goals for the district. One of the six goals addresses our facilities.

While the Strategic Plan does not explicitly refer to the enrollment crisis that we are experiencing in our elementary schools, our Elementary Space Needs Study, conducted by Drummond Roseane Anderson (DRA) (Attachment J), helped us to examine those needs and the possibilities for how to address them.

Vision Statement:

We, the Milton Public Schools, envision a district with excellent instruction in every classroom, where learning experiences are aligned with students' individual strengths and needs, and where attention to academic and social emotional growth are balanced so that every child achieves at high levels and develops a strong sense of self. We see a district of intellectual discourse and professional learning at all levels- students, faculty, and administration- in which there are structures and processes for continual reflection, innovation, and data driven decision-making. We know that such a district is achievable if: we facilitate instruction that instills a passion for learning, curiosity, and critical thinking skills; we are committed to cultural competency; we foster a positive approach to the behavioral health of children; and we build strong partnerships with families and the community.

Facilities Goal:

To ensure that the Milton Public Schools has sufficient classroom and other space for its expanding enrollment and that its facilities provide adequate elements necessary for a strong 21st century education.

OBJECTIVE 6.1

Provide sufficient dedicated classroom and other related space for our expanding enrollment

Activity 6.1.1

Using current enrollment and NESDEC study of enrollment trends, generate and prioritize a list of options for ways to deal with space needs

Activity 6.1.2

Contract for a study for architectural services to explore the options generated in 6.1.1 and to analyze cost implications of each option

Activity 6.1.3

Conduct public awareness campaign to inform the public of the need for space to accommodate increased enrollment and to share options that have been considered (including presentation on this issue at Town Meeting 2019)

Activity 6.1.4

If needed/appropriate, request that Town Meeting authorize a School Building Committee at Town Meeting 2019 to:

- a. Develop a plan, including cost estimates, for needed facilities expansion and enhancements to meet enrollment needs;
- b. Seek approval from Town Meeting and voters for the recommended facilities adaptation or expansion;
- c. Develop, approve and oversee the construction or adaptation of needed facilities

OBJECTIVE 6.2

Ensure that our facilities offer the adequate elements necessary for a strong 21st century education

Activity 6.2.1

Establish a 21st century schools task force to explore and prioritize the elements required for a strong 21st

century education – including:

- technologically appropriate space for STEM
- foreign languages
- special needs services
- fine arts
- social emotional learning
- space and furnishings to enable small group work
- student related programs and activities to address sustainability goals

Activity 6.2.2

Develop a plan for recommended improvements to school facilities to meet curriculum goals.

Activity 6.2.3

Forward recommendations for necessary improvements to School Building Committee to include in its school building plans.

OBJECTIVE 6.3

Effectively utilize our 20-year facilities maintenance plan to ensure that our buildings are well maintained.

Activity 6.3.1

Using the Facilities Maintenance Plan, and with the guidance of the Director of the Consolidated Facilities Department, generate an annual recommendation for required maintenance to be submitted, in collaboration with the Capital Improvement Committee, to the Warrant Committee as part of an annual recommended capital expenditure.

Activity 6.3.2

Raise public awareness about the adequate funding level required to properly maintain MPS school buildings.

Activity 6.3.3

Establish a Sustainability Task Force to develop a plan to integrate Sustainability into the operations and planning for the district's facilities

Please provide the current student to teacher ratios at the school facility that is the subject of this SOI: 23 students per teacher

Please provide the originally planned student to teacher ratios at the school facility that is the subject of this SOI: 20 students per teacher

Does the District have a Master Educational Plan that includes facility goals for this building and all school buildings in District? Yes

If "YES", please provide the author and date of the District's Master Educational Plan.

The 2022-27 Milton Public Schools Strategic Plan was approved in June, 2022. The new Strategic Plan addresses three strategic goals for the district (see Attachment K): Goal 1: Personalized Learning Goal 2: Safe and Supportive Schools Goal 3: Equity in Learning While the new Strategic Plan does not incorporate the Facilities Goal that was in the former plan, the Facilities Advisory Committee to the School Committee maintains its commitment to and focus on the goal.

Is there overcrowding at the school facility? Yes

If "YES", please describe in detail, including specific examples of the overcrowding.

This SOI is submitted based on the Cunningham School, which is indicative of the conditions at all four of the Milton Elementary Schools. Our buildings are severely overcrowded - the enrollment currently exceeds building capacity at our four schools by 21%.

The elementary enrollment in Milton Public Schools (MPS) has grown by 24% (451 students) over the past fifteen

years, since the last school building project was completed - from 1873 students (in 2008) to 2324 students (in 2023).

NESDEC enrollment projections (Attachment B1) show that we MAY be nearing a peak of the elementary enrollment growth in the next four years and it will hold fairly steady until 2032. However, enrollment projections do NOT include the “student yield” of numerous residential construction projects - including EIGHT 40B site approval applications that have been recently filed for projects, along with FIVE additional residential construction projects with a potential total of 640 new housing units, that are expected to increase enrollment 2022-23 onward. (See Attachment F). In addition, a new Housing Production Plan (See Attachment I) was produced in January, 2020, by the Town of Milton that plans for additional new affordable housing in town. Finally, the MBTA Communities zoning requirement was recently enacted by the state as part of the economic development bill in January 2021. Milton is a MBTA community with the high-speed trolley which connects Mattapan to Ashmont stations through our community, an

The MPS elementary schools were designed and built to accommodate 14 strands at each grade level (K-5). We are currently just 4 classes short of 17 strands at all grade levels. NESDEC enrollment projections show us to be short by 26 classrooms by 2032.

MPS has taken the following steps to address this dramatic enrollment increase:

1. Commissioned an Elementary Space Needs Study, conducted by Drumme Roseane Anderson (DRA) to study the overcrowding and recommend short and long term options
2. Kept its commitment to maintaining small class sizes across the district
3. Converted non-traditional spaces into classrooms

1. Elementary Space Needs Study: An Elementary Space Needs Study was conducted by the architectural firm Drumme Roseane Anderson (DRA) in 2019. DRA concluded that, based on NESDEC enrollment history and projections, MPS elementary schools will be short by 26 classrooms in 10 years. DRA suggested a range of long term options to be considered to address the overcrowding. After careful analysis of the options, the School Committee voted unanimously to pursue the construction of a new elementary school on May 1, 2019. A School Building Committee (SBC) was established by Town Meeting in February 2019. Over the three years that SBC has worked, the enrollment has grown into the middle and high schools. It became apparent that a new building must address overcrowding at all grade levels and not just elementary. On March 17, 2022, the School Committee voted a new recommendation to build a new middle school with a PreK wing to address growth at all levels.

2. Maintaining class sizes: In order to meet this growing enrollment, MPS has worked to keep its commitment to maintain small class sizes across the district, whenever possible. Target Maximum class sizes and the actual maximums are currently: K Target Maximum:23 (Actual: 24), Grade 1 – Target Maximum:22 (Actual: 27); Grade 2 – Target Maximum:23 (Actual:26); Grades 3, 4 and 5 – Target maximum:25(Actual: 26).

To achieve a balanced distribution of class sizes, the district has encouraged new enrollees to attend another school in town, if their neighborhood school’s class sizes are maxed out, with district provided transportation. This has enabled the school district to maintain even class sizes across town, despite the dramatic enrollment growth.

3. Converting non-traditional classroom spaces into classrooms: Twenty non-traditional classroom spaces have been converted over the past 10 years. A few more classroom conversions are projected for the next year or so. These conversions have all been at the expense of office space, computer labs, libraries, art rooms, music rooms, teachers’ rooms, conference rooms, and adult restrooms. The options have run out and additional space is now needed to resolve the ongoing enrollment increases and restore our educational programming. (For details, see General Description: Capacity and Utilization; and Attachments D and E.)

Other examples of the impact of overcrowding include: art and music teachers provide their services on a cart, in students’ classrooms; computers are made available on shared carts, since computer rooms have been converted; student lockers are in remote locations relative to classrooms; staff and service provider offices are overcrowded,

accommodating up to 6 desks in small offices meant for 1-2 staff; Special Education services must be scheduled at limited times in these shared offices, so t

Has the district had any recent teacher layoffs or reductions? No

If "YES", how many teaching positions were affected? 0

At which schools in the district?

Please describe the types of teacher positions that were eliminated (e.g., art, math, science, physical education, etc.).

Has the district had any recent staff layoffs or reductions? No

If "YES", how many staff positions were affected? 0

At which schools in the district?

Please describe the types of staff positions that were eliminated (e.g., guidance, administrative, maintenance, etc.).

Please provide a description of the program modifications as a consequence of these teacher and/or staff reductions, including the impact on district class sizes and curriculum.

Increased class sizes in core and elective classes at the Middle School. Technology support at the elementary schools has dropped to approximately one hour every other week per classroom.

Please provide a description of the local budget approval process for a potential capital project with the MSBA. Include schedule information (i.e. Town Meeting dates, city council/town council meetings dates, regional school committee meeting dates). Provide, if applicable, the District's most recent budget approval process that resulted in a budget reduction and the impact of the reduction to the school district (staff reductions, discontinued programs, consolidation of facilities).

A capital project, once approved by the School Committee, goes to the Town's Capital Planning and Improvement Committee which meets every 2-4 weeks depending on the time of year. Since such a project likely involves a debt exclusion override, it would go to the Select Board. The Select Board would vote in December or January to place an article on the warrant for the Annual Town Meeting, which is held on the first Monday in May. Following that, a special Town election would be held in June to present the measure to the electorate. While this is the usual timeline, there is often a Special Town Meeting in October, at which the article could be voted. However, a subsequent general election on the ballot question would likely not be held until January.

General Description

BRIEF BUILDING HISTORY: Please provide a detailed description of when the original building was built, and the date(s) and project scopes(s) of any additions and renovations (maximum of 5000 characters).

The Cunningham School was built in 1938 and renovated in 2005 when the neighboring Collicot School was demolished and rebuilt into a single facility with the Cunningham School. The two schools share common infrastructure (heating, power, cafeteria, library) but operate as two separate schools. Total building square footage of combined Cunningham/Collicot Schools noted below. The Glover School was built in 1950 and completely renovated in 2003. The Tucker School was built in 1923 and enlarged and renovated in 2004. All spaces in all four elementary schools were totally renovated or rebuilt.

TOTAL BUILDING SQUARE FOOTAGE: Please provide the original building square footage PLUS the square footage of any additions.

148000

SITE DESCRIPTION: Please provide a detailed description of the current site and any known existing conditions that would impact a potential project at the site. Please note whether there are any other buildings, public or private, that share this current site with the school facility. What is the use(s) of this building(s)? (maximum of 5000 characters).

Cunningham/Collicot: 11.57 acres. Approximately 4 acres on the north side of the site is wooded with wetland areas. Paved drop off lane in front of building. Paved drop off road and parking behind.

Glover: 10.79 acres. Building is bounded at front by Pine Tree Brook and behind by Turner's Pond, both of which involve conservation/wetland restrictions. A parking lot is in front of the building and an access driveway leads to the rear of the building.

Tucker: 1.78 acres in a residential/urban area. A small paved parking lot in front and limited play area behind.

ADDRESS OF FACILITY: Please type address, including number, street name and city/town, if available, or describe the location of the site. (Maximum of 300 characters)

Cunningham School, 44 Edgehill Rd, Milton MA 02186

Collicot School, 80 Edgehill Rd, Milton MA 02186

Glover School, 255 Canton Ave, Milton MA 02186

Tucker School, 187 Blue Hills Parkway, Milton MA 02186

BUILDING ENVELOPE: Please provide a detailed description of the building envelope, types of construction materials used, and any known problems or existing conditions (maximum of 5000 characters).

Cunningham/Collicot: Mostly brick, with 2007 new construction ground face CMU (Concrete Masonry Units). Flat roofs are membrane roofing; sloped are asphalt shingles. The sections of roof not replaced in the construction were replaced in 2016. There are some EIFS (exterior insulated finishing system) panels on the higher areas of the building. All windows were replaced in 2007. The heating and HVAC systems were also replaced in 2007.

Glover: Brick building, painted white, with the 2003 new construction being ground face CMU. Flat roofs are membrane roofing; sloped roofs are asphalt shingles. The section of the roof not replaced in 2003 is being replaced in 2020. All windows were replaced in 2003. The heating and HVAC systems were also replaced in 2003.

Tucker: Brick building with flat membrane roof. Section of roof not replaced during construction was replaced in 2019. All windows were replaced in 2004. The heating and HVAC systems were also replaced in 2004.

Has there been a Major Repair or Replacement of the EXTERIOR WALLS? NO

Year of Last Major Repair or Replacement:(YYYY) 2007

Description of Last Major Repair or Replacement:

N/A

Roof Section A

Is the District seeking replacement of the Roof Section? NO

Area of Section (square feet) 0

Type of ROOF (e.g., PVC, EPDM, Shingle, Slate, Tar & Gravel, Other (please describe))

N/A

Age of Section (number of years since the Roof was installed or replaced) 13

Description of repairs, if applicable, in the last three years. Include year of repair:

N/A

Window Section A

Is the District seeking replacement of the Windows Section? NO

Windows in Section (count) 0

Type of WINDOWS (e.g., Single Pane, Double Pane, Other (please describe))

N/A

Age of Section (number of years since the Windows were installed or replaced) 13

Description of repairs, if applicable, in the last three years. Include year of repair:

N/A

MECHANICAL and ELECTRICAL SYSTEMS: Please provide a detailed description of the current mechanical and electrical systems and any known problems or existing conditions (maximum of 5000 characters).

The Collicot and Cunningham Schools share a common mechanical and electrical plant that is similar to the other elementary schools. The mechanical system consists of two Burnham gas-fired boilers with boiler capacity of 4,551 MBH gross output. Each boiler has a 3hp Powerflame modulated burner. The electrical system consists of a switchboard with a 2,500A, 600V rated, 65 kAIC fully bussed pull section for incoming service and adjacent fully bussed 600V bully bariered fire pump CB section. These are maintained with no known existing problems or conditions.

Boiler Section 1

Is the District seeking replacement of the Boiler? NO

Is there more than one boiler room in the School? NO

What percentage of the School is heated by the Boiler? 100

Type of heating fuel (e.g., Heating Oil, Natural Gas, Propane, Other)

N/A

Age of Boiler (number of years since the Boiler was installed or replaced) 15

Description of repairs, if applicable, in the last three years. Include year of repair:

N/A

Has there been a Major Repair or Replacement of the HVAC SYSTEM? YES

Year of Last Major Repair or Replacement:(YYYY) 2007

Description of Last Major Repair or Replacement:

Replacement

Has there been a Major Repair or Replacement of the ELECTRICAL SERVICES AND DISTRIBUTION SYSTEM? YES

Year of Last Major Repair or Replacement:(YYYY) 2007

Description of Last Major Repair or Replacement:

Replacement

BUILDING INTERIOR: Please provide a detailed description of the current building interior including a description of the flooring systems, finishes, ceilings, lighting, etc. (maximum of 5000 characters).

All schools: Interior walls are mainly gypsum wallboard on metal studs except that the gymnasiums, toilets and stair interior walls are CMU. Most of the floor finishing is VCT (Vinyl Composition Tile). Specialty floors include synthetic sports flooring in the gymnasiums, epoxy flooring in the kitchen, terrazzo flooring in the lobby areas, ceramic tile in toilet rooms, rubber tile in stairs, and carpet in offices. Electrical rooms, custodial closets, etc are sealed concrete. Most ceilings are acoustic ceiling tiles with some gypsum wallboard soffits. Lighting has been primarily replaced with LED through Green Communities grants.

PROGRAMS and OPERATIONS: Please provide a detailed description of the current grade structure and programs offered and indicate whether there are program components that cannot be offered due to facility constraints, operational constraints, etc. (maximum of 5000 characters).

Our four elementary schools currently serve 2,324 Preschool – Grade 5 students in four elementary school buildings in the town of Milton. Our elementary schools were built for 14 strands (# of classes per grade), however, we are currently just 4 classrooms short of serving 17 strands at all grade levels.

In overcrowded schools and classrooms, teachers are less able to provide differentiated instruction which is critical to student achievement. Classrooms are more crowded with desks, chairs and students. Elementary art, music and Spanish language programming suffers from a lack of dedicated space. Students have difficulty finding an available seat in crowded cafeterias.

In addition, overcrowding has shown a strain on our educational programming in the following ways:

Strain on educational programming

- No locations for teacher common planning time
- Crowded offices have a negative impact on provision of Special Education services. They limit the district's ability to provide SPED services and testing, when required by IEPs, to meet students' needs and maintain confidentiality.
- Lack of space, limits district's ability to create specialized Special Education Programs that would permit students with Special Education needs to be taught in their home district's schools, and not have to attend COSTLY Collaboratives or Private Special Education schools, and travel up to two hours a day on Special Education vans.
- Quality of art and music programming compromised by teachers on a cart or in inadequate size rooms; inability to access kiln and store art/music materials because those rooms have been converted into classrooms; Traveling teachers is also not good use of instructional time.
- Library services compromised by reduction of space – staff working in libraries, library offices consumed for non-library staff, and Maker Spaces (see Libraries are carved up and compromised in Priority 2 Question 2)
- Elementary Computer labs have had to be eliminated so that the space can be used for classrooms; all third, fourth and fifth graders take MCAS and have lost dedicated computer labs as testing locations; Elimination of computer labs has a negative impact on instructional technology
- Negative impact on FLES (Foreign Language in the Elementary School) program for Grades 1-5. FLES teacher on cart, eliminating opportunity for creative programming in dedicated FLES classroom; Traveling teachers is also not good use of instructional time.
- (CO/CU) Shared Nurse's office serving 1300 students in smaller office than originally built for 500 students; wall built to create space for adjustment counselor reduced size of shared Nurse's office
- Expanded class sizes make learning more difficult for students and teacher's less able to adequately personalize instruction
- Lack of additional elementary space limits the number of Preschool classrooms that can be made available, while the district maintains extensive waiting lists. Furthermore, the number of days per week that Preschool programs are available needs to be decreased in order to accommodate the growing need for Preschool Special Education
- MPS offers two unique programs to students beginning in Grade 1: The English Innovation Pathway (with STEM

and Spanish) and French Immersion Program. We are still able to offer these two fine programs, but the School Committee recently approved an updated policy (JGA) to address Program Assignment. See Priority 2, Question 4 for more details.

- Milton Community Schools (MCS) offers before and after school Extended Day Programs in all four elementary schools. In the last four years, the number of participants in our programs has increased by 42%. The increasing number of events during off school hours limits the number of spaces that MCS can access. Increased incidents and accidents in gyms and playgrounds. Limited ability to provide small group opportunities, and to accommodate individual needs. For the first time, MCS has had to limit on the number of students that can enroll, due to overcrowding, creating waiting lists.
- Our transportation needs and safety issues around transportation have been greatly impacted. Additional crossing guards hired, reconfiguring drop off and pick up routes and increasing the number of staff outside the school during these times. An increase in the volume of cars in neighborhoods has contributed to safety concerns. In the 2019-2020 school year, we were unable to meet the transportation needs for families in middle and high school, resulting in a waiting list that began at 150 and is now at 50 students.
- Staff morale remains positive despite the overcrowding, but as working conditions continue to deteriorate, it will make it more difficult for the district to recruit and retain high quality staff

EDUCATIONAL SPACES: Please provide a detailed description of the Educational Spaces within the facility, a description of the number and sizes (in square feet) of classrooms, a description of science rooms/labs including ages and most recent updates, a description of the cafeteria, gym and/or auditorium and a description of the media center/library (maximum of 5000 characters).

Cunningham/Collicot: Two elementary schools that are connected and share a common "connector" that includes shared cafeteria, classrooms, and library. Currently using 51 rooms for K-5 regular education classrooms, 4 rooms for substantially separate/limited inclusion Special Education classes, 4 rooms for preschool, one shared cafeteria with stage, one common library, 3 shared music/art rooms and two gymnasiums.

Glover: Currently using 27 rooms for K-5 regular education classrooms, one room for a partial inclusion Special Education class, one art room, one music room, library, gymnasium and cafeteria with stage.

Tucker: Currently using 19 rooms for K-5 regular education classrooms, two rooms for preschool classrooms, one art room, one music room, gymnasium, library and cafeteria with stage.

CAPACITY and UTILIZATION: Please provide the original design capacity and a detailed description of the current capacity and utilization of the school facility. If the school is overcrowded, please describe steps taken by the administration to address capacity issues. Please also describe in detail any spaces that have been converted from their intended use to be used as classroom space (maximum of 5000 characters).

Original design capacity and current utilization of MPS Elementary Schools are as follow:

Cunningham - Original design capacity = 500 students Current utilization = 639

Collicot - Original design capacity = 500 students Current utilization = 583

Glover - Original design capacity = 500 students Current utilization = 634

Tucker - Original design capacity = 400 students Current utilization = 464

The following list provides the locations and names of non-traditional spaces that have been converted to classrooms in our four elementary schools to accommodate our expanded enrollment.

ELEMENTARY CLASSROOM CONVERSIONS

Glover School - Built for 4 Strands

CURRENT Kindergarten Classroom WAS FORMERLY Offices

CURRENT 1st grade Classroom WAS FORMERLY Art Room

CURRENT Art Room WAS FORMERLY Special Education Room

CURRENT 5th grade Classroom WAS FORMERLY Computer Lab

CURRENT Maker space, Technology space with Ipads and chromebooks on carts WAS FORMERLY Library computer center
CURRENT FLES teacher, Instructional Technology Teacher, Librarian, Future Problem Solving Teacher and Library paraprofessionals share one office space in back of circulation desk WAS FORMERLY Library Office
CURRENT SPED Team Chair Office, storage of all files WAS FORMERLY Conference Room
CURRENT FLES on a cart WAS FORMERLY FLES Room
CURRENT Speech/Language Pathologist office WAS FORMERLY Teacher planning and copy room
CURRENT Copy room WAS FORMERLY Closet and Hallway
CURRENT School Psychologist office WAS FORMERLY Music Storage room
CURRENT Bookshelves in Teacher's Room WAS FORMERLY Book and Curriculum Resource Room
CURRENT Music Room WAS FORMERLY Cafeteria Stage
CURRENT Gym is divided in half with storage on the other half
PROJECTED* Library WILL BECOME Special Education Classroom

Cunningham School - Built for 3 Strands
CURRENT Kindergarten Classroom WAS FORMERLY Special Education office space for 4 staff
CURRENT Art Room Grades 3-5 CO/CU Shared WAS FORMERLY Art Room Grades 2-5 CO/CU Shared
CURRENT PreK Substantially Separate Classroom WAS FORMERLY Teacher's Room
CURRENT PreK Substantially Separate Classroom WAS FORMERLY ASE Office/Coordinator's Office
CURRENT PreK Classroom WAS FORMERLY Special Education Office for 4 staff
CURRENT 1st grade classroom WAS FORMERLY LEAP (Sub-separate K-2 class)
CURRENT 2nd grade classroom WAS FORMERLY LEAP (Sub-separate K-3 class)
CURRENT 5th grade classroom WAS FORMERLY FLES Room
CURRENT Teacher's Room WAS FORMERLY Computer Lab
CURRENT Classroom WAS FORMERLY Section of Library
PROJECTED* 4th floor Storage will become Teacher's Room (CU and CO)

Collicot School - Built for 4 Strands
CURRENT Music Room WAS FORMERLY Computer Lab
CURRENT 3rd grade classroom WAS FORMERLY Flex
CURRENT 5th grade classroom WAS FORMERLY Flex room
CURRENT Milton Community Schools Office WAS FORMERLY Librarian's Office
CURRENT Classroom WAS FORMERLY Section of Library

Tucker School - Built for 3 Strands
CURRENT Kindergarten Classroom WAS FORMERLY Art/Music Room
CURRENT PreK classroom WAS FORMERLY Flex Room
CURRENT PreK classroom WAS FORMERLY SPED Team Chair Office
CURRENT Music room WAS FORMERLY Computer Lab
CURRENT Art room WAS FORMERLY Special Ed offices
CURRENT Office space WAS FORMERLY Library
CURRENT Office shared by Milton Community Schools, Family Outreach Liaison, Inclusion Specialists and small group lessons WAS FORMERLY Conference Room
CURRENT Small group RTI lessons, assessment, after school activities WAS FORMERLY Stage
CURRENT Shared Office - 2 reading specialists, math coach, 3 instructional support teachers WAS FORMERLY Title 1 Office
CURRENT FLES teacher's office WAS FORMERLY Storage room
CURRENT GYM is currently divided in half to have music classes in the other half
PROJECTED* Offices will become Teacher's Room
PROJECTED* Teacher's Room will become Classroom

* Projected to be converted over the next five years

MAINTENANCE and CAPITAL REPAIR: Please provide a detailed description of the district's current maintenance practices, its capital repair program, and the maintenance program in place at the facility that is the subject of this SOI. Please include specific examples of capital repair projects undertaken in the past, including any override or debt exclusion votes that were necessary (maximum of 5000 characters).

The Milton Public Schools has a 20 year Comprehensive Asset Management Plan that guides maintenance and repair work that is done on all six of our schools each year, within budgetary constraints. No debt exclusion overrides have taken place since the completion of the last school building project. Capital repairs to roofs listed above. Most other capital repairs were exterior: repaving, security systems, etc.

LOCATION/YEAR PROJECT AMOUNT

FY 11

PIERCE REMOVAL / REPLACEMENT OF FAIING DUCT WORK \$120,000.00

FY12

HS EXTERIOR DUCT WORK \$680,000.00

FY 13

ALL SCHOOLS SECURITY MEASURES \$100,000.00

BROOKS FIELD TOP LAYERS \$100,000.00

BROOKS FIELD TRACK \$15,000.00

TUCKER REPLACE NETWORK HARDWARE \$46,339.00

MHS REPLACE NETWORK HARDWARE \$178,566.00

COMPUTER REPLACEMENTS \$220,000.00

FY 15

ALL SCHOOLS SECURITY CAMERAS \$68,000.00

ALL SCHOOLS VIRTUALIZE SERVERS \$32,500.00

FY16

GLOVER SECURITY SYSTEM \$37,000.00

ALL SCHOOLS SECURITY CAMERAS \$230,000.00

BROOKS FIELD TRACK REPAIRS \$110,000.00

HS PARKING LOT & DRAINAGE \$90,000.00

FY17

ALL SCHOOLS SECURITY CAMERAS \$50,000.00

PIERCE SECURITY CAMERA UPGRADES \$75,000.00

HS HVAC UPGRADES \$45,000.00

ALL SCHOOLS PAVING / CURBING \$100,000.00

PIERCE SCIENCE WING \$170,000.00

FY 18

HS LOCKER ROOM UPGRADES \$30,000.00

TUCKER GYM FLOOR \$45,000.00

CUNNINGHAM EAVES/GUTTERS/TRIM/CUPOLA \$45,000.00

GLOVER RETAINING WALL/WALKWAY UPGRADES \$30,000.00

ALL SCHOOLS WINDOW PULLY SYSTEM (PHASED) \$30,000.00

FY19

SCHOOLS DISTRICT PAVING \$150,000.00

SCHOOLS DISTRICT ROOF TOP UNIT UPGRADES \$50,000.00

SCHOOLS DISTRICT FACILITIES IMPROVEMENTS/ UPGRADES \$188,000.00

FY20

SCHOOL DISTRICT WIDE ROOF REPLACEMENT AND IMPROVEMENTS \$250,000.00
SCHOOLS DISTRICT WIDE SECURITY SYSTEM UPGRADES \$150,000.00
SCHOOLS DISTRICT WIDE PAVING IMPROVEMENTS \$200,000.00
SCHOOLS DISTRICT WIDE DIGITAL NETWORK RADIO SYSTEM \$150,000.00
PIERCE MIDDLE SCHOOL NEW AUDITORIUM LIGHTING CONTROL SYSTEM \$100,000.00
SCHOOLS NEW MAINTENANCE DUMP TRUCK \$65,000.00
SCHOOLS DISTRICT WIDE FACILITIES IMPROVEMENTS (TILE/CARPET) \$30,000.00

FY21

SCHOOL DISTRICT WIDE WINDOW PULLY SYSTEM UPGRADES \$40,000.00
SCHOOLS DISTRICT WIDE PAVING/CONCRETE IMPROVEMENTS \$200,000.00
SCHOOLS DISTRICT WIDE HVAC IMPROVEMENTS \$50,000.00
MILTON HIGH SCHOOL AUDITORIUM LIGHTING CONTROL UPGRADES \$150,000.00
COLLICOT SCHOOL NEW GYM FLOOR REPLACEMENT \$40,000.00

FY22

SCHOOLS DISTRICT WIDE RENOVATIONS, IMPROVEMENTS, AND EQUIPMENT PURCHASES FOR DISTRICT SCHOOL SPACES IN ORDER TO ACCOMMODATE FOR OVERCROWDING \$160,000
SCHOOLS DISTRICT WIDE WINDOW REPAIR AND REPLACEMENT PROGRAM \$40,000
SCHOOLS DISTRICT WIDE HVAC IMPROVEMENTS AND UPGRADES \$60,000
HIGH SCHOOL AUDITORIUM LIGHTING CONTROL REPLACEMENT AND UPGRADES \$245,000
NEW POURED GYM FLOORING \$40,000
SCHOOLS DISTRICT WIDE MAJOR PAVING AND GRANITE CURBING REPAIRS \$200,000

Priority 2

Question 1: Please describe the existing conditions that constitute severe overcrowding.

In the late 1990's, Milton schools were obsolete and falling apart. In one large school construction project, with taxpayer and state funding support, we built or rebuilt all six of our public school buildings. The last new school buildings were opened in the 2007-08 school year – the Cunningham and Collicot Schools – two elementary schools that share a “connector” that contains a shared cafeteria, library and classrooms.

Milton continues to be a great place to live: excellent schools, an engaged community, proximity to Boston, and the beautiful Blue Hills. Student enrollment has grown dramatically since 2007-08 when Milton completed its last school building project. In 2011, Money Magazine ranked Milton #2 in “Best Places to Live” bringing further visibility to the community for young families. Families are eager to move here because they want their children to get a great education, and the rate of growth has far exceeded what was anticipated. We are currently serving the equivalent of 5 elementary schools in 4 school buildings.

This SOI is submitted based on the Cunningham School, which is indicative of the conditions at all four of the Milton Elementary Schools. Our buildings are severely overcrowded - the enrollment currently exceeds building capacity at our four schools by 24%.

The elementary enrollment in Milton Public Schools (MPS) has grown by 24% (451 students) over the past fifteen years, since the last school building project was completed - from 1,873 students (in 2008) to 2,324 students (in 2023).

NESDEC reports our dramatic enrollment growth over the last ten years in Attachment B and we provide some graphics that illustrate the growth in Attachment B2 and C.

NESDEC enrollment projections show that we MAY be nearing a peak of the elementary enrollment growth in the next four years and it will hold fairly steady until 2033. However, enrollment projections do NOT include the “student yield” of numerous residential construction projects - **including EIGHT 40B site approval applications that have been recently filed or approved for projects, plus an additional five residential projects with a potential total of 640 new housing units**, that are likely to increase enrollment 2022-23 onward. (See Attachment F). In addition, a new Housing Production Plan (See Attachment I) was produced in January, 2020, by the Town of Milton that plans for additional new affordable housing in town.

Furthermore, the NESDEC projections are CONSERVATIVE for the following reasons:

- After the first five years, the projections assume a level birth rate. Milton's birth to Kindergarten relationship has diverged for years due to families with young children moving in for the schools
- Our experience, leads us to expect a continued increased in-migration of new families
- NESDEC projections from 2008, when our last school building project was completed, projected 2,121 PreK-5 students in 2019, which was **275 less** than the actual enrollment of 2,396 in 2019.
- There are 640 units of proposed residential construction in the process of review for approval and/or under construction. This new construction will undoubtedly result in increased student enrollment.

Current Overcrowding Conditions 2021:

- Schools built for capacity and current enrollment:
 - Cunningham: Capacity: 500 Current Enrollment: 639
 - Collicot: Capacity 500 Current Enrollment: 583
 - Glover: Capacity 500 Current Enrollment: 634
 - Tucker: Capacity 400 Current Enrollment: 464
- Schools built for 14 strands* K-5 – (*strands are # of classes per grade):
 - Kindergarten: 16 strands (340 students)
 - 1st grade: 16 strands (366 students)

- 2nd grade: 17 strands (344 students)
- 3rd grade: 17 strands (378 students)
- 4th grade: 16 strands (366 students)
- 5th grade: 17 strands (379 students)
- Preschool: 5.5 strands (147 students)
 - Schools were built for 3 strands of Preschool— one Integrated, one Substantially Separate, and one Child Study Preschool
 - The Integrated and Substantially Separate Preschool programs are required to meet Special Education IEPs, so discontinuing is not an option

Maintaining class sizes:

In order to meet this growing enrollment, MPS has worked to keep its commitment to maintain small class sizes across the district, whenever possible. Target Maximum Class Sizes are determined by the administration based upon their best academic judgment, reflective of our current enrollment. Target Maximum class sizes is higher than desired class size. Target Maximum class sizes and the actual maximums are currently:

- Kindergarten – Target Maximum:23 (Actual: 23) Desired: 18-20
- Grade 1 –
 - English - Target Maximum: 22 (Actual:24) Desired: 20-22
 - French - Target Maximum: 26 (Actual: 26) Desired: 20-22
- Grade 2 – Target Maximum:23 (Actual:26) Desired: 20-22
- Grades 3, 4 and 5 – Target Maximum:25 (Actual: 26) Desired: 23-25.

To achieve a balanced distribution of class sizes, the district has encouraged new enrollees to attend another school in town, with district provided transportation, if their neighborhood school's class sizes are maxed out. This has enabled the school district to maintain evenly growing class sizes across town, despite the geographically uneven and dramatic enrollment growth.

Class sizes at the middle and high school levels have grown in recent years, as the enrollment has moved its way up to the secondary level. Pierce Middle School hosts 36 classes of 28 students or higher. Milton High School hosts 59 core classes and 23 PE classes of 28 students or higher.

Converting non-traditional classroom spaces into classrooms:

Twenty non-traditional classroom spaces have already been converted over the past 10 years. MPS has exhausted our reasonable options for classroom conversions and will need to consider other options described below. (Details are provided in General Description: Capacity and Utilization; in Priority 2, Question 2; and Attachments D and E.)

The existing school infrastructure inclusive of kitchens, cafeterias, restrooms, drop-off areas, parking, playground space, libraries, nurse offices and administrative and teacher offices and planning spaces is exhausted and cannot support additional enrollment.

Priority 2

Question 2: Please describe the measures the School District has taken to mitigate the problem(s) described above.

An **Elementary Space Needs Study** was conducted by the architectural firm Drummeay-Roseane-Anderson (DRA) in 2018-19. In January, 2019, DRA presented its final report to the School Committee (Attachment J) that concluded, based on NESDEC enrollment history and projections, MPS elementary schools will be short by 26 classrooms in 10 years. In their report, they recommended short and long term options to be considered by the Town of Milton.

Short term options to ameliorate the overcrowding were recommended by DRA. These short term options and evaluations by the School Committee of the options are found below:

- Do nothing – allow average class size to increase
 - Evaluation: The negative educational implications of increased class sizes were undesirable. Despite our best efforts, class sizes have grown. We hope to not let them grow any further before we find a long term solution to our overcrowding problem.
- Rent modular classrooms
 - Evaluation: Too expensive and, since modular classrooms need to be placed outdoors on site, they would have too negative an impact on much needed and already congested outdoor playgrounds for overcrowded schools. However, we are beginning to study what would be required to acquire, engineer and install multiple modular classrooms.
- Rent and renovate space, if available
 - Evaluation: Repeated unsuccessful attempts have been made to rent and renovate space to accommodate our overcrowding, with such community entities as religious institutions, Fontbonne Academy, Aquinas College, Laboure College, Milton Academy, and Curry College.
- Convert remaining art, music and computer rooms
 - Evaluation: We have already converted 20 of these spaces, but we are running out of spaces to convert to accommodate our overcrowding. Seen as the least undesirable and most economical option
- Create classrooms within library/media centers
 - Evaluation: We have already converted all of our media/computer rooms. Our libraries are carved up and compromised. See below. This has a negative impact on library services however, it is a last ditch option, when all possible room conversions are exhausted.
- Some combination of the above

Long term options

DRA also recommended a variety of long-term options to address our overcrowded schools. These options included:

- Do nothing – allow average class size to increase
- Convert remaining art, music, computer rooms, and libraries
- Construct new space
 - Addition to an existing elementary school
 - 5th grade addition to Pierce Middle School
 - Early Ed addition to Milton High School
 - New free-standing Early Ed (PreK & K) building
 - New free-standing K-5 school

After a series of public forums, and a great deal of review and evaluation of the above long-term options, the School Committee unanimously voted to recommend construction of a **New Free-Standing K-5 school** on May 1, 2019.

School Building Committee Established by Town Meeting

Milton Town Meeting approved an article to establish a School Building Committee (SBC) at its February 25, 2019 meeting. The Town Moderator appointed the nine members of the School Building Committee in June, 2019. The SBC began meeting in July, 2019 and has been meeting every 3-4 weeks since then.

As part of its due diligence, the SBC reviewed the enrollment projections and long-term options to deal with the school overcrowding. On November 25, 2019, the School Building Committee also voted to pursue the construction of a **New Free-Standing K-5 School**.

After three years of study by the School Building Committee and enrollment growth up into the middle and high schools, a proposal was **voted unanimously by the School Committee** to, instead, construct a **New Free-Standing Middle School for Grades 7 and 8, with a PreK wing, adjacent to the Milton High School Campus**. Under this plan, the elementary schools will house Grades K-4, Pierce Middle School will house Grades 5 and 6, the new Middle School will house Grades 7 and 8 and PreK, and Milton High School will continue to house Grades 9-12. District-wide offices, that are now housed in MHS, will be moved to the Pierce Middle School to relieve MHS of the overcrowding there. This alternative grade configuration will permit our elementary schools to house Grades K-4 with enough room to do so, the middle school and high school will also be able to accommodate the increased enrollment.

The School Building Committee has explored potential sites for a new School over the last four years. A potential site is proposed on property adjacent to the MHS campus. This parcel currently belongs to the Conservation Commission. A proposed Article 97 land swap of 15 acres in exchange for the 7.2 acres of the identified site has been approved by the School Committee, Conservation Commission and the Select Board and will be considered and voted upon at the May 2023 Town Meeting.

Meanwhile, the following measures have taken place:

Conversion of non-traditional rooms to classrooms

More than twenty non-traditional classroom spaces have been converted over the past 10 years. A few more classroom conversions are projected for the next year or so. These conversions have all been at the expense of office space, computer labs, libraries, art rooms, music rooms, teachers' rooms, conference rooms, storage rooms, and adult restrooms. The options have run out and additional space is now needed to resolve the ongoing enrollment increases and restore our educational programming. Please see Overcrowding Video at <https://youtu.be/TM7ckQm2OTw>

- Over 20 non-traditional rooms have been converted to classrooms and offices (see details in General Description: Capacity and Utilization; and Attachments D and E)
- MPS has developed a plan for classroom conversions over a 5 year period. We are rapidly running out of reasonable options at this point.
- An architectural and engineering study will be completed to examine the acquisition, engineering and installation of modular classrooms. This will result in a dramatic reduction of playground space outdoors, at a time when our school enrollment is so high.
- Walls removed to create new classrooms – non-optimal shapes and sizes
- Size of converted spaces inadequate – no rest rooms in converted classrooms for preschool and K students, requiring staff to leave classroom to take children to rest room and for adult rest rooms to be dedicated to use by students.
- The Milton Elementary schools have lost or converted the following spaces to classrooms due to overcrowding: Music rooms, Art rooms, Computers Labs, Library space, Office space, Conference Rooms, Teacher Lounges, Planning Rooms, Storage rooms and Adult Restrooms. (See Attachment D and E)
- Student lockers and/or cubbies are shared and/or are in remote locations relative to classrooms

Adverse Effects of overcrowding on Staff

- Overcrowded offices - staff and service provider offices are overcrowded, accommodating up to 6 desks in small offices meant for 1-2 staff, often in converted storage rooms with no windows
- Copy rooms eliminated and moved into hallways and closets
- Storage rooms being used for office space
- All common planning time occurs in the general education classrooms as there is no common/shared space dedicated to teacher planning. This has a serious negative impact on staff ability to communicate and plan together
- Special Education services must be scheduled at limited times in these shared offices, so that privacy and confidentiality can be maintained
- Adult rest rooms assigned to students in need of assistance (See Strain on Facilities below)
- Offices eliminated and moved into conference rooms, which are then, also unavailable for meetings

Shared office spaces

Elementary School staff members across the district have been forced to share cramped office space together. In multiple cases, staff members float to find work space wherever they can. This minimizes the amount of time staff are able to utilize their rooms for testing and/or service delivery with students. It also complicates scheduling of individual instruction or therapies, and makes maintenance of confidentiality more challenging. See details below.

Cunningham School (CU):

- Speech therapist shares space with Reading Specialist; PreK Speech Therapist shares space with English Language Learner (ELL) Teacher
- Assistant Principal shares space with traveling staff
- Team Chair and School Psychologist have offices in the Team Chair suite; offices shared with academic service providers for testing and/or service delivery
- Occupational Therapist (OT) shares space with BCBA and academic service providers for pullout services and testing
- Three special education teachers share an office that is used for testing and service delivery
- Nurse's Office is shared between Cunningham and Collicot Schools serving 1,300 students; a wall was built to provide space for Adjustment Counselor, taking away room for resting couches and making privacy a challenge
- Milton Community Schools staff office is in the Library office.

Collicot School (CO):

- Speech therapist shares office with School Psychologist – very hard to protect testing and service delivery space
- Assistant Principal shares office with Science Coordinator, Collaborative Class Teachers for Parent clinics. Office also used for testing due to lack of space
- Inserted window to supply closet for an OT office that is shared with ELL, Special Education and Speech and Language Pathologist, when needed for testing
- ELL works at a desk in a classroom; Shares space with Team Chair and OT for testing
- Four Special Educators share half of a classroom for an office; Very hard to protect testing and service delivery space
- Team Chair Suite converted to OT office with cubbies for report writing; Shares space with Principal when family clinics for New England Center for Children (NECC) and ELL testing occurs; Shares with School Psychologist and Special Education Teachers for testing, as needed
- Foreign Language in the Elementary Schools (FLES) office is in library

Tucker School (TU):

- Assistant Principal shares space with the Elementary Science Coordinator. Their current office space was originally a storage room
- After School Enrichment (ASE) staff currently has their office on the stage in the cafeteria

- ELL teacher and Speech and Language teacher share one office space
- Team Chairs (Preschool/Gr. K-5) and BCBA share one office space
- Adjustment Counselor shares one space with two social work interns. The interns and counselor often work in the conference room, library or other spaces to provide privacy when students are in counseling or small group sessions in this office space
- The School Psychologist and Occupational Therapist share one office space
- Two Special Education Teachers share one office space alternating between push in and pull out services to support students
- Two Physical Education (PE) Teachers share one office space adjacent to the gym
- Three custodians share one office space.

Glover School (GL):

- The ELL teacher shares a space with the English Reading Specialist and the French Reading Specialist. ELL testing, two weeks a year, has to be done in available offices and those related service providers or administrators are displaced
- Office space shared by Math Coach, Elementary Inclusion Specialist, and Elementary Science Coordinator
- FLES teacher, Instructional Technology Teacher, Librarian, Future Problem Solving (FPS) Teacher, and Library paraprofessionals share one office space in back of circulation desk in library
- District-wide Family Outreach Liaison has no dedicated office space and shares the office with the Inclusion Specialist, Math Coach, and Elementary Science Coordinator
- Custodial office moved into a small space with no windows attached to the boiler room. Three custodians share this small space
- Storage closet in gymnasium is used to store all PE equipment, recess equipment, folding chairs and risers for performances, and the PE Teachers' (2) office.
- The STEP (Social Emotional/Therapeutic Educational Program) is based in three separate small spaces. One is an academic small classroom space with a special educator, one is a designated work space inhabited by a BCBA, and one is a sensory-reduced space for regulation. These spaces are not all connected.

Strain on facilities

Overcrowded playgrounds and safety concerns

- (CU/CO) Between 210-225 students at a time during recess are out in a 22,600 square foot playground that is 90% paved. A new CCGreenspace was funded and built in 2020 by volunteers to provide additional play areas for students and has aided in providing an additional outdoor play area.
- 7 recess related injuries reported to the Nurse's Office per day

Rest rooms are limited and overtaxed

- (CU) One adult bathroom on each of the 1st and 2nd floors; 2 adult bathrooms on the 3rd floor; 1 bathroom on the 1st floor is assigned to students in preschool due to class not having a bathroom (125 staff members)
- (CO) 2 adult bathrooms on 1st floor; 1 adult bathroom on each of the 2nd and 3rd floors, 1 bathroom on each of the 2nd and 3rd floors have assigned to students (96 staff members)

Cafeterias are strained

- (All schools) Crowded tables (especially for older students), increased noise level, longer lunch lines leading to reduced amount of time to eat (25 minutes overall)
- (CU/CO) 8 overlapping lunches scheduled between 10:45-1:20 with extra cashiers added to address overcrowding
- (CU/CO) The overlapping of students can be a problem if classes are running late. More folding tables were brought in to handle the overcrowding. Two additional staff members (Assistant Cook and a cashier) brought in to handle the increased enrollment

- (All schools) Cafeteria stages are used for classroom instruction and meetings during lunch preparation in kitchens
- (GL) Family Volunteer Resources (Meet the Artist, Reading about Diversity, Outdoor Classroom materials and resources) located in cabinets in very cramped corner of the stage in cafeteria
- (TU) Food Services Manager uses tablet to help cashier for a few grades to get them through the serving line faster, so students have a little more time to eat

Libraries are carved up and compromised

- (CU/CO) A second grade classroom and a teacher's shared office are now located in the library, carved out of existing library space with portable room partitions. After a frozen pipe burst this winter, one more classroom has been moved to the library, while the classroom is being repaired. The former beautiful library is now comprised of three classrooms and multiple offices.
- (CU/CO) Milton Community Schools now occupies the library office and has walled off an adjacent section of the library for its photocopier, files, and work space
- (CU/CO) Library storage and work space have been pushed into part of the library computer lab
- (CU/CO) Half of the library lesson space and a nearby aisle are occupied by Spanish teachers' desks and materials, making a tight squeeze for class
- (CU/CO) There can be two, three, or potentially four classes in the library at one time (library classes, instructional technology classes in the computer lab, classes in the makerspace), creating a stressful learning and teaching environment
- (GL) FLES teacher, Instructional Technology Teacher, Librarian, Future Problem Solving Teacher (FPS), and Library paraprofessionals share one office space in back of circulation desk in library
- (GL) Library classes often overlap with instructional technology or makerspace classes, creating a more difficult learning environment.
- (GL) FPS teacher leads fifth grade group in the library around library class schedule (no classroom space)
- (TU) As the computer lab was eliminated, instructional technology and FPS teachers' spaces had to transition. The library is now office for four adults (Librarian, Library aide, Instructional Technology teacher and FPS teacher. All of these individuals share an open workspace behind the check-out counter
- (TU) The library is used for library classes, FPS classes, instructional technology/makerspace classes and generally for all teachers needing a space for activities throughout the week
- (CO) Math League materials are stored in the library for grades 2 - 5

Milton values its schools – Our Town Our Schools Our Future

Milton residents recognized that the quality of our public schools determines the quality of our town. During the campaign to rebuild all six schools in the early 2000's, the theme was "Our Town, Our Schools Our Future". While it was difficult to dig deep to fund our last school building project and the numerous subsequent operational overrides, Milton residents have done so, when needed. With the dramatic influx of new young families in the past fifteen years, our community continues to place a high value in supporting our schools.

Priority 2

Question 3: Please provide a detailed explanation of the impact of the problem described in this priority on your district's educational program. Please include specific examples of how the problem prevents the district from delivering the educational program it is required to deliver and how students and/or teachers are directly affected by the problem identified.

In our overcrowded schools and classrooms, teachers are less able to provide differentiated instruction which is critical to student achievement. Classrooms are more crowded with desks, chairs and students. Elementary art, music and Spanish language programming suffers from a lack of dedicated space. Students have difficulty finding an available seat in crowded cafeterias. In addition, overcrowding has shown a strain on our educational programming in the following ways:

Strain on educational programming

- No locations for **teacher common planning time**. Teachers are participating in remote meetings from their cars in school parking lots.
- Crowded offices have a negative impact on provision of **Special Education services**. They limit the district's ability to provide SPED services and testing, when required by IEPs, to meet students' needs and maintain confidentiality.
- Lack of space limits district's ability to create specialized Special Education Programs that would **permit students with Special Education needs to be taught in their home district's schools**, and not have to attend COSTLY Collaboratives or Private Special Education schools, and travel up to two hours a day on Special Education vans.
- Quality of **art and music** programming compromised by teachers on a cart or in inadequate size rooms; inability to access kiln and store art/music materials because those rooms have been converted into classrooms; Traveling teachers is also not good use of instructional time.
- **Library** services compromised by reduction of space – staff working in libraries, library offices consumed for non-library staff, and Maker Spaces (see Libraries are carved up and compromised in Priority 2 Question 2)
- **Elementary Computer** labs had to be eliminated so that the space can be used for classrooms; all third, fourth and fifth graders take MCAS and have lost dedicated computer labs as testing locations; Elimination of computer labs has a negative impact on instructional technology
- Negative impact on **FLES** (Foreign Language in the Elementary School) program for Grades 1-5. FLES teacher on cart, eliminating opportunity for creative programming in dedicated FLES classroom; Traveling teachers is also not good use of instructional time.
- (CO/CU) Shared **Nurse's office** serving 1300 students in smaller office than originally built for 500 students; wall built to create space for adjustment counselor reduced size of shared Nurse's office
- **Expanded class sizes** make learning more difficult for students and teacher's less able to adequately differentiate instruction
- Lack of additional elementary space **limits the number of Preschool classrooms** that can be made available, while the district maintains extensive waiting lists. Furthermore, the number of days per week that Preschool programs are available needs to be decreased in order to accommodate the growing need for Preschool Special Education
- **Milton Community Schools** (MCS) has offered before and after school Extended Day Programs in all four elementary schools for 40 years. In the last five years, the number of participants in our programs has increased by 42%. The increasing number of events during off school hours, limits the number of spaces that MCS can access. Increased number of incidents and accidents in gyms and playgrounds. The ability to tailor activities to smaller groups has been compromised, making personal connections more difficult, and limiting the ability to accommodate students with disabilities. For the first time, MCS has had to limit on the number of students that can enroll, due to overcrowding, creating waiting lists.
- Our **transportation** needs and safety issues around transportation have been greatly impacted. Additional crossing guards have been hired, drop off and pick up routes have been reconfigured, and increasing the numbers of staff outside the school during these critical times. An increase in the volume of cars in neighborhoods has contributed to traffic and safety concerns. As this elementary population of students moves up into the middle

and high schools we have seen an increase in need for bus transportation. In the 2019-2020 school year, we were unable to meet the transportation needs for families in middle and high school, resulting in a waiting list that began at 150 and is now at 50 students.

- **Staff morale** remains positive despite the overcrowding and the impact of the COVID19 pandemic, but as working conditions continue to deteriorate, it will make it more difficult for the district to recruit and retain high quality staff

Please also provide the following:

Cafeteria Seating Capacity: 456
Number of lunch seatings per day: 5
Are modular units currently present on-site and being used for classroom space?: NO

If "YES", indicate the number of years that the modular units have been in use:

Number of Modular Units:

Classroom count in Modular Units:

Seating Capacity of Modular classrooms:

What was the original anticipated useful life in years of the modular units when they were installed?:

Have non-traditional classroom spaces been converted to be used for classroom space?: YES

If "YES", indicate the number of non-traditional classroom spaces in use: 20

Please provide a description of each non-traditional classroom space, its originally-intended use and how it is currently used (maximum of 1000 characters).:

Over 20 non-traditional spaces have been converted to become classroom space. An additional few spaces are projected to be converted over the next couple of years. (Please see response to General Description: Capacity and Utilization and Attachments D and E for more detail on Classroom Conversions.)

Please explain any recent changes to the district's educational program, school assignment policies, grade configurations, class size policy, school closures, changes in administrative space, or any other changes that impact the district's enrollment capacity (maximum of 5000 characters).:

NEW PROGRAM ASSIGNMENT POLICY

The Milton Public Schools offers two unique programs to students beginning in Grade 1. Early in each calendar year prior to entry into 1st Grade, parents learn about and then select the program that they believe best suits their child's needs. The two program options are:

- o The English Innovation Pathway (with STEM and Spanish) engages students in solving real world problems using a variety of engineering and computing curricula. Students who choose the English Innovation Pathway take Spanish at the elementary level and then choose Latin or Spanish at the middle school.
- o The French Immersion Program is an instructional model where the general school curriculum is taught through the medium of the French language. The program begins with full French immersion in Grade 1. All subjects except specials are taught in French 100% of the time in Grades 1 and 2, 50% of the curriculum is taught in French in Grades 3 and 4, and 30% of the curriculum is taught in French in Grade 5. French language instruction continues through middle school and into high school, as do other world languages.

In December 2019, the Milton School Committee approved a new School Program Assignment Policy (JGA) that specifies the procedures by which 1st Grade Assignment will take place. (See Attachment G)

- Each elementary school will have a minimum of two English Innovation Pathway classes
- French Immersion classes will be determined equitably across the elementary schools, given the constraints of the number of classrooms available, enrollment numbers, and funding
- If enrollment numbers require an additional 1st Grade section is needed, the Superintendent will determine whether that section will be English or French, and in which school the section will be located, based on the needs and resources of the district.
- English Innovation Pathway classes are typically smaller in the primary grades. This is because new elementary students in Grades 2-5 are not permitted to enter French Immersion classes unless they are already proficient in the French language.
- In the event that a demand for a program exceeds the number of available seats, the Superintendent will assign students based on lottery results.
- If Grade One Program lotteries are required, they will take place in the middle of March each school year.
- See Attachment G for more information about Grade One Program lotteries.

ELEMENTARY STREET LISTING AND CLASS SIZE

Students' home address determines their "home school", based on the MPS Elementary Street Listing. (See Attachment H) The Elementary Street Listing is periodically updated with new streets, but home school districts have not changed since 2011.

For 1st Grade enrollment, the Elementary Street Listing determines students' "home school", but then the Program Assignment Policy determines the school that they will attend. Student assignment for new students, after 1st Grade is determined by the Elementary Street Listing and class size.

To achieve a balanced distribution of class sizes, MPS encourages new enrollees to attend another school in town, with district provided transportation, if their home school's class sizes are maxed out. This has enabled the school district to maintain evenly growing class sizes across town, despite the geographically uneven and dramatic enrollment growth.

Our rapidly increasing elementary enrollment has caused approximately 100 students to attend schools other than their home schools. However, Milton parents quickly see the benefit of sending their children to a school where the class size is low. Once families enroll their children in any one of Milton's outstanding elementary schools, they fall in love with the school and rarely ask to return to their home school. This change in practice in student assignment has assisted MPS in maintaining its outstanding educational programs.

If Milton succeeds in building a new Upper Middle School for Grades 7 and 8 with a PreK wing, all Milton

students will have the opportunity to attend the new school, during their time as MPS students. An additional transition will need to be orchestrated to minimize the potential negative impact of an additional transition. This is a challenge that can be met and is much better than continued overcrowding.

What are the district's current class size policies (maximum of 500 characters)?:

MPS does not have an official Class Size Policy, but the following guidelines guide class size determinations district-wide:

- Kindergarten – Target Maximum:23 (Actual: 23) Desired: 18-20
- Grade 1 –
 - o English - Target Maximum: 22 (Actual:24) Desired: 20-22
 - o French - Target Maximum: 26 (Actual: 26) Desired: 20-22
- Grade 2 – Target Maximum:23 (Actual:26) Desired: 20-22
- Grades 3, 4 and 5 – Target Maximum:25 (Actual: 26) Desired: 23-25

Priority 4

Question 1: Please describe the conditions within the community and School District that are expected to result in increased enrollment.

Milton is a great place to live: excellent schools, an engaged community, proximity to Boston, and the beautiful Blue Hills. Student enrollment has grown dramatically since 2007-08 when Milton completed its last school building project. In 2011, Money Magazine ranked Milton #2 “Best Places to Live” bringing further visibility to the community for young families. Families are eager to move here because they want their children to get a great education, and the rate of growth has far exceeded what was anticipated. We are currently serving the equivalent of 5 elementary schools in 4 school buildings.

As described in Priority 2, Milton’s elementary schools are overcrowded and the situation is expected to continue to worsen. NESDEC projects an expected increase of in-migration of new families, now strengthened by the effects of the 2008 real estate slowdown.

NESDEC enrollment projections (Attachment B) show that we MAY be nearing a peak of the elementary enrollment growth in the next four years and it will hold fairly steady until 2032. However, enrollment projections do NOT include the “student yield” of numerous residential construction projects - **including EIGHT 40B site approval applications that have been recently filed for projects with a potential total of 510 new housing units, plus an additional five residential projects with a potential total of 640 new housing units**, that are likely to increase enrollment 2023-24 onward. (See Attachment F). In addition, a new Housing Production Plan (See Attachment I) was produced in January, 2020, by the Town of Milton that plans for additional new affordable housing in town.

Furthermore, the NESDEC projections are CONSERVATIVE for the following reasons:

- After the first five years, the projections assume a level birth rate. Milton's birth to Kindergarten relationship has diverged for years due to families with young children moving in for the schools.
- Our experience leads us to expect a continued increased in-migration of new families
- NESDEC projections from 2008, when our last school building project was completed, projected 2,121 PreK-5 students in 2019, which was **275 less** than the actual enrollment of 2,396 in 2019.
- “The research literature reports the closest that enrollment forecasters are likely to come to actual enrollments is about 1% variance per year-from-the-known-data. Thus, we can expect a 10% variance “ten-years-out”. (NESDEC 2019) In Milton’s case, for our elementary enrollment, we can expect a variance of approximately 220 PK-5 students in 2033. The 2022 NESDEC projected enrollment for 2033 PK-5 is 2,209. With a 10% variance, that number could rise to 2,429.

There are numerous residential development projects that are in the planning process and are expected to be built during the next ten years in Milton. Together with the recently issued Town of Milton Housing Production Plan (Attachments F and I) these developments have the potential of yielding over 640 new residences in Milton. Young families are likely to purchase or rent these new homes. Empty nesters, who are looking to downsize and stay in Milton, are also likely to move into smaller homes and then put their larger homes on the market, bringing more young families with children to Milton. Together, these scenarios lead us to anticipate a sizable influx of new MPS students in the next ten years.

The recent NESDEC Enrollment Report dated November 9, 2022 notes the enrollment projections in the report do NOT include the "student yield" of projects not yet approved that will affect 2023-24 onward. (See list of Proposed Residential Construction in Attachment F).

Even without this anticipated growth, our elementary schools are already over capacity by approximately 424 students, and we have no indication of our severe overcrowding abating.

Priority 4

Question 2: Please describe the measures the School District has taken or is planning to take in the immediate future to mitigate the problem(s) described above.

The measures that Milton Public Schools have taken to deal with overcrowding are described in Priority 2 responses. As noted, we have already converted more than 20 non-traditional spaces to become classrooms. MPS has exhausted our reasonable options for classroom conversions and will need to consider other options described below, with increasingly intensified negative consequences for students and staff.

Soon, we will need to revisit our other short term options: including installation of modular classrooms and even larger class sizes – neither of which are desirable options for our schools.

We have begun the SOI process with the MSBA as one of our planning measures. We understand the process could take a minimum of three years. Three years from now we will have critical educational problems that we intend to avoid through beginning this process now.

Our long-term planning has included contracting with Drumme, Rosane Anderson Architects (DRA) in late 2018 to generate a space study on Milton Public Schools. The report was finalized in January 2019. In a Special Town Meeting in February 2019, the town approved the formation of a School Building Committee (SBC). Since its formation, the SBC has completed the following due diligence to validate the need for a new school and to prepare for the MBSA process:

- Met with NESDEC to learn how their projections are calculated to better understand how Milton's enrollment has consistently diverged on the high side from NESDEC's projections.
- The SBC has independently studied the real estate transactions and trends and their relationship with enrollment.
- The SBC has generated a detailed schedule to follow the MSBA process for a new school building from submitting an SOI to Project Completion.
- The SBC has personally visited all Milton elementary schools and the Pierce Middle School to witness the severe overcrowding personally.
- Identified potential new building sites.
- Started interviewing Owner's Project Managers.

The Facilities Advisory Committee, School Committee and School Building Committee have all independently and unanimously voted that a new school building is the only viable option to solve Milton's severe overcrowding.

We look forward to working hand-in-hand with the MSBA to make a new school building in Milton a success.

Priority 4

Question 3: Please provide a detailed explanation of the impact of the problem described in this priority on your district's educational program. Please include specific examples of how the problem prevents the district from delivering the educational program it is required to deliver and how students and/or teachers are directly affected by the problem identified.

The impacts of overcrowding are the same as described in Priority 2, Question 3.

The impact of overcrowding on educational programming includes the following:

- No locations for teacher common planning time
- Limited ability to provide SPED services and testing
- Limited ability to create programs that would permit students with SPED needs to be taught in their home schools, instead of costly out-of-district placements
- Art and music quality compromised by teachers on a cart or in other sub-optimal spaces
- Libraries compromised by crowding and reduction of space
- Instructional technology compromised by elimination of computer labs
- Foreign Language in the Elementary School (FLES) compromised by teachers on a cart
- Nurse's office serving double the capacity of students they were designed to serve
- Expanded class sizes make learning more difficult for students and teachers less able to personalize instruction
- Limited ability to expand Preschool programming when we have long waiting lists
- Limited ability to provide small group opportunities, and to accommodate individual needs, in after school programs
- Safety issues a growing concern during crowded drop off and pick up times and in crowded playgrounds
- Staff morale at risk of going down, as working conditions deteriorate

Please also provide the following:

Cafeteria Seating Capacity: 456

Number of lunch seatings per day: 5

Are modular units currently present on-site and being used for classroom space?: NO

If "YES", indicate the number of years that the modular units have been in use:

Number of Modular Units:

Classroom count in Modular Units:

Seating Capacity of Modular classrooms:

What was the original anticipated useful life in years of the modular units when they were installed?:

Have non-traditional classroom spaces been converted to be used for classroom space?: YES

If "YES", indicate the number of non-traditional classroom spaces in use: 20

Please provide a description of each non-traditional classroom space, its originally-intended use and how it is currently used (maximum of 1000 characters):

Please see details in General Description: Capacity and Utilization; and Attachments D and E for more detail on Classroom Conversions.

Over 20 non-traditional spaces have been converted to become classroom space. An additional few spaces are projected to be converted over the next couple of years.

Please explain any recent changes to the district's educational program, school assignment policies, grade configurations, class size policy, school closures, changes in administrative space, or any other changes that impact the district's enrollment capacity (maximum of 5000 characters). :

See Priority 2.

What are the district's current class size policies (maximum of 500 characters)?:

MPS does not have an official Class Size Policy, but the following guidelines guide class size determinations district-wide:

- Kindergarten – Target Maximum:23 (Actual: 23) Desired: 18-20
- Grade 1 –
 - o English - Target Maximum: 22 (Actual:22) Desired: 20-22
 - o French - Target Maximum: 26 (Actual: 26) Desired: 20-22
- Grade 2 – Target Maximum:23 (Actual:26) Desired: 20-22
- Grades 3, 4 and 5 – Target Maximum:25 (Actual: 26) Desired: 23-25

CERTIFICATIONS

The undersigned hereby certifies that, to the best of his/her knowledge, information and belief, the statements and information contained in this statement of Interest and attached hereto are true and accurate and that this Statement of Interest has been prepared under the direction of the district school committee and the undersigned is duly authorized to submit this Statement of Interest to the Massachusetts School Building Authority. The undersigned also hereby acknowledges and agrees to provide the Massachusetts School Building Authority, upon request by the Authority, any additional information relating to this Statement of Interest that may be required by the Authority.

Chief Executive Officer * **School Committee Chair** **Superintendent of Schools**

(signature)	(signature)	(signature)
Date	Date	Date

* Local chief executive officer: In a city or town with a manager form of government, the manager of the municipality; in other cities, the mayor; and in other towns, the board of selectmen unless, in a city or town, some other municipal office is designated to the chief executive office under the provisions of a local charter. Please note, in districts where the Superintendent is also the Local Chief Executive Officer, it is required for the same person to sign the Statement of Interest Certifications twice.

Milton Public Schools and Milton School Building Committee
2023 Statement of Interest
Massachusetts School Building Authority

ATTACHMENTS

- Attachment A SOI Update 2023 from Milton Public Schools
- Attachment B NESDEC Enrollment Projections - November 2022
- Attachment B2 Enrollment Data Review 2023
- Attachment C Elementary School Enrollment - History and Projections 2023
Enrollment History and Projections Grades PK-12
- Attachment D Elementary Classroom Conversions
- Attachment E Milton Elementary School Floor Plans with - Current and Short-Term Plans for Classroom Conversions
- Attachment F Proposed Residential Construction in Milton
- Attachment G Policy JGA - Program Assignment Milton
- Attachment H Elementary Street Listing
- Attachment I Milton Housing Production Plan 2020
- Attachment J Milton Elementary Space Needs Study 2019
- Attachment K Milton Public Schools Strategic Plan – 2022-27
- Attachment L MPS Overcrowding Video <https://youtu.be/TM7ckQm2OTw>

Attachment A

Milton Public Schools Statement of Interest to the Massachusetts School Building Authority 2023 Update

The school year 2022-23 was largely defined by a return to normal as the COVID-19 Pandemic waned. School programs and services resumed in a more typical fashion. Pandemic recovery has been a constant focus of MPS to help students achieve grade level proficiency and beyond. New curricula were purchased, formative assessments were regularly implemented, reading specialists and math interventionists were hired, and personalized learning is being implemented PK-12 to address individual student learning goals.

The remainder of funds approved by Milton Town Meeting in 2022 have been used to purchase room dividers, technology, lockers/cubbies, phones, etc. to create additional new classrooms to accommodate our increased enrollment. Classroom spaces have been converted from parts of the existing Cunningham-Collicot School library, the Glover School Library, the Tucker School Library, and the Pierce Middle School Library. The formerly converted classroom spaces noted in our SOI will continue to be used to accommodate our over enrollment. This continues to compromise our elementary educational program, as described in our SOI, and safety continues to be a concern for the numbers of students in our buildings and on our playgrounds and school grounds.

The Milton School Building Committee (SBC) has worked over the past four years in pursuit of a site for a new school building. The SBC has explored numerous options for sites - both town owned and private property. A local religious school convent became available this year and the SBC worked hard to pursue the purchase of the site for a partial remedy to the schools' overcrowding with an early childhood center. Unfortunately, the convent was withdrawn from the market.

A 7.2 acre site adjacent to the Milton High School has been identified as the best parcel for a new school building. The parcel consists of 2.8 acres of conservation land and 4.8 acres of park land, and is covered under MGL Article 97. A land swap has been proposed, where approximately 15 acres of town owned land will be exchanged for this parcel. An article in support of this land swap will be on the warrant for Milton's Annual Town Meeting in May. The land swap already has the support of both the Select Board, the School Building Committee, and the School Committee.

The re-submittal of Milton's MSBA Statement of Interest triggers an additional year of facilities modification planning to accommodate the projected enrollment and planned residential construction occurring within the proposed timeline associated with the MSBA modules. As can be seen throughout our SOI, the district has exhausted all available options within the facilities through cannibalization of non-education spaces.

In the years ahead, as we continue to house more students than we have capacity to serve, we will require costly accommodations to our ventilation systems, our rest room facilities, fire safety planning, and points of egress - especially as we move to add portable classrooms. As Milton moves toward funding the purchase and installation of portable classrooms (trailers), the space constrictions of the existing schools, plus the additional outdoor space consumed by possible trailers, Milton Public Schools will work hard to continue to provide high quality education in progressively compromised school buildings.



**Milton Public Schools
Milton, MA**

2022-23 Enrollment Projection Report

Copyright, New England School Development Council, 2022

Table of Contents

Section	Page
Enrollment Summary.....	1
Historical Enrollment Table.....	2
Historical Enrollment Graph.....	3
Projected Enrollment Table.....	4
Projected Enrollment Graph.....	5
Historical & Projected Enrollment Graph.....	6
Historical & Projected Enrollment in Grade Combinations Line Graph.....	7
Historical & Projected Enrollment in Grade Combinations Stacked Column Graph.....	8
Birth to Kindergarten Relationship Graph.....	9
Additional Information	10
New England's PK-12 Enrollment Trends.....	11
Reliability and Use of this Document	12

Enrollment Summary

The global pandemic continues to influence our nation's public health and economic stability in unpredictable ways. As such, it is still too early to identify many of the factors that could impact school enrollments. Over the past school year, we have seen fluctuations in the real estate market and job trends, which have impacted student attendance patterns. Moreover, during the past school year, we have seen how school enrollment patterns can differ substantially from one district to another, with some districts losing students while others experience an influx of students.

We are pleased to send you this report displaying the past, present, and projected enrollments for the District. These ten-year projections are designed to provide the District with yearly, up-to-date enrollment information that can be used by boards and administrators for effective planning and allocation of resources. Included in this report are graphs representing historical and projected grade-by-grade enrollments, as well as historical and projected enrollments in grade combinations. We have received the figures given to us by the District, and we assume that the method of collecting the enrollment data has been consistent from year to year.

Enrollment projections are more reliable in Years #1-4 in the future and less reliable in the "out-years." Projections six to ten years out may serve as a guide to future enrollments and are useful for planning purposes. In light of this, NESDEC has added a "Second Semester refresher" enrollment projection at no cost to affiliates. (For more information, please refer to the Reliability and Use of This Document section).

The NESDEC enrollment projection fell within 87 students of the K-12 total, 4,278 students projected vs. 4,191 enrolled. Ratios have been adjusted.

Births decreased by -11 from a previous ten-year average of 278 to a projected average of 267. In most districts, enrollments in Grades 1-8 are very stable environments. However, there have been declines in 7 of the 8 most recent years, leading to a net decline averaging -44 students per year.

Over the next three years, K-5 enrollments are projected to decrease by -85 students, Grades 6-8 enrollments are projected to increase by 16 students, and Grades 9-12 enrollments are projected to decrease by -17 students, as students move through the grades.



Historical Enrollment

School District: Milton, MA

11/9/2022

Historical Enrollment By Grade																			
Birth Year	Births*	School Year	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	UNGR	K-12	PK-12
2007	282	2012-13	101	323	331	337	349	329	295	321	310	266	236	237	234	268	0	3836	3937
2008	272	2013-14	91	314	339	323	337	339	333	311	294	305	244	244	234	228	1	3846	3937
2009	264	2014-15	84	350	341	352	326	327	344	337	289	290	262	247	236	226	6	3933	4017
2010	258	2015-16	125	335	363	349	346	335	343	328	300	273	248	262	255	230	6	3973	4098
2011	248	2016-17	139	365	337	371	351	353	338	329	289	299	240	240	263	239	5	4019	4158
2012	293	2017-18	136	356	373	348	363	357	355	322	303	286	272	238	240	263	1	4077	4213
2013	289	2018-19	134	356	373	381	355	362	350	342	300	296	270	272	235	247	0	4139	4273
2014	324	2019-20	137	372	377	383	399	362	366	351	324	305	269	277	272	233	6	4296	4433
2015	262	2020-21	100	309	365	359	385	393	347	340	308	306	291	273	273	275	9	4233	4333
2016	288	2021-22	122	350	335	375	372	392	392	323	321	293	266	285	279	289	15	4287	4409
2017	272	2022-23	147	342	365	345	379	365	381	366	287	305	247	263	277	269	7	4198	4345

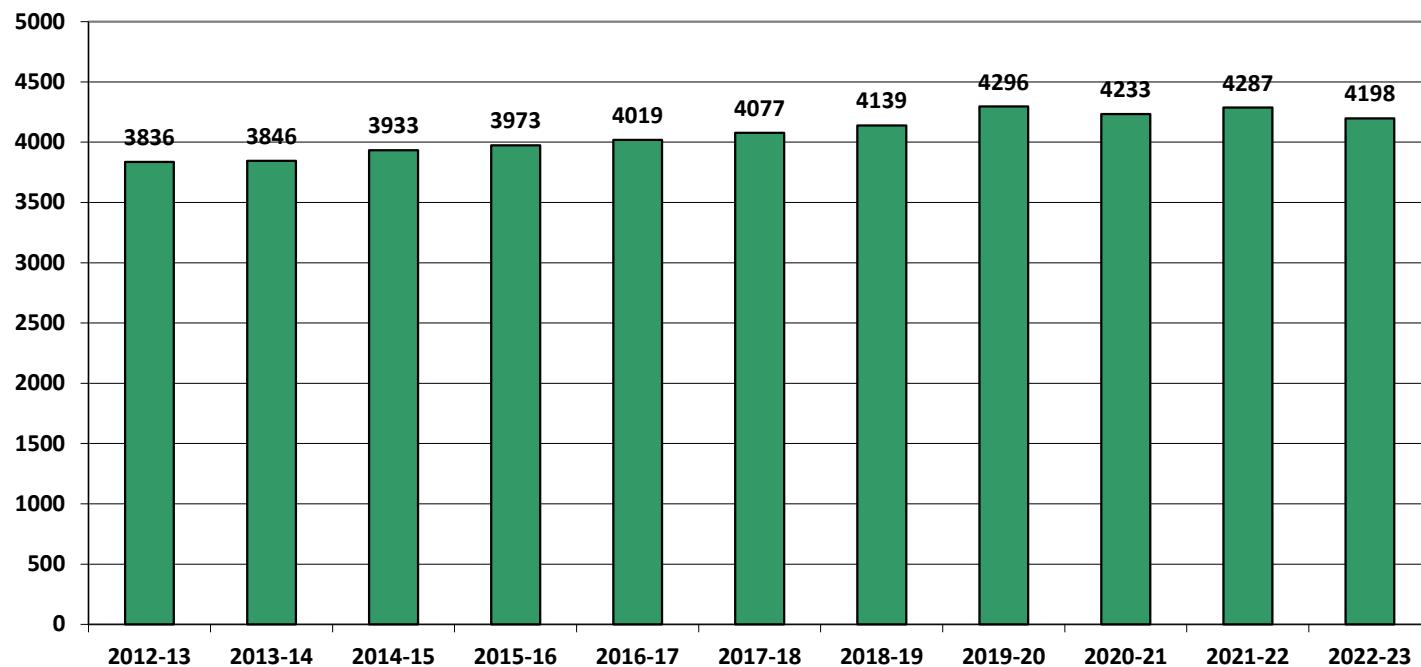
*Birth data provided by Public Health Vital Records Departments in each state.

Historical Enrollment in Grade Combinations									
Year	PK-5	K-5	PK-8	K-8	5-8	6-8	7-8	6-12	9-12
2012-13	2065	1964	2962	2861	1192	897	576	1872	975
2013-14	2076	1985	2986	2895	1243	910	599	1860	950
2014-15	2124	2040	3040	2956	1260	916	579	1887	971
2015-16	2196	2071	3097	2972	1244	901	573	1896	995
2016-17	2254	2115	3171	3032	1255	917	588	1899	982
2017-18	2288	2152	3199	3063	1266	911	589	1924	1013
2018-19	2311	2177	3249	3115	1288	938	596	1962	1024
2019-20	2396	2259	3376	3239	1346	980	629	2031	1051
2020-21	2258	2158	3212	3112	1301	954	614	2066	1112
2021-22	2338	2216	3275	3153	1329	937	614	2056	1119
2022-23	2324	2177	3282	3135	1339	958	592	2014	1056

Historical Percentage Changes			
Year	K-12	Diff.	%
2012-13	3836	0	0.0%
2013-14	3846	10	0.3%
2014-15	3933	87	2.3%
2015-16	3973	40	1.0%
2016-17	4019	46	1.2%
2017-18	4077	58	1.4%
2018-19	4139	62	1.5%
2019-20	4296	157	3.8%
2020-21	4233	-63	-1.5%
2021-22	4287	54	1.3%
2022-23	4198	-89	-2.1%
Change	362	9.4%	

Historical Enrollment

K-12, School Years 2012-13 to 2022-23



Projected Enrollment

School District: Milton, MA

11/9/2022

Enrollment Projections By Grade*																				
Birth Year	Births*		School Year	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	UNGR	K-12	PK-12
2017	272		2022-23	147	342	365	345	379	365	381	366	287	305	247	263	277	269	7	4198	4345
2018	255		2023-24	148	310	354	372	351	379	360	362	331	273	273	246	261	279	7	4158	4306
2019	291		2024-25	149	354	321	361	378	351	373	342	327	314	244	271	244	263	7	4150	4299
2020	252		2025-26	150	307	367	327	367	378	346	354	309	311	281	243	269	246	7	4112	4262
2021	268	(prov.)	2026-27	151	326	318	374	333	367	372	329	320	294	278	279	241	271	7	4109	4260
2022	268	(est.)	2027-28	152	326	338	324	380	333	361	353	297	304	263	276	277	243	7	4082	4234
2023	267	(est.)	2028-29	153	325	338	345	330	380	328	343	319	282	272	262	274	279	7	4084	4237
2024	269	(est.)	2029-30	154	328	337	345	351	330	374	312	310	303	252	270	260	276	7	4055	4209
2025	265	(est.)	2030-31	155	322	340	344	351	351	325	355	282	295	271	251	268	262	7	4024	4179
2026	267	(est.)	2031-32	156	325	334	347	350	351	346	309	321	268	264	269	249	270	7	4010	4166
2027	267	(est.)	2032-33	157	325	337	341	353	350	346	329	279	305	240	263	267	251	7	3993	4150

Note: Ungraded students (UNGR) often are high school students whose anticipated years of graduation are unknown, or students with special needs - UNGR not included in Grade Combinations for 7-12, 9-12, etc.



Based on an estimate of births



Based on children already born



Based on students already enrolled

*Birth data provided by Public Health Vital Records Departments in each state.

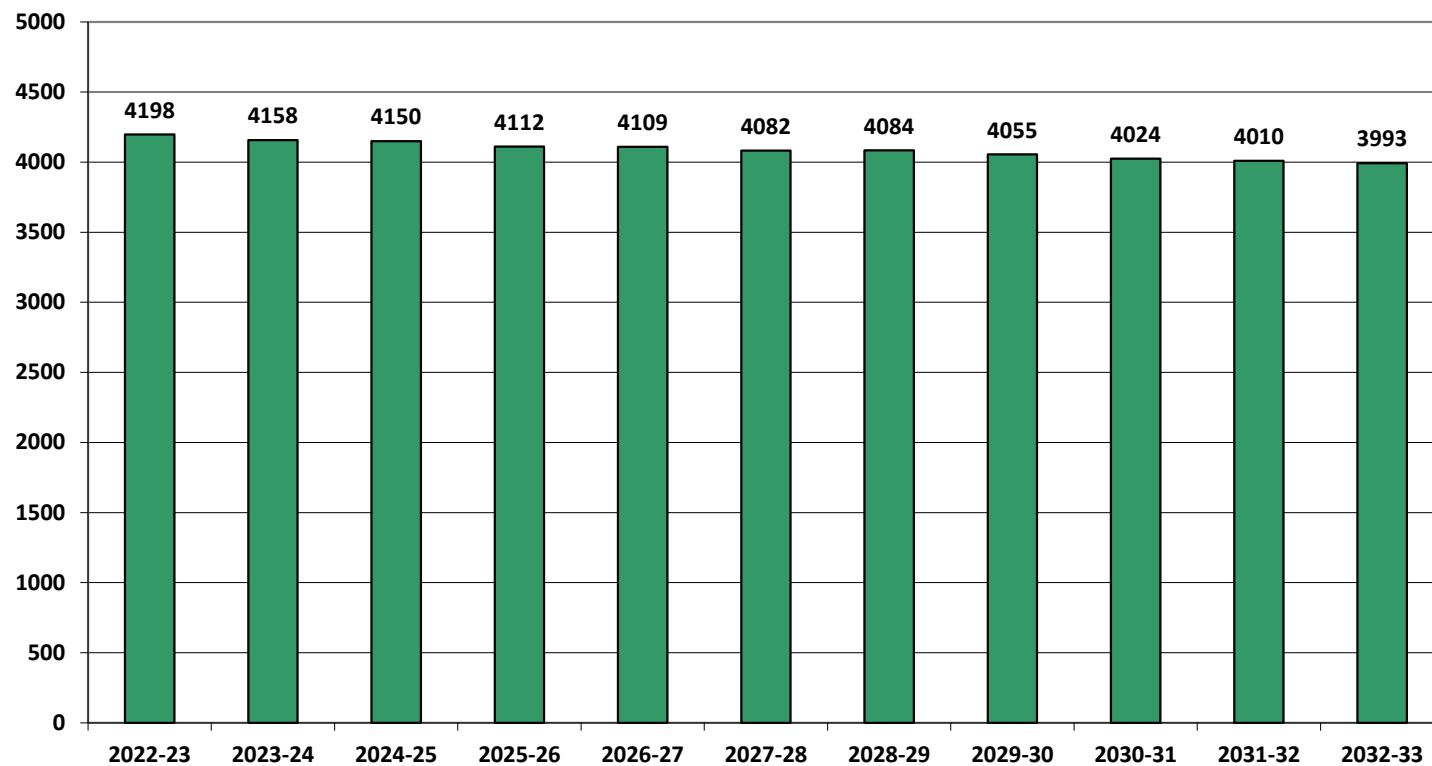
Projected Enrollment in Grade Combinations*									
Year	PK-5	K-5	PK-8	K-8	5-8	6-8	7-8	6-12	9-12
2022-23	2324	2177	3282	3135	1339	958	592	2014	1056
2023-24	2274	2126	3240	3092	1326	966	604	2025	1059
2024-25	2287	2138	3270	3121	1356	983	641	2005	1022
2025-26	2242	2092	3216	3066	1320	974	620	2013	1039
2026-27	2241	2090	3184	3033	1315	943	614	2012	1069
2027-28	2214	2062	3168	3016	1315	954	601	2013	1059
2028-29	2199	2046	3143	2990	1272	944	601	2031	1087
2029-30	2219	2065	3144	2990	1299	925	613	1983	1058
2030-31	2188	2033	3120	2965	1257	932	577	1984	1052
2031-32	2209	2053	3107	2951	1244	898	589	1950	1052
2032-33	2209	2052	3122	2965	1259	913	584	1934	1021

Projected Percentage Changes			
Year	K-12	Diff.	%
2022-23	4198	0	0.0%
2023-24	4158	-40	-1.0%
2024-25	4150	-8	-0.2%
2025-26	4112	-38	-0.9%
2026-27	4109	-3	-0.1%
2027-28	4082	-27	-0.7%
2028-29	4084	2	0.0%
2029-30	4055	-29	-0.7%
2030-31	4024	-31	-0.8%
2031-32	4010	-14	-0.3%
2032-33	3993	-17	-0.4%
Change		-205	-4.9%

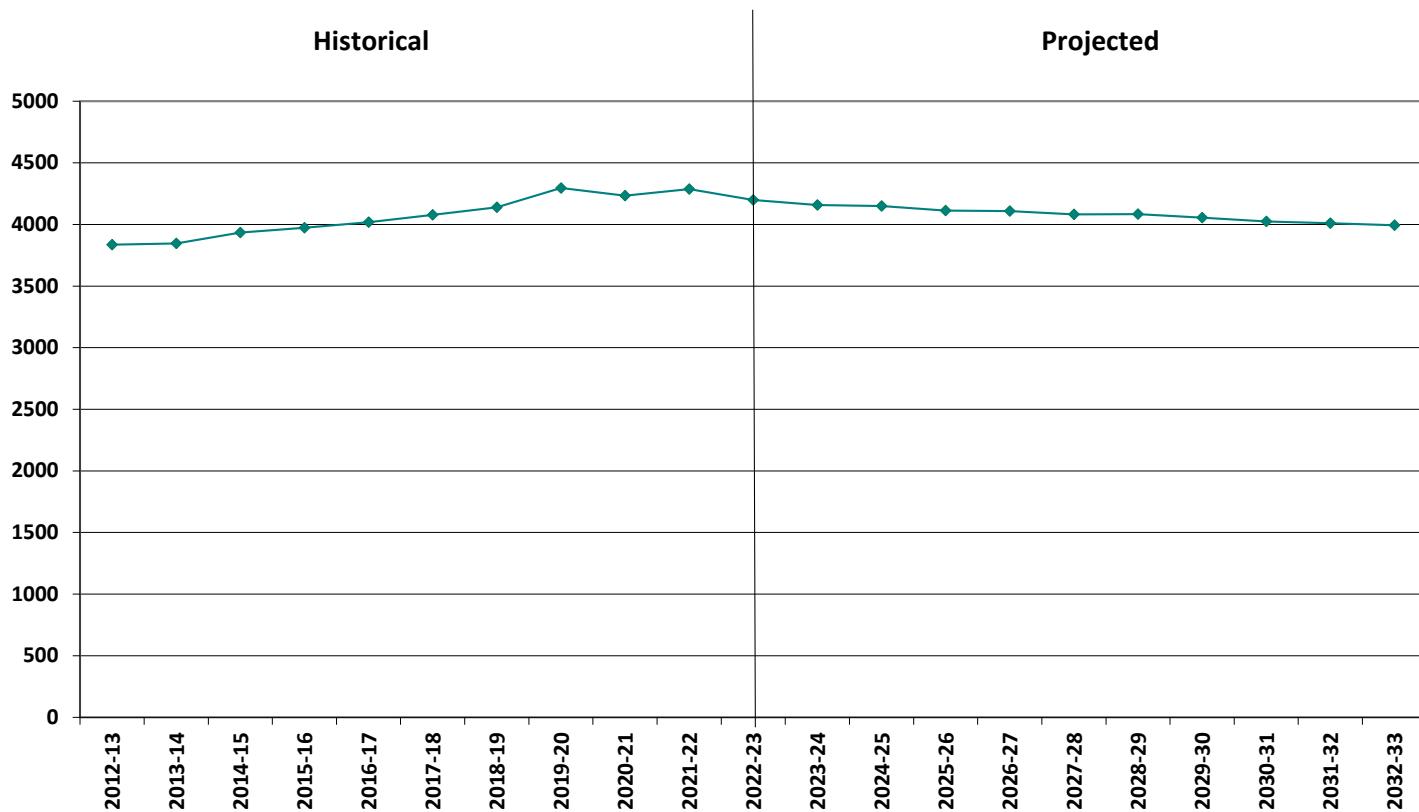
*Projections should be updated annually to reflect changes in in/out-migration of families, real estate sales, residential construction, births, and similar factors.

Projected Enrollment

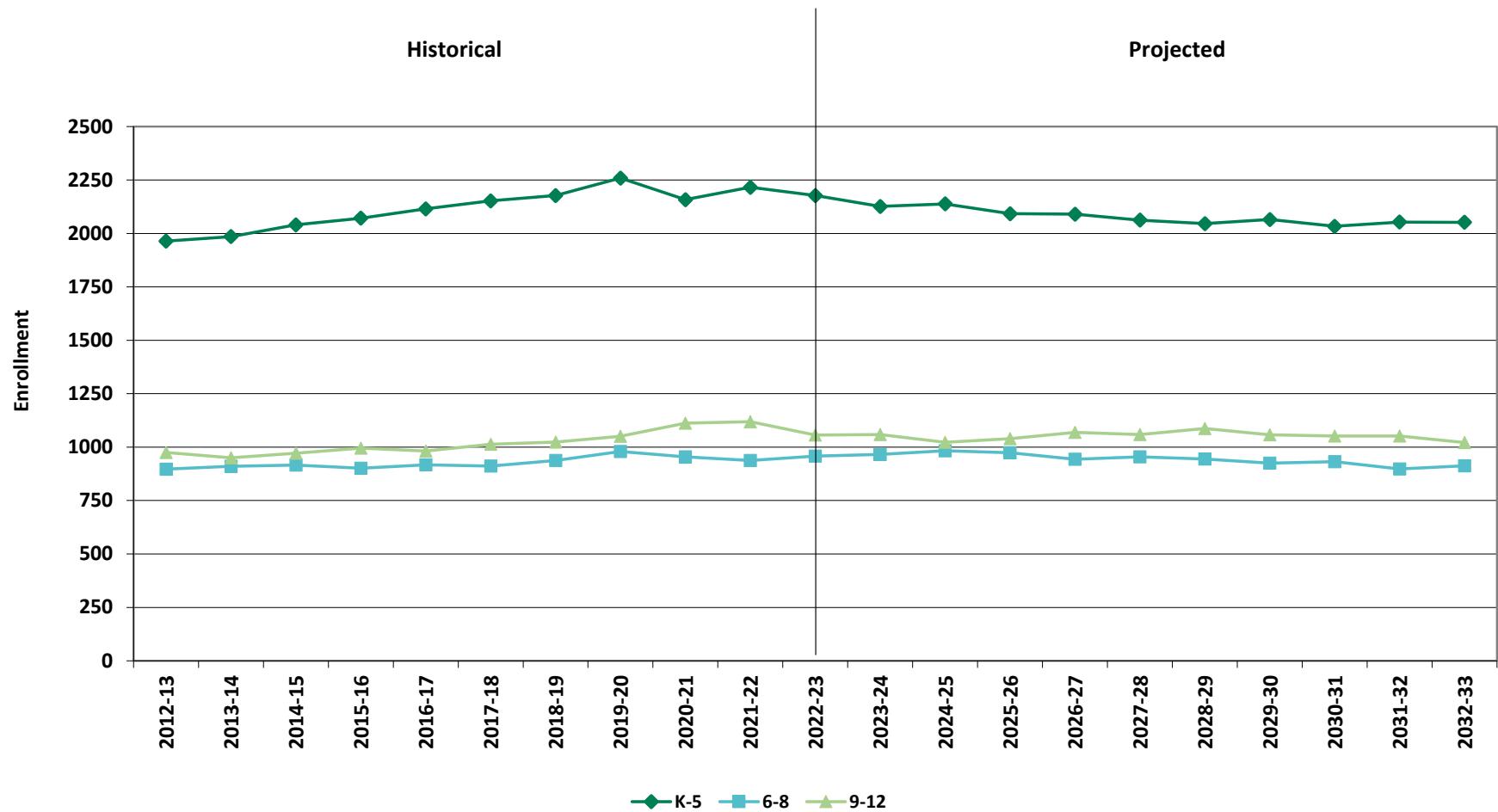
K-12, School Years 2022-23 to 2032-33



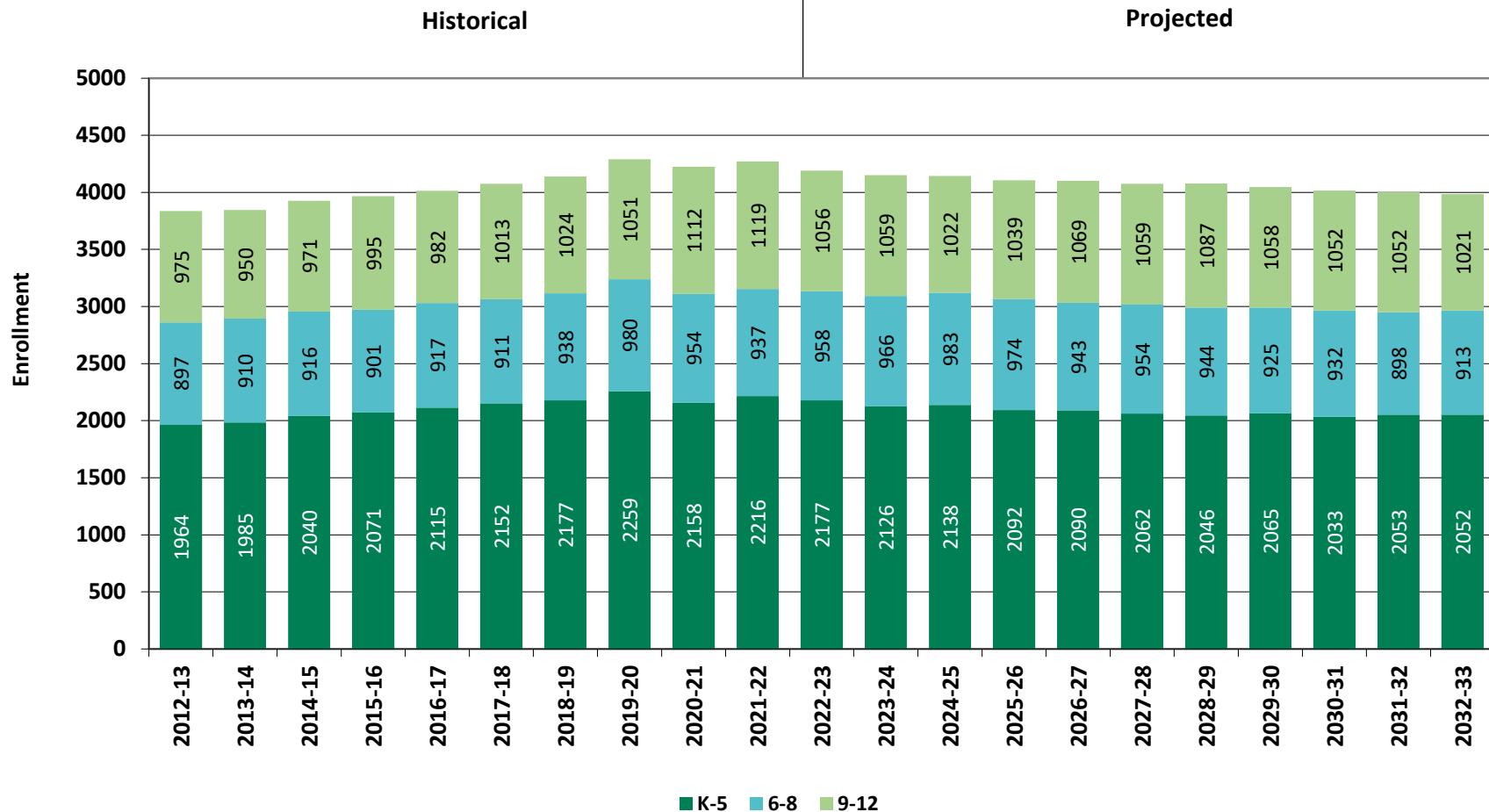
Historical & Projected Enrollment



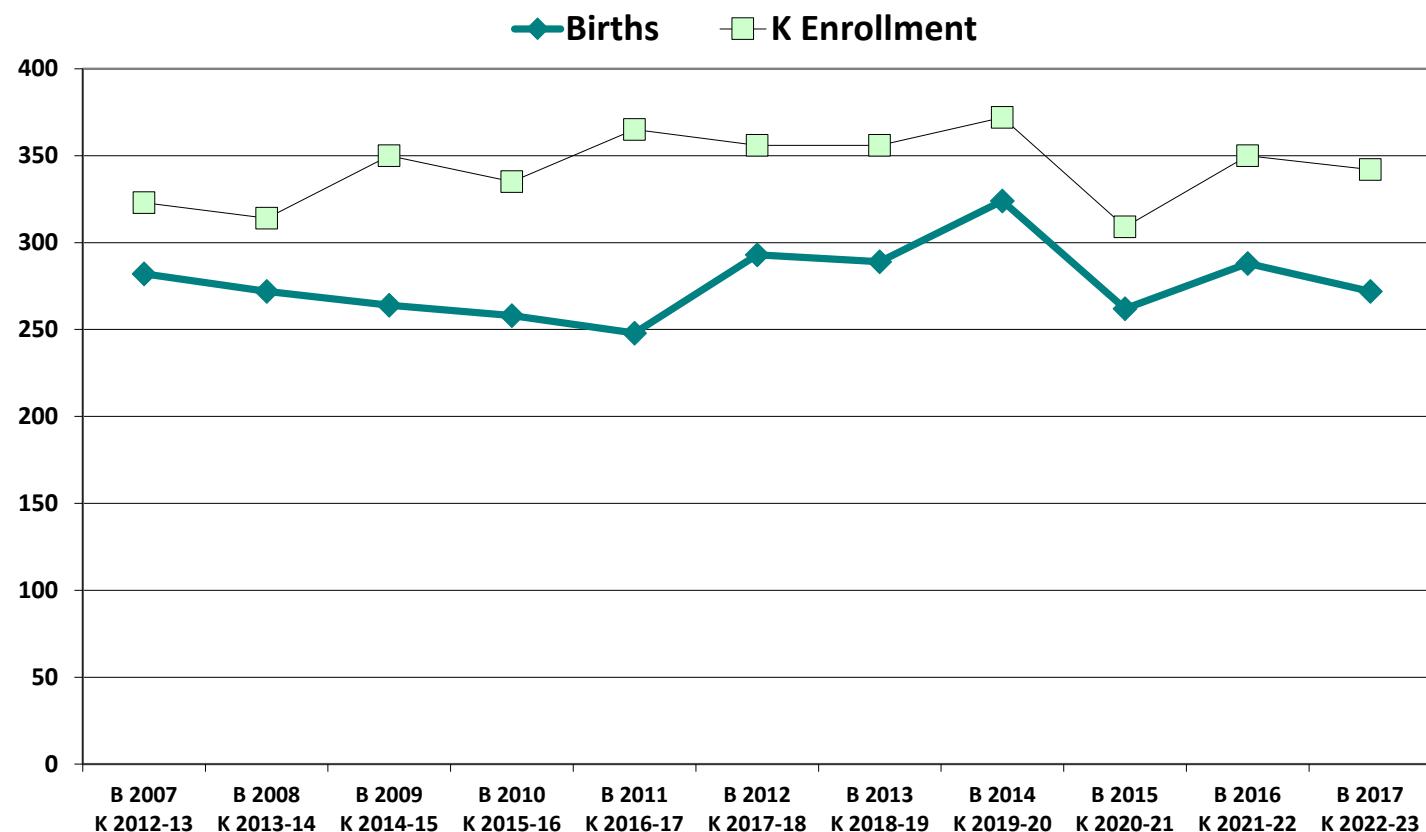
Historical & Projected Enrollments in Grade Combinations



Historical & Projected Enrollments in Grade Combinations



Birth-to-Kindergarten Relationship



Additional Information

Building Permits Issued (Source: HUD)		
Year	Single-Family	Multi-Units
2012	5	0
2018	20	0
2019	17	2
2020	22	0
2021	25	8
2022	10 to date	0 to date

Enrollment History*		
Year	Career-Tech 9-12 Total	Non-Public K-12 Total
2012-13	48	1046
2018-19	n/a	930
2019-20	34	882
2020-21	35	939
2021-22	42	956
2022-23	38	n/a

Residents in Non-Public Independent and Parochial Schools (General Education)*														
Jan. 1, 2022	K	1	2	3	4	5	6	7	8	9	10	11	12	K-12 TOTAL
	30	24	30	24	33	48	60	113	122	130	102	124	116	956

K-12 Home-Schooled Students*	
2022	18

K-12 Residents in Charter or Magnet Schools, or Choiced-out*	
2022	7

K-12 Special Education Outplaced Students*	
2022	41

K-12 Tuitioned-In, Choiced-In, & Other Non-Residents*	
2022	n/a

*The above data were provided by the District, with the exception of building permit data (provided by HUD).

"n/a" signifies that information was not provided by District.



New England's PK-12 Enrollment Trends

From 2020 to 2030, the US Department of Education anticipates changes in PK-12 enrollment of -2.4% in the South, -6.5% in the West, -3.8% in the Midwest, -6.2% in the Northeast, and a total of -4.3% nationwide.

State	Fall 2020 PK - 12	Fall 2030 Projected	PK-12 Decline	% Change 2020-2030
CT	509,058	475,600	-33,458	-6.6%
ME	172,455	161,800	-10,655	-6.2%
MA	921,712	879,900	-41,812	-4.5%
NH	169,027	144,600	-24,427	-14.5%
RI	139,184	130,200	-8,984	-6.5%
VT	82,401	74,600	-7,801	-9.5%

Source: U.S. Department of Education, National Center for Education Statistics, *Enrollment In Public Schools fall 1990 to fall 2030*, Table 203.20, March 2022.

Although most New England Districts are seeing a decline in the number of births, NESDEC's experience indicates that the impact on enrollment varies from District to District. Almost half of New England Districts have been growing in PK-12 enrollment, and a similar number are declining (often in rural areas), with the other Districts remaining stable.

Reliability and Use of this Document

PROJECTION METHODOLOGY

Cohort component (survival) technique is a frequently used method of preparing enrollment forecasts. NESDEC uses this method, but modifies it in order to move away from forecasts that are wholly computer- or formula-driven. Such modification permits the incorporation of important, current district-specific information into the generation of enrollment forecasts (such as in/out-migration of students, resident births, HUD-reported building permits, etc.). Percentages are calculated from the historical enrollment data to determine a reliable percentage of increase or decrease in enrollment between any two grades. For example, if 100 students enrolled in Grade 1 in 2018-19 increased to 104 students in Grade 2 in 2019-20, the percentage of survival would be 104%, or a ratio of 1.04. Ratios are calculated between each pair of grades or years in school over several recent years.

After study and analysis of the historical ratios, and based upon a reasonable set of assumptions regarding births, migration rates, retention rates, etc., ratios most indicative of future growth patterns are determined for each pair of grades. The ratios thus selected are applied to the present enrollment statistics to project into future years. The ratios are the key factors in the reliability of the projections, assuming validity of the data at the starting point.

RELIABILITY OF ENROLLMENT PROJECTIONS

Projections can serve as useful guides to school administrators for educational planning. Enrollment projections are more reliable in Years #1-4 in the future and less reliable in the "out-years." Projections six to ten years out may serve as a guide to future enrollments and are useful for planning purposes, but they should be viewed as subject to change given the likelihood of potential shifts in underlying assumptions/trends, such as student migration, births as they relate to Kindergarten enrollment, and other factors.

Projections that are based upon the **children who already are in the district** (the current K-12 population only) will be the most reliable. The second level of reliability will be for those children already **born into the community but not yet old enough to be in school**. The least reliable category is the group for which an estimate must be made to **predict the number of births**, thereby adding additional uncertainty. See these three multi-colored groupings on the "Projected Enrollment" tab.

Annual updates allow for early identification of recent changes in historical trends. When the actual enrollment in a grade is significantly different (higher or lower) from the projected number, it is important (yet difficult) to determine whether this is a one-year aberration or whether a new trend may have begun. **In light of this possibility, NESDEC urges all school districts to have updated enrollment forecasts developed by NESDEC each October.** This service is available at no cost to affiliated school districts.

USING THIS INFORMATION ELECTRONICALLY

If you would like to extract the information contained in this report for your own documents or presentations, you can use screenshots, which can be inserted into PowerPoint slides, Word documents, etc. Because screenshots create graphics, the image is not editable. Please feel free to contact us if you need assistance in this matter, by phone (508-481-9444) or by email (ep@nesdec.org).

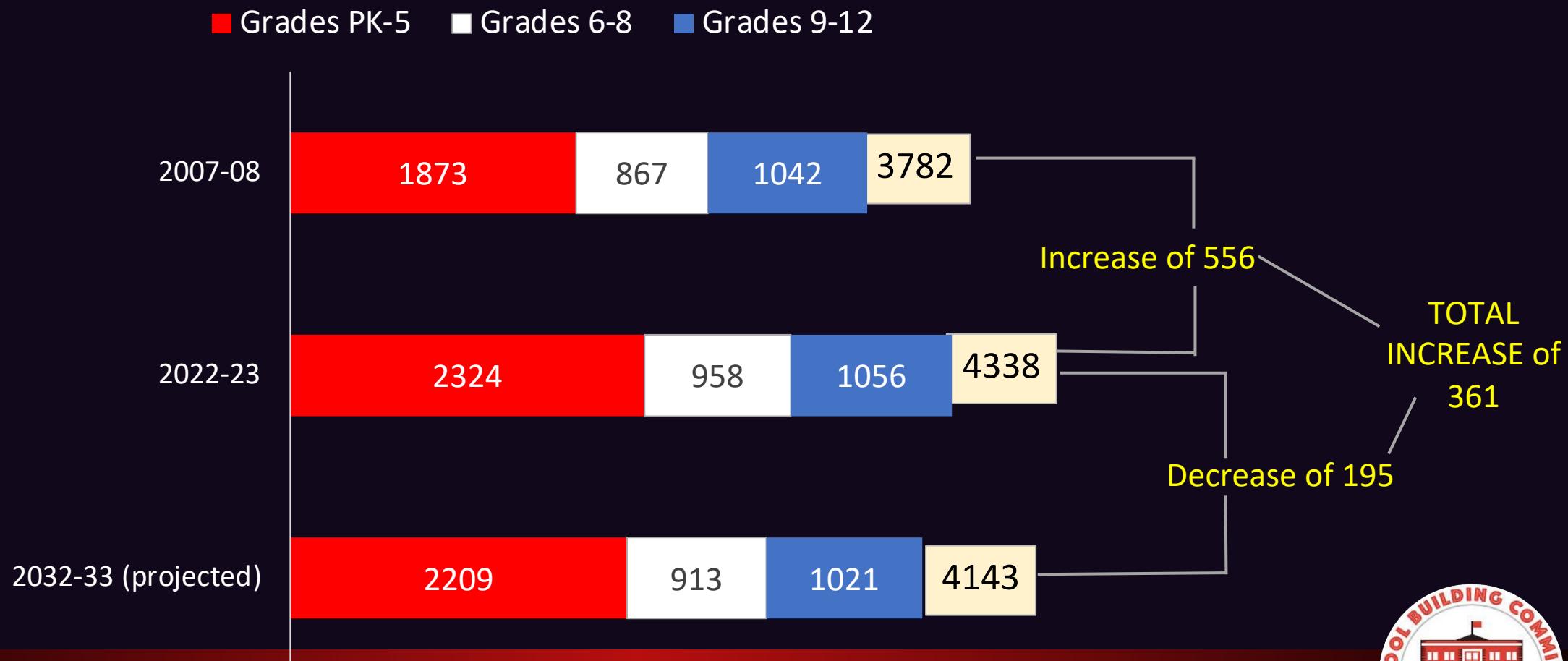
MSBA STATEMENT OF INTEREST ATTACHMENTS TOWN OF MILTON

April 14, 2023



ENROLLMENT DATA REVIEW 2023

STUDENT ENROLLMENT DISTRICT WIDE: Projected to grow by 361 students since our schools were rebuilt in 2007-08*



New England School Development Council – October 2022
assumes level births; level move-ins
Does not consider residential housing projects not yet approved.

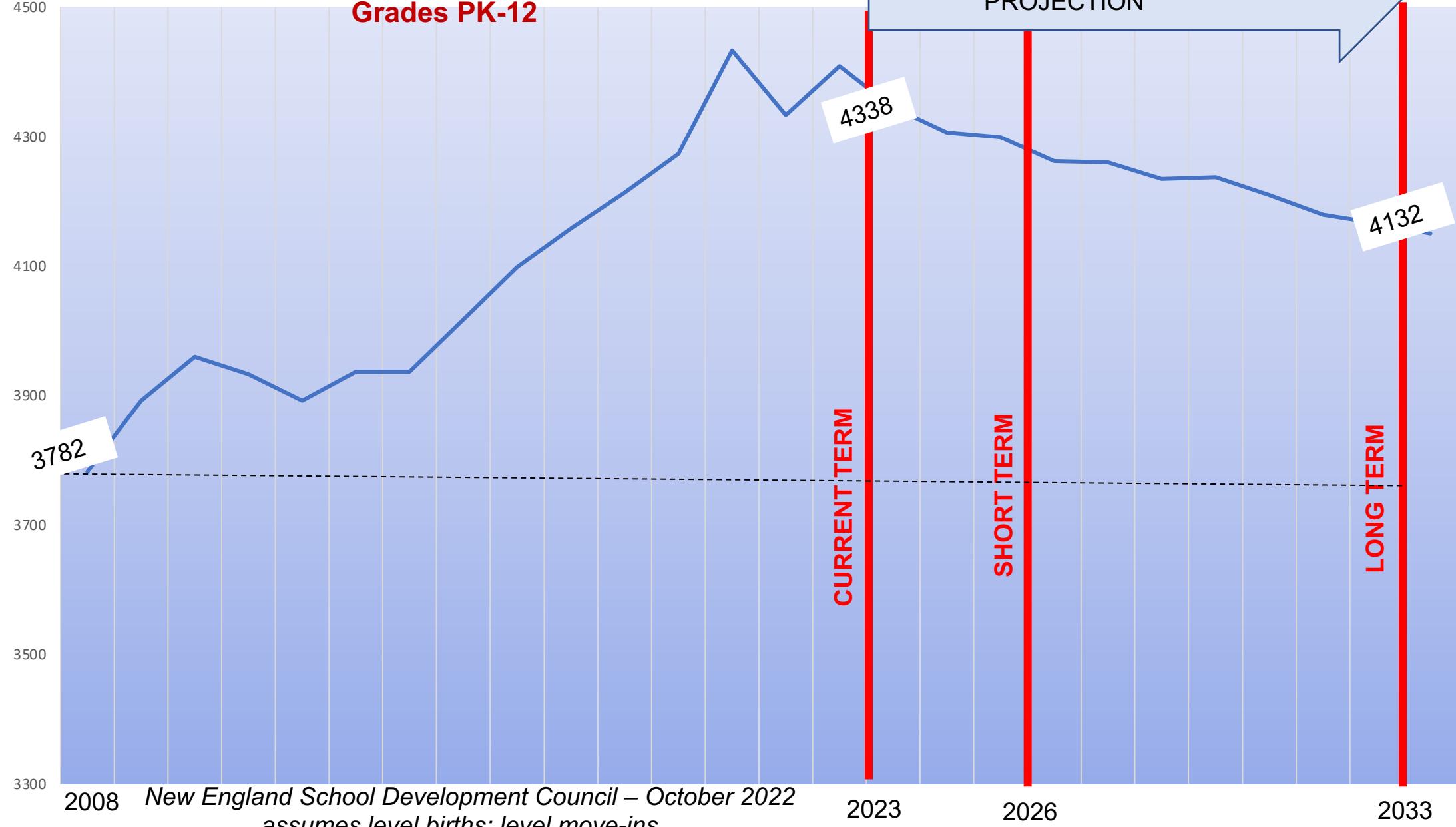


MILTON PUBLIC SCHOOLS

Attachment C ENROLLMENT HISTORY AND PROJECTIONS

Grades PK-12

PROJECTION



2008 New England School Development Council – October 2022
assumes level births; level move-ins

Attachment D

Elementary Classroom Conversions

CUNNINGHAM SCHOOL (Built for 3 Strands)		
CURRENTLY	FORMERLY	Floor
Kindergarten Classroom	Special Education office space for 4 staff	1
Art Room - Grades 3-5 CO/CU shared	Art Room Grades 2-5 CO/CU shared	1
Art/Music Room - Grades K-2 CO/CU shared	Music K-5 CO/CU shared	1
PreK Substantially Separate Classroom (smaller than traditional room) (without bathroom)	Teacher's Room	2
PreK Substantially Separate Classroom (smaller than traditional room) (without bathroom)	ASE Office/Coordinator's Office	2
PreK Classroom (without bathroom)	Special Education office space for 4 staff	1
1st Grade Class	LEAP (Subseparate K - 2 class)	2
2nd Grade Class	LEAP (Subseparate K - 3 class)	2
5th grade Classroom	FLES Room	3
Teacher's Room	Computer Lab	2
Classroom – Grade 2	Library section	3
PROJECTED*: 4th floor Storage will become Teacher's Room (CU and CO)		

COLLICOT SCHOOL (Built for 4 Strands)

Music Room	Computer Lab	2
3rd grade classroom	Flex room	2
5th grade classroom	Flex room	2
Librarian's Office shared with Milton Community Schools office	Library Office	3
Classroom (for 2021-22)	Library Section	

<u>Elementary Classroom Conversions</u>		
TUCKER SCHOOL (Built for 3 Strands)		
CURRENTLY	FORMERLY	Floor
4th Kindergarten Classroom (no bathroom or cubbies)	Art/Music Room	1
PreK classroom	Flex room	2
PreK classroom	SPED Team Chair Office	2
Music room	Computer Lab	2
Art room	Special Ed offices	2
Office space	Library	2
Office shared by Milton Community Schools, Family Outreach Liaison, Inclusion Specialists and small group lessons	Conference Room	1
Small group RTI lessons, assessment, after school art activities	Stage	1
Shared office - 2 reading specialists, math coach, 3 instructional support teachers	Title 1 Office	3
FLES teacher's office	Storage room	3
PROJECTED*: Offices will become Teachers Room		
PROJECTED*: Teacher's Room will become Classroom		

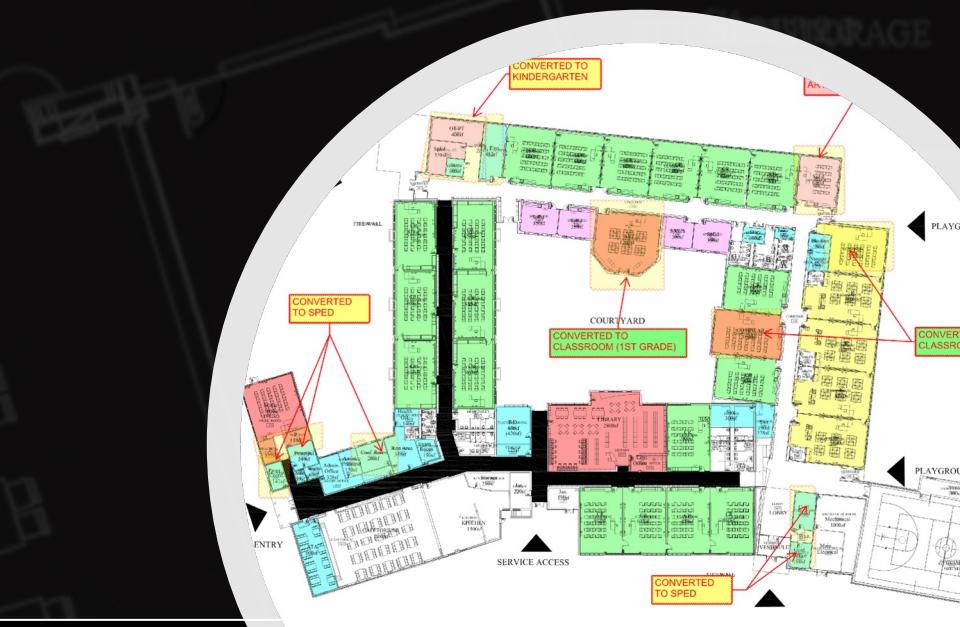
Elementary Classroom Conversions

GLOVER SCHOOL (Built for 4 Strands)		
CURRENTLY	FORMERLY	Floor
Kindergarten Classroom (no bathroom and cubbies in hall)	Offices	1
1st grade Classroom (with kiln, multiple sinks, and art supplies)	Art Room	1
Art on a cart	Art Room	1
5th grade Classroom	Computer Lab	1
Maker space, Technology space with Ipads and chromebooks on carts	Library computer center	1
FLES teacher, Instructional Technology Teacher, Librarian, Future Problem Solving Teacher, and Library paraprofessionals share one office space in back of circulation desk	Library office	1
SPED Team Chair Office, storage of all files	Conference Room	1
FLES on a cart	FLES Room	1
Speech/Language Pathologist office	Teacher planning and copy room	1
Copy room	Closet and Hallway	1
School Psychologist office	Music storage room	1
Bookshelves in Teacher's Room	Book and Curriculum Resource Room	1
Music on a Cart	Music Room	
SPED Classroom	Library	

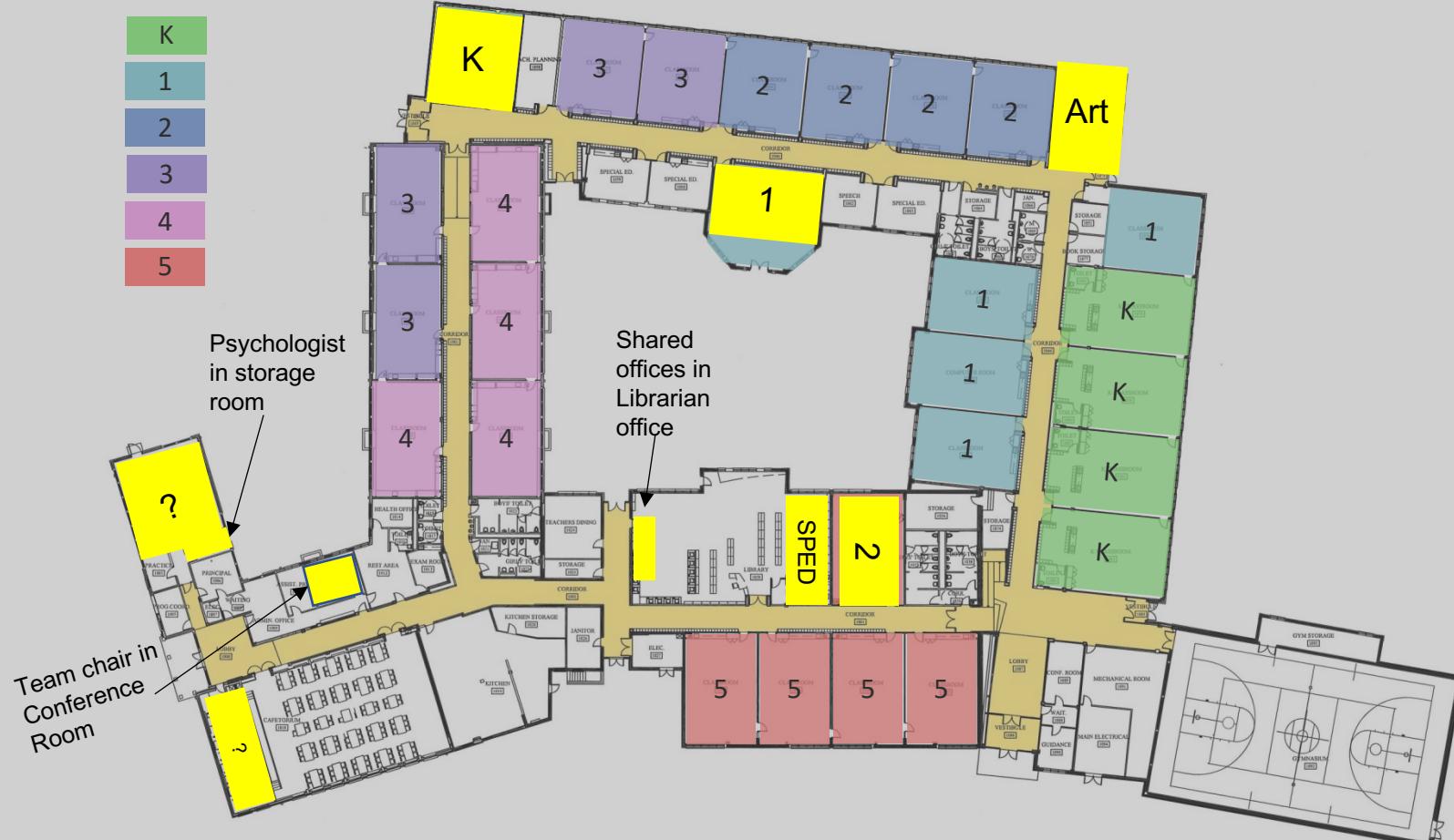
MILTON ELEMENTARY SCHOOLS

Current and Short-Term Plans for Classroom Conversions

- CURRENTLY: **Converted 20 Spaces** to CLASSROOMS
 - At the expense of office space, computer labs, libraries, art rooms, music rooms
- SHORT TERM PLAN FOR NEXT FIVE YEARS:
 - **Need to Convert 5 Additional Spaces** to CLASSROOMS (at the expense of office space, teachers room, preschool, library and another music room)



Classroom Conversions GLOVER

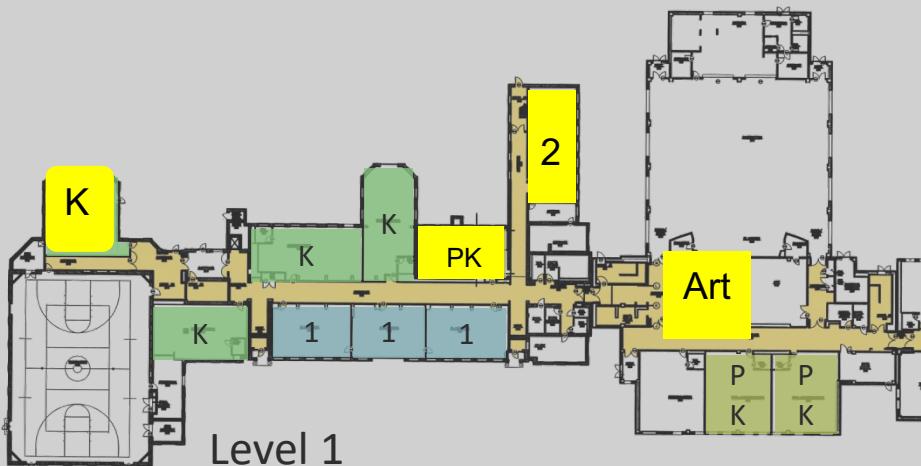
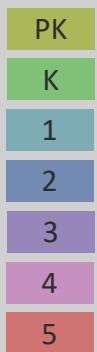
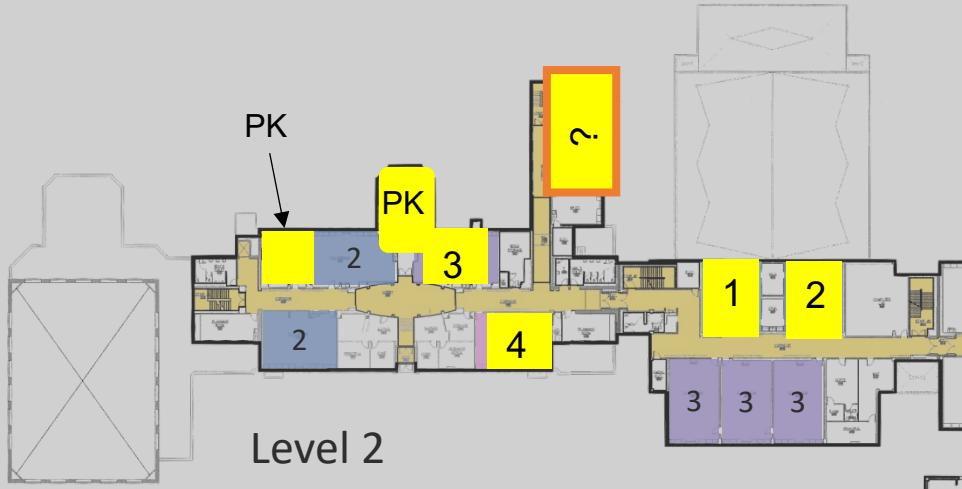


Key

- Space already converted to classroom
- Space to be converted to classroom next

Classroom Conversions CUNNINGHAM

GRADES PK-5



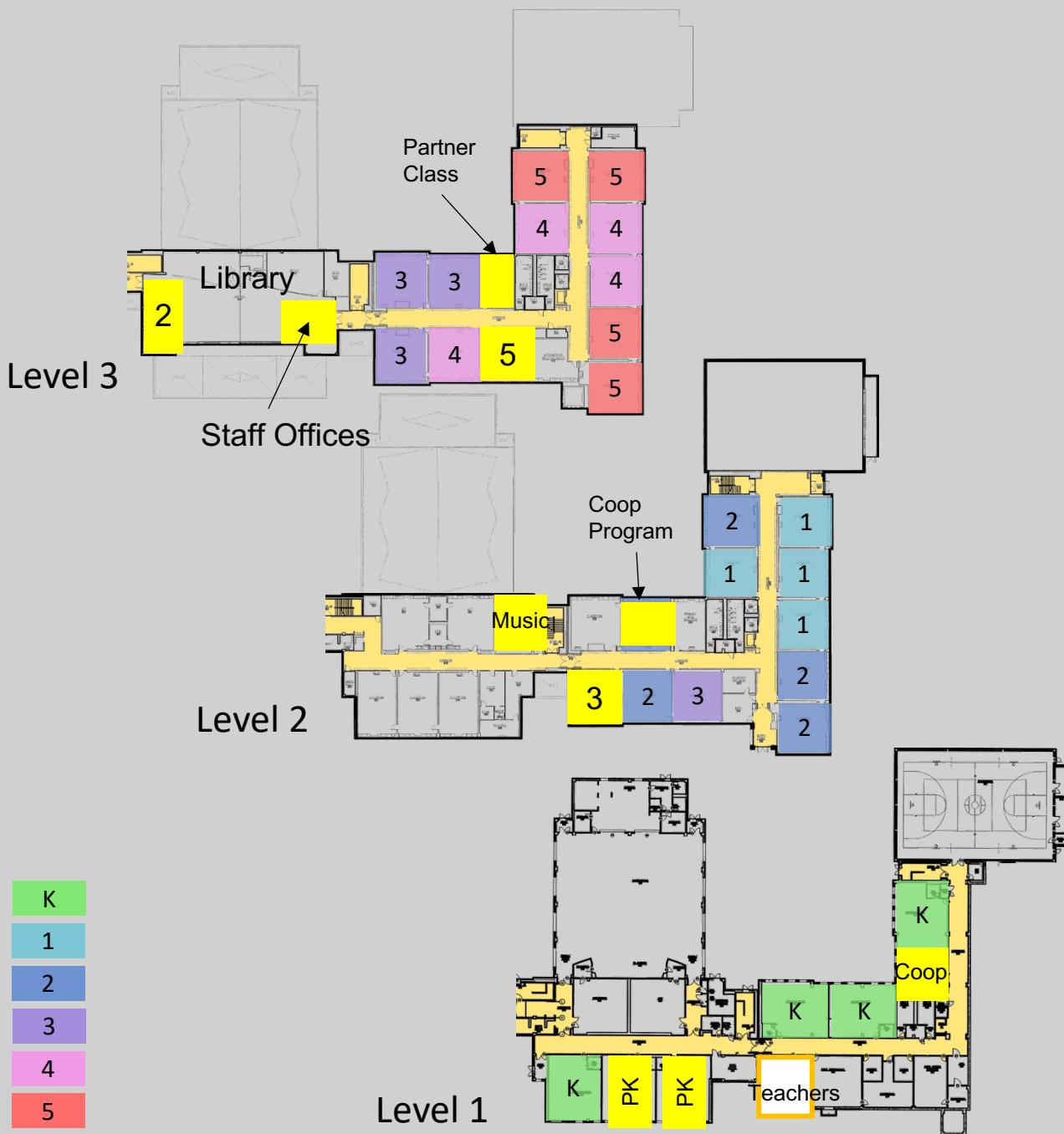
Key

Space already converted to classroom

Space to be converted to classroom next

Classroom Conversions COLLICOT

GRADES K-5



Key

■ Space already converted to classroom

■ Space to be converted to classroom next

Classroom Conversions TUCKER

GRADES PK-5



Proposed Residential Construction in Milton

	Location	Residence type	Status	Construction anticipated
1	711 Randolph Ave.	40B – Multifamily residential - 90 units	In litigation	2023
2	485-87 Blue Hills Parkway	40B, Multifamily residential - 52 units	Approved	2023
3	648-652 Canton Avenue	40B, Multifamily residential - 116 units	Under review	2023
4	582 Blue Hill Avenue	40B, Multifamily residential - 84 units	Approved	2024
5	19-21 Bassett St/ 4-24 Franklin St.	40B, Multifamily residential - 92 units	Under review	2024
6	16 Amor Road	40B, Multifamily residential – 16 units	Under review	2023
7	936 Brush Hill Road	40B, Multifamily residential – 20 units	Under review	2023
8	728 Randolph Avenue	40B, Multifamily residential – 40 units	Under review	2024
	TOTAL PROPOSED 40B UNITS	510 Units		

Proposed Residential Construction in Milton (continued)

	Location	Residence type	Status	Construction anticipated
1	Pine Gardens Way/227 Pleasant St.	Subdivision - 5 single family homes	Under construction	2023
2	Woodlot Drive	23 Single family homes	Construction complete	2021
3	1672-1726 Canton Ave.	54 units, 20 single family homes plus 34 condo units	Under construction	2023
4	131 Eliot Street	38 units - Multifamily residential/mixed use	Under construction	2022
5	Wentworth Farm Road	10 Single family homes	Under construction	2022
TOTAL OTHER PROPOSED or UNDER CONSTRUCTION UNITS (NON 40B)		130 Units		
TOTAL 40B AND OTHER PROPOSED OR UNDER CONSTRUCTION RESIDENTIAL UNITS		640 UNITS		

Attachment G

JGA

PROGRAM ASSIGNMENT

General Procedures

The assignment of students to grade one will always be carried out in a manner that provides optimal learning environments for all students.

Generally, students will be required to attend school in the attendance area in which they reside, unless the Superintendent has granted special permission, the student is participating in the French Immersion Program through the below process, or school location is determined by a student's Individualized Education Program (IEP) or Section 504 Plan.

Special permission may be granted for the following reasons:

1. If the change involves a student with a disability, a hardship case, or if there are medical considerations.
2. If the change appears to be in the interests of the child, of the schools, and/or for disciplinary and administrative reasons.
3. If the legal residency of a child changes from one attendance area to another during the school year and the parents wish the child to remain in his/her former school; permission will not be extended beyond current school year.

School bus transportation will not be provided for students attending school outside their attendance area unless they can be accommodated on existing bus routes and schedules or the placement has been made pursuant to the student's IEP or Section 504 Plan.

The Superintendent has the authority to assign or reassign students to an elementary school other than his/her neighborhood school if the other school is better suited to address the student's educational and/or special educational needs.

Grade One Assignment Procedures

Each year the district will provide families with information regarding the Elementary programs. The district will provide this information in various formats as determined by the Superintendent.

Each year the Superintendent will:

1. **Determine the level of interest in the grade 1 English and French programs.**
2. **Accommodate and assign all students to grade 1 English who select English.**
3. **Determine the number of grade one English and French Immersion sections in each school based on the established format:**
 - **Each Elementary school will have a minimum of two English Innovation Pathways classes**
 - **French Immersion classes will be determined equitably across the Elementary Schools, given the constraints of the number of classrooms available, enrollment numbers and funding**
 - **If enrollment numbers require that an additional Grade 1 section is needed, the Superintendent will determine whether that section will be English or French and in which school the section will be located based on the needs and resources of the district.**
4. **Continue to prioritize school building assignment for siblings, however siblings will not have priority for assignment to a program.**
5. **Hold Grade One lotteries in the event that the demand a program in a school exceeds the number of available seats in that school.**

Grade One Program Lotteries

In the event that the demand for a program exceeds the number of available seats the Superintendent will assign students based on the results of lotteries as detailed below.

Lottery Detail

The initial lottery will typically take place after March 1st and before April 15th. The lotteries will be conducted by the Superintendent. Results of the lotteries (including assignment and waitlist order) will be communicated on an individual basis. The assigned seats will be determined using a computer generated random number process. Multiples (twins, triplets, etc..) will enter the lotteries as a single entry. Waitlists for open seats for all lotteries will remain in effect until the tenth day of school.

Lottery Order

1. **School-based Lottery for Kindergarten students attending the MPS as of March 1st.**

If seats still exist at one or more schools

2. **District-wide lottery for Kindergarten students attending the MPS as of March 1st that have been waitlisted at their home school and would voluntarily leave their home school.**

If seats still exist at one or more schools

3. **School Based Lottery for Kindergarten students who begin attending the MPS sometime after March 1st through the end of the school year.**

If seats still exist at one or more schools

4. **School Based Lottery for students new to the MPS in Grade 1.**

Original Adoption: January 9, 2013

First Reading: December 4, 2019

Second Reading: December 18, 2019

**MILTON PUBLIC SCHOOLS
MILTON, MASSACHUSETTS**

REVISED MILTON ELEMENTARY SCHOOL DISTRICTS BY STREET

2/24/2011

STREET NAME	SCHOOL
ABERDEEN RD	TUCKER
ACADEMY LN	CUNNINGHAM
ADAMS CT	COLLICOT
ADAMS ST	COLLICOT
ADANAC RD	CUNNINGHAM
ADRIAN RD	TUCKER
ALBERT PL	COLLICOT
ALDEN RD	COLLICOT
ALFRED RD	TUCKER
ALLEN CIR	GLOVER
ALLERTON RD	GLOVER
ALVIN AV	COLLICOT
AMOR RD	TUCKER
ANDREWS RD	COLLICOT
ANNAPOLIS RD	TUCKER
ANTWERP ST	COLLICOT
APPLE LN	TUCKER
ARROWHEAD LN	CUNNINGHAM
ARTWILL ST	CUNNINGHAM
ASH ST	COLL/CUNN
ATHERTON LN	TUCKER
ATHERTON ST	TUCKER
AUDUBON RD	GLOVER/TUCKER
AUGUSTA RD	COLLICOT
AUSTIN ST	TUCKER
AVALON RD	GLOVER
AZALEA DR	CUNNINGHAM
BABCOCK ST	COLLICOT
BADGER CIR	COLL/CUNN
BAILEY AV	COLL/CUNN
BALLOU ST	COLLICOT
BARBARA LN	TUCKER
BARBERRY LN	COLLICOT
BARNARD AV	COLLICOT
BARTONS LN	COLL/CUNN
BASSETT ST	COLLICOT
BATES RD	COLLICOT
BEACON ST	TUCKER
BEACON STREET CIR	TUCKER

The Milton Public Schools will not accept responsibility for the use of this list for information. This list is subject to change at anytime. It shall not be used by a realtor or anyone else to inform clients as to school district locations.

MILTON PUBLIC SCHOOLS
MILTON, MASSACHUSETTS

BEALE ST		COLLICOT
BEECH ST		COLL/CUNN
BELCHER CIR		COLLICOT
BELVOIR RD		TUCKER
BERLIN AV		COLLICOT
BIG BLUE DR		TUCKER
BIRCH ST		COLL/CUNN
BLACKSMITH RD		CUNNINGHAM
BLUE HILL AV		TUCKER
BLUE HILL RIVER RD		TUCKER
BLUE HILL TERRACE ST		TUCKER
BLUE HILLS PKWY	Below 353 Odd	TUCKER
BLUE HILLS PKWY	353 and above Odd	CUNNINGHAM
BLUE HILLS PKWY	406 and down Even	GLOVER/TUCKER
BLUE HILLS PKWY	Above 406 Even	CUNNINGHAM
BONAD RD		CUNNINGHAM
BOULEVARD ST		COLLICOT
BRACKETT ST		COLLICOT
BRADFORD RD		COLL/CUNN
BRADLEE LN		TUCKER
BRADLEE RD		TUCKER
BRAE BURN RD		COLLICOT
BRANDON RD		GLOVER
BRECK ST		GLOVER
BREWSTER RD		COLLICOT
BRIARFIELD RD		GLOVER
BRIERBROOK ST		COLLICOT
BROOK DR		CUNNINGHAM
BROOK HILL RD		GLOVER
BROOK LN		COLLICOT
BROOK RD	733 and up	COLLICOT
BROOK RD	below 733	GLOVER
BROOKSIDE PK		GLOVER
BRUSH HILL LN		TUCKER
BRUSH HILL RD		TUCKER
BRYANT AV		COLLICOT
BUCKINGHAM RD		CUNNINGHAM
BUNTON ST		COLLICOT
BYRNE RD		GLOVER
CABOT ST		COLLICOT
CALIFORNIA AV		COLLICOT
CANTON AV	Between 939 and 300	CUNNINGHAM

The Milton Public Schools will not accept responsibility for the use of this list for information. This list is subject to change at anytime. It shall not be used by a realtor or anyone else to inform clients as to school district locations.

MILTON PUBLIC SCHOOLS
MILTON, MASSACHUSETTS

CANTON AV	300 and down	GLOVER
CANTON AV	939 and up	TUCKER
CANTWELL RD		GLOVER
CAPE COD LN		GLOVER
CAPEN ST		GLOVER
CARBERRY LN		TUCKER
CARIS BROOKE		TUCKER
CARLSON RD		TUCKER
CARY AV		COLLICOT
CATHERINE RD		GLOVER/TUCKER
CEDAR RD		COLLICOT
CEDAR TERRACE ST		COLLICOT
CENTRAL AV	428 and up	CUNNINGHAM
CENTRAL AV	Below 428	GLOVER
CENTRE LN		CUNNINGHAM
CENTRE ST	443 and up	COLLICOT
CENTRE ST	Below 443	CUNNINGHAM
CENTURY LN		COLLICOT
CHANNING ST		CUNNINGHAM
CHEEVER ST		TUCKER
CHERRY BLOSSOM LN		CUNNINGHAM
CHERYL DR		COLLICOT
CHESTERFIELD RD		COLLICOT
CHICKATAUBUT RD		CUNNINGHAM
CHILTON PK		GLOVER/TUCKER
CHRISTOPHER DR		COLLICOT
CHURCH PL .		COLLICOT
CHURCH ST		COLLICOT
CHURCHILL ST		TUCKER
CHURCHILLS LN	120 and down	COLLICOT
CHURCHILLS LN	Above 120	CUNNINGHAM
CLAPP ST		CUNNINGHAM
CLARK RD		COLL/CUNN
CLAY ST		COLL/CUNN
CLIFF RD		GLOVER
CLIFTON RD		CUNNINGHAM
COLLAMORE ST		COLLICOT
COLONIAL RD		CUNNINGHAM
COLUMBIA PK		GLOVER
COLUMBINE RD		GLOVER
CONCORD AV		TUCKER
CONWAY RD		COLL/CUNN

The Milton Public Schools will not accept responsibility for the use of this list for information. This list is subject to change at anytime. It shall not be used by a realtor or anyone else to inform clients as to school district locations.

MILTON PUBLIC SCHOOLS
MILTON, MASSACHUSETTS

COOLIDGE RD	CUNNINGHAM
COREY LN	TUCKER
COTTAGE PL	COLL/CUNN
COUNTRYSIDE LN	CUNNINGHAM
COURTLAND CIR	COLLICOT
CRAIG HILL LANE	COLL/CUNN
CRAIG ST	CUNNINGHAM
CRANE RD	GLOVER
CRESTERFIELD RD	COLLICOT
CRESTVIEW LN	TUCKER
CRESTVIEW RD	TUCKER
CROWN ST	TUCKER
CUNNINGHAM LN	COLL/CUNN
CURTIS RD	GLOVER
CUSHING RD	TUCKER
CYPRESS RD	COLL/CUNN
DAHLGREN ST	COLLICOT
DANA AV	TUCKER
DARBY RD	GLOVER
DEAN RD	COLL/CUNN
DECKER ST	TUCKER
DEER IELD DR	CUNNINGHAM
DENMARK AVE	COLLICOT
DEXTER ST	CUNNINGHAM
DOLLAR LN	TUCKER
DUDLEY LN 42 and down	COLLICOT
DUDLEY LN Above 42	CUNNINGHAM
DUGGAN LN.	COLLICOT
DYER AVE	GLOVER/TUCKER
EAGER RD	COLLICOT
EATON ST	COLLICOT
EDGE HILL RD	COLLICOT
EDWARD AV	COLLICOT
EILEEN RD	TUCKER
ELIAS LN	TUCKER
ELIOT CIR	GLOVER
ELIOT ST	GLOVER
ELLIOT AV	COLLICOT
ELLSWORTH RD	COLLICOT
ELM LAWN	GLOVER
ELM ST	CUNNINGHAM
ELMWOOD AV	COLLICOT

The Milton Public Schools will not accept responsibility for the use of this list for information. This list is subject to change at anytime. It shall not be used by a realtor or anyone else to inform clients as to school district locations.

MILTON PUBLIC SCHOOLS
MILTON, MASSACHUSETTS

ELTON RD	COLL/CUNN
EMERSON RD	COLLICOT
ENGINE RD	GLOVER
ESSEX RD	TUCKER
EVERGREEN TRAIL	CUNNINGHAM
FAIRLAWN AV	GLOVER/TUCKER
FAIRBANKS RD	CUNNINGHAM
FAIRFAX RD	GLOVER
FAIRMOUNT AVE	TUCKER
FARADAY ST	TUCKER
FARMER RD	CUNNINGHAM
FATHER CARNEY DR	COLLICOT
FERN CROFT RD	CUNNINGHAM
FIELDSTONE LN	GLOVER
FLETCHER STEELE DR	CUNNINGHAM
FORBES RD	COLLICOT
FORD RANCH RD	COLLICOT
FOREST ST	COLLICOT
FOSTER LN	COLLICOT
FOXHILL LN	CUNNINGHAM
FRANCIS ST	GLOVER
FRANKLIN ST	COLLICOT
FROTHINGHAM ST	GLOVER
FULLER'S LN	COLL/CUNN
GALEN ST	COLL/CUNN
GARDEN ST	COLLICOT
GARDINER RD	COLLICOT
GARFIELD AVENUE EXT	TUCKER
GARFIELD RD	GLOVER
GASKINS RD	GLOVER
GERALD RD	COLL/CUNN
GIBBONS ST	GLOVER/TUCKER
GILE RD	CUNNINGHAM
GLENDALE RD	COLL/CUNN
GORDON RD	COLLICOT
GOULD LN	TUCKER
GOVERNOR BELCHER LN	COLLICOT
GOVERNOR STOUGHTON LN	CUNNINGHAM
GOVERNORS RD	COLLICOT
GRAFTON AV	COLLICOT
GRANITE AV	COLLICOT
GRANITE PL	COLLICOT

The Milton Public Schools will not accept responsibility for the use of this list for information. This list is subject to change at anytime. It shall not be used by a realtor or anyone else to inform clients as to school district locations.

MILTON PUBLIC SCHOOLS
MILTON, MASSACHUSETTS

GREEN HOLLOW LN		CUNNINGHAM
GREEN ST		TUCKER
GREENLEAF RD		GLOVER
GRIGGS LN		GLOVER
GROVE ST		GLOVER/TUCKER
GUILFORD RD		COLLICOT
GULLIVER ST		CUNNINGHAM
GUN HILL ST		COLL/CUNN
HALLEN AV		CUNNINGHAM
HARBOR VIEW PK		COLLICOT
HARBOR VIEW RD		COLLICOT
HARLAND ST 440 and up		CUNNINGHAM
HARLAND ST Below 440		TUCKER
HAROLD ST		GLOVER/TUCKER
HAWTHORN RD		GLOVER
HAZEL ST		COLL/CUNN
HEATHER DR		COLLICOT
HEMLOCK DR		TUCKER
HERITAGE LN		GLOVER
HERRICK DR		GLOVER
HIGH ST		GLOVER
HIGHFIELD CIR		COLLICOT
HIGHLAND LN		CUNNINGHAM
HIGHLAND ST		CUNNINGHAM
HILLCREST RD		COLLICOT
HILLS VIEW RD		TUCKER
HILLSIDE ST		COLLICOT
HILLTOP ST		COLLICOT
HINCKLEY RD		GLOVER
HOLBORN ST		COLLICOT
HOLLINGSWORTH RD		TUCKER
HOLLIS ST		COLLICOT
HOLMES LN		CUNNINGHAM
HOPE AV		COLLICOT
HORTON PL		COLL/CUNN
HOUGHTON RD		COLLICOT
HOUSTON AV 128 and above		GLOVER
HOUSTON AV Below 128		GLOVER/TUCKER
HOWARD ST'		COLLICOT
HOWE ST		COLLICOT
HOY TER		COLL/CUNN
HUDSON ST		CUNNINGHAM

The Milton Public Schools will not accept responsibility for the use of this list for information. This list is subject to change at anytime. It shall not be used by a realtor or anyone else to inform clients as to school district locations.

MILTON PUBLIC SCHOOLS
MILTON, MASSACHUSETTS

HUNTINGTON RD	COLLICOT
HURLCROFT RD	COLLICOT
HUTCHINSON ST	COLLICOT
INDIAN SPRING RD	CUNNINGHAM
JEREMIAH WAY	COLL/CUNN
JOHNSON ST	COLLICOT
KAHLER AV	GLOVER/TUCKER
KC FARM RD	CUNNINGHAM
KENILWORTH RD	COLLICOT
KEVIN RD	TUCKER
LAFAYETTE ST	CUNNINGHAM
LANCASTER LANE	GLOVER
LANDON RD	TUCKER
LANTERN LN	GLOVER
LAUREL RD	GLOVER/TUCKER
LAWNDALE RD	COLLICOT
LAWRENCE RD	COLL/CUNN
LIBBY RD	COLLICOT
LINCOLN ST	GLOVER
LINDBERGH RD	COLLICOT
LOCHLAND ST	COLLICOT
LODGE ST	COLL/CUNN
LOEW CIRCLE	TUCKER
LONG MEADOW RD	CUNNINGHAM
LONGWOOD RD	GLOVER
LORAYNE DR	CUNNINGHAM
LOTHROP AV	TUCKER
LUFBERY ST	CUNNINGHAM
LYMAN RD	COLL/CUNN
MAGNOLIA RD	CUNNINGHAM
MAITLAND ST	COLL/CUNN
MANNING LN	CUNNINGHAM
MAPLE ST	GLOVER
MARGARET RD	TUCKER
MARILYN RD	GLOVER
MARK LN	COLLICOT
MAROON RD	CUNNINGHAM
MARRCREST DR	COLLICOT
MARSHALL RD	CUNNINGHAM
MARTIN RD	CUNNINGHAM
MARTIN TER	COLLICOT
MATHAURS ST	COLL/CUNN

The Milton Public Schools will not accept responsibility for the use of this list for information. This list is subject to change at anytime. It shall not be used by a realtor or anyone else to inform clients as to school district locations.

MILTON PUBLIC SCHOOLS
MILTON, MASSACHUSETTS

MAXWELL RD	GLOVER
MCKINNON AV	COLL/CUNN
MEADOW LN	CUNNINGHAM
MEADOWIEW RD	TUCKER
MEAGHER AV	GLOVER/TUCKER
MECHANIC ST	COLLICOT
MEETINGHOUSE LN	TUCKER
MELBOURNE RD	COLLICOT
MEREDITH CIR	CUNNINGHAM
METROPOLITAN AV	TUCKER
MILLER AV	COLL/CUNN
MILTON HILL RD	COLLICOT
MILTON ST (EAST)	COLLICOT
MILTON ST (WEST)	TUCKER
MINGO ST	TUCKER
MORTON RD	GLOVER
MORTON TER	GLOVER
MOUNTAIN LAUREL PATH	CUNNINGHAM
MULBERRY RD	TUCKER
MURRAY AV	COLL/CUNN
MYERS LN	TUCKER
NAHANTON AVE	COLLICOT
NANCY RD	COLL/CUNN
NASH ST	COLLICOT
NEPONSET VALLEY PKWY	TUCKER
NEW BEDFORD ST	TUCKER
NORMAN ST	CUNNINGHAM
NORTH RUSSELL ST	GLOVER
NORWAY RD	GLOVER
OAK RD	GLOVER
OAK ST	TUCKER
OLD FARM RD	CUNNINGHAM
ORCHARD RD	CUNNINGHAM
ORONO ST	GLOVER
OSBORNE RD	COLLICOT
OTIS ST	COLLICOT
PAGODA CIR	CUNNINGHAM
PAGODA ST	CUNNINGHAM
PARADISE RD	COLLICOT
PARK ST	TUCKER
PARKWAY CRESCENT	GLOVER/TUCKER
PARKWOOD DR	COLLICOT

The Milton Public Schools will not accept responsibility for the use of this list for information. This list is subject to change at anytime. It shall not be used by a realtor or anyone else to inform clients as to school district locations.

MILTON PUBLIC SCHOOLS
MILTON, MASSACHUSETTS

PATRICIA DR		COLL/CUNN
PAWNEE CIR		CUNNINGHAM
PEQUOT LN		CUNNINGHAM
PHYLLIS LN		COLL/CUNN
PIERCE ST		COLLICOT
PILGRIM RD		COLLICOT
PILLON RD		COLLICOT
PINE AV		COLL/CUNN
PINE GROVE ST		COLLICOT
PINE TREE BROOK RD		CUNNINGHAM
PINEHURST DR		CUNNINGHAM
PL YMOUTH AVE		COLLICOT
PLEASANT ST		COLL/CUNN
POND ST		COLLICOT
PONKAPOAG TRAIL		CUNNINGHAM
POPE HILL RD		CUNNINGHAM
POWDER MILL RD		CUNNINGHAM
PREACHER RD		CUNNINGHAM
PRINCE ST		CUNNINGHAM
QUARRY LN		COLL/CUNN
QUENTIN ST		CUNNINGHAM
QUISSET BROOK RD		CUNNINGHAM
RANDOLPH AV	Above 920	COLLICOT
RANDOLPH AV	From 920 to above 650	COLL/CUNN
RANDOLPH AV	From 650 to above 239	CUNNINGHAM
RANDOLPH AV	239 and down	COLLICOT
REED ST		CUNNINGHAM
REEDSDALE RD	126 and above	CUNNINGHAM
REEDSDALE RD	Below 126	GLOVER
RESERVATION RD		COLLICOT
REVERE ST		GLOVER/TUCKER
RIDGE RD		GLOVER
RIDGEWOOD RD		COLLICOT
RIVERSIDE AV		COLLICOT
ROBBINS ST		TUCKER
ROCK VIEW RD		GLOVER
ROCKWELL AV		COLLICOT
ROCKWELL PL		COLLICOT
ROSE ST		COLL/CUNN
ROWE ST		COLLICOT
RUGGLES LN		GLOVER
RUSSELL ST		GLOVER

The Milton Public Schools will not accept responsibility for the use of this list for information. This list is subject to change at anytime. It shall not be used by a realtor or anyone else to inform clients as to school district locations.

MILTON PUBLIC SCHOOLS
MILTON, MASSACHUSETTS

RUSTLEWOOD RD	GLOVER
SADDLE RIDGE RD	CUNNINGHAM
SASSAMON AV	COLLICOT
SAVIN ST	CUNNINGHAM
SCHOOL ST	GLOVER
SEARS RD	COLLICOT
SHELDON ST	COLLICOT
SHERIDAN DR	COLLICOT
SIAS LN	CUNNINGHAM
SILVER BROOK RD	TUCKER
SMITH RD	TUCKER
SPAFFORD RD	CUNNINGHAM
SPRUCE ST	COLL/CUNN
SQUANTUM ST	COLLICOT
ST AGATHA RD	COLLICOT
ST MARY'S RD	GLOVER
STANDISH RD	GLOVER
STANTON RD	CUNNINGHAM
STATE ST	COLLICOT
STODDARD LN	CUNNINGHAM
STONEBRIDGE ST	TUCKER
STONEHILL LN	COLLICOT
SUGAR MAPLE LN	CUNNINGHAM
SUMMIT ST	TUCKER
SUMNER ST	TUCKER
SUNNYSIDE RD	COLLICOT
SURREY LN	TUCKER
SUSI LN	COLLICOT
TAFF RD	COLLICOT
TAYLOR RD	CUNNINGHAM
THACHER ST 227 and down	GLOVER
THACHER ST Above 227	CUNNINGHAM
THE LEDGEWAY	TUCKER
THISTLE AV	COLLICOT
THOMPSON LN	GLOVER
TROUT BROOK AV	TUCKER
TRUMAN HGWY	TUCKER
TRURO LN	TUCKER
TUCKER ST	TUCKER
UNION AV	TUCKER
UNQUITY RD	CUNNINGHAM
VALENTINE RD	TUCKER

The Milton Public Schools will not accept responsibility for the use of this list for information. This list is subject to change at anytime. It shall not be used by a realtor or anyone else to inform clients as to school district locations.

MILTON PUBLIC SCHOOLS
MILTON, MASSACHUSETTS

VALLEY RD		GLOVER
VAN BRUNT ST		TUCKER
VERNDALE RD		TUCKER
VICTORIA ST		CUNNINGHAM
VICTORY AV		COLLICOT
VINEWOOD RD		COLLICOT
VIOLA ST		GLOVER
VIRGINIA ST		GLOVER
VOSE HILL RD		TUCKER
VOSES LN	11 and down	GLOVER
VOSES LN	Above 11	CUNNINGHAM
WAGONWHEEL DR		CUNNINGHAM
WALDECK RD		COLLICOT
WALDO RD		GLOVER
WALNUT ST		CUNNINGHAM
WARNER RD		COLLICOT
WARREN AV	142 and above	GLOVER
WARREN AV	Below 142	GLOVER/TUCKER
WASHINGTON ST		COLLICOT
WEBSTER RD		COLLICOT
WENDELL PK		CUNNINGHAM
WEST SIDE RD		GLOVER
WEST ST		GLOVER/TUCKER
WESTBOURNE ST		COLLICOT
WESTON ST		GLOVER/TUCKER
WESTVALE RD		COLLICOT
WHARF ST		COLLICOT
WHITEAWN AV		GLOVER
WHITMAN RD		COLLICOT
WHITTIER RD		CUNNINGHAM
WILDWOOD RD		CUNNINGHAM
WILLIAMS AV		TUCKER
WILLOUGHBY RD		GLOVER
WINDSOR RD		GLOVER
WINTHROP ST		GLOVER/TUCKER
WOLCOTT RD		TUCKER
WOOD ST		COLLICOT
WOODBINE ST		CUNNINGHAM
WOODCHESTER DR		COLLICOT
WOODLAND RD		TUCKER
WOODSIDE DR		CUNNINGHAM
WOODVILLE AV		COLL/CUNN

The Milton Public Schools will not accept responsibility for the use of this list for information. This list is subject to change at anytime. It shall not be used by a realtor or anyone else to inform clients as to school district locations.

**MILTON PUBLIC SCHOOLS
MILTON, MASSACHUSETTS**

WOODWARD CT	COLLICOT
WYNDMERE RD	COLLICOT

The Milton Public Schools will not accept responsibility for the use of this list for information. This list is subject to change at anytime. It shall not be used by a realtor or anyone else to inform clients as to school district locations.

TOWN OF MILTON HOUSING PRODUCTION PLAN



**Prepared by
Housing Production Plan Working Group Members**

Richard Boehler

Thomas Callahan

William Clark

Melinda Collins

Kathleen M. Conlon

Julie Creamer

Frank Davis

Lauren Masiar

Philip D. Murphy

Cheryl Tougas

Allyson Quinn

Karen Sunnarborg, Housing and Planning Consultant

With technical support from William Clark, Director of Planning and Community Development

January 2020

Acknowledgements

The Town of Milton and Consultant would like to acknowledge the following individuals for their helpful contributions to this document:

Bill Brauner, Community Economic Development Assistance Corporation (CEDAC)

Robert Bushway and Nancy Shibley, Assessor's Office

Barbara Cataldo, Town Clerk's Office

Noreen Dolan, Milton Residents Fund

Deborah Felton, Fuller Village

Mary Gormley and Glenn Pavlicek, Milton Public Schools

Margaux LeClair, Massachusetts Department of Community and Housing Development

Sarah McLaren, Milton Residences for the Elderly (MRE)

Joseph Prondak, Building Commissioner

Mary Ann Sullivan, Council on Aging

Brian Tatro, Milton Housing Authority

It is also important to acknowledge all those who generously gave their time to participate in the project's Community Housing Forums.

TOWN OF MILTON HOUSING PRODUCTION PLAN

Table of Contents

	Page
I. Executive Summary	1
A. Introduction	1
B. Summary of Housing Needs Assessment	2
C. Summary of Priority Housing Needs	6
D. Summary of Housing Production Goals	7
E. Summary of Housing Strategies	7
II. Introduction	11
A. Housing Goals	11
B. Definition of Affordable Housing	13
III. Housing Needs Assessment	15
A. Demographic and Economic Profile	15
B. Housing Profile	31
C. Subsidized Housing Inventory	47
D. Priority Housing Needs	54
IV. Challenges to Producing Affordable Housing	61
V. Housing Production Goals	70
VI. Housing Strategies	74
A. Zoning Strategies	75
B. Capacity-Building Strategies	85
C. Housing Production Strategies	90
D. Housing Preservation Strategies	103
Attachment 1: Local and Regional Organizations	108

TOWN OF MILTON

HOUSING PRODUCTION PLAN

I. EXECUTIVE SUMMARY

A. Introduction

Milton is among the most desirable places in the state to live, work, and raise children. Milton is in fact a town of neighborhoods, including many small sub-neighborhoods in addition to the more readily identifiable areas of Columbine, Hillside Street, or Milton Hill. Most of these neighborhoods include housing that was built in the 1920s and 1930s where single-family homes predominate with pockets of two-family dwellings on tree-lined streets with sidewalks. Some areas, such as Hillside Street and Milton Hill, have historic homes with Victorians and New England Colonials. The Town feels established and is family-oriented.

These appealing community characteristics have resulted in high property values which have remained high despite the financial crisis of more than a decade ago. As a result, many residents, particularly those with lower incomes, are hard-pressed to find housing that is affordable or remain in their homes. Children who grew up in town are now facing the likelihood that they may not be able to return to raise their own families locally. Long-term residents, especially the elderly, are becoming less able to maintain their homes but unable to secure alternative housing that responds to their current lifestyles and resources. Families are unable to find affordable starter housing unless it is subsidized and municipal employees as well as other local workers continue to find it challenging to live in the community given such high housing costs. More housing options are required to meet the needs of these diverse populations.

Based on the Massachusetts Department of Housing and Community Development's most recent data on affordable housing in Milton, the Town has 479 units that are included on the Subsidized Housing Inventory (SHI) per Chapter 40B comprehensive permit requirements, representing 4.97% of the year-round housing stock, up from 426 units and 4.42% in 2013. However, at least 964 of the existing units need to be "affordable" to meet the 10% standard under Chapter 40B,¹ representing a current gap of 485 affordable housing units.² Because the 10% state affordability threshold is recomputed every decade as new decennial census figures are released, it is a moving target and it is likely to fall closer to about 4.8% when the 2020 census results are issued based on projected building activity.

Reaching the 10% affordability goal will be a significant challenge in Milton. First, because the Town is an older established suburb of Boston, it is largely built-up with limited land available for new development. Second, local zoning provides obstacles to affordable housing development, and current

¹ Chapter 774 of the Acts of 1969 established the Massachusetts Comprehensive Permit Law (Massachusetts General Laws Chapter 40B) to facilitate the development of affordable housing for low- and moderate-income households (defined as any housing subsidized by the federal or state government under any program to assist in the construction of low- or moderate-income housing for those earning less than 80% of median income) by permitting the override of local zoning and other local restrictions in communities where less than 10% of the year-round housing is low- and moderate-income housing.

² It should be noted that under Chapter 40B requirements, all units are counted in the SHI for rental projects while only the required 25% affordable units in ownership developments are eligible for inclusion in the SHI.

regulations would have to be reformed or in some cases overridden through “friendly” comprehensive permits. Third, the Town needs to build its capacity to create new units by aggressively reaching out for necessary technical and financial resources as well as political support to get the job done. Because Milton does not have Community Preservation Act (CPA) funding, it lacks an important financial resource to invest in local improvements, including affordable housing, and leverage other public and private financing to make development feasible.³ Despite these obstacles, the community must continue to strategically plan for more affordable and accessible residential development in appropriate locations to meet the range of local needs in response to current and projected demographic and economic conditions and more limited development opportunities.

This Housing Plan provides an opportunity to obtain information on current demographic, economic and housing characteristics and trends in order to identify priority housing needs and articulate strategies to address these needs. Through a range of strategies including zoning changes, partnerships with developers and service providers, and subsidies; the Town can continue to play a meaningful role in promoting housing options that match people to appropriately located, priced and sized units – producing housing that reflects the range of Milton’s local preferences and priorities.

B. Summary of the Housing Needs Assessment

The Housing Needs Assessment, which is the first major component of the Housing Production Plan, presents an overview of the existing and projected housing dynamic that provides the context within which a responsive set of affordable housing and smart growth initiatives can be developed.

Demographic Trends

In general, the Town’s population has been growing slowly and is projected to continue to increase, particularly among older residents, driven by the Baby Boom generation. Moreover, Milton continues to be a community of families and has experienced small increases in children which are reflected in higher school enrollments and capacity issues.

Population Growth

- *Limited population growth* with a population of 27,003 in 2010, comparable to 27,190 in 1970 and up to 27,527 according to 2017 census estimates.

Those 65 years of age or older are estimated to increase from 15.4% of all residents in 2010 to a range of 25% to 26% by 2030, representing a gain of between about 3,000 and 4,000 residents. This is very high in comparison to total projected population growth of about 3% to 6%. The Town will have to be alert to additional opportunities for downsizing.

- *Population projections indicate continuing growth* through 2030 to at least 27,792 according to the Metropolitan Area Planning Council (MAPC) “Status Quo” scenario of continuing rates of births, deaths, migration and housing occupancy.
- Milton has been experiencing small increases in children, large increases in middle-age residents with accompanying declines in younger adults and only marginal changes in the population of seniors.
- The aging of the population, particularly those age 45 to 64 and part of the Baby Boom generation, is reflected in increases in the median age from 39.3 years in 2000 to 43.1 years in 2010.

³ On the other hand, the Town will likely be able to access some of the \$5 million in sales proceeds from the Town Farm that can help finance affordable housing on the property and leverage important resources.

- Population projections predict decreases in those 34 years of age and younger. While projections suggest modest increases in the 35 to 44 age range, significant declines are predicted for the middle-aged population ages 45 to 64.

Race

- The number and percentage of *minority residents have increased substantially* from 6.2% in 1990 to about 26% by 2017 and is now proportionately higher than county and state levels of 20.6% and 21.1%, respectively. This is likely a signal that more and more people consider Milton a welcoming community.

Households

- Milton has *more families*, involving about three-quarters of all households compared to 66% and 64% for the county and state, respectively.
- Milton has fewer residents who live alone at 23% of all households in 2010 and down somewhat to about 19% in 2017. This is lower than county and state levels of 27% of 28%, respectively.
- Of the estimated 1,715 single-person households in 2017, 1,238 or 72% were 65 years of age or older.
- MAPC projections suggest possible growth in the number of households, from 9,274 in 2010 to at least 10,565 through 2030, which would necessarily be dependent on more housing production.

Economic Trends

On the whole, Milton residents are becoming more affluent although there are growing income disparities related to tenure, age and type of householder. It is not surprising that families with middle-aged heads of households have significantly higher incomes than single individuals, particularly older residents on fixed incomes. While these higher income households can afford Milton's high housing prices, others are struggling to remain in the community. It will be important for the Town to promote more social and economic diversity to avoid becoming a place where only the rich or those living in subsidized housing can afford to live.

Income

- Median household income increased by approximately \$25,000 each decade from \$24,777 in 1979 to \$126,000 according to 2017 census estimates. Moreover, while only 383 households earned more than \$75,000 in 1979, 3,073 earned more than double that at \$150,000 by 2011, increasing to 3,847 by 2017.
- The *median household income of \$126,000* was considerably higher than the median of \$95,668 for Norfolk County and \$74,167 for the state.
- The 60% increase in median income between 1999 and 2017 was considerably higher than the rate of inflation during that period of 47%.
- *Poverty has also increased since 1999*, representing 1,129 residents or 4% of all individuals and 208 or 3% of all families; increasing from 2.7% and 1.6%, respectively in

While income levels for most Milton residents have increased substantially, there remains a significant population with very limited financial means. For example, about 15% of all households had incomes of less than \$35,000 while 43% were earning more than \$150,000. This level of affluence is substantially higher than county and state levels with 28% and 20% having incomes of \$150,000 or more, respectively.

1999. While poverty levels are lower than the county and state at 6.5% and 11.1% of all individuals, respectively, this increase is worrisome given the general affluence of the community. Of particular concern is the growing poverty among those 65 years and over, increasing from 4.3% to 9.2% between 1999 and 2017.

Income Disparities

- There were significant disparities between the median incomes of owners and renters, at \$144,363 and \$51,161, respectively. Other disparities involved age with median household incomes of those 25 to 44 years of age of \$152,917 and \$159,464 for those ages 45 to 64. On the other hand, the median income of households with seniors age 65 and over was \$53,109, less than half the median income for the community of \$126,000.
- Employment data indicates that the average weekly wage of those with jobs in the community was \$1,063 which translates into an annual income of about \$55,500 which is less than half of Milton's median household income. *This indicates that it is likely that many of those who work in Milton cannot afford to live in the community, particularly given a median single-family home price of \$700,000 and rents well above \$2,000.*

Housing Trends

Limited housing production and high demand, reflected in zero percent vacancy rates, have been driving up the costs of housing leading to wider affordability gaps for both homeownership and rentals as well as increasing cost burdens.

Housing Growth

- Higher recent past and future housing growth than total population growth with a projected number of units reaching more than 11,000 by 2030 compared to 9,700 in 2010 given conservative MAPC projections. Without substantial changes in zoning and greater incentives and resources for new housing development, it is difficult to imagine this level of growth. For example, between 2010 and August 2019, only 164 net new units were added to the housing stock.
- Almost half of Milton's housing stock predates World War II with a median age of 71 years. It is likely that many of these units have deferred maintenance needs including some with lead-based paint that is hazardous to young children.

Housing Occupancy

- Milton has *limited housing diversity* as about three-quarters of units are in single-family detached homes. Nevertheless, there has been a considerable increase in units in larger multi-family structures of ten units or more, from 304 units in 1990 to 870 in 2017.
- Milton has a *high level of owner-occupancy* at about 82% compared to 69% and 62% for the county and state, respectively.
- The conversion of two-family homes into condominiums has also been eroding some of Milton's more affordable private housing stock.
- Milton's *housing units are getting somewhat larger*, from a median of 6.9 rooms in 2011 to 7.1 by 2017. This is likely reflective of some teardown activity with larger more expensive homes replacing more modest and affordable ones. Demo/replacement activity is still limited to less than 10% of new residential construction permits.
- *Housing vacancy rates are about zero* for both ownership and rentals indicating extremely tight market conditions and driving up housing prices.

Housing Costs and Affordability Gaps

- *High and rising housing prices are creating wider affordability gaps.* For example, to afford the median sales price of a single-family home of \$700,000 as of May 2019, a household would have to earn approximately \$158,250,⁴ much higher than the required income of \$96,250 in 2013 based on a median of \$460,000. This assumes that the purchaser has cash on hand of about \$150,000 to afford the upfront costs of the down payment and closing costs based on typical mortgage lending practices of 80% financing.
- There was an affordability gap of \$142,600, the difference between what the median income earning household can afford (\$557,400) and the median single-family house price (\$700,000).
- A gap of \$387,000 emerges when the affordability analysis focuses on those low- and moderate-income households earning at the 80% of area median income (AMI) limit, or \$80,300 for a family of three based on HUD 2019 income limits.⁵ These households are unable to afford a house costing more than \$313,000 assuming they can qualify for subsidized mortgages like the ONE Mortgage Program or a MassHousing mortgage without private mortgage insurance and 95% financing.
- The gap increases to almost \$700,000 for a single-person household earning at the 80% AMI limit of \$62,450 who could likely afford a home for no more than about \$243,500.
- In regard to rentals, the median gross median rent of \$1,520, according to the 2017 census estimates, requires an income of about \$68,800,⁶ which is within HUD's current income limit for three-person households earning at 80% AMI (\$80,300) but substantially more than the median income for renter households of \$51,161. About 28% of Milton households would still be unable to afford to rent at this level, assuming they were spending no more than 30% of their income on housing costs.
- Local listings indicate that market rents are actually considerably higher, ranging from \$2,151 for a basic two-bedroom apartment to \$7,500 for a high-end rental of a single-family house. Internet sources indicate a median rent of \$2,875 which would require an income of approximately \$123,000, not much less than Milton's \$126,000 median household income.
- Focusing on low- and moderate-income earning households with a median income of \$80,300 for a household of three, the rental affordability gap would be \$675 based on the difference between what they could afford of approximately \$2,200 and the Internet listed median of \$2,875. The gap increases to \$1,115 for a single-person household earning at the 80% AMI limit of \$62,450 who could afford a rent of about \$1,760.⁷
- It should also be noted that rentals involve considerable up-front cash requirements including potentially first and last month's rent and a security deposit. On the \$2,875 apartment, this would amount to \$8,625, a considerable amount for those with limited incomes and savings. Moreover, landlords are increasingly obtaining credit records and references for tenants, which also can pose barriers to securing housing.

⁴ Figures based on 80% financing, interest of 4.5%, 30-year term, annual property tax rate of \$13.18 per thousand, and insurance costs of \$6 per thousand for single-family homes. Given 80% financing, private mortgage insurance (PMI) was not included in calculations. Figures also assume that a household will pay no more than 30% of its income on housing costs.

⁵ The average household size was 2.86 persons based on 2017 census estimates.

⁶ Assumes monthly utility charges of \$200.00.

⁷ Rental calculations include a household not spending more than 30% of their income on housing costs, including monthly utility bills averaging \$200.00.

Of the households earning at or below 80% AMI, 1,928 or 71% were spending more than 30% of their income on housing and of these 1,185 or 44% were spending more than half of their income on housing, compared to 68% and 45% with cost burdens and severe cost burdens in 2009, respectively.

Cost Burdens

- *Cost burdens, defined as spending more than 30% of income on housing costs, are also high and largely increasing for lower income households.*
- Altogether 2,743 households or 30% of all Milton households were living in housing that is by common definition beyond their means and unaffordable. This includes 14% with severe cost burdens as they were spending more than half of their income on housing costs.
- There were 2,720 total households earning at or below 80% AMI, who might be eligible for housing assistance based on income alone, higher than 2,365 such

households in 2009.

- Of the 6,354 households earning more than 80% AMI, 815 or 13% were spending too much on their housing, down from 6,720 and 20% in 2009.

The convergence of these trends – an aging population, fewer young adults, limited new housing production, very high and rising housing prices, extremely low vacancy rates, widening affordability gaps, increasing cost burdens, and large up-front cash requirements for homeownership and rentals – all point to greater housing challenges for the Milton community.

C. Summary of Priority Housing Needs

Based on the indicators of need that are documented throughout the Housing Needs Assessment, it is clear that even if the Town reached the 10% state affordability threshold there would still be many residents with unmet housing needs. These needs are not restricted to a particular target population and Milton's most vulnerable residents, but also include more middle-income residents who struggle to remain in the community. While focusing on those earning at or below 80% AMI, the Housing Needs Assessment suggests that some attention should also be given to those earning above this level who are still priced out of the community's high-priced housing market. Of particular need, however, are those spending more than half of their income on housing costs including seniors and those with disabilities on fixed incomes as well as young families who need starter housing.

This Housing Needs Assessment suggests that the Town focus on the production of affordable housing with a split favoring rental over homeownership units. Currently almost all state and federal subsidy funding is for rental unit development, and there are extensive wait times for subsidized rentals as well as high cost burdens for existing renters. Moreover, all units in a Chapter 40B rental development can be included in the Subsidized Housing Inventory (SHI) as opposed to only the affordable ones in an ownership project. Another issue is that it is difficult to qualify homeowners for affordable housing assistance, particularly long-term owners, as there are limits on financial assets.

Priority Housing Needs Require a Greater Diversity of the Housing Stock

A combination of information on demographic shifts, cost burdens, affordability gaps, and the community's affordable housing mix suggest the following priority housing needs:

Housing Production

- Goal of 250 affordable units over the next five years reflecting about 10% to the total estimated unmet housing need and annual housing production goals.
- Rental development goal of 85% of all new units created.
- About half of *rental* units produced directed to seniors or single individuals (many with special needs) through one-bedroom units, 40% for small families with two bedrooms, and 10% of units for larger families with at least three bedrooms (required by state for units that are not age-restricted or for single person occupancy.)
- About 25% of *ownership units* targeted to seniors or single individuals through one-bedroom units, 25% for small families with two bedrooms, and 50% for larger families with three plus bedrooms.
- 20% of one-bedroom units with handicapped accessibility and/or supportive services and at 10% for other units created.

Housing Preservation and Stabilization

While new housing production is the top priority, housing preservation and stabilization strategies are also key to this Housing Production Plan to support health and safety improvements and help keep residents in their homes through emergency assistance. While these investments most likely cannot be counted as part of the SHI or towards annual production goals because they do not meet state requirements, they still serve pressing local housing needs.

D. Summary of Housing Production Goals

The state administers the Housing Production Program that enables cities and towns to adopt an affordable housing plan that demonstrates the production of 0.50% over one year or 1.0% over two-years of its year-round housing stock eligible for inclusion in the Subsidized Housing Inventory.⁸ Milton would have to produce at least 48 affordable units annually, a formidable challenge, and housing growth will continue to drive-up the 10% goal. The annual housing production goal will increase when the 2020 census is released, but likely to no more than 50 units. If the state certifies that the locality has complied with its annual production goals, the Town may be able, through its Zoning Board of Appeals, to deny or conditionally approve comprehensive permit applications for one (with 48 units produced) or two years (with 96 units produced). See Section V for details.

The state's subsidizing agencies have also entered into an Interagency Agreement that provides more guidance to localities concerning housing opportunities for families with children and are now requiring that at least 10% of the units in affordable production developments that are funded, assisted or approved by a state housing agency have three or more bedrooms with some exceptions (e.g., age-restricted housing, assisted living, supportive housing for individuals, SRO's. etc.).

E. Summary of Housing Strategies

The strategies listed in Table I-1 are based on previous plans, reports, studies, the Housing Needs Assessment, housing goals, and the experience of Milton to date and other comparable localities in the region and throughout the Commonwealth. The strategies are grouped according to the type of action proposed – Zoning, Building Local Capacity, Housing Production, and Housing Preservation – and categorized by Two-Year and Five-Year Action Plans. Two-Year actions are those that can begin within

⁸ The state has issued changes to Chapter 40B that included modifications to the Planned Production requirements. For example, the annual production goals are instead based on one-half of one percent of total housing units and plans are now referred to as Housing Production Plans (HPP).

the next two years, most of which will involve some immediate actions. Those strategies included in the Five-Year Action Plan involve focused attention after the next couple of years, working towards implementation after Year 2 but before Year 5.

In addition to the specific housing goals that are included in this Housing Plan (see Section II.A), housing strategies are also based on several guiding principles in selecting project sites, determining types of development, and identifying priorities. Whenever possible, the Town of Milton will pursue development projects based on the following development objectives:

Support Smart Growth Principles

- Look to areas of town that can accommodate higher housing densities and mixed-uses such as business areas, transit stations and other areas with concentrations of nonresidential uses.
- Avoid targeting development projects in areas that are ecologically sensitive and will degrade nearby conservation land; however, look to opportunities to combine open space preservation and housing development through cluster development.
- Pursue affordable housing opportunities that will minimize neighborhood impacts such as accessory apartments, small infill projects, adaptive reuse or buy-down/conversion initiatives.
- Preserve existing historic resources and integrate them with affordable housing.

Promote Affordability

- Leverage public and private resources to the greatest extent possible.
- Target development projects to Town-owned properties where feasible to take advantage of parcels that will have discounted or nominal acquisition costs to make affordable housing more financially feasible.
- Look for opportunities to obtain privately-owned land or other resources for free or at below market values as tax-deductible gifts.

Distribute and Diversify New Production

- Spread the impacts of new housing development geographically throughout town to avoid substantial impacts in any one residential neighborhood.
- Develop a number of project alternatives in recognition of a range of housing needs in town including rental and homeownership options as well as housing for seniors, families, and those with special needs. Allow more types of housing in more areas of town.
- Encourage mixed-income development to minimize stigmas associated with concentrations of low-income units and address a wider range of housing needs.

The Town has actually effectively achieved a number of these objectives through relatively recent initiatives including:

- *Milton Hill House*

The Town received a \$1 million grant from the state's MassWorks Program to connect two business districts – Milton Village and the Central Avenue Business District – and pursue transit-oriented development as both districts are adjacent to MBTA train stations. The Milton Hill House at 50 Eliot Street was subsequently built that included 27 total units three of which are affordable. Waits for these affordable units can be as long as nine years, demonstrating the need and demand for such units.

- *The Residence at Brook Hill/36 Central Avenue*

The Town also approved a project at 36 Central Avenue in the business district through its Planned Unit Development (PUD) bylaw that included 18 residential units, two (2) of which are affordable, as well as three (3) commercial units. The market rate units were priced between \$399,000 and \$589,000 and the affordable units sold for \$157,000.

- *Zoning*

New zoning was also adopted to guide the development of several projects. For example, 36 housing units were built as part of the Woodmere at Brush Hill development, including four affordable units. This project was permitted through the Planned Unit Townhouse Development bylaw. Additionally, the Wolcott Woods development will include 54 units of “over 55” age-restricted housing and six affordable units of non-age restricted units off-site. This project was permitted through the Great Estate Planned Unit Development bylaw.

- *Work, Inc. Special Needs Housing*

Work, Inc. built special needs housing for five (5) disabled young adults in a state-of-the-art special facility that the Town committed a significant amount of HOME Program funding.

- *475 Adams Street*

While not including affordable units, the single-family house at 475 Adams Street in East Milton was demolished to make way for a mixed-use property that will include two units of rental housing, thus diversifying the housing stock.

- *Other Initiatives*

In addition to the above projects, the Town has implemented a number of other strategies that were included in the 2006 Housing Plan including obtaining approval for a Municipal Affordable Housing Trust Fund and joining the South Shore HOME Consortium to secure another important resource for creating affordable housing.

Based on prior planning efforts, housing goals and objectives, the Housing Needs Assessment, interviews with local housing stakeholders, a Community Housing Forum, past affordable housing efforts and those of comparable communities; the following strategies are recommended as part of this Housing Production Plan. It is important to note that these strategies are presented as a package for the Town to consider, prioritize, and process, each through the appropriate regulatory channels.

Table I-1: Summary of Housing Strategies

Strategies	Timeframe for Implementation		Lead Entities
	Priority 1: Years 1-2	Priority 2: Years 3-5	
A. Zoning Strategies *			
1. Adopt additional zoning for mixed-use development	X		Planning Board
2. Explore inclusionary zoning	X		Planning Board
3. Streamline permit approval process/Affordable Housing Guidelines		X	Planning Board
4. Amend accessory apartment Bylaw	X		Planning Board
5. Amend the condo conversion bylaw	X		Planning Board
B. Capacity-Building Strategies *			
1. Conduct outreach and education	X		Housing Trust
2. Capitalize the Housing Trust Fund	X		Select Board
C. Housing Production Strategies			
1. Make publicly-owned property available for affordable housing	X		Select Board
2. Continue to pursue mixed-use and transit-oriented development	X		Planning Board
3. Continue to promote adaptive reuse	X		Planning Board
4. Support scattered-site infill housing		X	Planning Board
D. Housing Preservation Strategies *			
1. Introduce a Small Repair Grant Program	X		Housing Trust
2. Help residents access housing assistance	X		Housing Trust
3. Maintain affordability of SHI		X	Select Board

* Indicates actions that are unlikely to directly produce new affordable units by themselves but are key to creating the regulations and capacity that will contribute to actual unit creation.

II. INTRODUCTION

This Housing Production Plan provides an opportunity to analyze updated demographic, economic and housing information to obtain a better understanding of the current housing market dynamic and local needs. It also enables the Town to revisit what has been accomplished since its previous housing planning efforts that included a Community Development Plan prepared by the Metropolitan Area Planning Council (MAPC) in tandem with the Milton Planning Board in 2004 with funding from Executive Order 418, an Affordable Housing Plan completed in 2006, as well as a Housing Production Plan in 2014. The Town also completed a Master Plan in 2015 which included diversifying the housing stock as a top priority. This current planning effort enables the Town to further define its housing agenda based on current conditions, resources and evolving community needs.

A. Housing Objectives and Goals

The 2006 Affordable Housing Plan and 2014 Housing Production Plan established and maintained the following housing objectives that represented the building blocks on which specific housing strategies were recommended. These still resonate today.

- *Meet local housing needs along the full range of incomes, promoting social and economic diversity and the stability of individuals and families living in Milton.* Diversity in a community has been found to contribute to local health and vitality. Certainly, the preservation and production of affordable housing is a proven method for promoting diversity, allowing those individuals and families with more limited means to afford to live in town. Solutions need to be found to enable children who grew up in town to return to raise their own families here, to offer Town employees the opportunity to live in the community in which they work, to provide housing alternatives to elderly residents who have invested much of their lives in the community but now require alternatives to their large single-family homes, and to offer starter housing for families.
- *Leverage other public and private resources to the greatest extent possible.* Because Milton is a small town that does not receive federal funding for affordable housing on an entitlement basis⁹ and because it does not have large pockets of poverty that make it a target for state or federal funding, the Town needs to be creative in how it can leverage both public and private resources to make affordable housing development possible. State agencies recognize the importance of suburban localities doing their fair share in housing lower income households and want to be supportive of affordable housing initiatives. Nevertheless, the Town needs to be strategic in how it invests its limited resources towards the production of new housing opportunities.
- *Ensure that new housing creation is harmonious with the existing community.* New affordable housing development should be an amenity that blends well within the architectural context of Milton. The town is comprised of many neighborhoods, many of which provide an established and family-oriented feel due to the Victorian and Colonial-style homes and tree-lined streets. Therefore, developments should incorporate a number of characteristics – cover a wide range of income needs, include low to medium densities, eliminate huge impacts in any one neighborhood, direct greater density in appropriate “smart” locations, be well designed to make

⁹ Cities with populations of more than 50,000 receive federal funds, such as the Community Development Block Grant and HOME Program funding, directly from the federal government on a formula basis and are referred to as entitlement communities.

maximum use of any natural attributes of development sites, and comply with the architectural character of the community.

- *Strive to meet the 10% state standard for affordable housing.* There is currently a 485-unit gap between the state's affordable housing standard (10% of the year-round housing stock that has been subsidized by the federal or state government to benefit those earning at or below 80% of area median income) and the current 479 affordable units that are part of Milton's Subsidized Housing Inventory (SHI).
- *Provide a wide range of housing alternatives to meet diverse housing needs.* This Housing Production Plan, through its Housing Needs Assessment, identifies a wide range of housing needs based on limited opportunities for first-time homeownership, special needs housing, rental units for families, and more options for households interested in downsizing and remaining in the community. To accommodate this range of needs, the Town should stimulate the production of a variety of housing types, focusing on those who are priced out of the private housing market.
- *Promote smart growth development.* Smart growth development is a response to the problems associated with unplanned, unlimited suburban development – or sprawl. Smart growth principles call for more efficient land use, compact development patterns, less dependence on the automobile, a range of diverse housing opportunities and choices, equitable allocation of the costs and benefits of development, and an improved jobs/housing balance. Examples of smart growth development and planning that incorporate affordable housing include:
 - Providing mixed-use development near the town and village centers;
 - Locating housing in close proximity to public transportation;
 - Allowing higher density housing or mixed-use development near transit stops, along commercial corridors or in town and village centers;
 - Redeveloping environmentally impacted or brownfield sites;
 - Restoring vacant and abandoned residential buildings to productive use;
 - Converting vacant or underutilized former manufacturing, commercial or municipal buildings to housing;
 - Encouraging the development of housing and preservation of open space so that the goals of each will be mutually satisfied using techniques such as cluster zoning, transfer of development rights, or other innovative zoning or regulatory devices;
 - Promoting the redevelopment of vacant infill parcels; and
 - Participating in regional responses to addressing affordable housing needs.

Milton is in an excellent position to promote development in keeping with smart growth principles particularly in regard to transit-oriented development in proximity to its four MBTA stations as well as mixed-use redevelopment opportunities in Milton Village, Central Avenue, and East Milton Square.

- *Preserve the existing affordable housing stock including its diversity of prices, building types, and lot sizes.* Besides the 479 units that are included in Milton's state-approved Subsidized Housing Inventory (SHI), and despite high housing prices, there are still rental and homeownership units included in the town's private housing market that would be considered affordable as the occupants have incomes of not more than 80% of area median income and they are not paying

more than 30% of their incomes on housing expenses. Such housing is becoming rarer given increasingly rising housing values and some households are facing difficulties in remaining in their homes. Many of these households are elderly or fixed incomes who have problems affording property taxes, insurance, medical bills, utility expenses, etc. and are likely to have deferred home maintenance problems as well. The Town of Milton should consider how it could support these households in remaining independent in their homes and making necessary home improvements. The Town also needs to ensure that the units that are counted in the Subsidized Housing Inventory remain affordable for as long a period of time as possible.

Participants of the September 14, 2019 Community Housing Forum echoed the importance of these objectives, providing the following responses to the question regarding their hope for the future of housing in Milton (an aspirational goal to strive for):

- Develop housing that is harmonious with neighborhood and community character.
- Develop affordable housing through the “Friendly 40B” process as part of the state’s Local Initiative Program (LIP).
- Ensure sufficient housing diversity to accommodate local needs.
- Create sufficient housing opportunities for seniors and young families.
- Build more “Milton-like” or Unquity House type of development.
- Make smaller homes available.

Subsequent to the completion of the 2014 Housing Production Plan, the Town embarked on a Master Planning process, completing the Master Plan in 2015. The goal of improving housing and neighborhoods emerged as a top community priority with the following goal statement:

To preserve and enhance existing housing and become more proactive in providing affordable housing and meeting a variety of changing housing needs; to preserve and enhance existing neighborhood character.

Master Plan recommendations were revisited as part of preparing this Housing Production Plan, integrating key strategies and actions into the Town’s housing agenda for the next five years.

B. Definition of Affordable Housing

There are a number of definitions of affordable housing as federal and state programs offer various criteria. For example, HUD generally identifies units as affordable if gross rent (including costs of utilities borne by the tenant) is no more than 30% of a household’s net adjusted income (with a small deduction for each dependent, for child care, for extraordinary medical expenses, etc.) or if the carrying costs of purchasing a home (mortgage, homeowners association fees, property taxes and insurance) is not more than typically 30% of net adjusted income. If households are paying more than these amounts, they are described as experiencing housing affordability problems; and if they are paying 50% or more for housing, they have severe housing affordability problems and cost burdens.

Affordable housing is also defined according to percentages of median income for the area, and most housing subsidy programs are targeted to particular income ranges depending upon programmatic goals. Extremely low-income housing is directed to those earning at or below 30% of area median income (AMI) as defined by the U.S. Department of Housing and Urban Development (\$32,000 for a family of three for the Boston area) and very low-income is defined as households earning more than

30% AMI but at or below 50% AMI (\$53,350 for a family of three). Low-income generally refers to the range between 51% and 80% AMI (\$80,300 for a family of three).¹⁰

Chapter 774 of the Acts of 1969, which established the Massachusetts Comprehensive Permit Law (Massachusetts General Laws Chapter 40B), counts a housing unit as affordable if it is subsidized by state or federal programs that support low- and moderate-income households with incomes at or below 80% AMI and meet other requirements. Consequently, most state-supported housing assistance programs are targeted to households earning at or below 80% AMI, however, some funding sources can provide support to somewhat higher income households while many rental financing resources reach lower income thresholds.

While Milton has not passed the Community Preservation Act (CPA), this funding source, derived from a property tax surcharge and state matching funds, supports municipal efforts to promote open space preservation, recreational activities, historic preservation and community housing in half of the communities across the state. CPA funding is available to assist households earning up to 100% AMI, however, only units targeting the 80% AMI limit and meet other state requirements are eligible for inclusion on the SHI.

Table II-1 includes the HUD income limits for 2019 as well as the CPA 100% AMI limits. It also includes what some might term as workforce housing limits of up to 120% AMI targeted to those who do not meet other funding criteria but may still be priced out of the housing market.

Table II-1: 2019 Income Limits for the Boston-Cambridge-Quincy, MA-NH Metro Area

# Persons in Household	30% AMI	50% AMI	80% AMI	100% AMI	120% AMI
1	\$24,900	\$41,500	\$62,450	\$79,310	\$95,172
2	\$28,450	\$47,400	\$71,400	\$90,640	\$108,768
3	\$32,000	\$53,350	\$80,300	\$101,970	\$122,364
4	\$35,550	\$59,250	\$89,200	\$113,300	\$135,960
5	\$38,400	\$64,000	\$96,350	\$122,364	\$146,837
6	\$41,250	\$68,750	\$103,500	\$131,428	\$157,714
7	\$44,100	\$73,500	\$110,650	\$140,492	\$168,590
8+	\$46,950	\$78,250	\$117,750	\$149,556	\$179,467

Sources: U.S. Department of Housing and Urban Development (HUD), the Community Preservation Coalition for 100% AMI figures and 120% AMI limits based on 1.2 times the 100% AMI ones.

It is worth noting that extrapolating those earning less than the 80% AMI limit for a household of three from 2017 census estimates, about 2,900 or almost one-third of households might be income-eligible for affordable housing using the 80% AMI criterion.¹¹ This is up from 2,835 households or 30% based on the 2011 census estimates.

¹⁰ The family of three (3) is illustrated here and is used in affordability calculations as the average household size was 2.75 persons per the 2010 census and 2.86 persons in the 2017 census estimates.

¹¹ This is based on income estimates alone and do not take financial assets into consideration.

III. HOUSING NEEDS ASSESSMENT¹²

This Housing Needs Assessment presents an overview of the past and current housing dynamic in the town of Milton, providing the context within which a responsive set of strategies can be developed to address housing needs.

A. Demographic and Economic Profile

It is important to closely examine demographic and economic characteristics, particularly past and future trends, in order to understand the composition of the population and how it relates to current and future housing needs. Key questions to be addressed include the following:

- What have been the growth trends in Milton?
- What are the ramifications of increases and decreases of various age groups in regard to housing needs?
- What are the variations in household size and types of households that suggest unmet or greater housing needs?
- What changes in income levels have occurred and how does this relate to housing affordability?
- What proportion of the population is disabled or has other special needs that suggest the need for supportive services or home modifications?

In general, the Town's population has been growing slowly and is projected to continue to increase, particularly among older residents, driven by the Baby Boom generation. Moreover, Milton continues to be a community of families and has experienced small increases in children which are reflected in higher school enrollments and capacity issues.

1. ***Population Growth – Little net growth since 1970***

Milton's population growth occurred largely during the early decades of the 20th Century and has been relatively modest since then as shown in Table III-1 and visually presented in Figure III-1. Most of the growth occurred after World War I and II. In fact, the Town actually spurred some of this growth when it sold house lots of approximately 10,000 square feet to returning veterans for \$500 in a couple of locations.

The population actually decreased during the economic recession of the late 1980s and early 1990s. The town then gained 337 new residents between 1990 and 2000, representing only a 1.3% population change, and then increased by an additional 941 residents between 2000 and 2010, reflecting higher growth of 3.6% and reaching a total population of 27,003. This total population count is actually somewhat less than the population of 27,190 in 1970. The 2017 census estimates indicate continued growth to 27,527 residents.

The Town census figure was 26,698 as of July 17, 2019. The disparity between the federal and local figures is largely because federal census counts students as living at their colleges and universities while the Town counts only those students living on Milton's college campuses or boarding at Milton Academy if they choose to register to vote in Milton.

¹² This Housing Needs Assessment uses the most recent data sources available. It should be noted, however, because the 2010 census includes actual counts from all households, not samples, they are more reliable. Census data from the American Community Survey (ACS) is used for other types of data, but because ACS data involves estimates from a sample of residents/households, they have some margin of error.

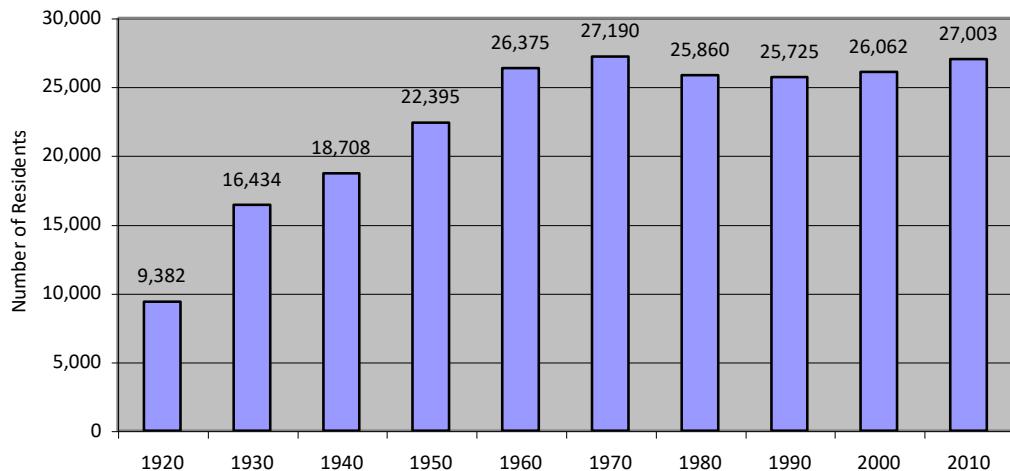
Table III-1: Population Growth: 1920 to July 2019

Year	Total Population	Change in # Residents	Percent Change in Population
1920	9,382	--	--
1930	16,434	7,052	75.6
1940	18,708	2,274	13.8
1950	22,395	3,687	19.7
1960	26,375	3,980	17.8
1970	27,190	815	3.1
1980	25,860	(1,330)	(4.9)
1990	25,725	(135)	(0.5)
2000	26,062	337	1.3
2010	27,003	941	3.6
2017	27,527	524	1.9
As of 7-17-19	26,698	-829	-3.0

Sources: U.S. Census Bureau, decennial figures and American Community Survey Five-Year Estimates for 2013-2017; and Milton Town Clerk, July 10, 2019

Figure III-1

Population Growth, 1920 to 2010



2. Age Distribution – Notable growth in middle-age residents

Census data on the changes in the age distribution from 1990 to 2017 is provided in Table III-2 and visually presented in Figure III-2 for 2000 through 2017. In general, there were small increases in children, large increases in middle-age residents with accompanying declines in younger adults and only marginal changes in the population of seniors. The median age climbed during these decades, from 39.3 years in 2000 to 41.4 years by 2010, higher than the county median of 40.7 years and largely reflective of the substantial increase in the 45 to 64-age group. The 2017 census estimates indicate a significant decrease to 38.7 years, this time lower than the county median of 41.0 years.

Specific changes in the Town's age distribution are summarized below.

- *Increases in children*

The number of those 18 years or younger increased significantly, from 5,749 in 1990, to 6,683 by 2010, and up higher to 7,007 children according to 2017 census estimates. Nevertheless, children have continued to represent about one-quarter of the Town's population since 2000, higher than 22.7% for the county and 21.7% for the state in 2010, and 21.5% and 20.4%, respectively, in 2017. Figure III-2 clearly shows the relatively large portion of children in the under 18 range, including the estimated recent increase. Some of the increase is likely attributable to Milton Academy adding a boarding component that includes 320 beds.

- *Fluctuations in very young adults*

Younger adults in the 20 to 24 age range decreased significantly between 1990 and 2000, down to 1,301 residents and then increased to 2,114 by 2017. A good many of these residents likely included residential students at local colleges.

- *Net decreases in Millennials*

Demographic trends also suggest that escalating housing costs were likely pricing younger individuals and families out of the housing market. Those entering the labor market and forming new families were dwindling in numbers, reducing the pool of entry-level workers and service employees. Housing costs may also be prompting grown children who were raised in town to relocate outside of Milton, although these young Millennials may have a preference for living in more urban settings. For example, those between the ages of 25 and 34 decreased by 43% between 1990 and 2010, from 3,450 to 1,955 residents. The 2017 census estimates suggest a small increase to 2,114 residents in this age range.

- *Net decreases in the younger middle-aged residents*

Residents in the age 35 to 44 range fluctuated somewhat over the decades but generally decreased from 4,155 residents in 1990 to 3,422 in 2010 and then up somewhat to 3,797 according to 2017 census estimates. This represented an 8.6% net decrease since 1990.

Table III-2: Age Distribution, 1990-2017

Age Range	1990		2000		2010		2017	
	#	%	#	%	#	%	#	%
Under 5 Years	1,745	6.8	1,640	6.3	1,544	5.7	1,757	6.4
5 – 9 Years	1,670	6.5	1,832	7.0	1,968	7.3	2,033	7.4
10 – 14 Years	1,487	5.8	2,064	7.9	1,941	7.2	1,855	6.7
15 – 19 Years	1,718	6.7	1,959	7.5	2,313	8.6	2,376	8.6
20 – 24 Years	1,910	7.4	1,301	5.0	1,779	6.6	2,054	7.5
25 – 34 Years	3,450	13.4	2,533	9.7	1,955	7.2	2,114	7.7
35 – 44 Years	4,155	16.2	4,212	16.2	3,422	12.7	3,797	13.8
45 – 54 Years	2,573	10.0	4,155	15.9	4,238	15.7	4,031	14.6
55 – 64 Years	2,524	9.8	2,132	8.2	3,686	13.7	3,190	11.6
65 – 74 Years	2,351	9.1	1,947	7.5	1,861	6.9	2,140	7.8
75 – 84 Years	1,652	6.4	1,599	6.1	1,497	5.5	1,398	5.1
85 Years and Over	490	1.9	688	2.6	799	3.0	782	2.8
Total	25,725	100.0	26,062	100.0	27,003	100.0	27,527	100.0
Population Under 18	5,749	22.3	6,721	25.8	6,683	24.7	7,007	25.5
Population 65+	4,493	17.5	4,234	16.2	4,157	15.4	4,320	15.7

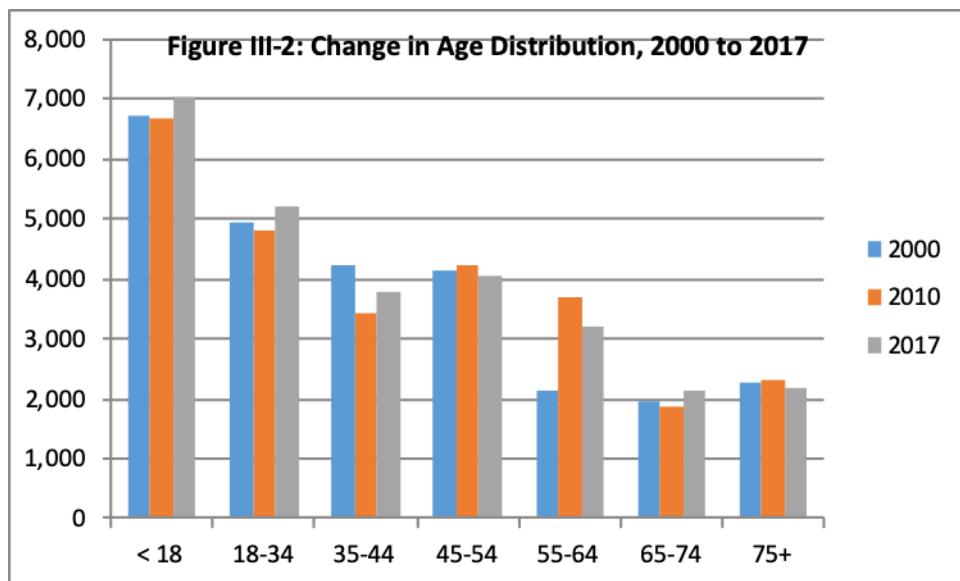
Source: U.S Census Bureau, 1990, 2000 and 2010 and American Community Survey 5-Year Estimates 2013-2017.

- *Substantial increases in the older middle-age population*

There were substantial increases in those age 45 to 64 between 1990 and 2010, many who were aging during this period as part of the Baby Boom generation. There were 5,097 residents in this age category in 1990, rising to 7,924 by 2010, representing a 55.5% increase in growth despite only 5% total population growth. The 2017 census estimates suggest a 9% fall-off of in this age range since 2010 to 7,221 residents. This data points to a need for more housing that is smaller and easier to maintain by empty nesters and younger seniors in the years ahead.

- *Small net decreases in older adults*

There was a 7.5% decrease in residents 65 years of age or older between 1990 and 2010, from 4,493 to 4,157 residents. Census estimates indicate an increase to 4,320 residents by 2017, still short of the 1990 level. This data suggests that some of those who were retiring opted to move out of the community in search of other housing options, perhaps looking for more affordable living conditions as their incomes became fixed, or even perhaps moving outside of the area.



3. Population Projections – Continued growth including major gains in those 65 years and older

Given limited population growth in prior decades, 5% between 1990 and 2010, it is difficult to imagine the high levels of projected population growth, particularly without substantial changes in zoning and greater incentives and resources for new housing development.

Population projections suggest continued growth through 2030. This Housing Plan presents three sets of projections, two from the Metropolitan Area Planning Council (MAPC), Milton's regional planning agency, and the other from the State Data Center at the University of Massachusetts Donahue Institute.

The MAPC projections forecast continued population growth with the "Status Quo" figures estimating a population of 27,792 by 2030, representing 2.9% growth since 2010 and predicated on continued patterns of births, deaths, migration and occupancy. Its "Stronger Region" estimates indicate higher population growth to 28,705 residents by 2030, representing 6.3% growth since 2010 and based on a number of smarter growth

assumptions described below. Both projections suggest significant growth in those 65 years and older driven largely by the Baby Boom generation.

The State Data Center estimates higher levels of growth, at 10.6%, to a population of 31,277 residents by 2030. It also predicts an even greater increase in older residents age 65 and older to comprise 26.1% of Milton's population by 2030 from 15.4% in 2010.

MAPC "Status Quo" Projections

Population projections from MAPC estimate that the population will reach 27,183 residents by 2020 under its "Status Quo" scenario which is based on the continuation of rates of births, deaths, migration and housing occupancy. This figure is less than the 2017 census estimate of 27,527 residents. MAPC projections further indicate continued growth to 27,792 residents by 2030, 3% more than the 2010 census figure and only 265 residents above the 2017 census figure. Table III-3 offers these projections by age category for 2020 and 2030, comparing these figures to 2010 census figures.

These projections also indicate some significant age distributional changes. For example, those under age 20 are predicted to decrease from 28.8% to 24.5% of the total population between 2010 and 2030, representing a 12.4% population loss of about 963 residents. The projections further suggest a loss of 332 residents or 18.7% in the 20 to 24 age range and a net increase of 379 residents in the 25 to 34 age category by 2030, or by 19.4%, not insignificant. Those in the 35 to 44 range are projected to increase by 5.6%, or by 191 residents, while those in the 45 to 54 age range are projected to decrease still more, by 24%, representing a loss of 1,017 residents.

The population of older middle-aged residents in the 55 to 64 range is expected to decrease as well with a net loss of 474 residents or 13% following a shorter-term increase in 2020.

These projected population changes suggest the need for housing alternatives to accommodate the increasing population of seniors, such as more handicapped accessibility, housing with supportive services, and units without substantial maintenance demands. Additionally, to maintain a diverse population, more affordable starter housing opportunities to attract young adults, including young families, should be promoted both as rentals and first-time homeownership.

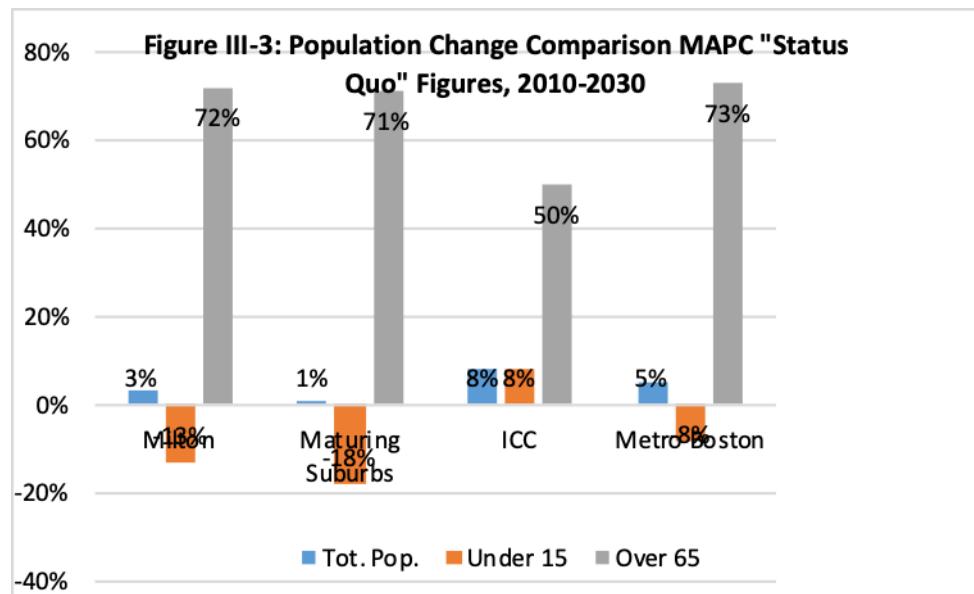
Table III-3: Age Distribution, 2010 Census and MAPC "Status Quo" Projections

Age Range	2010 Census		2020 Projections		2030 Projections	
	#	%	#	%	#	%
Under 5 Years	1,544	5.7	1,327	4.9	1,376	5.0
5 – 19 Years	6,222	23.0	5,818	21.4	5,427	19.5
20 – 24 Years	1,779	6.6	1,562	5.7	1,447	5.2
25 – 34 Years	1,955	7.2	2,407	8.9	2,334	8.4
35 – 44 Years	3,422	12.7	3,031	11.2	3,613	13.0
45 – 54 Years	4,238	15.7	3,540	13.0	3,221	11.6
55 – 64 Years	3,686	13.7	3,839	14.1	3,212	11.6
65 – 74 Years	1,861	6.9	3,425	12.6	3,620	13.0
75 – 84 Years	1,497	5.5	1,476	5.4	2,749	9.9
85+ Years	799	3.0	757	2.8	794	2.9
Total	27,003	100.0	27,183	100.0	27,792	100.0
Under 20	7,766	28.8	7,145	26.3	6,803	24.5
Age 65+	4,157	15.4	5,658	20.8	7,163	25.8

Source: Metropolitan Area Planning Council (MAPC), January 2014

Those over age 65 are estimated to increase from 15.4% of all residents in 2010 to 25.8% by 2030, representing a gain of 3,006 residents in this age category and growth of 72%.

These projected demographic shifts are further presented in Figure III-3, comparing projections for Milton to other maturing suburbs, the Inner Core subregion,¹³ and Metro Boston from 2010 to 2030. Estimates suggest that Milton will experience relatively comparable growth patterns with respect to very modest total population increases and losses in those under 15 and substantial gains in those over age 65. These losses of children run counter to school enrollment projections.



MAPC "Stronger Region" Projections

MAPC's "Stronger Region" scenario projects higher population growth to 27,640 residents by 2020 and 28,705 residents by 2030. These figures represent growth of 6.3% between 2010 and 2030 and the addition of 1,702 residents, more than double the 2.9% rate under the "Status Quo" projections.

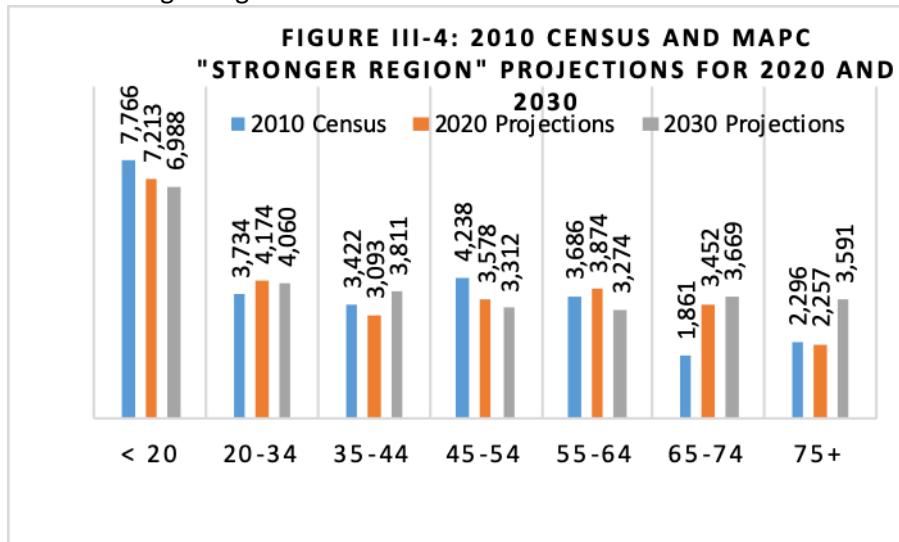
These "Stronger Region" projections are based on the following assumptions:

- The region will attract and retain more people, especially young adults, than it does today;
- Younger households (born after 1980) will be more inclined toward urban living than their older counterparts and less likely to choose to live in single-family homes; and
- An increasing share of older adults will choose to downsize from single-family homes to apartments or condominiums.

These "Stronger Region" projections are presented in Figure III-4 and are significantly higher than the 2017 census estimate of 27,527 residents and the "Status Quo" projection of 27,792.

¹³ In addition to Milton, MAPC's Inner Core Communities (ICC) subregion includes the communities of Arlington, Belmont, Boston, Brookline, Cambridge, Chelsea, Everett, Lynn, Malden, Medford, Melrose, Needham, Newton, Quincy, Revere, Saugus, Somerville, Waltham, Watertown, and Winthrop.

The “Stronger Region” figures estimate that those under age 20 will decrease from 7,766 residents, or 29% of the population in 2010, to 6,988 or 24.3% of all residents by 2030. On the other end of the age range, **those 65 years of age or older are estimated to grow from 4,157 residents or 15.4% of all residents in 2010 to 7,260 and 25.3% of all residents by 2030, representing growth of 3,103 seniors or 75%.** Other more modest demographic shifts include some increases in 20 to 44-year olds and declines in the middle aged 45 to 54 and 55 to 64 age ranges.



State Data Center Projections

The State Data Center at the University of Massachusetts Donahue Institute predicts considerably higher population growth in 2020 and 2030 of 29,445 and 31,277 residents, respectively, both well above the 2017 census estimate. Like the MAPC estimates, the State Data Center indicates that those under age 15 will comprise almost 17% of all residents, down from 20% in 2010. The State Data Center figures show a significant decline in those age 15 to 19, going from 2,313 residents in 2010 to 1,776 by 2030, representing a loss of 537 residents or 23% despite a projected population increase of 15.8%. Again, this runs counter to school enrollment projections

**Table III-4: Age Distribution, 2010 Census and State Data Center Projections
2020 and 2030**

Age Range	2010 Census		2020 Projections		2030 Projections	
	#	%	#	%	#	%
Under 5 Years	1,544	5.7	1,336	4.5	1,506	4.8
5 – 19 Years	6,222	23.0	6,367	21.6	5,523	17.7
20 – 24 Years	1,779	6.6	1,484	5.0	1,594	5.1
25 – 34 Years	1,955	7.2	2,344	8.0	2,549	8.1
35 – 44 Years	3,422	12.7	3,379	11.5	4,240	13.6
45 – 54 Years	4,238	15.7	4,017	13.6	3,708	11.9
55 – 64 Years	3,686	13.7	4,383	14.9	3,981	12.7
65 – 74 Years	1,861	6.9	3,497	11.9	4,055	13.0
75 – 84 Years	1,497	5.5	1,656	5.6	3,023	9.7
85+ Years	799	3.0	982	3.3	1,099	3.5
Total	27,003	100.0	29,445	100.0	31,277	100.0
Under 20	7,766	28.8	7,703	26.2	7,029	22.5
Age 65+	4,157	15.4	6,135	20.8	8,177	26.1

Source: University of Massachusetts, Donahue Institute, State Data Center.

On the other end of the age range, the State Data Center projects a very high increase of those 65 year of age or older to 8,177 residents, from 15.4% of the population to 26.1%. The age cohorts in between demonstrate some similar fluctuations to MAPC estimates with increases in 25 to 44-year olds and general declines in older middle-age residents age 45 to 64.

Table III-5 compares the two MAPC projections and the State Data Center figures. The State Data Center predicts not only greater total population growth but also forecasts a greater proportionate decrease in those under 20, particularly in the age 15 to 19 age range. It also projects greater numbers of seniors. **Once again, given relatively slow overall growth during the last several decades, even the most conservative projections from MAPC's "Status Quo" figures appear high unless new zoning incentives and housing resources are created.**

Table III-5: Comparison of Population Projections, 2030

Age Range	MAPC "Status Quo"		MAPC "Stronger Region"		State Data Center	
	#	%	#	%	#	%
< Age 15	4,719	17.0	4,860	16.9	5,253	16.8
< Age 20	6,803	24.5	6,988	24.3	7,029	22.5
Age 65+	7,163	25.8	7,260	25.3	8,177	26.1
Total Pop	27,792	100.0	28,750	100.0	31,277	100.0

Sources: MAPC and the State Data Center at the UMass Donahue Institute

It should be noted that previous MAPC projections from its MetroFuture Report suggested a total population of 26,991 by 2030, lower than the 2017 census estimate of 27,527 residents and thus likely underestimating growth.

4. Race – Substantial increase in minority residents

As indicated in Table III-6, the population has remained predominantly White, but is becoming more diverse. The 2010 census indicates that the number and percentage of minority residents had climbed significantly from 6.2% of the population in 1990 to 22.6%, involving a total of 6,102 residents. Approximately 64% of the 2010 minority population identified themselves as Black or African-American, 22% as Asians, and 14% as Hispanic or Latino.

Table III-6: Key Demographic Characteristics, 1990-2017

Demographic Characteristics	1990		2000		2010		2017	
	#	%	#	%	#	%	#	%
Total Population	25,725	100	26,062	100	27,003	100.0	27,527	100.0
Minority Population*	1,605	6.2	3,810	14.6	6,102	22.6	7,115	25.8
Total # Households	8,749	100.0	8,982	100	9,274	100.0	8,970	100.0
Family Households**	6,675	76.3	6,757	75.2	6,835	73.7	6,931	77.3
Female Heads of Households with Children < 18**	1,038	11.9	443	4.9	483	5.2	479	5.3
Non-family Households **	2,074	23.7	2,225	24.8	2,439	26.3	2,039	22.7
Average Household Size	2.85 persons		2.79 persons		2.75 persons		2.86 persons	

Sources: U.S. Census Bureau 1990, 2000 and 2010 decennial counts and American Community Survey Five-Year Estimates, 2013-2017. *All Non-White classifications ** Percent of all households

The 25.8% level of minority residents is significantly higher than 20.6% for the county and 21.1% for the state.

The 2017 census estimates suggest continued growth of minority residents to 25.8% of the population. This data identified 4,136 or 58% of minority residents as Black or African-American and another 1,811 or 25.5% as Asian. A total of 1,094 residents, or 4% of the population, identified themselves as having Hispanic or Latino heritage.

5. Households – Increasing number of families

As Table III-6 and Figure III-5 indicate that while Milton's population remained relatively flat between 1990 and 2010, growing by 5.0%, the number of households increased by 6.0%, from 8,749 to 9,274. This is reflective of some small decrease in the size of families with the average household size decreasing from 2.85 persons to 2.75 during this period. It is also due to the increasing numbers of nonfamily households, which grew by 17.6% compared to the 2.4% growth in family households between 1990 and 2010.

The 2017 census estimates indicate a decrease in the number of households, to 8,970 and close to the 1990 level, representing a decline of 3.3% in the context of 1.9% population growth. This decrease is surprising and the data may be questionable. The 2017 estimates also indicate increases in the average household size from 2.75 persons in 2010 to 2.86 in 2017 with the size of families increasing from 3.27 persons to 3.30.

Still about three-quarters of Milton's households involved families, considerably higher than the 65.5% for the county and 63.0% for the state in 2010. The 2017 census estimates indicate some growth in the number and percentage of families despite a decrease in the number of households. This is further reflected in the average household size which increased from 2.75 persons in 2010 to 2.86. The average family size increased even more. It should be noted that in many comparable communities, particularly affluent communities, the number of families and average household size has typically decreased, due largely to increasing number of older residents living alone, empty nesters, and families having fewer children.

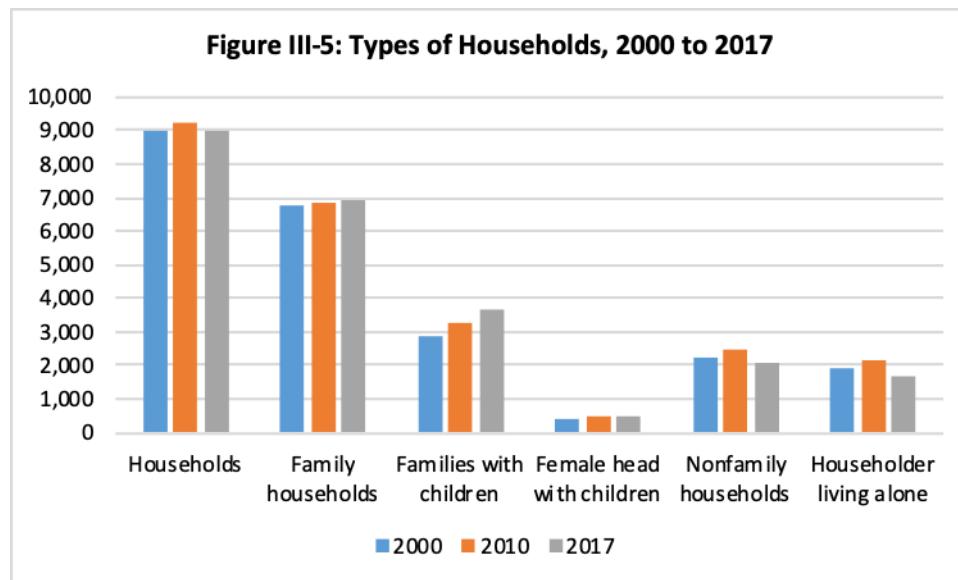


Table III-7 examines the types of households by household size for 2000, 2010 and 2017 with the following findings demonstrating the continuing growth of smaller households:

- Single-person households comprised 21.2% of all households and 85.6% of the nonfamily households in 2000, increasing to 23% of all households and 87.4% of nonfamily households by 2010. The 2017 figures surprisingly indicate a decline in these households to 19.1% of all households and 84.1% of all nonfamily households. This level of single-person households is both lower than the county level of 27.0% and the state at 28.5%.
- Of the estimated 1,715 single-person households in 2017, 1,238 or 72% were 65 years of age or older.
- Almost half of Milton households involved only two or three members, ranging from 47.6% of all households in 2000, down to 46.5% in 2010, and then up a bit to 47.9% according to 2017 census estimates.
- Four-person households declined from 18.5% of all households in 2000, to 18.0% in 2010, and then grew significantly to 20.1% in 2017.
- The proportion of large families of five or more persons remained about the same at 12.7% in 2000, to 12.6% in 2010, and then up modestly to 12.9% in 2017.
- A total of 519 or 14.7% of the households with children under age 18 were headed by one parent (92.3% of these involved single mothers) based on 2017 census estimates.

Table III-7: Types of Households by Size, 2000, 2010 and 2017

Households by Type and Size	2000		2010		2017	
	#	%	#	%	#	%
Nonfamily households	2,225	24.8	2,439	26.3	2,039	22.7
1-person household	1,905	21.2	2,131	23.0	1,715	19.1
2-person household	262	2.9	259	2.8	300	3.3
3-person household	31	0.3	31	0.3	0	0.0
4-person household	19	0.2	11	0.1	0	0.0
5-person household	5	0.1	4	0.04	24	0.3
6-person household	2	0.02	2	0.02	0	0.0
7 or more person-household	1	0.01	1	0.01	0	0.0
Family households	6,757	75.2	6,835	73.7	6,931	77.3
2-person household	2,336	26.0	2,390	25.8	2,354	26.2
3-person household	1,645	18.3	1,629	17.6	1,639	18.3
4-person household	1,643	18.3	1,657	17.9	1,806	20.1
5-person household	780	8.7	755	8.1	878	9.8
6-person household	229	2.5	282	3.0	195	2.2
7 or more person-household	124	1.4	122	1.3	59	0.7
Total	8,982	100.0	9,274	100.0	8,970	100.0

Source: U.S. Census Bureau, 2000 and 2010 Summary File 1 and 2013-2017 American Community Survey Five-Year Estimates

MAPC projections suggest notable growth in the number of households, from 9,274 in 2010 to 10,565 or 10,922 through 2030 based on their “Status Quo” or “Stronger Region” figures, respectively. This represents a 13.9% or 17.8% level of growth, respectively, compared to the projected 2.9% or 6.3% projected population growth. This indicates that the projections forecast greater numbers of smaller households in the future that is likely largely driven by the aging of the Baby Boom generation and more childless households, including those living alone. As noted earlier, projections may likely overestimate future growth patterns without substantial changes in zoning and new housing development.

6. Income Distribution – Very high incomes but growing income disparities

On the whole, Milton residents are becoming more affluent although there are growing income disparities related to tenure, age and type of householder. It is not surprising that families with middle-aged heads of households have significantly higher incomes than single individuals, particularly older residents on fixed incomes. While these higher income households can afford Milton’s high housing prices, others are struggling to remain in the community. It will be important for the Town to promote more social and economic diversity to avoid becoming a place where only the rich or those living in subsidized housing can afford to live.

A comparison of income figures for the past several decades is presented in Table III-8 and Figure III-6, suggesting that Milton has in general become significantly more affluent over the past several decades. For example, there were only 383 households that earned more than \$75,000 in 1979, however, 3,073 earned more than double that amount, \$150,000, by 2011, increasing to 3,847 by 2017.

The dramatic upsurge in relative affluence is also demonstrated by increases in median income levels, increasing by approximately \$25,000 each decade from \$24,777 in 1979. Milton’s 2017 median household income of \$126,000 was significantly higher than Norfolk County’s median of \$95,668 and the state of \$74,167.

Milton’s 60% increase in median household income between 1999 and 2017 was considerably higher than the rate of inflation during this period of 47%.

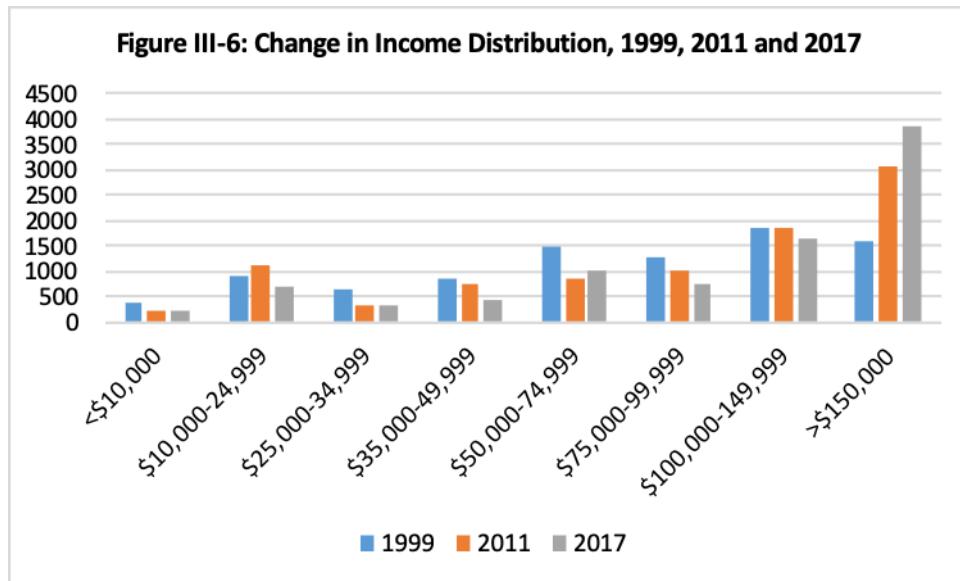
Table III-8: Income Distribution by Household, 1979-2017

Income Range	1979		1989		1999		2011		2017	
	#	%								
Under \$10,000	1,363	16.3	569	6.6	383	4.3	245	2.6	206	2.3
\$10,000-24,999	2,870	34.3	1,166	13.5	924	10.3	1,118	12.1	718	8.0
\$25,000-34,999	1,762	21.0	775	9.0	628	7.0	351	3.8	357	4.0
\$35,000-49,999	1,371	16.4	1,491	17.3	833	9.3	756	8.2	430	4.8
\$50,000-74,999	625	7.5	2,026	23.4	1,479	16.4	858	9.2	1,033	11.5
\$75,000-99,999	383	4.6	1,183	13.7	1,285	14.2	1,023	11.0	753	8.4
\$100,000-149,999			916	10.6	1,852	20.6	1,852	20.0	1,626	18.1
\$150,000 or more			513	5.9	1,609	17.9	3,073	33.1	3,847	42.9
Total	8,374	100.0	8,639	100.0	8,993	100.0	9,276	100.0	8,970	100.0
Median income	\$24,777		\$53,130		\$78,985		\$104,357		\$126,000	

Source: U.S. Census Bureau, 1980, 1990 and 2000 Summary File 3 and 2009-2011 and 2013-2017 American Community Survey Five-Year Estimates.

The percentage of households earning under \$75,000 decreased from almost all households in 1979 (95.4%) to about 36% by 2011, and then to 30.6% in 2017. Of these, 5,995 households had incomes of less

than \$35,000 in 1979 compared to 1,935 in 1999 and 1,281 in 2017. This dramatic decrease in lower income households is likely correlated to the high costs of living in Milton, housing costs in particular.



As shown in Figure III-7, median income levels vary considerably by tenure and household type. For example, the median income for those households that include children – families – was \$151,120, up from \$135,750 in 2011 and \$94,359 in 1999. On the other hand, nonfamilies had a median income of only \$42,369 from \$28,889 in 1999 and \$31,380 in 2011. This was largely related to the predominance of single persons, including retired individuals, in these households. There were also significant discrepancies between the median incomes of owners and renters, at \$144,363 and \$51,161, respectively.

Another comparison of median income level relates to the age of the principal householder. While the sample size was too small for the youngest of households of less than age 25, the 2017 census estimates indicate that the median household income of those age 25 to 44 was \$152,917, not much less than those age 45 to 64 of \$159,464. On the other hand, the median income of households with seniors age 65 and over was \$53,109, half the median income for the community of \$126,000 and correlated with the larger numbers of those living alone and on fixed income in this age range.

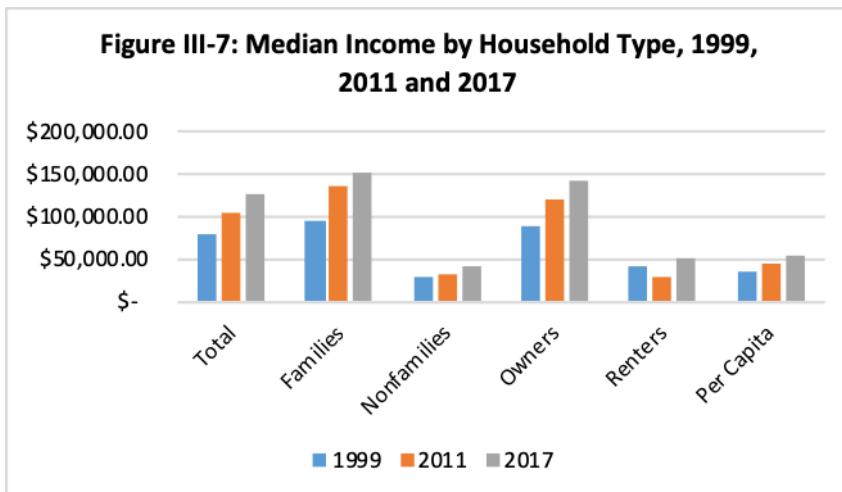


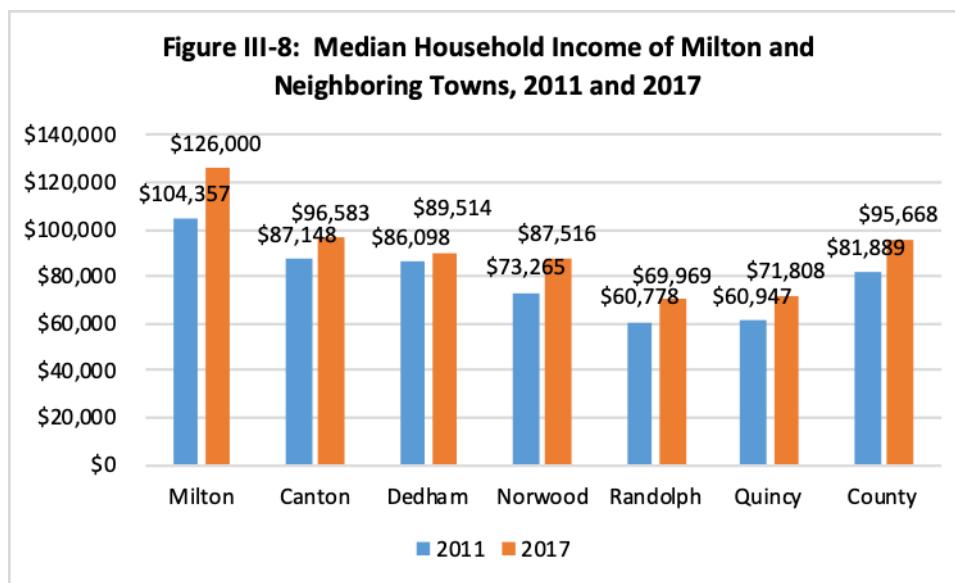
Table III-9 presents information on the comparative distribution of incomes between Milton and Norfolk County as another comparison. As the table demonstrates, Milton has been somewhat more affluent than the county as a whole. The percentage of those earning less than \$75,000 was 42.5% in 2017 for Norfolk County, down from 58.5% in 1999. On the other hand, those earning below this level included only 30.6% of Milton households, down from 47.2% in 1999. Those earning more than \$150,000 included 28.4% of all households in Norfolk County in 2017 compared to about 43% for Milton. Higher income levels in Milton were also reflected in the median income levels as noted earlier.

Table III-9: Income Distribution by Household: Norfolk County and Milton, 1999 and 2017

Income Range	Norfolk County				Milton			
	1999		2017		1999		2017	
	#	%	#	%	#	%	#	%
Under \$10,000	14,002	5.6	10,363	4.0	383	4.3	206	2.3
\$10,000-24,999	28,589	11.5	23,552	11.5	924	10.3	718	8.0
\$25,000-34,999	21,077	8.5	14,559	5.6	628	7.0	357	4.0
\$35,000-49,999	31,912	12.8	20,672	7.9	833	9.3	430	4.8
\$50,000-74,999	50,129	20.1	35,483	13.5	1,479	16.4	1,033	11.5
\$75,000-99,999	37,684	15.1	31,670	12.1	1,285	14.2	753	8.4
\$100,000-149,999	37,315	15.0	51,412	19.6	1,852	20.6	1,626	18.1
\$150,000 or more	28,193	11.4	74,613	28.4	1,609	17.9	3,847	42.9
Total	248,901	100.0	262,324	100.0	8,993	100.0	8,970	100.0
Median Income	\$63,342		\$95,668		\$78,985		\$126,000	

Source: U.S. Census Bureau, 2000 Summary File 3 and 2013-2017 American Community Survey Five-Year Estimates.

This relative affluence of Milton is also demonstrated through a comparative look at the median household income levels of neighboring communities as shown in Figure III-8. Median household incomes ranged from a low of \$69,969 for Randolph to a high of \$126,000 for Milton. Milton also demonstrated the greatest increase since 2011.



7. *Poverty – Increasing levels of poverty, particularly among seniors*

While income levels for most town residents have increased substantially, there remains a significant population within the town of Milton with very limited financial means and living below the poverty level.¹⁴ The 2000 census indicated that the absolute numbers of those with incomes below the poverty level decreased from 1979 to 1999 as shown in Table III-10, with the exception of those 65 years or older where the numbers increased somewhat. Since 1999, poverty has risen, representing 1,129 residents or 4.1% of all individuals and 208 families or 3.0% of all families. Of particular concern is the growing poverty among those 65 years and over, increasing from 4.3% to 9.2% between 1999 and 2017. While poverty in Milton is lower than the county and state, at 6.5% and 11.1% of all individuals, respectively, these increases are nevertheless disturbing.

Table III-10: Poverty Status, 1979-2017

Household Type	1979		1989		1999		2011		2017	
	#	%	#	%	#	%	#	%	#	%
Individuals *	957	3.7	758	2.9	697	2.7	1,350	5.0	1,129	4.1
Families **	188	2.8	125	1.9	108	1.6	184	2.7	208	3.0
Related Children Under 18 Years (Under 17 Years for 1990 data) ***	306	5.0	49	0.6	147	2.2	307	4.6	140	2.0
Individuals 65 and Over****	138	3.1	216	4.8	183	4.3	229	5.5	397	9.2

Source: U.S. Census Bureau 1980, 1990 and 2000 Summary File 3 and the American Community Survey, Five-Year Estimates for 2009-2011 and 2013-2017. *Percentage of total population **Percentage of all families

Percentage of all related children under 18 years *Percentage of all individuals age 65+

This data should also be viewed in light of the town's limited Subsidized Housing Inventory that included 479 subsidized housing units with another 140 or so rental subsidies, the total of which is insufficient to cover the housing affordability issues most likely confronting this very vulnerable population.

8. *Employment – Growing labor force driven by educational and health services*

Of the population 16 years of age or older, 14,491 or 68.1% were in the labor force according to 2017 census estimates, higher than 13,700 or 64.8% in 2011. In the context of an expanding labor force were decreases in the unemployment rate, from 8.2% in 2011 to 2.7% in 2017 according to census estimates. Estimates further suggest that 60% of Milton residents who were in the labor force were in management, business, science and arts occupations, 11.6% were in service occupations, 19.3% in sales and office occupations, and the remaining workers in a mix of jobs related to construction, production and transportation. Half of workers were involved in professional, scientific, educational, and health related services. Approximately two-thirds of workers commuted alone by car, down from three-quarters in 2011, with about 10% carpooling and 12% using public transportation. The average commute was 32.9 minutes, up from almost 30 minutes in 2011.

Detailed information on employment patterns from the state Executive Office of Labor and Workforce

¹⁴ The 2019 federal poverty level from the U.S. Department of Health and Human Services was \$12,490 for an individual and \$21,330 for a three-person household.

Development shows that of the 14,746 workers in the labor force, 14,354 were employed, with an unemployment rate of 2.7% in May 2019. This data reflects employment patterns for those living in Milton, but state data also includes information on local Milton jobs for 2017 as summarized in Table III-11. This data shows an average employment of 6,486 workers with much of the Town's economic base driven by educational services and health care/social assistance reflective of Milton's significant number of public and private educational institutions as well as Milton Hospital.

The average weekly wage by industry varied considerably from a high of \$1,848 in professional and financial services to only \$498 in accommodation and food services. There were 636 business establishments in Milton which provided a total wage level of more than \$358 million, with an average weekly wage of \$1,063. As a point of comparison, the average weekly wage for Boston was \$1,878, \$1,240 for Quincy, and \$967 for Plymouth. **Milton's average weekly wage translates into an annual wage of about \$55,500, less than half of Milton's median household income of \$126,000. This indicates that it is likely that many of those who work in Milton cannot afford to live in the community, particularly given a median single-family home price of \$700,000 as of May 2019.**

Table III-11: Average Employment and Wages by Industry in Milton, 2017

Industry	# Establishments	Total Wages	Ave. Employment	Ave. Weekly Wage
Construction	84	\$19,272,959	252	\$1,471
Wholesale trade	22	\$12,702,226	56	\$1,362
Retail trade	33	\$14,127,929	433	\$627
Information	13	\$3,242,205	58	\$1,075
Finance & insurance	29	\$9,995,035	104	\$1,848
Real estate, rental and leasing	30	\$8,602,284	153	\$1,081
Professional and technical services	100	\$27,241,285	281	\$1,864
Administrative and waste services	20	\$3,988,058	103	\$745
Education services	10	\$118,394,762	2,217	\$1,027
Health care and social assistance	138	\$80,849,300	1,445	\$1,076
Arts, entertainment and recreation	15	\$6,089,934	230	\$509
Accommodation and food services	25	\$13,596,026	525	\$498
Other services	83	\$9,115,617	236	\$743
Public administration	19	\$22,250,568	263	\$1,627
TOTAL	636	\$358,628,754	6,486	\$1,063

Source: Massachusetts Executive Office of Labor and Workforce Development, July 14, 2019

* Shaded industries involve average employment of more than 400 workers.

9. Education – Very high educational attainment and small increases in school enrollments

The educational attainment of Milton residents has improved over the last couple of decades. In 2011, 96.9% of those 25 years and older had a high school diploma or higher and 61.2% had a Bachelor's degree or higher (compared with 49.4% for the county and 39.1% for the state), up from the 2000 figures of

94.6% with at least a high school diploma and more than half, 52.2%, with a Bachelor's degree or higher. The 2017 census estimates indicate continuing high levels of educational attainment with 95.6% having at least a high school degree and, of these 61.8% had a bachelor's degree or higher.

Enrollment projections from the New England School Development Council (NESDEC) indicate continued growth in enrollments to 4,465 students by 2023-2024 and 4,664 by 2028-2029 that will result in school capacity problems.

Those enrolled in school (nursery through graduate school) totaled 9,070 in 2011 but decreased to 8,844 students according to 2017 census estimates. These figures include students at Curry College, Milton Academy and other area private schools. There were 5,866 students enrolled in nursery school through high school, representing an increase of 149 students since 2000, but comparable to the 2011 level of 5,890 students.

Enrollments in the Milton Public School District have increased slightly, from 3,807 students in the 2000-2001 school year to 3,836 in 2012-2013 and then to 4,139 in 2018-2019. Consequently, almost one-quarter of school-age students under the high school level are likely attending the town's considerable number of private schools. See Section IV for more information on school enrollments and capacity issues.

10. Group Quarters Population – Major increases since 1990

The 2010 census counted 1,516 residents living in group quarters including 1,229 living in college/university housing, 150 living in other noninstitutional housing, most likely Milton Academy, and 137 in nursing facilities. This is up considerably from the 2000 census count of 1,035 residents in group quarters (265 in institutional settings and 770 living outside of institutionalized group quarters) as well as 751 residents in 1990 (139 in institutions and 612 in other group quarters). Consequently, those living in group quarters almost doubled between 1990 and 2010, largely reflecting increased enrollments of residential students at local colleges and Milton Academy for example. The 2017 census estimates indicate a continuing increase to 1,831 residents living in group quarters.

11. Disability Status – About one-third of seniors claimed some type of disability

A total of 2,160 residents claimed some type of disability according to the 2017 census estimates, representing about 8% of Milton's population. This is down from 2,781 disabled residents in 2011 that comprised 10.4% of all residents. Of the 2017 population under age 18, 143 or 2% had some type of disability, and of the population 18 to 64, 686 or 4.3% claimed a disability, half of those who claimed a disability in 2011. Of the population 65 years of age or older, 1,331 or 31.5% in this age range identified themselves as having a disability, down again from the 2011 level of 35% but about the same number of residents.

Additional information on the types of disabilities for local seniors is summarized in Table III-12, comparing Milton estimates to those of the state based on the Tufts Health Plan Foundation's Healthy Aging Community Profile.

Compared to the state, those 65 years and older who live in Milton do the same or somewhat worse on all of the disability levels with the exception of self-reported ambulatory difficulties. Milton is considered an emerging Dementia-Friendly Community and some local resources for promoting the health of older residents include a Council on Aging, Cultural Council, a memory café, and lifelong learning opportunities. These community resources will become increasingly important given projected increases in seniors.

Table III-12: Types of Disabilities, Percentage 65 Years of Age and Older

Population Characteristics	Milton Estimates	State Estimates
Self-reported hearing difficulty	15.3%	14.2%
Clinical diagnosis of deafness or hearing impairment	17.0%	16.1%
Self-reported vision difficulty	8.7%	5.8%
Clinical diagnosis of blindness or vision difficulty	1.5%	1.5%
Self-reported cognition difficulty	10.0%	8.3%
Self-reported ambulatory difficulty	19.4%	20.2%
Clinical diagnosis of mobility impairments	4.3%	3.9%
Self-reported self-care difficulty	8.5%	7.9%
Self-reported independent living difficulty	18.6%	14.3%

B. Housing Profile

This section of the Housing Needs Assessment summarizes housing characteristics and trends, analyzes the housing market from a number of different data sources and perspectives, compares what housing is available to what residents can afford, summarizes what units are defined as affordable by the state, and establishes the context for identifying priority housing needs.

In general, limited housing production and high demand, reflected in zero percent vacancy rates, have been driving up the costs of housing leading to wider affordability gaps as well as increasing cost burdens.

1. Housing Growth – Higher recent past and future housing growth than total population growth

As shown in Table III-13, from a total of 9,700 housing units that were counted as part of the 2010 census, approximately half (4,535 units or 46.8%) predate World War II, and a total of 7,300 units or three-quarters of the units were constructed prior to 1960. This clearly identifies Milton as one of the older suburbs of Boston with most of its development occurring during the earlier part of the 20th century. This older housing may be in need of repairs, remodeling, or lead paint removal. This early housing development is significantly higher than countywide levels where 28.9% of all units were built prior to 1939 with an additional 21.2% between 1940 and 1960.

Since the early 1960s, housing development fell off considerably with the total number of units built per decade ranging from a low of 259 in the 1990s to a high of 607 in the 1960s. Between 2000 and 2010, a total of 539 housing units were built, representing 5.6% of the housing stock and higher than the 3.6% population growth during the same period.

The 2017 census estimates suggest a substantial decrease in the total number of housing units, down to 9,377 units, which is surprising and questionable. It is likely that few if any units have been lost since 2010, especially given permit activity summarized in Table III-14.

Table III-13: Year Structure Built, 2010

Years	#	%
2000 to 2010	539	5.6
1990 to 1999	259	2.7
1980 to 1989	421	4.3
1970 to 1979	574	5.9
1960 to 1969	607	6.3
1940 to 1959	2,765	28.5
1939 or earlier	4,535	46.8
Total	9,700	100.0

Source: U.S. Census Bureau, 2000 and 2010

Table III-14 presents housing growth since 2010 and indicates that 177 units have been permitted through August 21, 2019. Most of these units were mostly single-family homes but the units at Woodmere and the Milton Hill House at 50 Eliot Street were also included, both developments including affordable units. Of the 177 total units, 11 involved the demolition and replacement of units for a total of 164 net new units. Consequently, teardown activity, replacing more affordable homes in the private housing market with larger more expensive ones, is still relatively limited in Milton compared to 40% of all new single-family homes in Hingham and more than 90% in Needham for example. Table III-14 also shows the estimated cost of this new development with average costs per year varying considerably but averaging almost \$434,000 over this period. However, it would be over \$500,000 if the analysis focused solely on single-family homes.

Table III-14: Building Permit Activity, 2010 to August 21, 2019

Year	New Units	Demo/ Replacement Units	Net New Units	Estimated Cost	Average Cost/Unit
2010	5	0	5	\$2,367,000	\$473,400
2011	4	0	4	\$1,034,000 + \$1,238,000	\$344,667 ¹⁵
2012	12	1	11	\$3,281,870	\$273,489
2013	6 27 (50 Eliot St.)	0	6 27	\$4,148,516 \$5,110,868	\$639,103 \$189,291
2014	19	2	17	\$8,895,723	\$468,196
2015	8	1	7	\$7,346,784	\$918,348
2016	36	3	33	\$14,086,952	\$391,304
2017	22	4	18	\$9,897,079	\$449,867
<i>Subtotal</i>	<i>139</i>	<i>11</i>	<i>128</i>	<i>\$57,407,637</i>	<i>\$413,005</i>
2018	23	2	21	\$12,807,760	\$556,859
As of 8-21-19	15	0	15	\$6,566,693	\$437,780
<i>Subtotal</i>	<i>38</i>	<i>2</i>	<i>36</i>	<i>\$19,374,453</i>	<i>\$509,854</i>

¹⁵ One of the four units was estimated to cost \$1,238,000 which was not included in the average as it would have significantly skewed results.

Total	177	13	164	\$76,782,090	\$433,797
-------	-----	----	-----	--------------	-----------

Source: Milton Building Department; Karen Sunnarborg Consulting

Metropolitan Area Planning Council (MAPC) projections suggest continued housing growth to as many as 11,029 units by 2030 under its “Status Quo” scenario and 11,397 units based on its “Stronger Region” figures. This represents significant future housing growth of 13.7% and 17.5% between 2010 and 2030, respectively, higher than the projected population growth of 2.9% and 6.3%, respectively, under the two scenarios. As noted earlier in this Plan, such growth, even under the more conservative “Status Quo” analysis, appears to greatly overestimate future growth. **Based on the permitting activity above and the 9,700-unit count in the 2010 census, it is hard to believe that more than 10,000 units will be built by 2020 and 11,000 units by 2030 would be remarkable given prior housing growth rates of less than 6% per decade since 1970.**

2. *Housing Occupancy – Continuing high level of owner-occupancy*

As shown in Table III-15, Milton had 9,700 total units based on 2010 census data, including 9,274 occupied units and 9,641 year-round units.¹⁶ Of these, 7,644 or 82.4% were owner-occupied while the remaining 1,630 or 17.6%, were rental units. This level of owner-occupancy was substantially higher than the county and state at 69.2% and 62.3%, respectively. However, about two-thirds of the growth in occupied housing units involved rentals between 2000 through 2010, despite the high level of town-wide owner-occupancy.

As noted above, the 2017 census estimates suggest a decrease in the total number of housing units, from 9,700 in 2010 to 9,377, which did not occur as documented by building permit data. Of these, 95.7% were shown as occupied with a similar split in tenure as 2010 with a net loss of 243 owner-occupied units and 61 rental units during this period. It is also interesting to note that the average household size of the owner-occupied units increased from 2.89 persons in 2010 to 3.05 persons in 2017, reflective of the growing size of households and families included in the 2017 demographic data. On the other hand, the average household size of renters decreased from 2.08 to 2.01 persons.

The 2010 census counted 4.4% or 426 units as vacant, up from 1.5% and 179 units in 2000. The 2017 census estimates show a continuing level of 4.4%.

Table III-15: Housing Occupancy, 1990-2017

Occupancy Characteristics	1990		2000		2010		2017	
	#	%	#	%	#	%	#	%
Total Units	9,003	100.0	9,161	100.0	9,700	100.0	9,377	100.0
Occupied Units *	8,749	97.2	8,982	98.5	9,274	95.6	8,970	95.7
Total Vacant Units *	254	2.8	179	1.5	426	4.4	407	4.4
Owner-Occ. Units **	7,219	82.5	7,554	84.1	7,644	82.4	7,401	82.5
Renter-Occ. Units **	1,530	17.5	1,428	15.9	1,630	17.6	1,569	17.5
Ave. Household Size of Owner-Occupied/Renter Unit	2.98/2.25 persons		2.92/2.09 persons		2.89/2.08 persons		3.05/2.01 persons	

Source: U.S. Census Bureau 1990, 2000 and 2010 and American Community Survey Five-Year Estimates 2013-2017. * Percentage of total housing units ** Percentage of occupied housing units

¹⁶ Year-round units that are used as the basis for the 10% Chapter 40B affordability goal and annual housing production goals and are calculated by subtracting seasonal, occasional or recreational units from total housing units in the decennial census.

As indicated in Table III-16, the homeowner vacancy rate was 1.1% and the rental vacancy rate was 5.9% in 2010, up only slightly from 2000 and still well below state and national levels. The 2017 census estimates indicate still lower vacancy rates to 0.4% for ownership and zero for rentals that do not even take normal housing turnover into consideration. Such vacancy rates consequently demonstrate extremely tight market conditions.

Table III-16: Vacancy Rates by Tenure, 2010 and 2017

Tenure	Milton 2010	Milton 2017	State 2010	State 2017
Renter-Occupied	5.9%	0.0%	6.5%	4.0%
Owner-Occupied	1.1%	0.4%	1.5%	1.1%

Source: U.S. Census Bureau 2010 and American Community Survey Five-Year Estimates, 2013-2017.

3. Types of Units and Structures – Relatively homogeneous housing stock

As shown in Table III-17, the 2017 census estimates indicate that three-quarters of the existing housing units were in single-family detached structures, significantly higher than the 58.5% level for the county. However, census estimates suggest that Milton experienced some loss of these units between 2000 and 2011, from 7,209 to 6,905 units, and then regained some to 7,020 units by 2017.

Table III-17: Units in Structure, 1990 – 2017

Type of Structure	1990		2000		2011		2017	
	#	%	#	%	#	%	#	%
1-Unit Detached	6,982	77.5	7,209	78.7	6,905	73.8	7,020	74.9
1-Unit Attached	178	2.0	179	2.0	241	2.6	309	3.3
2 to 4 Units	1,412	15.7	1,334	14.6	1,079	11.5	1,125	12.0
5 to 9 Units	63	0.7	80	0.9	89	1.0	43	0.5
10 or More Units	304	3.4	351	3.8	1,044	11.2	870	9.3
Other	64	0.7	8	0.1	0	0.0	10	0.1
Total	9,003	100.0	9,161	100.0	9,358 ¹⁷	100.0	9,377	100.0

Source: U.S. Census Bureau 1990 and 2000 and American Community Survey 2009-2011 and 2013-2017.

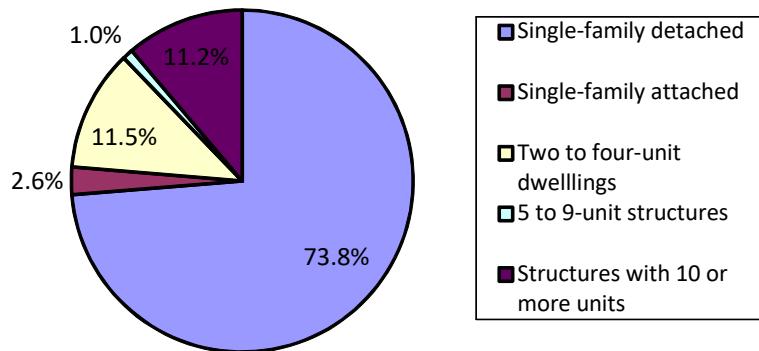
Another 309 units were located in single-family attached dwellings, up from 179 in 2000 and 241 in 2011. On the other hand, there was a continuing loss of units in two to four-unit structures, from 1,412 units in 1990 to 1,079 by 2011. The 2017 census estimates indicate some modest increase in these units to 1,125. The net decline in these units, however, is reflected in some conversions of units to high-priced condominiums and thus eroded some of the community's more affordable private market housing. It is important to note that small multi-family dwellings tend to provide relatively less costly rental and ownership opportunities. Because lenders typically will count 75% of rental income in their underwriting, lower income purchasers can usually qualify.

There was a small gain in the number of units in five to nine-unit structures between 1990 and 2011, once again reversed according to 2017 census estimates to 43 units, less than half of the 2011 level. Similarly, there was a substantial increase in units in larger multi-family structures with ten or more units from 304

¹⁷ The American Community Survey (ACS) involves sampling data and is somewhat off from the actual 2010 census counts, in this case counting 9,358 units as opposed to 9,700. The 2010 ACS figure is actually relatively close to the 2017 census estimate of 9,377 units.

to 1,044 units between 1990 and 2011, increasing to 11.2% of the Town's total housing units. Once again, the 2017 census estimates questionably suggest a reversal of this trend, down to 870 units from 1,044 in 2011. The census counted eight (8) mobile homes in 2000, none by 2011, and then ten in 2017, although Assessor's data indicates that there are no mobile homes remaining in Milton. The 2017 reversals of past trends are surprising and highly questionable and the proportionate distribution of units in 2011 is likely more reliable.

Figure III-9: Units in Structure, 2011



The median number of rooms per housing unit was 7.1 in 2017, up from 6.9 rooms in 2011, indicating that homes are getting somewhat larger. This is also likely reflective of some teardown activity of larger more expensive homes replacing more modest and affordable ones. In 2011, 1,364 units or 14.6% of units had four rooms or less, decreasing to 1,277 units or 13.6% in 2017. There were also decreases in larger units as those with nine rooms or more declined modestly from 2,226 units or 23.8% of the housing stock in 2011 to 2,012 and 21.5% in 2017. This decrease is another surprising outcome given the level of teardown activity.

4. Housing Values – High and rising housing costs for both homeownership and rentals

The following analysis of the housing market examines values of homeownership and rental housing from a number of data sources including:

- The 1990, 2000 and 2010 Decennial U.S. Census figures
- The U.S. Census Bureau's 2009-2011 and 2013-2017 American Community Survey Five-Year Estimates
- The Warren Group's median sales price statistics and sales volume by year, from 1990 through May 2019
- Multiple Listing Service (MLS) data
- Internet rental listings (rental housing)

Ownership Costs

Census data on housing values for owner-occupied units is provided in Table III-18, indicating a median house value of \$558,700 in 2017 up 154% from the median of \$219,600 in 1990 which is much higher than the rate of inflation during this period of 42.3%. Only 150 units were valued below \$200,000, up from 104 units in 2011. Almost 500 units were valued between \$200,000 and \$300,000 in 2011, declining to 324 units in 2017 and still relatively affordable.

While the number of units valued between \$300,000 and \$499,999 decreased from 47.1% to 34.7% of all units between 2011 and 2017, those in the \$500,000 to \$999,999 range increased markedly from 37.4% of all owner-occupied units to 51.3%. The small number of affordable homes is in sharp contrast to the 569 homes valued at more than \$1 million. This data indicates that the number and percentage of properties worth more than \$1 million remained about the same in 2011 and 2017, at 7.6%.

Table III-18: Housing Values for Owner-Occupied Properties, 1990 – 2017

Value	1990		2000		2011		2017	
	#	%	#	%	#	%	#	%
Less than \$100,000	136	2.2	55	0.8	104	1.4	107	1.5
\$100,000 to \$149,999	429	6.9	254	3.8	0	0.0	0	0.0
\$150,000 to \$199,999	1,949	31.2	871	13.1	0	0.0	43	0.6
\$200,000 to \$299,999	2,454	39.3	2,505	37.8	491	6.5	324	4.4
\$300,000 to \$499,999			2,132	32.1	3,551	47.1	2,571	34.7
\$500,000 to \$999,999	1,282	20.5	693	10.4	2,819	37.4	3,794	51.3
\$1,000,000 or more			122	1.8	569	7.6	562	7.6
Total	6,250	100.0	6,632	100.0	7,534	100.0	8,970	100.0
Median (dollars)	\$219,600		\$285,800		\$481,800		\$558,700	

Source: U.S. Census Bureau 1990 and 2000 and American Community Survey 2009-2011 and 2013-2017.

While census data is derived primarily from Assessors information that typically underestimates existing values somewhat, *The Warren Group* tracks more updated market data from Multiple Listing Service (MLS) data derived through actual sales. This historic market information since 2000 through May 2019 is summarized in Table III-19. It is also visually presented in Figure III-10 which shows relatively slow and steady increases in median housing values for both single-family homes and condos following the recession with the exception of the 2019 condo median which is largely based on the very high market sales prices at the Woodmere development.

After a decline in market prices in the early 1990s, due largely to an economic slump, the market began to revive and rose significantly after 1997 to the height of the market in 2005 with a median single-family house price of \$475,000. After that housing values were relatively stable for single-family homes despite the “bursting of the housing bubble” with a median of \$450,000 as of the end of 2012. Since then prices have risen significantly to \$700,000 as of May 2019.

Median prices of condos have been largely lower as shown in Figure III-10, from \$515,000 at the height of the pre-recession market in 2004, dipping to a low of \$330,000 in 2007, and then steadily increasing to \$547,500 in 2018. The median as of May 2019 was stunningly high, at \$1,027,500, once again reflective largely of the high sales prices at the Woodmere development, ranging from \$835,000 to \$1.25 million.

The numbers of sales in any year has ranged considerably for both single-family homes and condos. For example, sales of single-family homes ranged from high of 365 in 2005 to a low of 232 in 2006, showing the effects of the recession. Market activity fell to 233 sales in 2010, reviving somewhat to 297 in 2012 and up to 322 sales in 2017. The number of sales declined somewhat again to 286 in 2018.

Condo sales reached a high of 49 in 2004 but have been down considerably since then to only nine in 2009 and then to 22 in 2011, 2012 and 2013. In 2017, sales activity was at its highest since the recession, to 35 sales, and then fell off again to 22 sales in 2018.

Table III-19: Median Sales Prices: 2000 through May 2019

Year	Months	Single-family	# Single-family Sales	Condos	# Condo Sales
2019	Jan – May	\$700,000	83	\$1,027,500	8
2018	Jan – Dec	685,500	286	547,500	22
2017	Jan – Dec	640,000	322	520,000	35
2016	Jan – Dec	615,000	309	502,450	32
2015	Jan – Dec	565,000	305	419,000	16
2014	Jan – Dec	525,000	284	410,000	17
2013	Jan – Dec	492,500	308	394,375	22
2012	Jan – Dec	450,000	297	372,500	22
2011	Jan – Dec	446,500	247	385,000	22
2010	Jan – Dec	469,000	233	385,000	20
2009	Jan – Dec	440,500	246	350,000	9
2008	Jan – Dec	456,000	256	385,000	15
2007	Jan – Dec	441,000	265	330,000	24
2006	Jan – Dec	466,000	232	400,500	24
2005	Jan – Dec	475,000	365	489,000	42
2004	Jan – Dec	469,000	349	515,000	49
2003	Jan – Dec	441,500	300	385,500	10
2002	Jan – Dec	378,500	295	364,000	13
2001	Jan – Dec	338,700	314	350,500	10
2000	Jan – Dec	330,000	317	289,750	14

Source: The Warren Group, July 15, 2019

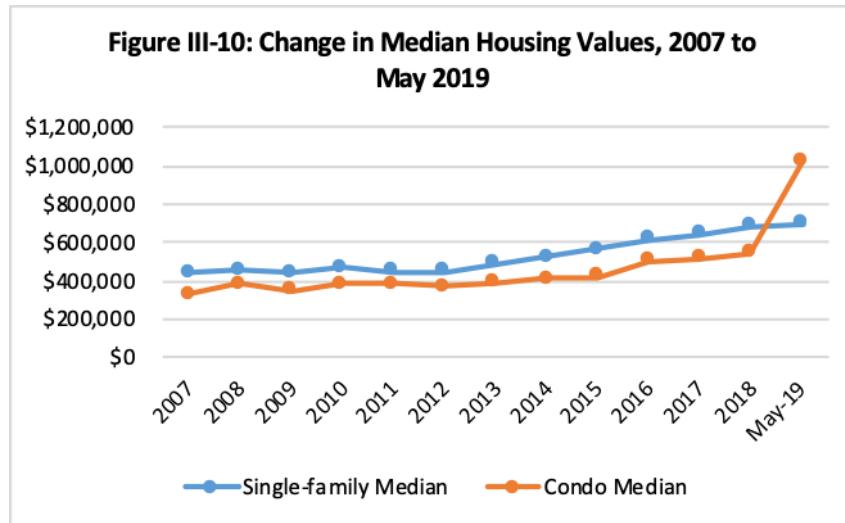


Figure III-11 compares Milton's median sales data to those of neighboring communities for 2005, near the top of the housing market, as well as March of 2013 and May 2019. Milton's housing values remain the highest. Of particular note is the spike in Milton's median to \$700,000 as of May 2019. Like Milton, all of the 2019 median values from the nearby communities included in this analysis have surpassed the pre-recession ones, which is not the case in numbers of communities throughout the state.

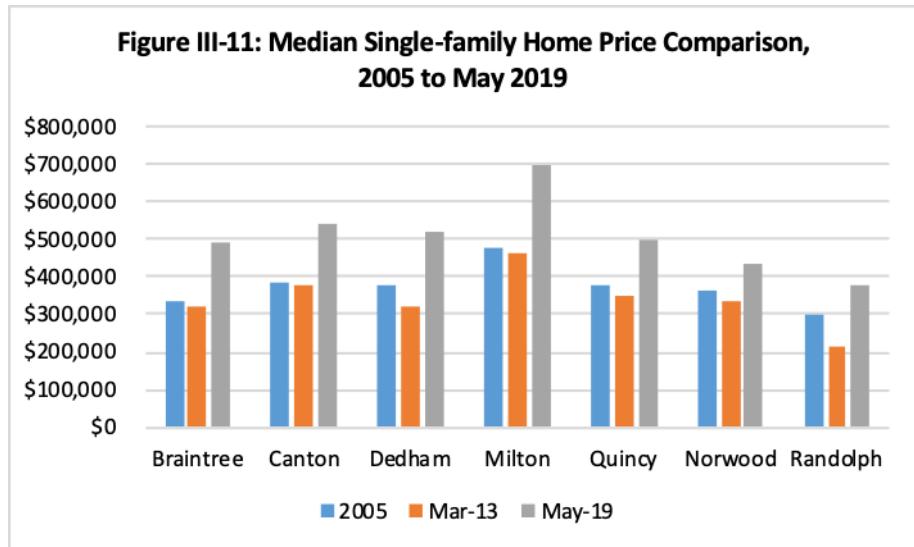
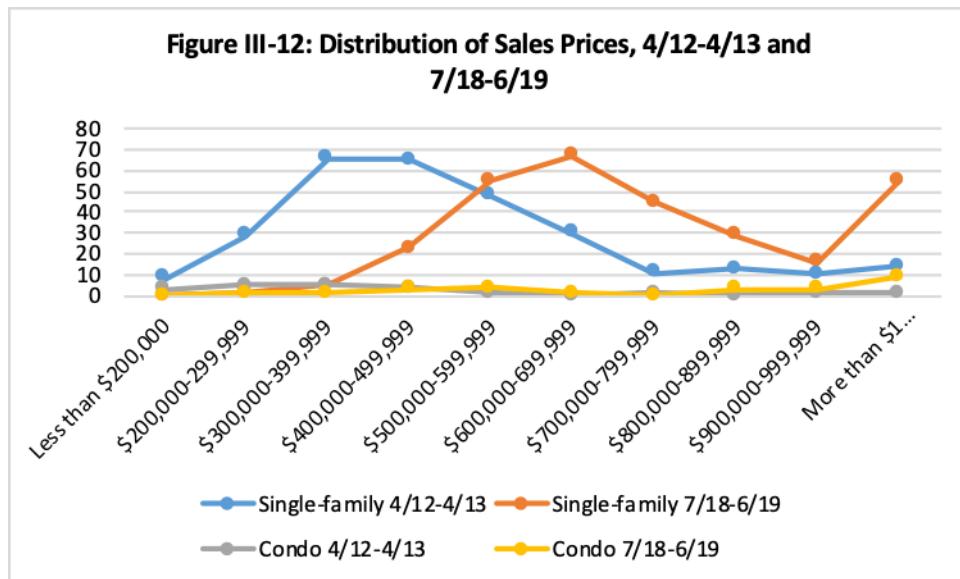


Table III-20 and Figure III-12 summarize *sales activity for single-family homes and condos between July 2018 and June 2019*. There were no sales for less than \$200,000, and only three ranging from \$200,000 to \$300,000. About 40% of sales occurred between \$500,000 and \$700,000 with half of the units sold above this level including about 20% over \$1 million. It is interesting to note that there were 15 or 60% of condo sales above \$800,000 including nine selling for more than \$1 million, almost all part of the Woodmere development off of Brush Hill Road. Median sales prices were \$688,000 and \$900,000 for single-family homes and condos, respectively, the condo median skewed by the high Woodmere prices. Figure III-12 demonstrates the clear shift towards higher market prices and also the increase in sales above \$1 million.

Table III-20: Single-family House and Condo Sales, July 2018 through June 2019

Price Range	Single-family Homes		Condominiums		Total	
	#	%	#	%	#	%
Less than \$200,000	0	0.0	0	0.0	0	0.0
\$200,000-299,999	2	0.7	1	4.0	3	0.9
\$300,000-399,999	5	1.7	1	4.0	6	1.9
\$400,000-499,999	23	7.7	3	12.0	26	8.1
\$500,000-599,999	55	18.5	4	16.0	59	18.3
\$600,000-699,999	67	22.6	1	4.0	68	21.1
\$700,000-799,999	45	15.2	0	0.0	45	14.0
\$800,000-899,999	29	9.8	3	12.0	32	9.9
\$900,000-999,999	16	5.4	3	12.0	19	5.9
Over \$1 million	55	18.5	9	36.0	64	19.9
Total	297	100.0	25	100.0	322	100.0
Median Price	\$688,000		\$900,000		--	

Source: *Banker & Tradesman*, July 19, 2019



As Table III-21 indicates, very few housing units were valued in the more affordable ranges according to Assessor's records. Of the 7,174 single-family homes and 322 condominium units, there were only 11 properties assessed for less than \$200,000 with all four of the condos as part of the Woodmere development. Another 160 of these properties were assessed between \$200,000 and \$300,000, still relatively affordable. While 16% of the units were assessed between \$400,000 and \$500,000, almost half were assessed in the \$500,000 to \$700,000 range. Another 27% were assessed above \$700,000, including 976 units or 13% at over a \$1 million, demonstrating Milton's significant luxury housing market.

The median single-family assessment was \$621,200 and the condo median was \$501,900. These values are lower than those reported by Banker & Tradesman based on actual sales of \$700,000 and \$547,500 (for 2018 as the sample size was too small for a reliable median as of May 2019), respectively. Assessments are typically lower than actual market values, particularly in rising housing markets.

Assessor's data also shows significant numbers of small multi-family properties, particularly two-family dwellings, with 584 two-families (1,168 units) and 21 three-family residences (63 units). More than half of the two-family properties were assessed between \$500,000 and \$600,000. Median values for these properties were \$573,500 and \$611,900, respectively.

Additionally, the Assessor's database includes the following additional inventory of residential properties:

- 36 properties with multiple homes on the same lot, 75% of which were assessed for more than \$1 million and with a median assessment of \$1,615,200.
- 4 properties with four to eight units that ranged in value from \$747,000 to \$1,076,500.
- 7 properties with more than 8 units that included 50 Eliot Street, Unquity House, Winter Valley Residences, and Fuller Village. These properties ranged in value from \$5,590,000 to \$25,579,700.
- 27 mixed-use properties with assessments ranging from \$421,400 to \$14,073,700.

Table III-21: Assessed Values of Residential Properties, FY19

Assessment	Single-Family Dwellings		Condominiums		Total Units		Small Multi-Unit Dwellings 2-family/3-family	
	#	%	#	%	#	%	#	%
\$0-\$199,000	7	0.1	4	1.2	11	0.1	1/0	0.2/0.0
\$200,000 - 299,000	16	0.2	21	6.5	37	0.5	0/0	0.0/0.0
\$300,000 - 399,000	98	0.4	62	19.3	160	2.1	4/0	0.7/0.0
\$400,000 - 499,000	1,129	15.7	74	23.0	1,203	16.0	51/1	9.1/4.8
\$500,000 - 599,000	1,976	27.5	74	23.0	2,050	27.3	300/8	51.4/38.1
\$600,000 - 699,000	1,486	20.7	28	21.1	1,514	20.2	163/8	27.9/38.1
\$700,000 - 799,000	830	11.6	15	4.7	345	4.6	53/2	9.1/9.5
\$800,000 - 899,000	389	5.4	13	4.0	402	5.4	6/2	1.0/9.5
\$900,000 - 999,000	281	3.9	17	5.3	298	4.0	2/0	0.3/0.0
Over \$1 Million	962	13.4	14	4.3	976	13.0	2/0	0.3/0.0
Total	7,174	100.0	322	100.0	7,496	100.0	584/21	100.0/100.0

Source: Milton Town Assessor

Rental Costs

Census data on the costs of rental units from 1980 through 2017 is included in Table III-22. These census estimates indicate that there were 1,569 occupied rental units in Milton in 2017, and that the median gross rental was very high, at \$1,520, up considerably from \$1,268 in 2011 and \$830 in 2000. The 2017 gross rent for the county was high but lower, at \$1,450, with the state median well below at \$1,173.

Only about 14% of the rental units were renting for less than \$500 by 2017, surprisingly higher than 10.6% in 2011. On the other end of the price range, 46% of the rental units were priced at \$1,500 or more including 303 or 19% with rents of at least \$2,000.

It should be noted that the census data includes subsidized rents and consequently does not totally reflect market values.

Table III-22: Rental Costs, 1980-2017

Gross Rent	1980		1990		2000		2011		2017	
	#	%	#	%	#	%	#	%	#	%
Under \$200	202	15.0	160	10.7	58	4.1	33	2.0	216	13.8
\$200-299	332	24.7	94	6.3	33	2.3	102	6.3		
\$300-499	569	42.3	233	15.5	152	10.8	38	2.3	221	14.1
\$500-749	101	7.5	417	27.8	310	21.9	172	10.6		
\$750-999			321	21.4	270	19.1	269	16.6	252	16.1
\$1,000-1,499	109	7.3			382	27.0	393	24.3		
\$1,500 or more					66	4.7	557	34.4	722	46.0
No cash rent	142	10.5	165	11.0	143	10.1	54	3.3	158	10.1
Total	1,346	100.0	1,499	100.0	1,414	100.0	1,618	100.0	1,569	100.0
Median rent	\$321		\$646		\$830		\$1,268		\$1,520	

Source: U.S. Census Bureau 1980, 1990 and 2000 Summary File 3 and American Community Survey 2007-2011 and 2013-2017.

Recent *listings* of rental units are presented in Table III-23, indicating the high cost of rental housing in Milton. The lowest listings were in two-family homes or a duplex, ranging from \$2,151 to \$2,350 in July 2019, much higher than the \$1,475 to \$1,650 range in 2013. Houses were listed from \$3,750 to \$7,500, also substantially higher than the 2013 rents of between \$1,795 and \$3,200. The Trulia website cited a median rent of \$2,875.

Table III-23: Rental Listings, July 2019

Unit Type	# Bedrooms	# Baths	Square Footage	Rent
Condo for rent	2	1	956	\$2,151
Two-family	2	1	1,100	\$2,300
Duplex	2	2	1,350	\$2,300
Two-family	2	1	NA	\$2,350
Condo	2	2	1,260	\$2,590
Condo	2	2	1,500	\$3,300
Multi-family	3	1	NA	\$2,500
Multi-family	3	1	1,250	\$2,600
Townhome	3	2.5	3,592	\$4,200
Single-family House	3	3.5	3,400	\$4,750
Single-family House	3	2	1,867	\$5,000
Single-family House	4	2.5	2,415	\$3,750
Single-family House	4	3.5	5,583	\$7,500

Sources: Internet listings in Trulia, Apartments.com, and Zillow, July 16, 2019.

5. Affordability Analysis – Widening affordability gaps and cost burdens

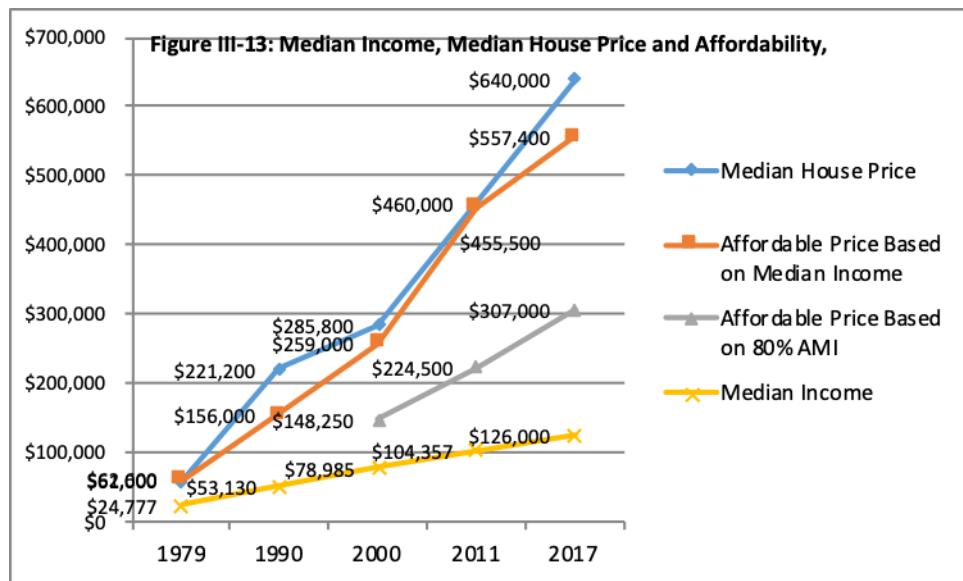
Current housing market data tells us that at least 40% of Milton's households do not have sufficient income of an estimated \$158,250 to afford the median single-family sales price of \$700,000 as of May 2019. Also, about 28% of households cannot afford the median rent cited on the Internet of \$2,875, which requires an income of about \$68,800. These high housing costs obviously have the most severe impact on those on the lowest rungs of the income ladder, but the effects of such high housing prices have spread well into the middle class. Clearly if you do not already own a home or are not affluent, you will be hard-pressed to purchase a home in Milton.

Affordability Gaps

A traditional rough rule of thumb is that housing is affordable if it costs no more than 2.5 times the buyer's household income. By this measure, the median income earning household could afford a house of approximately \$315,000, approximately half the median house price of \$700,000. This implies that the household in the middle of the town's income range faced an "affordability gap" of almost \$385,000.

Additionally, housing prices have risen faster than incomes making housing much less affordable as demonstrated in Figure III-13. As time went by, the gap between median household income and the median single-family house price widened considerably from median income being 40.6% of the median house price in 1979 to 20% in 2017. Another way of analyzing this figure is that *the gap between income and house value was only \$36,223 in 1979 but increased to \$514,000 by 2017*. The gap would be much greater if more recent market prices were taken into consideration with a median single-family house price of \$700,000 as of May 2019.

Figure III-13 also compares the median single-family sales prices to two different affordable prices. One set of affordable prices is based on what a median-income earning household can afford and the other is based on the 80% AMI limit for a household of three, the average Milton household size.¹⁸ The affordable price for the median-income earning household was close to the median market price in 1979 and between 2000 and 2011 but has diverged since then. The affordable price, based on the 80% AMI limit, is considerably lower than the median market price however, and shows a widening affordability gap. It should be noted that these prices are higher than what would be allowed under the state's Local Initiative Program (LIP) which bases affordable purchase prices on the 70% AMI limit to offer a window for marketing purposes.



A second calculation of ownership affordability is to estimate the “affordability gap”, typically defined as the difference between the cost of housing and the proportion of income that is reasonable to pay for it, generally using HUD's definition of 30% of gross income as this affordability threshold. To afford the median sales price of a *single-family home* in Milton of \$700,000 as of May 2019, a household would have to earn approximately \$158,250, much higher than the required income of \$96,250 in 2013.¹⁹ This assumes that the purchaser has cash on hand of about \$150,000 to afford the upfront costs of the down payment and closing costs based on typical mortgage lending practices of 80% financing.

The borrowing power of the median income earning household, with an income of \$126,000 based on the latest 2017 census estimates, is about \$557,400, significantly lower than the median house value of \$700,000. Consequently, **there was an affordability gap of \$142,600, the difference between what the median income earning household can afford (\$557,400) and the median single-family house price (\$700,000)**. The high upfront cash requirements effectively widen this gap, particularly for those who do not have equity in a previous home, substantial savings, or a major gift.

¹⁸ Figures based on 80% financing, 30-year term, interest rates and property tax rates at the time, and insurance costs of \$6 per thousand. Given 80% financing, private mortgage insurance (PMI) was not included in calculations. Figures also assume that a household will pay no more than 30% of its income on housing costs.

¹⁹ Figures based on 80% financing, interest of 4.5%, 30-year term, annual property tax rate of \$13.18 per thousand, insurance costs of \$6 per thousand. Given 80% financing, private mortgage insurance (PMI) was not included in calculations. Figures also assume that a household will pay no more than 30% of its income on housing costs.

A gap of \$387,000 emerges when the affordability analysis focuses on those low- and moderate-income households earning at the 80% of area median income limit, or \$80,300 for a family of three based on HUD 2019 income limits.²⁰ These households are unable to afford a house costing more than \$313,000 assuming they can qualify for subsidized mortgages like the ONE Mortgage Program or a MassHousing mortgage without private mortgage insurance and at least 95% financing. **The gap increases to almost \$700,000 for a single-person household earning at the 80% AMI limit of \$62,450 who could likely afford a home for no more than \$243,500.**

In regard to *rentals*, the median gross median rent of \$1,520, according to the 2017 census estimates, requires an income of about \$68,800,²¹ which is within HUD's current income limit for three-person households earning at 80% of area median income (\$80,300) but substantially more than the median income for renter households of \$51,161. About 28% of Milton households would still be unable to afford to rent at this level, assuming they were spending no more than 30% of their income on housing costs.

Local listings indicate that market rents are actually considerably higher, ranging from \$2,151 for a basic two-bedroom apartment to \$7,500 for a high-end rental of a single-family house. Internet sources indicate a median rent of \$2,875 which would require an income of approximately \$123,000, not much less than Milton's \$126,000 median household income. Consequently, there is no affordability gap.

Focusing on low- and moderate-income earning households with a median income of \$80,300 for a household of three, the rental affordability gap would be \$675 based on the difference between what they could afford of approximately \$2,200 and the internet listed median of \$2,875. The gap increases to \$1,115 for a single-person household earning at the 80% AMI limit of \$62,450 who could afford a rent of about \$1,760.²²

It should also be noted that rentals also involve considerable up-front cash requirements including potentially first and last month's rent and a security deposit. On the \$2,875 apartment, this would amount to \$8,625, a considerable amount for those with limited income and savings. Moreover, landlords are

increasingly requiring credit records and references for tenants, which also can pose barriers to securing housing.

Findings generally point to small increases in cost burdens over the past few years, especially for lower income residents and renters, including some increases for lower income owners as well. Significant numbers of cost burdened seniors and single individuals also suggest a need for smaller affordable rental units.

Cost Burdens

Another way to analyze affordability is to see how many households are paying too much for their housing, which is typically defined as paying more than 30% of a household's income on housing expenses whether towards homeownership or rental. The 2017 census estimates indicated that 393 households or 5.3% of Milton homeowners were paying between 30% and 35% of their income for housing (mortgage, utilities, taxes, homeowners association fees, and insurance) and another 1,471 homeowners or 20% of all homeowners were paying 35% and higher. In regard to renters, 96 renters or 6.1% were spending between 30% and 34% of their income on

²⁰ The average household size was 2.86 persons based on 2017 census estimates.

²¹ Assumes monthly utility charges of \$200.00.

²² Rental calculations include a household not spending more than 30% of their income on housing costs, including monthly utility bills averaging \$200.00.

housing and another 644 or 41% of renting households were allocating 35% or more of their income for housing. **This data suggests that 2,604 households, or 29% of all households, were overspending on their housing, also referred to as having cost burdens. This is up from the 2,466 households, or 26.6% of all Milton households with cost burdens in 2011.**

The U.S. Department of Housing and Urban Development (HUD) also provides data on these housing cost burdens by tenure, income level and type of household. Table III-24 summarizes this information for 2015 (the latest report available). The data is based on the U.S. Census Bureau's American Community Survey Five-Year Estimates for 2011-2015. They also reflect the high costs of housing in Milton, whether for ownership or rentals, that make it extremely challenging to afford to live in the community.

Altogether 2,743 households or 30% of all Milton households were living in housing that is by common definition beyond their means and unaffordable.

Total Households

- **Of those Milton households with cost burdens, 1,286 or 14% had severe cost burdens as they were spending more than half of their income on housing costs. These figures are down somewhat from 2009 with 33% and 14.6% levels of cost burdens and severe cost burdens, respectively.**
- **There were 2,720 total households earning at or below 80% of median family income (MFI),²³ who might be eligible for housing assistance based on income alone, higher than 2,365 such households in 2009.**
- **Of the households earning at or below 80% MFI, 1,928 or 71% were spending more than 30% of their income on housing and of these 1,185 or 44% were spending more than 50% of their income on housing, compared to 68% and 45% with cost burdens and severe cost burdens in 2009, respectively.**
- Of the 6,354 households earning more than 80% Median Family Income (MFI), 815 or 13% were spending too much on their housing as well, down from 6,720 and 20% in 2009.
- Of the 919 households earning at or below 30% MFI, 689 or 75% were spending too much on their housing with 565 or 62% spending more than half of their income on housing costs. This is up from 885 households extremely low-income households in 2009 but with a higher level of 78.5% with severe cost burdens in 2009. Many households in this income range without cost burdens were likely living in subsidized units.
- This data also indicates that between 2009 and 2015 there was an increase of 418 renter households compared to an increase of 435 owner households.

Renter Households

- **Of the 1,219 renter households earning at or below 80% MFI, 784 or 64% were spending too much on their housing including 435 or 36% who were spending more than half of their income on housing expenses. These figures are largely higher than those for 2009 with 925 households with incomes at or below 80% MFI, 607 or 66% with cost burdens, and 364 or 39% with severe cost burdens.**
- **There were 494 renter households earning at or below 30% MFI which were experiencing cost burdens with 190 or 38.5% having severe cost burdens. This is higher than the 360 households in**

²³ Median Family Income (MFI) is used in this report but is the equivalent of Area Median Income (AMI) used throughout this Plan.

this income category in 2009 but at that time 280 or 78% had severe cost burdens. **Of particular concern are the 190 seniors with severe cost burdens based on the 2015 figures.**

- Of the 625 renter households earning between 30% and 80% MFI, 490 or 78% were overspending including 225 or 36% with severe cost burdens, up from 57% and 15% in 2009, respectively. **There are significant unmet needs of seniors as well as small families in this income range.**
- It can largely be assumed that many of the 435 renter households earning below the 80% MFI level and without cost burdens were living in subsidized housing or doubled up with friends or family given the high costs of rentals in Milton.
- About two-thirds or 520 of the 780 elderly renter households earning less than 80% MFI were overspending on their housing, including 255 or 33% with severe cost burdens. Many of those remaining 260 seniors earning below 80% MFI and not overspending were likely living in Milton's subsidized housing reserved for seniors or other subsidized developments. These figures also suggest increased cost burdens from 2009 data when 62% of the 495 seniors in this income range were experiencing cost burdens, only 2% with severe cost burdens.
- Of the 284 small families (2 to 4 household members) who had incomes lower than 80% MFI, 204 or 72% were paying too much for their housing. Of particular concern are the 150 households earning between 30% and 50% MFI with severe cost burdens. It is likely that those without cost burdens were living in affordable housing. This is also up considerably from 100 or 53% of the 190 small family renter households with cost burdens in 2009.
- There were no large families (5 or more members) with incomes below 50% MFI, but 30 of the 50 households earning between 50% and 80% MFI had cost burdens. There were only 35 such households earning at or below 80% MFI in 2009, all with incomes between 30% and 50% MFI and including 29 with cost burdens.
- There were also 105 non-elderly, non-family households (single individuals) earning at or below 80% MFI, of which 30 were overspending on their housing, all with severe cost burdens. This is down from 200 such households in 2009, 55% with severe cost burdens.

Owner Households

These high levels of cost burdens among low-income elderly owners likely point to a situation where long-term senior residents, who are retired and living on fixed incomes, are experiencing challenges affording the high housing costs in Milton, including rising energy, insurance costs, and property taxes. Many of these owners are empty nesters living in single-family homes that cost too much to maintain and have more space than they require at this stage of their lives.

- **Of the 7,104 owner households, 1,905 or 27% were overspending on their housing including 847 or 12% with severe cost burdens. This included 750 households earning at or below 80% MFI with severe cost burdens. These levels are down a bit from 2009 when 30% of the 7,575 owner households were overspending including a comparable 12% with severe cost burdens.**
- Of the 1,495 owner households earning at or below 80% MFI, 1,144 or 76.5% were spending too much and 750 or half were spending more than 50% of their earnings on housing costs. These levels of cost burdens are up from 2009, from 70% and 48%, respectively.
- There were 855 elderly owners with incomes at or below 80% MFI (57% of all owner households in this income range), down from 985 in 2009. In 2015, 610 of these households or 71% were overspending, including 390 or 46% with severe cost burdens. These

levels of cost burdens are up from 60% and 39%, respectively, in 2009.

- Of the 410 small family households earning at or below 80% MFI, 345 or 84% were spending too much, including 215 or 52% with severe cost burdens. The numbers of households in this income range was lower in 2009, at 230 households, and the percentage with cost burdens was also a bit lower at 83% with a higher proportion of those with severe cost burdens at 72%.
- There were only 165 large families earning less than 80% MFI, of which 95 or 58% had severe cost burdens. This represents a slight increase from 80 such large households in 2009, 60 or 75% with severe cost burdens.
- There were also 65 non-elderly, non-family owner households earning at or below 80% MFI of which 50 or 77% were spending too much for their housing, all with severe cost burdens. The 2009 data also shows more than double such households in this category, 145, including 90 or 62% with severe cost burdens.

Table III-24: Cost Burdens, 2015

Type of Household By Tenure	Households Earning <30% MFI/# with cost burdens *	Households Earning > 30% to < 50% MFI/ # with cost burdens *	Households Earning > 50% to < 80% MFI/# with cost burdens *	Households Earning > 80% and < 100% MFI /# with cost burdens *	Households Earning > 100% MFI/ # with cost burdens *	Total
Elderly Renters	460/80-190	225/145-50	95/40-15	29/0-4	160/0-0	969/265-259
Small Family Renters	4/4-0	160/0-150	120/50-0	30/20-0	275/0-0	589/74-150
Large Family Renters	0/0-0	0/0-0	50/30-0	10/0-0	20/20-0	80/50-0
Other Renters	30/0-20	45/0-0	30/0-10	35/10-0	150/0-0	290/10-30
Total Renters	494/84-210	430/145-200	295/120-25	104/30-4	605/20-0	1,928/399-439
Elderly Owners	290/30-235	270/110-110	295/80-45	195/39-8	930/65-15	1,980/324-413
Small Family Owners	110/10-95	95/25-60	205/95-60	110/55-40	3,300/345-4	3,820/530-259
Large Family Owners	15/0-15	40/4-10	110/40-70	10/0-0	740/100-15	915/144-110
Other Owners	10/0-10	20/0-20	35/0-20	30/0-15	330/60-0	425/60-65
Total Owners	425/40-355	425/139-200	645/215-195	345/94-63	5,300/570-34	7,140/1,058-847
Total	919/124-565	855/284-400	940/335-220	449/124-67	5,905/590-34	9,068/1,457-1,286

Source: U. S. Department of Housing and Urban Development (HUD), SOCDS CHAS Data, American Community Survey, 2011-2015 Five-Year Estimates. Note: Median Family Income (MFI), used in this report, is the equivalent of Area Median Income (AMI). *First number is total number of households in each category/second is the number of households paying between 30% and 50% of their income on housing – and third number includes those that are paying more than half of their income on housing expenses (with severe cost burdens). Small families have two to four family members while larger families include five or more members. The “Other” category, for both renters and owners, includes non-elderly and non-family households, basically single individuals.

Foreclosures

Another indicator of housing affordability involves the ability to keep up with the ongoing costs of housing which some residents have found challenging since the recession about a decade ago. This recession forced some Milton homeowners to confront the possibility of losing their home through foreclosure as shown in Table III-25.

A total of 11 homeowners have in fact lost their homes to foreclosure auctions since 2010 with more than another hundred possibly facing foreclosure through petitions filed to foreclose. There were relatively few actual auctions relating to the resolution of problems. While there were no foreclosures prior to 2010, the highest level of foreclosures occurred in 2016. The jump in recent foreclosure activity is reputed to relate

to a backlog of cases that had been on hold pending court cases and the need to clarify new regulations. This is the case in many communities across the state.

Table III-25: Foreclosure Activity, 2008 through 2018

Year	Petitions to Foreclose	Foreclosure Auctions	Total
1/1/19-6/30/19	6	0	6
2018	17	0	17
2017	13	0	13
2016	28	0	28
2015	10	0	10
2014	7	0	7
2013	5	1	6
2012	14	1	15
2011	10	6	16
2010	12	3	15
2009	0	0	0
2008	0	0	0
2007	0	0	0
Total	122	11	133

Source: The Warren Group, July 21, 2019.

C. Subsidized Housing Inventory (SHI)

The Subsidized Housing Inventory (SHI) is the official list of units, by municipality, that the state counts towards a community's 10% housing affordability goal as prescribed by Chapter 40B comprehensive permit law. To be counted as affordable under Chapter 40B, housing must be dedicated to long-term occupancy of income-eligible households through affordability restrictions. Table III-26 presents the income limits for the affordable units based on the 2019 HUD guidelines for the Boston area, including the town of Milton, directed to those earning at or below 80% of area median income adjusted by household size.

**Table III-26: 2019 Income Limits for Boston PMSA
Based on 80% of Area Median Income**

Number of Persons in Household	Income Limit
1	\$62,450
2	\$71,400
3	\$80,300
4	\$89,200
5	\$96,350
6	\$103,500
7	\$110,650
8	\$117,750

Source: U.S. Department of Housing and Urban Development (HUD)

1. Current Inventory – About half-way to the 10% affordability goal

Milton has 479 or 4.97% of its 9,641 year-round housing units included in its Subsidized Housing Inventory (SHI), up from 426 units or 4.42% in 2013 and 380 units in 2004. These units are listed in Table III-27. Of the 479 SHI units, 52 are public housing units, 388 are privately owned, and 39 involve units in group homes supported by the state Department of Developmental Services (DDS) or Department Mental Health (DMH).

Almost all of the SHI units involve rentals with the exception of two affordable units at The Residence at Brook Hill and four at Woodmere at Brush Hill. None of the SHI units involved Chapter 40B comprehensive permits.

All of the privately-owned subsidized housing is for the elderly. In total, 91% of the Town's subsidized housing is for the elderly, 4% is for families, and about 5% is for people with special needs.

The Milton Housing Authority (MHA) owns and manages 51 units of public housing, 39 for the elderly and disabled and twelve (12) for families. Demand for the Town's subsidized housing is very strong, particularly for the family units.

According to the Milton Housing Authority, the number of

applicants on the senior/disabled waiting list is 251 that includes 123 local applicants. The waiting time is ambiguous as the Milton Housing Authority averages only two or three vacancies per year at the

senior/disabled complex. Thirteen and a half percent (13.5%) of senior housing must house young (under 60) disabled applicants. The Milton Housing Authority has met this percentage and therefore the wait time for these applicants on this list is longer.



MHA's Miller Avenue

The number of applicants on the family list is 500. Of that number, 62 are local families. **There has not been a vacancy in the family units in six years!** The Milton Housing Authority has two handicapped accessible units at

the senior/disabled housing complex. The wait for one of these units is approximately five years.

It should also be mentioned that MHA owns and manages two group homes with a total of 11 units/beds, however, support services to the special needs residents are provided by other entities.

The Housing Authority has also been administering 144 Section 8 Housing Choice Vouchers and three vouchers from the Massachusetts Rental Voucher Program (MRVP). These rental vouchers enable income-eligible households to find housing in the private market with the voucher subsidizing the difference between a Fair Market Rent (FMR) and a percentage of the household's income.²⁴ Voucher holders have been finding it challenging to find units in Milton as spikes in rental costs have resulted in fewer participants being able to live in Milton with only 12 of the voucher holders leasing units in Milton. The Milton Housing Authority is now also administering six Veteran Administration Subsidized Housing (VASH) vouchers.



MRE's Unquity House

Much of the privately owned housing is run by the Milton Residences for the Elderly (MRE). Milton Residences for the Elderly, Inc. (MRE) is a private not for profit corporation which developed and manages two private not for profit corporations. MRE's first development, Unquity House Corporation, includes 139 units of affordable senior housing consisting of 99 one-bedroom apartments with approximately a two-year current wait time; and 40 studio apartments with approximately a 1-year to 1.5-year wait times. While the affordability of these units was due to expire, it was extended until at least 2030 through project-based subsidies through the RAD Project (Rental Assistance Demonstration Project).

MRE also owns and manages Winter Valley Residences, Inc., which has 160 affordable units of housing for seniors and the physically disabled. There is a mix of assisted living, one-bedroom, two-bedroom,

and efficiency units, of which 132 units are subsidized under the HUD Section 202 Program. The other 28 units are considered market. Depending on the type of unit, the wait is currently between two and four years. The affordability of these units, while due to expire in 2020, has also been extended through refinancing.



MRE's Winter Valley Development

Both communities provide a full activities program, a hairdresser, laundry facility and a library on the property. Transportation is provided for van trips and MRE offers car service to residents for their personal local appointments.

The Fuller Village development has 321 units, including 80 units that are counted as part of the SHI. It is divided into two neighborhoods, Blue Hill and Brush Hill, with most units involving a life lease purchase and monthly service fees. The market rate prices for Fuller Village were priced significantly lower than market comparables with units starting at \$250,000 for an apartment-style unit. The most expensive two-bedroom unit is priced at \$355,000 with a monthly maintenance fee of \$1,490. The affordable units range from \$206,000 to \$296,000 depending on square footage and location. Fees are from \$1,080 to \$1,385. Fuller Village has maintained its affordable prices since June 2017 and does not intend on raising them.

²⁴ The 2019 Fair Market Rents (FMRs) for the Boston metropolitan area by unit size include: efficiency = \$1,608, one-bedroom = \$1,801; two-bedroom = \$2,194, three-bedroom = \$2,749, four-bedroom = \$2,966.



There are 63 applicants on the wait list for the affordable units and 97 waiting for market rate units. Since there are far fewer affordable units, the wait times for these units are longer.

The development has 13 handicapped accessible residences, one for the hearing impaired, and an additional 27 units that are partially accessible.

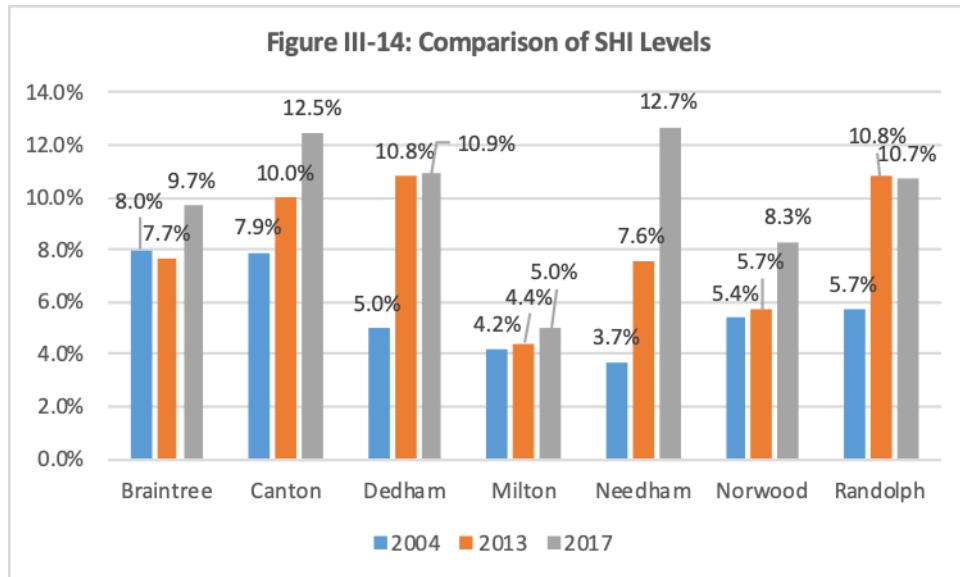
Table III-27: Milton's Subsidized Housing Inventory (SHI), May 2013/July 2019

Project Name	# SHI Units	Project Type/ Subsidizing Agency	Use of 40B	Affordability Expiration Date
65 Miller Avenue*	40	Rental – elderly disabled/DHCD	No	Perpetuity
121 Central Avenue**	8	Rental – special needs/DHCD	No	Perpetuity
753 Blue Hill Avenue**	2/6	Rental – special needs/DHCD	No	Perpetuity
Eliot Street*	2	Rental – families/DHCD	No	Perpetuity
Central Avenue*	2	Rental – families/DHCD	No	Perpetuity
Lothrop Avenue*	2	Rental – families/DHCD	No	Perpetuity
Brook Road*	2	Rental – families/DHCD	No	Perpetuity
Blue Hill Avenue*	2	Rental – families/DHCD	No	Perpetuity
Tucker Street*	2	Rental – families/DHCD	No	Perpetuity
Unquity House	139	Rental – elderly/MassHousing	No	2014
Winter Valley Housing	129	Rental – elderly/HUD	No	2020
Winter Valley Phase II	32	Rental – elderly/HUD	No	2031
Fuller Village Phase II	33/82	Rental – elderly/DHCD	No	Perpetuity
DDS Group Homes	20/18	Special Needs Rental/DDS	No	NA
DMH Group Homes	7	Special Needs Rental/DMH	No	NA
The Residence at Brook Hill	2	Ownership – DHCD	No	Perpetuity
Woodmere at Brush Hill	4	Ownership – DHCD	No	Perpetuity
TOTAL	426/479	434 rentals, 39 special needs rentals, and 6 ownership	No 40B units	

Source: Massachusetts Department of Housing and Community Development, May 22, 2013/July 22, 2019

* Milton Housing Authority units. ** Group homes that are owned and managed by MHA but services are provided to residents by outside vendors.

Figure III-14 compares Milton's progress in reaching the 10% affordability goal under Chapter 40B to its neighbors. While none of the communities had reached 10% in 2004, Canton, Dedham and Randolph had surpassed the 10% threshold by May 2013. By September 2017 (the latest state report available), all of the communities had surpassed the 10% affordability level with the exception of Braintree at 9.7%, Norwood at 8.3% and Milton at 5.0%.



It should be noted that when the 2010 census results were released, the year-round housing totals increased for all communities, reducing the level of SHI units somewhat. For example, the year-round housing unit total increased from 9,142 units to 9,641 in the case of Milton. When the 2020 census figures become available, the year-round figure will change once again, likely still not surpassing 10,000 units.

It should also be noted that there are a number of developments where affordability restrictions are due to expire that would remove them from the SHI. These include Unquity House that received an extension of the Section 8 subsidies through 2029 and the Winter Valley projects with an expiration date in 2029 for phase 1 and 2020 for phase II. Because these developments are sponsored by a mission-led organization to promote affordable housing for seniors, it is likely that the owner will work to extend the affordability provisions. Nevertheless, the Town should still monitor these developments and intervene if necessary, to ensure the appropriate extensions of affordability.

2. Potential Projects

There are a number of housing-related initiatives that are in various stages of planning and development including the following:

- *131 Eliot Street*

Connelly Construction Company is redeveloping the old Hendries Ice Cream property at 131 Eliot Street, demolishing the former building and constructing a five-story building on Central Avenue and a lower adjoining building on Eliot Street next to an MBTA train stop. The development will include 38 condominiums, four of which will be affordable, as well as 3,800 square feet of retail space. The property was permitted through a special permit and site plan approval. Construction has been delayed for well more than a year due to environmental issues.

- *Town Farm*

The Governor Stoughton Trust manages the Town Farm and is entrusted in ensuring that the restrictions on the deed are upheld, particularly the need to dedicate the property to serving the

poor of the town. The property includes about 34 acres of which 30 were sold to Pulte Homes, which plans to build 23 luxury homes.

The Town has engaged a consultant to undertake a financial feasibility analysis of developing affordable housing on the remaining four acres of the site. It then hopes to prepare and issue a Request for Proposals (RFP) to select a developer to build affordable rental housing. Such a project is a major component of this Housing Production Plan. Some of the \$5 million sales proceeds could be important in ensuring project feasibility and leveraging other sources of financing.

- *Wolcott Woods*

Northland Residential Corporation has received approvals to develop 54 units of new age-restricted (55 and over) two and three-bedroom townhouses on 47 acres off of upper Canton Avenue. The new development is envisioned to fill a void in the local housing market for townhouses especially designed for “Active Adults”. The project will involve the preservation of 60% of the land as open space as well as three existing historic homes including the Devens House, Manor House, and the Wolcott House. The project is being developed in accordance with the Town’s Great Estate Planned Unit Development (PUD) zoning and Scenic Road bylaw.”

The property is bordered by the Blue Hills Reservation on two sides and once belonged to Roger Wolcott who was the Governor of Massachusetts at the end of the 19th Century. Northland purchased the property from the Carberry family. A requirement of the Special Permit is six (6) off-site affordable units. These must be eligible for inclusion in the SHI.

- *East Milton Square*

The Town has been exploring the feasibility of mixed-use development in East Milton Square. This included a data report prepared by the Metropolitan Area Planning Council (MAPC) that provided the basic information to undertake an Urban Land Institute (ULI) Technical Assistance Program (TAP) grant. The TAP included a charrette on development options and the possibility of a follow-up Chapter 40R Smart Growth Overlay District feasibility study. There are hopes for significant redevelopment opportunities in the area, and a developer has already proposed a mixed-use building. East Milton Square continues to be a smart location for guiding new development including more diverse housing types.

- *Milton Village*

A key Master Plan recommendation is the adoption of a Mixed-use Overlay District that would encourage over the shop housing as well as additional retail and dining options, pocket parks, and streetscape improvements. Pursuant to this recommendation, the Town commissioned a study of adopting such zoning in the Milton Village/Milton Landing area, beginning work with MAPC in 2017. The Master Plan Implementation Committee, with support from the Town’s Planning Department and with Town and MAPC funding plus additional support from a Barr Foundation grant, is overseeing the study which includes the preparation of a zoning bylaw, the Milton Village Mixed-use Planned Unit Development (PUD) bylaw. Key components of this zoning are incentives for streetscape improvements, water access, historic preservation and affordable housing through density bonuses. More detailed information on this draft bylaw is included in Section IV.B.

- *Selectmen's Parcel off Access Road*

The Town owns a 3½-acre parcel that is next to the Golf Course that might accommodate some housing. The property is currently under the control of the Select Board. Additionally, a developer owns an adjacent parcel of more than two acres and has indicated an interest in a potential Chapter 40B townhouse development. Combining the two properties could lead to a more significant housing development, including affordable units.

- *Kidder Library*

The idea of converting the Kidder Library to housing has been floated as the Library Board has raised the possibility of conveying the property to the Select Board to sell for another use. Such a conversion would be challenging however, given the expected high costs of redeveloping this property for housing.

- *Veteran's Housing*

A developer has expressed an interest in building up to 30 units of housing at the American Legion Post at 123 Granite Avenue. At this point, such a project would require professional capacity from another entity to sponsor the development and the necessary permitting and financing for small units that could include other target populations in addition to veterans.

- *711 Randolph Avenue*

Holland Construction originally proposed a rental project of 72 units with 36 three-bedroom units on seven acres on Randolph Avenue through a comprehensive permit with MassHousing as the subsidizing agency. The developer received its site eligibility letter from MassHousing that enabled it to file a comprehensive permit application with the Milton Zoning Board of Appeals (ZBA). The Town raised concerns about environmental issues, density, access, design and title. The developer agreed to change the project to 90 units and only nine three-bedroom units to reduce school capacity impacts. The ZBA approved 35 units which the developer appealed to the state's Housing Appeals Committee (HAC) and won. The neighbors have remained averse to the project, and the Town has filed litigation at the Land Court which is further delaying the project.

- *Ford Ranch Road – Wentworth Farm Drive*

A local developer applied under current zoning and ultimately was denied a special permit by the Planning Board for a three-lot Open Space Development (each site needed a minimum of 4 acres each). He then proposed a 90-unit Chapter 40B development that was reduced to 40 townhouses and still attracted substantial neighborhood pushback. The current project configuration is for 10 single-family homes with an agreement to provide some funding for the Affordable Housing Trust.

- *Randolph Avenue Assisted Living*

A 92-unit assisted living facility was proposed for the former site of Horseplay Stables to include nine (9) affordable units or 10% of the total number of units. The Town approved Assisted Living Residence Development (ALRD) zoning for the development at its May 2013 Town Meeting, however, the agreement with the developer expired. The property owner has expressed some interest in housing development, but it is unlikely that this project will move ahead in the foreseeable future.

D. **Priority Housing Needs**

Based on the indicators of need included in this Housing Needs Assessment, the extent of unmet local needs for affordable housing is well beyond what could be accomplished by meeting the 10% state affordability goal and suggest the following housing priorities:

Produce Subsidized Rental Housing for Households with Limited Incomes

There is a sizable population of those who are seniors, have special needs and/or have very low incomes who have significantly reduced capacity to secure decent, safe and affordable housing in Milton. Increasing poverty and disparities between the incomes of owners and renters suggest the need for more subsidized rentals.

Indicators of Need:

Growing numbers of lower income households

- Of the 8,970 households in 2017, 206 or 2.3% had incomes of less than \$10,000 and another 718 or 8.0% had incomes between \$10,000 and \$24,999. An additional 357 households or 4.0% had incomes in the \$25,000 to \$34,999 range. Consequently, the total number of households within these income categories was 1,280 or 14.3% of all households, significantly higher than the 714 or 7.7% of households earning below \$35,000 as reported in the 2011 census estimates.
- There were 1,129 residents living below the poverty level in 2017, down from 1,350 in 2011, but still high given the relative affluence of Milton. This might point to improvements in the financial situations of some households but may also suggest that some very low-income residents had to leave the community in search of more affordable living conditions. Of some concern is the increase in poverty among those 65 years of age older, growing from 229 to 397 residents or from 5.5% to 9.2% between 2011 and 2017.

Substantial income disparities

- There was a significant difference between the median incomes of owners and renters, at \$144,363 and \$51,161, respectively, as well as by age with a median of \$159,464 for those age 45 to 64 compared to \$53,019 for those 65 years of age or older. Additionally, the income of families of \$151,120 was more than triple that of nonfamilies of \$42,369.

High affordability gaps

- The affordability gap for rentals is \$675, the difference between the median rent of \$2,875 and what a household earning at 80% of area median income (\$80,300 for a household of three) can afford or \$2,200. The gap increases to about \$1,800 for the median income earning renter household which can afford a rent of about \$1,079.²⁵

***High cost burdens*²⁶**

- Of the 1,219 renter households earning at or below 80% AMI, 784 or 64% were spending too much on their housing including 435 or 36% spending more than half of their income on housing costs.

²⁵ Assumes households are spending no more than 30% of their income on housing costs including average monthly utility costs of \$200.

²⁶ Costs burdens are defined as spending more than 30% of household income on housing costs, whether for rental or ownership. Severe cost burdens involve spending more than half of income on housing.

- About two-thirds or 520 of the 780 elderly renter households earning less than 80% AMI were overspending, including 255 or 33% with severe cost burdens. Of particular concern are the 190 seniors earning at or below 30% AMI with severe cost burdens.
- Of the 284 small families (2 to 4 member households) who had incomes at or below 80% AMI, 72% were overspending. Of particular concern are the 150 small families with severe cost burdens earning between 30% and 50% AMI.
- Thirty of the 50 large families (5 members or more) earning at or below 80% AMI had cost burdens.
- Of the 105 non-elderly and non-family households earning at or below 80% AMI, 30 were overspending, all with severe cost burdens.
- Based largely on cost burdens, Table III-29 estimates unmet housing need for rental housing at 939 units or about half of all rental units, 884 or 46% for those earning at or below 80% AMI.

Large demand for subsidized units

- There are 500 applicants on the waiting list for the 12 family units that are owned and managed by the Milton Housing Authority (MHA) including 62 local families. There has not been a vacancy in these units in six years. There are in fact very few SHI units available to families.
- There are 251 applicants on the Housing Authority's waiting list for their housing for the elderly and disabled (123 are Milton residents) with only two to three vacancies per year.
- At Fuller Village there are 63 applicants on the wait list for the affordable units and 97 waiting for market rate units. Since there are far fewer affordable units, the wait times for these units are longer.
- Depending on the type of unit, the wait is currently between two and four years for MRE's Winter Valley units and one year to one and a half years at Unquity House.

Goal: Most new units produced will be rentals based on the above indicators of need as well as the following considerations:

- Target the needs of the community's most vulnerable residents with very limited financial means as rental housing is typically more affordable and requires less up-front cash.
- Promote greater housing diversity as 82% of Milton's housing stock is comprised of homeownership units and 75% involve single-family detached homes. More housing options are necessary to meet the needs of local workers who are priced out of the housing market, people who grew up in Milton and want to raise their own families locally, and empty nesters for example.
- Offer greater local control over affordable housing development as all units in a Chapter 40B rental development count towards the Town's 10% affordability goal and annual housing production goals as opposed to only the affordable units in homeownership developments. Meeting these goals will enable the Town to obtain a safe harbor against what it might consider to be inappropriate 40B applications that do not meet local housing needs.
- Invest local subsidy funds in support of greater numbers of households/occupants over time as rentals turnover more regularly than ownership units.
- Provide more appropriately sized units for increasing numbers of smaller households.
- Provide opportunities for some seniors who are "over-housed" and spending far too much of their fixed incomes on housing to relocate to more affordable and less isolated settings, opening up their homes to families requiring more space.

- Leverage other funds as state and federal resources are almost exclusively directed to rental housing development, family rentals in particular.
- Enhance the ability to qualify occupants for housing subsidies as state requirements for including units on the SHI make it very difficult for long-term homeowners to be eligible for subsidized or assisted housing based on asset limitations.
- Provide opportunities for mixed-income housing where several different income tiers can be accommodated within the same project.

Create Opportunities for Young Families to Purchase Homes and Invest in the Community

Efforts to enable children who grew up in town to raise their own families locally as well as to provide opportunities for local workers to live in the same community in which they work should be pursued, providing some opportunities for starter housing which the private housing market is no longer producing without subsidies.

Indicators of Need:

Demographic trends towards fewer younger adults

- Demographic trends suggest that those in the child formation period of their lives are decreasing, likely related to the difficulty that younger families and workers face in finding housing they can afford in Milton. For example, those age 25 to 34 decreased from 13.4% to 7.2% of the total population between 1990 and 2011 and then rose only modestly to 7.7% according to 2017 census estimates. There was also a net decrease in those age 35 to 44 of 8.6% between 1990 and 2017.
- Population projections generally point to declines of those less than 64 years of age.

High and rising housing costs

- Historic housing sales information indicates that median single-family sales prices have been rising considerably from \$450,000 in 2012 to \$700,000 as of May 2019. The condo median was \$372,500 in 2012, increasing to \$1,027,500 as of May 2019, largely reflective of the extremely high prices of the Woodmere development.
- A review of housing sales between July 2018 and June 2019 indicates that there were no sales for less than \$200,000 and only three in the \$200,000 to \$300,000 range. About 40% of sales occurred between \$500,000 and \$700,000 with half of the units selling for more than \$700,000 including 20% for over \$1 million.

Widening affordability gaps

- There is an affordability gap of \$142,600, the difference between what the median income earning household can afford (\$557,400) and the median single-family house price (\$700,000). The high upfront cash requirements effectively widen this gap, particularly for those who do not have equity in a previous home, substantial savings, or a major gift.
- There is a gap of \$387,000 for those low- and moderate-income households earning at the 80% of area median income limit, or \$80,300 for a family of three based on HUD 2019 income limits.²⁷ These households are unable to afford a house costing more than \$313,000 assuming they can qualify for subsidized mortgages like the ONE Mortgage Program or a MassHousing mortgage without private mortgage insurance and at least 95% financing.

²⁷ The average household size was 2.86 persons based on 2017 census estimates.

- The gap increases to almost \$700,000 for a single-person household earning at the 80% AMI limit of \$62,450 who could afford a home for no more than about \$243,500.

Increasing cost burdens

- Of the 1,495 owner households earning at or below 80% AMI, 1,144 or 76% were cost burdened including 750 or half with severe cost burdens.
- A significant number of these lower-income, cost-burdened households are seniors including 855 households with 610 or 71% experiencing cost burdens, 390 or 46% with severe cost burdens. It should be noted that it is difficult for long-term owners to qualify for affordable housing subsidies given financial asset limits, although other public interventions to limit financial hardships can be explored.
- There were also considerable cost burdens among families including 484 families earning at or below 80% AMI with 310 or 64% having severe cost burdens.
- There were also 65 non-elderly, non-family owner households earning at or below 80% AMI of which 50 or 77% were experiencing severe cost burdens.

Goal: An estimated 15% of units produced should be for affordable homeownership, representing about 38 units over five (5) years.

Provide Greater Handicapped Accessibility, Supportive Services and/or Smaller Units for Disabled and an Increasing Elderly Population

Population projections suggest that aging Baby Boomers will create a need for more housing that is smaller and easier to maintain by empty nesters and younger seniors in the years ahead in addition to significant numbers of residents with disabilities.

Indicators of Need:

Demographic trends towards an aging population

- There were substantial increases in those age 45 to 64 between 1990 and 2010, many who were aging during this period as part of the Baby Boom generation. There were 5,097 residents in this age category in 1990, rising to 7,924 by 2010, representing a 55.5% level of growth despite nearly flat total population growth.
- There are substantial projected increases in the population 65 years of age and older, from 15.4% in 2010 to an estimated 25.8% by 2030, representing a gain of 3,006 residents in this age category and growth of 72% based on MAPC “Status Quo” figures. This growing population will require more units with handicapped accessibility and supportive services.
- The Council on Aging reports that seniors are becoming increasingly frustrated by the increasing housing costs, including taxes and utility bills, in tandem with limited places to downsize. Units at Winter Valley and Unquity House have long waits while “you would have to have put your name on the wait list long ago to have a chance at a unit in the Home, Inc. development”. Some seniors have had to leave the community in which they invested their whole adult lives, supporting the series of local overrides, in search of more affordable living conditions. It is reported that many moved to more affordable condos and apartments in Canton for example. “Seniors are tired of being told how much their house is worth when they are struggling to stay in the community.”

High level of special needs

- A total of 2,160 residents claimed some type of disability according to 2017 census estimates, representing about 8% of Milton's population.
- In regard to the population 65 years of age or older, 1,331 or almost 32% claimed some type of disability according to the 2017 census estimates.

Goal: At least 10% of all units produced for families and 20% for seniors or single individuals should include handicapped accessibility and supportive services. Goal of 40% of produced rental units and 25% of ownership units that are smaller for increasingly older residents and single individuals.

Table III-29: Distribution of Unmet Housing Needs

Households by Income and Tenure	All Units	Housing Available That is Affordable	Unmet Need*
Rentals			
Extremely Low Income (At or below 30% AMI)	494	200	294
Very Low Income (30% to 50% AMI)	430	85	345
Low to Moderate Income (50% to 80% AMI)	295	50	245
<i>Subtotal</i>	1,219	335	884
80% to 100% AMI	104	70	34
Above 100% AMI	605	585	20
Total Renter Households	1,928	990	938
Homeownership			
Extremely Low Income (At or below 30% AMI)	425	30	395
Very Low Income (30% to 50% AMI)	425	86	339
Low to Moderate Income (50% to 80% AMI)	645	235	410
<i>Subtotal</i>	1,495	351	1,144
80% to 100% AMI	345	188	157
Above 100% AMI	5,300	4,696	604
Total Owner Households	7,140	5,235	1,905
TOTAL ALL HOUSEHOLDS	9,068	6,225	2,843
Types of Households			
	All Units Occupied By Those Earning ≤ 80% AMI	Housing Available That is Affordable to Those Earning ≤ 80% AMI	All Those with Cost Burdens/Unmet Needs Occupied by Those Earning ≤ 80% AMI
Seniors (62 and over)	780 Renters 855 Owners	260 Renters 245 Owners	520 Renters (66.7%) 610 Owners (71.3%)
Families	334 Renters 575 Owners	100 Renters 91 Owners	234 Renters (70.1%) 484 Owners (84.2%)
Non-elderly Individuals	105 Renters 65 Owners	75 Renters 15 Owners	30 Renters (28.6%) 50 Owners (76.9%)

Source: U.S. Department of Housing and Urban Development (HUD), SOCDs CHAS Data, 2015. *Includes all those spending too much on their housing per Table III-24.

Table III-30 presents targeted affordable housing development goals based on priority housing needs over the next five years. The total figure of 250 is largely based on the annual housing production goal of 48 units that will increase somewhat when the 2020 census figures are released.

As noted in the opening parts of this section, given a list of considerations, rental housing should be the Town's top priority. This table suggests a breakdown of 85% to 15% of rental to homeownership units or 212 to 38 affordable units, respectively. All of the ownership units that are included in the SHI are small-scale projects and it is therefore likely that such future units will be produced on this basis as well through Habitat for Humanity or other private developers.

On the other hand, projects that involve some significant scale and can reach households earning at or below 50%-60% AMI with some potential inclusion of units for households with incomes of less than 30% AMI can be pursued through a mix of state and local financing, including the Low Income Housing Tax Credit Program, to produce higher numbers of units towards meeting housing goals.

These priorities also address another priority housing need related to providing barrier-free units and supportive services where feasible, representing 20% of the one-bedroom units and 10% of the two- and three-bedroom units.

Table III-30: Summary of Priority Housing Needs and Targeted Development Goals

Rental Units	Seniors + Single Persons/ One Bedroom Units @ 40%	Small Families/2 Bedrooms @ 50%	Large Families/3+ Bedrooms @ 10%	Total 5-Year Goal
Rental @ 85%	85	106	21	212
Ownership Units	Seniors + Single Persons/ One Bedroom Units @ 25%	Small Families/2 Bedrooms @ 25%	Large Families/3+ Bedrooms @ 50%	Total/5-Year Goals
Ownership @ 15%	10	10	18	38
Total	95	116	39	250
Special Needs* (% of total units)	(19)	(12)	(4)	(35)

Source: 2015 HUD SOCDS CHAS and Karen Sunnarborg Consulting

* Represents at least 10% of all units created in family housing and 20% in senior and single-person housing. For example, of the total 95 projected total one-bedroom units produced, largely directed to seniors, individuals, or those with disabilities, 20% or 19 would involve handicapped accessibility and/or supportive services.

It should also be noted that while the focus of Milton's housing agenda is providing housing for those most in need, the Town will also explore opportunities to integrate "workforce housing units" for those earning above 80% AMI but still priced out of the community's high-priced housing market.

Promote Housing Preservation and Stabilization

While new housing production is the top priority, housing preservation and stabilization strategies are also key to this Housing Production Plan. While these investments most likely cannot be counted as part of the SHI or towards annual production goals because they do not meet state requirements, they still serve pressing local housing needs.

Indicators of Need:

Housing Preservation – Aging and historic housing stock

- About half of Milton's housing units were built prior to World War II with another 40% built between 1940 and 1980. Some of these aging units likely have deferred maintenance needs.
- Those homes built prior to 1978 likely have traces of lead-based paint, posing safety hazards to young children.
- Given the age of the housing stock, many homes and neighborhoods have historic significance that require extra attention to preserve for future generations.

Goal: Make referrals to existing regional programs and services and Identify resources to introduce technical and financial support for qualifying homeowners to make essential health and safety improvements including home modifications for an increasingly aging population and special needs residents.

Housing Stabilization – Residents struggling to remain in their homes

- The Milton Residents Fund, which is supported by a number of special gifts and funds, provides emergency assistance to qualifying Milton residents, as needed, primarily to prevent utility shutoffs and evictions and promote safe and stable housing. They support about 187 gifts per year, not including Holiday gifts, and see first-hand how many residents are struggling to remain in the community given such high housing costs, including property taxes and utility bills.
- The Quincy Community Action Program (QCAP) provides programs and services to help stabilize lower income households including fuel assistance and home modifications for people with disabilities for example. There are also a multitude of other agencies that are available to provide needed housing services to qualifying Milton residents.

Goal: Make referrals to local and regional housing programs and services and provide additional support as feasible to local efforts to help stabilize individuals and families.

In conclusion, there is a need to provide support to all these types of households along a wide range of incomes. Everyone should have a right to safe and affordable housing which is so fundamental to stabilizing both individuals and families who may be living in substandard conditions and/or spending far too much for their housing. The whole community benefits when all residents have a decent and affordable place to call home.

IV. CHALLENGES TO PRODUCING AFFORDABLE HOUSING

It will be a great challenge for the town of Milton to create enough affordable housing units to meet the state's 10% affordable housing standard and local needs. Current constraints to such development including the following:

A. Limited Developable Land

Challenges: As an older established community, Milton has less land available for development than many other communities in the region, and remaining property has become increasingly valuable and difficult to develop. Subsequent to Milton's building boom years prior to 1960, homebuilding in Milton has averaged fewer than 50 dwelling units per year, with the housing stock growing at about ½% per year. During recent years the number of building permits has dropped significantly with only 177 new units produced, 13 of which involved teardown activity for a net of 164 new units. The average number of units created per year was then about 17 between 2010 and August 2019.

Because of the dwindling supply of developable land, the Town can expect that a substantial share of new building will occur through redevelopment of previously developed sites and areas involving the "recycling" of property rather than consuming vacant land. That building is likely to include single-lot "tear-downs" of relatively small dwellings being replaced with substantially larger ones, leaving the number of dwelling units unchanged, but increasing their value and diminishing their potential affordability. As redevelopment efforts broaden to include former commercial and light industrial properties, environmental issues may be confronted and some remediation on selected parcels may become necessary that will increase project budgets and the time required to produce new units.

Mitigation Measures: It will be important to guide future development to appropriate locations, particularly the village centers, maximizing density in some areas and minimizing the effects on the natural environment and preserving open space corridors and recreational opportunities. Therefore, changes to the Town's Zoning Bylaw will be necessary to make such development possible and to integrate incentives for including public benefits, affordable housing in particular. The Town is preparing Village Mixed-use Zoning in Milton Village to promote such development and has adopted Planned Urban Development (PUD) bylaws in various locations to cluster new development and preserve open space, also mandating the inclusion of affordable housing.

B. Zoning

Challenges: As is the case in most American communities, a zoning bylaw or ordinance is enacted to control the use of land including the patterns of housing development. Like most localities in the Commonwealth, Milton's Zoning Bylaw provides for relatively low housing densities which constrains the construction of affordable housing that is typically reliant on economies of scale, particularly in areas with very high land costs such as Milton.

The Milton Zoning Bylaw contains four principal residential districts and four special purpose districts, each with its own requirements as summarized in Table IV-1.

Table IV-1: Milton Zoning Districts

District	Minimum Lot Size	Frontage Requirement
Residence A District	40,000 square feet	150 feet
Residence AA District	80,000 square feet	150 feet
Residence B District	20,000 square feet	100 feet
Residence C District	7,500 square feet	75 feet
Residence D District	100,000 square feet for elderly housing	50 feet/no more than 25% lot coverage
Residence D-1 District	20 acres for elderly/disabled housing not to exceed 160 units	150 feet
Residence D-2 District	25 acres for elderly/disabled housing not to exceed 332 units	300 feet
Residence E District	25 acres/at least 70% of land preserved as open space	

Other provisions that are currently part of local zoning that were adopted to promote smart growth development and a greater diversity of housing types include:

- *Cluster Development*

Cluster development is intended to “encourage development on large tracts of land in a manner which preserves open space and topography, wooded areas, and natural features of substantial portions of those tracts, and to provide a process requiring careful site planning and high quality design resulting in developments in harmony with the surrounding open spaces which enhance the neighborhoods in which they occur and the Town as a whole.”²⁸. This provision requires single-family house development.

In the May 2014 Town Meeting, changes to the original bylaw were approved that provided for increased density. The new bylaw also required that there be some inclusion of affordable housing with the following language:

“In a Cluster Development containing less than 10 building lots, an application may provide for an additional building lot to be used for a single-family dwelling, suitably restricted so as to count on the state’s Subsidized Housing Inventory (SHI) or its future equivalent, or in lieu thereof the application may provide for a monetary contribution to the Town’s Affordable Housing Trust Fund in an amount which is reasonable as determined by the Planning Board under the relevant circumstances. In a Cluster Development containing 10 or more lots, 10% of the lots (rounded to the nearest whole number) shall be suitably restricted so that the single-family dwellings built thereon shall count on the SHI or its future equivalent.”²⁹

- *Attached Cluster Development*

This provision is only applicable in the Residence E District which comprises the Quisset Brook development that is built out under the bylaw. The bylaw allows for a greater mix of housing types and somewhat greater densities than allowed in the other residential zones without a significant increase in population density or public service requirements. The bylaw defines the Attached Cluster Development as “a complex of attached single-family units, each unit

²⁸ Town of Milton Zoning Bylaw, Article VI.J.

²⁹ Town of Milton Zoning Bylaw, Article VI.J.6.

separated by party walls from the other, located on the parcel of land having an area of not less than 25 acres and the development shall be so laid out that there should be groups of dwellings within the complex with suitable common and open space adjacent to and surrounding it.”³⁰ Other requirements include at least 70% of the parcel must be maintained as open space, height restrictions of 2½ stories, and densities not to exceed one unit per each 25,000 square feet with the average number of 2.5 bedrooms per unit. These requirements result in densities that are well below what is typically required to make affordable housing feasible and have very limited applicability. Approval is obtained through a special permit.

- *Planned Unit Development (PUD)*

The Zoning Bylaw allows mixed-use development on lots of at least 80,000 square feet in the Milton Village/Central Avenue Business District under a special permit. The number of housing units cannot exceed one unit per 2,000 square feet, but at the discretion of the Planning Board could potentially be one unit per 1,000 square feet. Additionally, the total gross floor area of all buildings, excluding below grade basements and parking areas, cannot exceed 0.8 times the area of the lot but under certain conditions can be 1.6 times the area of the lot. At least 30% of the lot area must be set-aside as open space, which must be accessible to the public to the greatest extent possible. While this provision moves in the right direction towards promoting smart growth, the restrictions do not provide any incentives to encourage affordable housing. (Section III.I of the Zoning Bylaw)

An amendment to the bylaw continued to allow mixed-use development in the Central Avenue Business District under a special permit but the number of units changed to one per 1,000 square feet of qualifying lot area, plus a possible bonus of up to 30% for streetscape improvements. FAR (floor area ratio) cannot exceed 1.5 times the area of the lot plus a possible bonus of 15% for the preservation of natural features and provision of significant amenities. Additionally, 10% of the total housing units are required to be affordable and qualify for inclusion in the Subsidized Housing Inventory (SHI).

- *Central Avenue Planned Unit Development (PUD)*

The Town amended the PUD bylaw for the Central Avenue Business District that reduced the minimum lot area to 20,000 square feet to permit development on moderately-sized lots with good access to transit, to combine both business and residential uses, and provide significant amenities to the public in the Central Avenue Business District.³¹ This revised bylaw extended housing density bonuses for streetscape improvements and included a mandate that 10% of all housing units be affordable and eligible for inclusion in the SHI. The project at 131 Eliot Street was permitted under this bylaw.

- *Accessory Apartments*

The Zoning Bylaw refers to accessory apartments as temporary apartments within detached one-family dwellings. The bylaw only permits these units under a time-limited special permit (through the Board of Appeals) in owner-occupied homes where at least one of the tenants is a family member. The units cannot be more than 800 square feet in size or greater than one-third the floor area of the existing house. The temporary apartment must be entirely contained within the existing house or on the second floor of a garage without any exterior indication of its

³⁰ Town of Milton Zoning Bylaw, Article VI.K.

³¹ Town of Milton Zoning Bylaw, Article III.J.

existence with the exception of safety requirements. Any additional parking that is required must be screened from the view of neighbors. The term of the special permit is four (4) years. The Town has found that the enforcement of this four-year period has proven challenging as owners have rarely come forward to renew their permits. Approximately 28 permits have been issued. (Section III.A of the Zoning Bylaw)

- *Planned Unit Townhouse Development (PUTD)*

The Planning Board adopted a bylaw to promote cluster development of townhouse condominium units at a density of 4.5 units per acre. This bylaw was presented for approval at the October 2014 Town Meeting to fulfill a number of purposes including “to permit well-designed townhouse development on large tracts of land adjoining property where multi-unit, high density development currently exists. The proposed bylaw provision includes a requirement that 10% of the housing units must be affordable and count on the SHI provided that in developments of less than 10 units there may be a payment to the Town’s Affordable Housing Trust in an amount determined by the Planning Board in lieu of the provision of an affordable unit. The Woodmere at Brush Hill development was permitted under this bylaw.

- *Great Estates Planned Unit Development (PUD)*

The Great Estates Planned Unit Development Bylaw was created to “permit well-designed, multi-unit attached or detached townhouse development on existing large tracts of land” on properties that contain at least 46 acres, have frontage of at least 1,500 feet, and where there are at least two single-family dwellings exist that were constructed before 1900. The bylaw also requires that the housing units be age-restricted to those 55 years and over and that 10% of the total number of housing units be affordable, not age-restricted, and count as part of the SHI. The bylaw also allows the off-site provision of the affordable units based on certain provisions. This zoning was created for the Milton Woods development and modified for the Wolcott Woods project.

- *Parkway Planned Unit Development (PUD)*

The Town created and passed new zoning through the Parkway Planned Unit Development (PUD) bylaw for the property known as the Ice House on 2.5 acres along Blue Hill Parkway. The zoning was adopted to permit the development of 12,000 square feet of commercial space for a small food market and five to twelve small residential units on the lot, with the additional ability of potentially having a smaller 3,000 square foot bank building.

The bylaw includes affordability requirements such that one of the housing units must be affordable and included in the SHI. However, if fewer than six apartments were developed, the developer would be allowed to provide a payment to the Town’s Affordable Housing Trust in an amount determined reasonable by the Planning Board. The bylaw further stipulated that if at least three affordable units were created, involving 25% or more of the total number of apartments, and all units can be counted as part of the SHI, then the total floor area of the second building may be increased by up to 6,000 square feet of residential use beyond what would otherwise be permissible and a third story would also be allowed. Further, the Planning Board can authorize an increase of 1,500 square feet (or less) of residential square footage if the developer can show it is needed to make the development of an affordable apartment financially feasible.

The Property owner has entered into a Purchase & Sale Agreement with a developer who is preparing a Chapter 40B application with the Massachusetts Housing Partnership (MHP) as the subsidizing agency for a sizable number of units, perhaps 80+.

- *Brownfield Planned Unit Development (PUD)*

The Brownfield Planned Unit Development bylaw was adopted to “permit the reclamation of the sites of a discontinued industrial use which can be characterized as a ‘brownfield’ under federal or state law or state guidelines by the creation of quality residential development and by provision of public amenities”.³² This particular area includes the Bay State Paper Mill off of Truman Highway along the Neponset River. The bylaw specified that no more than 90 units could be built and at least 30% of the lot must be preserved as open space. Once again, 10% of the units must be affordable and qualify for inclusion on the SHI.

The property has access issues as it is under the current Readville shuttle line (MBTA commuter rail/Purple Line) in a 9' X 11' box culvert. The owners received an order of conditions from the Milton Conservation Commission to remove the old mill structures.

- *Assisted Living Residence Development (ALRD)*

The Assisted Living Residential Development (ALRD) bylaw was adopted to support the development of residences for people who are experiencing difficulties in living independently but do not require the level of care that is part of skilled nursing facilities. The bylaw was prepared to accommodate the development of a proposed 92-unit assisted living facility proposed for the former site of Horseplay Stables that would include nine affordable units or 10% of the total number of units. This project did not move forward, and the bylaw has not been used to date.

Mitigation Measures: This Housing Plan recommends a number of zoning and regulatory changes to promote smart growth and incentivize affordable housing including adopting additional zoning for mixed-use development, exploring inclusionary zoning, streamlining the permit approval process for affordable housing, amending the accessory apartment bylaw, and amending condo conversion provisions.

C. School Enrollment

Challenges: One of the major issues communities must consider when planning for housing development is the effect on existing Town services. This includes the capacity of local schools to absorb new students. Enrollments in the Milton Public School District have increased, from 3,807 students in the 2000-2001 school year to 3,836 in 2012-2013 and then to 4,139 in 2018-2019.

Enrollment projections from the New England School Development Council (NESDEC) indicate continued growth in enrollments to 4,465 students by 2023-2024 and 4,664 by 2028-2029 that will result in school capacity problems. For example, the NESDAC projections suggest a 34% increase in enrollments in the Elementary School grades that will result in a shortfall of 25.5 classrooms over 10 years. The NESDAC report outlined a number of options to address these capacity problems from converting art, music, and computer rooms into classrooms; constricting new classrooms within other areas of existing schools including additions; and renting modular classrooms; ranging substantially in costs.

³² Town of Milton Zoning Bylaw, Article III.K.

Mitigation Measures: This Housing Plan is proposing that 85% of the housing units produced be rentals that have fewer children than ownership housing with household sizes of 2.01 and 3.05 persons, respectively. The Town might pursue Smart Growth Overlay Districts under Chapter 40R and 40S to spur mixed-use and mixed-income development in village areas. Chapter 40S under the Massachusetts General Law provides additional benefits through insurance to towns that build affordable housing under 40R (see Section VI.A.1 for information on 40R) that they would not be saddled with the extra school costs caused by school-aged children who might move into this new housing. 40S is intended to hold those communities participating in 40R harmless from costs added to school budgets as a result of the 40R related development.

D. Environmental Concerns

Challenges: Milton is the guardian of regionally significant natural resources such as the state-owned Blue Hills and Neponset River Reservations as well as numerous municipal parks and conservation areas. Most residents take pride in the community's natural treasures and are rightly concerned about conserving them. Some of these resources have presented challenges however, including the following environmental issues:

- Bedrock is at or near the surface in numerous areas.
- There has been some degradation of water quality as part of the Neponset River ecosystem as a result of development.
- There are 13 species that are recognized as rare, threatened or endangered in Milton, many located within the Blue Hills Reservation that contains a wide variety of plant and animal life and is an important wildlife habitat.
- There are numerous water resources including brooks, ponds, and wetlands that in addition to the Neponset River offer important wildlife habitats.

While regulations to protect the environment (e.g., wetlands, aquifers, floodplains, septic systems) are important and essential, they present challenges to development by reducing the amount of buildable land and increasing the time and costs of developing new housing.

Mitigation Measures: The Town has an active Conservation Commission to protect environmentally sensitive areas. The impacts of any new development will be identified as to how they affect the environment and what actions might be required to mitigate problems. The Town has also undertaken the following remediation measures:

- Worked with the Neponset River Watershed Association to revegetate the banks of the tributaries of the Neponset River to better control pollution.
- Supported the designation of 75% of the Blue Hills Reservation as a Priority Habitat by the Massachusetts Endangered Species Act.
- Preserved a substantial amount of open space to safeguard natural resources including 2,000 acres by the state Department of Conservation and Recreation (DCR) involving 25% of Milton's land area as well as additional conservation land owned by non-profit organizations (Trustees of the Reservations and Historic New England) as well as individual property owners.
- Focused on efforts, including new zoning, to promote the redevelopment of areas where mixed uses and greater density is more appropriate, including Central Avenue, Milton Village, Milton Landing and East Milton for example, as well as the development of large estates where new clustered zoning is required to preserve open space and natural amenities.

E. Availability of Subsidy Funds

Challenges: Financial resources to subsidize affordable housing preservation and production as well as rental assistance have suffered budget cuts at the state and federal level in recent years, making funding limited and extremely competitive. Communities are finding it increasingly difficult to secure necessary funding and must be creative in determining how to finance projects and tenacious in securing these resources.

While about half of the communities in the Commonwealth have access to Community Preservation Act (CPA) funding to support open space and historic preservation as well as recreation and community housing activities, Milton has not approved this important resource and therefore has less capacity to fund local housing programs and is less competitive in accessing other public subsidy programs.

Mitigation Measures: This Housing Plan provides guidance on the use of HOME funding and the Affordable Housing Trust Fund for affordable housing initiatives that will enable the Town to support the production of new affordable units and leverage other public and private funding sources. It also recommends another effort to obtain community approval for adopting CPA and explore other potential resources.

F. Community Perceptions

Challenges: Affordable housing, subsidized housing, low-income housing, projects, Section 8, etc. – these terms can conjure thoughts of potential neglect that undermines property values, increased crime, and even tensions concerning class and race. If one has not witnessed the benefits of affordable housing directly, images of a distressed and dangerous inner city may emerge. On the other hand, with such high real estate prices, community perceptions are tilting towards the realization that affordable housing is needed in the community. More people are recognizing that the new kindergarten teacher, the waitress at their favorite restaurant, their grown children, or the elderly neighbor may not be able to afford to live or remain in the community. It is this growing awareness and the interest in maintaining a vital and diverse community that is spurring localities such as Milton to take a more proactive stance in support of affordable housing initiatives.

Mitigation Measures: This Plan suggests that the Town undertake ongoing community outreach and education to make sure that residents obtain important information in general on affordable housing and more specifically on proposed housing-related initiatives with ample opportunity for input. These measures are recommended as part of strategy VI.B.1.

G. Transportation

Challenges: Milton has good highway access with two exits on Route I-93. It also has access to public transportation through the Massachusetts Bay Transit Authority (MBTA) on four fixed bus routes and four stations as part of the Mattapan Trolley Service line. The MBTA also operates THE RIDE program to serve the elderly and those with disabilities.

Nevertheless, many would argue that Milton is not well-served by the MBTA with most residents having to rely on their cars which leads to traffic congestion, cut-through measures, speeding, and parking shortages.

Mitigation Measures:

The Town has taken some actions to improve transportation resources. For example, the Council on Aging has provided between 800 and 1,000 rides for seniors every year through their van services, helping seniors get to the Senior Center as well as important appointments, shopping opportunities, and special events. It has also installed calming devices on some local roadways. The Town also approved new mixed-use and transit-oriented development zoning in the Central Avenue Business District resulting in the development at 36 Central Avenue and 131 Eliot Street, both including affordable units. The Town is further moving towards new zoning in Milton Village and East Milton Square to promote mixed-use development that will create more housing in walking distance to services and amenities where residents will be less reliant on their cars. This zoning is an important component of this Housing Production Plan.

It should be noted that the Master Plan emphasized the need for alternative transportation options for moving within and outside of Milton including better access to the trolley and buses.

In the case of all new housing development or redevelopment proposals, the Town will closely review the traffic and parking implications and work with the developer to resolve problems to the greatest extent possible.

H. High Housing Costs

Challenges: Section III of this Housing Plan documents high and rising housing costs for both homeownership and rentals in Milton. This has largely been driven by an imbalance in housing supply and demand as a result of limited developable property, low housing production levels, and zero or near zero vacancy rates coupled with more people willing and able to afford to live in the community. This draw to Milton is reinforced by media sources which have called the Town among the best places to live in the country. Moreover, Milton's housing market is not only high-priced, but has been relatively resilient to market shifts as the recession of a decade ago had limited effect on prices.

It is not surprising that affordability gaps between housing costs and what residents can afford are widening and thus the subsidy amounts to fill these gaps are also growing, making it more challenging to finance affordable units, particularly for the community's most vulnerable residents.

Mitigation Measures: The Town has utilized high market prices to support affordable units through inclusionary provisions in new Planned Unit Development zoning. The required affordability level has been 10%, however based on market prices, this level could quite feasibly be increased to up to 15%. Moreover, this Housing Plan suggests that the Town explore new housing resources including additional regional, state, and federal sources of financing as well as local support by adopting the Community Preservation Act (CPA) for example.

I. Tax Base

Challenges: Milton's tax base is almost entirely reliant on its housing stock with only 3.8% of its taxes coming from other uses. Some suggest that this has resulted in higher taxes for both housing and commercial uses than neighboring communities, however, as Table IV-2 indicates, this is not entirely the case. Milton in fact is in the lowest end of the range for commercial property taxes at \$20.19 per 1,000 with the exception of Hingham without a separate rate for commercial properties.

Nevertheless, with an increase in commercial development to become perhaps 5% to 10% of the tax base, as suggested in the Master Plan, the Town will have a larger budget to invest in important local needs.

Table IV-2: Comparison of Tax Rates, FY19

Community	Commercial Tax Rate	Residential Tax Rate
Milton	\$20.19	\$13.18
Boston	\$25.00	\$10.54
Braintree	\$22.20	\$10.09
Quincy	\$25.77	\$12.40
Dedham	\$29.79	\$14.15
Hingham	\$11.81	\$11.81
Needham	\$24.42	\$12.39
Quincy	\$25.18	\$12.55
Randolph	\$29.01	\$14.98

Source: Karen Sunnarborg Consulting

Mitigation Measures: A major component of the Master Plan was amending zoning to establish new commercial zoning districts and promote the redevelopment of mixed uses in Milton Village, Central Avenue and East Milton Square to expand the non-residential tax base and create more viable business centers. This is also a key part of this Housing Production Plan.

V. HOUSING PRODUCTION GOALS

The Planned Production Program was introduced in December 2002 with the intention of providing municipalities with greater local control over housing development. Under the Program, cities and towns were required to prepare and adopt a Housing Plan that demonstrated the production of an increase of 0.75% over one year or 1.5% over two-years of its year-round housing stock eligible for inclusion in the Subsidized Housing Inventory.³³ The Affordable Housing Plan completed in 2006 was prepared under these regulations.

Changes to Chapter 40B established some new rules.³⁴ For example, Planned Production Plans became referred to as Housing Production Plans. Moreover, annual goals changed from 0.75% of the community's year-round housing stock to 0.50%, meaning that Milton will have to now produce at least 48 affordable units annually to meet annual production goals through 2020, still a challenge for a small community. Annual production goals will change when the 2020 census figures are released as the total year-round housing figure on which these percentages are based will increase and correspondingly increase the annual housing production goal to potentially up to 50 units and Milton's percentage of affordability will also drop.

If DHCD certifies that the locality has complied with its annual goals or met two-year goals, the Town's Zoning Board of Appeals can potentially deny comprehensive permit applications without the developer's ability to appeal the decision. For example, if a Board considers that a denial of the comprehensive 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 must provide written notice to the applicant with a copy to the Department of Housing and Community Development (DHCD), 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 DHCD, with a copy to the Board within 15 days of its receipt of the Board's notice, including any documentation to support its position. DHCD then reviews the materials provided by both parties and issues a decision within 30 days of its receipt of all materials. The Board has 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 on the part of DHCD to issue a timely decision will be deemed a determination in favor of the municipality. This procedure shall trigger the requirement to terminate the hearing within 180 days.³⁵

³³ Massachusetts General Laws Chapter 40B, 760 CMR 31.07 (1)(i).

³⁴ Massachusetts General Laws Chapter 40B, 760 CMR 56.00.

³⁵ 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).

- If either the Board or the applicant wishes to appeal a decision issued by DHCD 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 Housing Appeals 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 will then be stayed until the conclusion of the appeal, at which time the Board's hearing will 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.

To meet production goals, the Town of Milton will have to work cooperatively with developers to create affordable units through normal regulatory channels and the Chapter 40B comprehensive permit process, the “friendly 40B” process under the state’s Local Initiative Program (LIP) to the greatest extent possible. Comprehensive permit development offers a flexible planning tool which is available for use in municipalities which seek to increase their stock of affordable housing available to households with incomes at or below 80% of area median income. Comprehensive permit development produces best results when the Town and the developer work cooperatively in developing a workable, financially feasible plan to produce affordable housing which will fit well into the area where it is built and have positive impacts.

Table V-1 has been developed on the assumption of such cooperative efforts and the availability of sites and suitable infrastructure. These housing goals, however, do not represent full Town endorsements of all these efforts at this early point in time. Instead these housing goals represent estimates and there is likely to be a great deal of fluidity over the term of this HPP.

Table V-1: Milton Housing Production Program/Five-Year Program*

Strategies by Year	Affordable Units < 80% AMI	Ineligible for SHI	Total # Units
Year 1 – 2020			
Mixed-use development/ICE House/ (homeownership)	14	42	56
Scattered site Great Estates PUD/Wolcott Woods off-site units/(ownership)	6	0	6
Accessory apartments/(rental)	0	10	10
Small Repair Grant Program/(ownership)	0	10	10
<i>Subtotal</i>	20	62	82
Year 2 – 2021			
Mixed-use development/East Milton Square 40B/(rental)**	50	0	50
Development of publicly-owned property/Town Farm/”Friendly 40B” (rental)**	35	0	35
Accessory apartments/(rental)	0	10	10
Small Repair Grant Program/(ownership)	0	10	10
<i>Subtotal</i>	85	20	105

Year 3 – 2022			
Potentially covered by certification under Year 2			
Mixed-use Development/Milton Village PUD (rental) @ 15% affordability	6	34	40
Adaptive reuse/Veterans housing on Granite Avenue/”Friendly 40B”/(rental)**	30	0	30
Scattered-site infill development/group home (special needs rental)	8	0	8
Development of publicly-owned property and adjacent private property/Selectmen’s parcel off access road*/”Friendly 40B”/ (ownership)	6	18	24
Accessory apartments/(rental)	0	10	10
Small Repair Grant Program/(ownership)	0	10	10
<i>Subtotal</i>	<i>50</i>	<i>72</i>	<i>122</i>
Year 4 – 2023			
Potentially covered under Year 3 certification			
Mixed-use Development/East Milton Square 40R (rental)**	20	0	20
Scattered-site infill development/”Friendly 40B” development/(ownership)	5	15	20
Adaptive reuse and Brownfield PUD/Paper Mill/(rental) @ 10% affordability	5	45	50
Scattered-site infill development/micro co-living units/”Friendly 40B”/(rental)**	15	0	15
Scattered-site infill development/pocket neighborhood/Habitat or Housing Trust (ownership)	5	0	5
Accessory apartments/(rental)	0	10	10
Small Repair Grant Program/(ownership)	0	10	10
<i>Subtotal</i>	<i>50</i>	<i>80</i>	<i>130</i>
Year 5 – 2024			
Potentially covered under Year 4 certification			
Adaptive reuse/senior housing/”Friendly 40B”/(rental)**	40	0	40
Scattered-site infill development/ small pocket neighborhood/”friendly 40B” (ownership)	3	7	10
Scattered-site infill development/conversion of large home/”Friendly 40B”/(ownership)	1	3	4
Scattered-site infill development/”Friendly 40B”/(rental)**	6	0	6
Accessory apartments/(rental)	0	10	10
Small Repair Grant Program/(ownership)	0	10	10
<i>Subtotal</i>	<i>50</i>	<i>30</i>	<i>80</i>
Total	255	264	519

* Final determination of the use of existing Town-owned parcels for new affordable housing is subject to a more thorough feasibility analysis of site conditions and Town Meeting approval. If any of the

preliminarily identified existing Town-owned properties are finally determined infeasible or do not obtain approval from Town Meeting, it is anticipated that the projected numbers of affordable units would be met through the acquisition of privately-owned properties, private development or other Town-owned property.

** All units count in SHI for Chapter 40B/40R rental projects.

VI. HOUSING STRATEGIES

This Housing Production Plan involves a package of proactive strategies for promoting affordable housing which have been informed by the following sources:

- Previous plans, including the 2004 Community Development Plan, 2006 Affordable Housing Plan, 2014 Housing Production Plan, and the 2015 Master Plan.
- Reports and studies such as MAPC's report in preparation for the Urban Land Institute's (ULI) charrette on East Milton Square and a potential Chapter 40R district, Milton Village Mixed-Use Study, Milton Housing Overview prepared by the Massachusetts Housing Partnership, and materials on the Milton Town Farm.
- Interviews with local and regional housing stakeholders.
- Meetings of the Select Board's Housing Subcommittee and HPP Working Group.
- Community Housing Forum held on September 14, 2019 and a second public meeting on January 27, 2020.
- Prior and present Milton housing initiatives and the experience of other comparable localities in the area and throughout the Commonwealth.
- The findings in the Housing Needs Assessment included in this Plan.

The strategies are grouped according to the type of action proposed – Zoning Strategies, Capacity-Building Strategies, Housing Production Strategies, and Housing Preservation Strategies – and prioritized by the estimated time for implementation. For example, first priority strategies are those that can begin within the next two years, most of which will involve some immediate actions. Other actions are identified for focused attention after the next couple of years, working towards implementation after Year 2 but before Year 5. A summary of these housing strategies is included as Table I-1.

The strategies also reflect state requirements that ask communities to address all of the following major categories of strategies to the greatest extent applicable:³⁶

- Identification of zoning districts or geographic areas in which the municipality proposes to modify current regulations for the purposes of creating affordable housing developments to meet its housing production goal;
- Identification of specific sites for which the municipality will encourage the filing of comprehensive permit projects;
- Characteristics of proposed residential or mixed-use developments that would be preferred by the municipality;
- Municipally owned parcels for which the municipality commits to issue requests for proposals to develop affordable housing; and
- Participation in regional collaborations addressing housing development.

It should be noted that a major goal of this Plan is not only to strive to get closer to the state 10% goal under Chapter 40B, but to also to serve the wide range of local housing needs. Consequently, there are instances where housing initiatives might be promoted to meet these needs that will not necessarily result in the inclusion of units in the Subsidized Housing Inventory (examples potentially include the

³⁶ Massachusetts General Law Chapter 40B, 760 CMR 56.03.4.

promotion of accessory apartments or mixed-income housing that includes “community housing” or “workforce housing” units)³⁷.

Within the context of these compliance issues, local needs, existing resources, affordability requirements, sources listed above, and the goals listed in Section I.C of this Plan; the following housing strategies are proposed. ***It is important to note that these strategies are presented as a package for the Town to consider, prioritize, and process, each through the appropriate regulatory channels.***

A. Zoning Strategies

Zoning can be a very powerful tool for incentivizing new development and guiding it to appropriate locations, particularly in communities with limited financial resources for subsidies.

Housing production is contingent not only on actual development projects but also on the planning and regulatory tools that enable localities to make affordable housing economically feasible and effectively guide housing creation. To execute the strategies included in this Plan, greater flexibility is needed in the Town’s Zoning Bylaw. The Town of Milton should consider the following zoning-related strategies to promote the creation of additional affordable units.

1. Adopt Additional Zoning for Mixed-Use Development

Responsible Parties: Planning Board with support from the Select Board’s Housing Subcommittee and Affordable Housing Trust

Priority 1: Years 1-2

Current Status: Milton has made significant progress in promoting mixed residential and commercial development through the following important efforts:

- New Zoning***

Milton adopted the Central Avenue Planned Unit Development (PUD) bylaw that has already resulted in new mixed-use development at 131 Eliot Street. This project is currently under construction and will include four affordable units. Additionally, new zoning was created as part of the Parkway Planned Unit Development and Brownfield Planned Unit Development to accommodate projects that will include mixed uses as well as affordable housing.

- Milton Hill House***

The Town received a \$1 million grant from the state’s MassWorks Program to connect two business districts – Milton Village and the Central Avenue Business District – and pursue transit-oriented development as both districts are adjacent to MBTA train stations. The Milton Hill House at 50 Eliot Street was subsequently built that includes 27 total units, three of which are affordable.

³⁷ In this Plan, “community housing” refers to units directed to those earning between 80% and 100% AMI, whereas “workforce housing” refers to units directed to those earning between 80% and 120% AMI, but still typically priced out of the private housing market.

- *The Residence at Brook Hill/36 Central Avenue*

The Town also approved a project at 36 Central Avenue in the business district through its Planned Unit Development (PUD) bylaw that included 18 residential units, two of which are affordable, as well as three commercial units. The market rate units were priced between \$399,000 and \$589,000 and the affordable units sold for \$157,000.

- *Parkway Planned Unit Development*

The Town created and passed new zoning through the Parkway Planned Unit Development (PUD) bylaw for the property known as the Ice House on 2.5 acres along Blue Hill Parkway. The zoning was adopted to permit the development of 12,000 square feet of commercial space for a small food market and five to twelve small residential units on the lot (including affordable units) with the additional ability of incorporating a smaller 3,000 square foot bank building if wanted.

- *Milton Village Zoning Study*

A key Master Plan recommendation is the adoption of a Mixed-use Overlay District that would encourage “above the shop” housing as well as additional retail and dining options, pocket parks, and streetscape improvements. Pursuant to this recommendation, the Town commissioned a study for adopting such zoning in the Milton Village/Milton Landing area, beginning work with MAPC in 2017. The Master Plan Implementation Committee, with support from the Town’s Planning Department, MAPC funding, and additional support from a Barr Foundation grant, is overseeing the study which includes the preparation of a zoning bylaw, the Milton Village Mixed-use Planned Unit Development (PUD) bylaw. Key components of this zoning include incentives for streetscape improvements, water access, historic preservation, and affordable housing through density bonuses.

The key goals of the proposed zoning would be to:

- Enhance the character of the district, targeting certain types of development opportunities.
- Invite investment and economic development to increase the feasibility of redevelopment activity.
- Promote ground-floor commercial space with residential units on the upper floors, not currently allowed in the district.
- Strengthen district vitality that frame street frontages and improve streetscape conditions.
- Preserve significant history and legacy to reduce development pressures on historically significant structures as much as possible through bonus incentives.
- Increase the range of housing types to allow smaller unit sizes and affordable units with a requirement that a percentage of the units be affordable.
- Strengthen the tax base by increasing allowed commercial and residential spaces and reducing the amount of land devoted to free parking.
- Mitigate potential impacts related to traffic, safety, parking, or historic preservation while providing incentives through bonuses for streetscape improvements, public amenities, or historic preservation.

- *East Milton Square Study and Charrette*

The Town has been exploring the feasibility of mixed-use development in East Milton Square. This included a data report prepared by the Metropolitan Area Planning Council (MAPC) that provided the basic information to support an Urban Land Institute (ULI) Technical Assistance Program (TAP) effort. The TAP included a charrette on development options and the possibility of a follow-up Chapter 40R Smart Growth Overlay District feasibility study. There are hopes for significant redevelopment opportunities in the area, and a developer has already proposed a mixed-use building. East Milton Square continues to be a smart location for guiding new development including more diverse housing types.

Next Steps: In an effort to promote smart growth and mixed-income development, the Town should act take action to adopt new zoning in Milton Village and East Milton Square.

First, the Planning Board has drafted and approved a bylaw to establish a Mixed Use PUD bylaw for the Milton Village/Milton Landing area and is moving towards a hopeful approval at the spring 2020 Town Meeting.

Second, the Planning Board might prepare another version of the Milton Village PUD bylaw for East Milton Square but should consider the alternative of adopting a 40R Smart Growth Overlay District as well as other state resources to support mixed-use development with affordable housing in East Milton Square. As noted above, MAPC has already conducted some preliminary research on specific area characteristics and properties with the Urban Land Institute (ULI) providing additional guidance on redevelopment opportunities.

Chapter 40R is an effective tool that promotes mixed housing and commercial development to take place within the context of carefully planned guidelines developed with substantial community participation. Through Smart Growth Overlay Districts, 40R was created to encourage compact, mixed-income, mixed-use, and by-right development in appropriate locations to better manage residential growth. Eligible areas are near transit, city/town centers, commercial areas and other suitable locations. Planning Boards, which typically administer the bylaw, could through site plan approval be “able to ensure that what is built in the District is compatible with and reflects the character of the immediate neighborhood.”³⁸

Chapter 40R also comes with a number of important advantages including:

- Allows “as-of-right” development meeting specified densities with a range of housing types.
- Promotes greater walkability and access to goods, services, transit and amenities.
- Allows design controls through zoning guidelines.
- Provides that 20% of the units shall be affordable, helping the community towards the 10% state affordability threshold and annual housing production goals.³⁹
- Provides two types of payments to municipalities.⁴⁰
- Offers a more competitive edge for state discretionary funds.

³⁸ “A Housing Strategy for Smart Growth and Economic Development: Executive Summary,” p. 4.

³⁹ It should be noted that many 40R bylaws require that 25% of units be affordable in a rental development so that the state will count the total number of project units as part of the SHI.

⁴⁰ There are also density bonus payments of \$3,000 for each residential unit issued a building permit and incentive payments based on the projected number of units proposed in the district.

An important consideration in mixed-use zoning involves parking requirements as mixed-use development poses opportunities for shared parking – residents using spaces in the evening and the public during the workday and typically smaller “above the shop” units require less parking.

- Provides additional benefits through insurance to towns that build affordable housing under 40R that they would not be saddled with the extra school costs caused by school-aged children who might move into this new housing under Chapter 40S.
- Encourages housing development on vacant infill lots and in underutilized nonresidential buildings.
- Permits the preservation of specific amounts of open space and the protection of historic districts.
- Promotes energy efficiencies and other sustainability provisions.
- Streamlines the approval of development proposals

that meet design guidelines and other requirements.

- Accommodates parking at an appropriate level in appropriate locations.
- Requires usable open space in critical areas.

The formal steps involved in creating 40R Overlay Districts are as follows:

- The Town holds a public hearing as to whether to adopt an Overlay District per the requirements of 40R;
- The Town applies to DHCD in a comprehensive application, including a detailed plan describing the district and the proposed new zoning;
- DHCD reviews the application and issues a Letter of Eligibility if the new zoning satisfies the requirements of 40R and the plan is complete;
- The Town adopts the new zoning through a two-thirds vote of Town Meeting subject to any modifications required by DHCD;⁴¹
- The Town submits evidence of approval to DHCD upon the adoption of the new zoning; and
- DHCD issues a letter of approval, which indicates the number of incentive units and the amount of initial incentive payment.

It would be useful to also consider DIF and/or UCH-TIF programs as part of Milton’s efforts to promote mixed-use development, and a meeting with appropriate state representatives with the Office of Business Development and DHCD could be arranged to explore the regulatory requirements and potential benefits for implementation in Milton.

Resources Required: The application process will require a significant amount of staff time from the Director of Planning and Community Development and/or a consultant in the case of 40R. Donated time from the Planning Board would also be required with support from the Select Board’s Housing Subcommittee and Affordable Housing Trust.

⁴¹ If the Baker Administration’s recommendation under its Housing Choice Initiative passes, zoning-related approvals for housing could be reduced to a simple majority vote.

2. Explore Inclusionary Zoning

Responsible Parties: Planning Board with support from the Select Board's Housing Subcommittee and Affordable Housing Trust
Priority 1: Years 1-2

Inclusionary zoning, not currently included in Milton's Zoning Bylaw, is a zoning provision that requires a developer to include affordable housing as part of a development or potentially contribute to a fund for such housing. This mechanism has been adopted by more than half the communities in the state.

The Town has adopted inclusionary provisions as part of a number of Planned Unit Development (PUD) bylaws with a requirement that at least 10% of the units be affordable and eligible for inclusion in the SHI (e.g., Planned Unit Development, Planned Townhouse Unit Development, Great Estates Planned Unit Development, Central Avenue Planned Unit Development, Brownfield Planned Unit Development, Assisted Living Residence Development, Parkway Planned Unit Development). This has been an incremental approach towards project by project inclusion, but does not provide mandates or incentives for including affordable units in developments on a town-wide basis. Adopting a town-wide bylaw would enable Milton to have some affordability integrated into any new development or redevelopment project over a certain size.

Studies on inclusionary zoning indicate that mandatory provisions coupled with strong incentives are most effective in promoting affordable housing. It is important to provide sufficient incentives to developers to make sure that the incorporation of affordable units will be financially feasible. Incentives, such as density bonuses, also reduce the risk of litigation from developers who claim that the mandatory inclusion of affordable units involves a "taking" of their property rights. In fact, inclusionary zoning can be legally vulnerable if requirements make it impossible for the developer to earn a reasonable return on the project as a whole.

Many of the municipalities that have inclusionary zoning in place are reaping the rewards of these actions through the creation of actual affordable units and/or cash contributions to the locality for investment in other affordable housing production efforts. Most of the by-laws include mandated percentages of units that must be affordable, typically 10% to 20%, coupled with density bonuses. Some also allow the development of affordable units off-site and/or cash in-lieu of actual units. Table VI-1 provides a summary of some inclusionary zoning requirements from other communities.

Providing options for developers as part of inclusionary zoning mandates will likely result in the greater use of the bylaw. If a payment in-lieu of units is adopted, it will be essential that the formula for calculating the fee provide sufficient proceeds to fully subsidize the required number of affordable units despite changes in market conditions and to ensure that the funding will be dedicated to supporting affordable housing. The cash-out fee should be tied to the value of the affordable unit. From a theoretical standpoint that value is commonly considered to be the difference between a unit's market-rate price and the affordable one. This means that the value of the cash-out fee relates to the losses the developer would suffer by building affordable units. Stronger fees typically match the value of the affordable unit not built, allowing the fee to subsidize the same number of units in a separate project.

A simple formula, adopted by Somerville and Groton for example, would be the difference between the market sales price and the affordable one with the affordability based on the state's formula for calculating the purchase price through the Local Initiative Program (LIP). The per-unit fee would be

multiplied by the number of affordable units required under the permitting, bearing in mind differences in number of bedrooms.

Another consideration is adopting the cash-out fee calculation included in Watertown's inclusionary zoning bylaw in which the cash payment is equal to the most current Total Development Costs (TDC) as articulated in the MA Department of Housing and Community Development's Qualified Allocation Plan (QAP) for projects using the Low-Income Housing Tax Credit. These costs are determined by whether the units are part of a production or preservation project, are outside or within the Metro Boston area and by the type of housing to be built. For example, a production project with small units in an urban area within the Metro Boston area would have a TDC cap of \$379,000, a project with large units would have a cap of \$399,000 based on the 2018-2019 QAP. For Milton this would range from \$259,000 to \$349,000 in 2018-2019.

There are a variety of by-laws that have been adopted in localities throughout the state and requirements vary considerably. The Executive Office of Environment and Energy's Smart Growth Toolkit includes a model inclusionary zoning bylaw that highlights key local decisions and makes some commentary for consideration throughout (www.mass.gov/envir/smart_growth_toolkit/pages/SG-by-laws.html). The Citizen Planner Training Collaborative website has a model bylaw with commentary and some policies as well (www.umass.edu/masscptc/exampleby-laws.html).

Table VI-1: Summary of Inclusionary Zoning Requirements in Other Communities

Municipality	Required Percentage of Affordable Units	Minimum Project Size	Payment-in-lieu of Affordable Units
Amherst	Based on project size Ranges from 7% to 12%	10 Units	No ⁴²
Arlington	15%	6 Units	Yes
Barnstable	10%	10 Units	Formed a committee to study
Belmont	10%, 12.5% or 15% depending on project size	2 single-family or two-family homes	Yes
Brookline	15%	6 Units	Yes
Cambridge	15%**	10 Units	Yes
Duxbury	10%	6 Units	Yes
Hopkinton	10%	10 Units	Yes
Medway	10%	6 Units	Yes
Newton	15%	4 Units*	Yes
Somerville	12.5% to 20% depending on location	6 Units*	Yes
Tewksbury	15%	4 Units*	Yes
Watertown	12.5% to 15%	6 Units	Yes
Wellesley	20%	5 Units	Yes
Yarmouth	20%	5 Units	Yes

*Zoning indicates that the calculation of a fractional unit of 0.5 or more shall be regarded as a whole unit. With a 12.5% to 15% affordability requirement, the 0.5 threshold occurs with four (4) total units. ** Considering increasing the percentage to 20%.

⁴² A cash in-lieu fee was recommended as part of the Housing Production Plan that the Town approved in 2014.

Next Steps: The Milton Planning Board, with support from the Affordable Housing Trust and Select Board's Housing Subcommittee, should explore models and prepare a zoning amendment that is best suited to promoting affordable housing in Milton. Ideally the adoption of this bylaw would lead to the production of actual housing units, but may also deliver payments in-lieu of actual units to help capitalize Milton's Affordable Housing Trust Fund.

Based on Milton's housing values, the Planning Board should consider increasing the affordability requirement to 15% or implement sliding scale requirements based on the size of the development, such as been done in other locations including Watertown as summarized below. The higher percentage would be applied to areas where property values are likely higher and greater density is appropriate such as in Milton's commercial areas and/or near transit.

It should also be noted that while off-site units were approved as part of the Wolcott Woods development, it is challenging to ensure that these affordable units are comparable to the on-site ones and such approvals should only be granted under extenuating circumstances.

It will be important to also ensure that all affordable units produced through the bylaw get counted as part of the Subsidized Housing Inventory, applied through the Local Initiative Program (LIP) administered by DHCD if another housing subsidy is not used. Some clearly designated oversight and familiarity with state requirements is required. The monitoring of projects to ensure continued affordability based on use restrictions would be the responsibility of a designated monitoring agent, DHCD in the case of LIP units, however towns also have a role in supporting the monitoring process. These would be important functions of the Assistant Planner.

Model: Watertown Affordable Housing Requirements (Inclusionary Zoning)

Watertown relatively recently modified its affordable housing/inclusionary zoning requirements to better promote such units and to strengthen provisions given dramatic increases in housing prices that have been eroding the community's more affordable private housing stock. The rent and ownership price requirements are as follows:

Total Project Size	Affordable Units	Rental Price	Ownership Price
1 to 5 Units	0	NA	NA
6 to 19 Units	12.5%	80% AMI	80% AMI
20+ Units	15.0%	No less than 5% of the total units at 65% AMI 10% of total units at 80% AMI	80% AMI

Source: Watertown Zoning Bylaws, Section 5.07.

This bylaw allows the developer to pay cash-in-lieu of actual units into the Town's Affordable Housing Fund. The payment is based on DHCD's annual Qualified Allocation Plan for the Low Income Housing Tax Credit for the HUD designated area adjusted for the type of project and number of units. For Milton this would range from \$259,000 to \$349,000 in 2018-2019.

Resources Required: Time of the Director of Planning and Community Development and the Planning Board to conduct a significant community outreach and education process and to present the inclusionary zoning bylaw to Town Meeting. It will also be important to have staff oversight to ensure that all state affordable housing requirements are met, likely from the Assistant Planner. If payments in-lieu of actual affordable units are involved, the Assistant Town Planner will need to work with the Affordable Housing Trust to oversee the proper transfer of funds.

3. *Explore Opportunities for Streamlining the Permit Approval Process for Affordable Housing Including Affordable Housing Guidelines*

Responsible Parties: Planning Board with support from the Select Board's Housing Subcommittee and Affordable Housing Trust
Priority 2: Years 3-5

Current Status: It is essential that every municipality have a local regulatory process that protects the city or town from development that is not in the best interest of its citizenry. However, the time and costs associated with this regulatory process have been considered by some to be unduly burdensome, and therefore some municipalities have attempted to make the regulatory permit process easier to navigate, providing greater guidance to applicants on requirements and more predictability in the process. While the processing of building permits for single-family homes results in a relatively quick turn-around, regulatory approvals involving larger projects are likely to deserve greater scrutiny but frequently encounter overly burdensome red tape and delays.

Next Steps: The Planning Board should determine whether there is a need to expedite the review and approval of housing developments that involve affordable housing. Town officials and appropriate staff should work closely with the Director of Planning and Community Development to review the current process, explore what other towns are requiring as part of the permitting process, and make recommendations on possible reforms to the system if and where appropriate. Updated informational materials and development criteria that clearly articulate the requirements involved in obtaining permit approvals should be written and available to potential developers.

The Town of Milton should also consider preparing Housing Guidelines as a helpful tool for promoting more responsive private development and greater cooperation between the Town and private for-profit and non-profit developers on affordable housing production. This Housing Plan identifies development opportunities leading to the production of affordable housing units over the next five years which will require private initiative and investment for implementation. To this end, the Town should consider affecting the types of housing proposals submitted through the creation of reasonable Housing Guidelines that provide input on projects that will be acceptable to the community and therefore will more likely avoid prolonged and often litigious battles.

Affordable Housing Guidelines provide an aid to both non-profit and for-profit housing developers to help them plan for residential development that will be in line with what the community seeks in affordable housing related to scale, siting, density, levels of affordability, location, design, etc. The Guidelines can also include policy statements on such issues related to affordable unit condo fees and assessments as well as fair housing rules and practices for example. Through such Guidelines the developer "wins" because there is greater predictability in what the Town is willing to approve, and the Town "wins" because it gets new affordable units that meet locally established development criteria that help address local needs and goals. These Guidelines will contribute to a more open environment

where developers who adopt these development criteria can approach the Town with the expectation that they will likely be able to pursue their project through a “friendly” Chapter 40B process or normal regulatory channels, working with instead of against the Town on housing creation strategies.

The Planning Board, working in coordination with representatives of the Select Board’s Housing Subcommittee, the Affordable Housing Trust, and Zoning Board of Appeals, should draft Affordable Housing Guidelines and share them with the Select Board, Housing Authority, Conservation Commission, Board of Health, and other interested boards and committees for review and comment. The Guidelines can then be finalized as local policy and made public.

There are a number of good models of such Guidelines. For example, the Town of Needham has approved Local Chapter 40B Guidelines, which can be reviewed and adapted to Milton.

Resources Required: Time of Planning Board, Affordable Housing Trust, and Select Board’s Housing Subcommittee with staff time from the Director of Planning and Community Development and Assistant Planner.

4. ***Amend the Accessory Apartment Bylaw***

Responsible Parties: Planning Board with support from the Select Board’s Housing Subcommittee and Affordable Housing Trust
Priority 1: Years 1-2

Current Status: The current Zoning Bylaw allows accessory apartments (also typically known as in-law apartments or accessory dwelling units) within detached single-family dwellings through a special permit process and refers to them as temporary apartments. The bylaw only permits these units in owner-occupied homes where at least one of the tenants is a family member. The units cannot be more than 800 square feet in size or greater than one-third the floor area of the existing house. The temporary apartment must be entirely contained within the existing house or on the second floor of a garage without any exterior indication of its existence with the exception of safety requirements. Any additional parking that is required must be screened from the view of neighbors. The term of the special permit is four years. (Section III.A. of the Zoning Bylaw)

The Town has permitted 28 accessory apartments under the bylaw; however, it is generally recognized that there may be a significant number of unauthorized apartments in town which may pose health and safety hazards. Enforcing the provisions of the bylaw has been challenging as property owners do not readily come forward after the four-year term to demonstrate continued compliance and renew their permit.

Accessory units can be helpful in meeting a number of public policy objectives including:

- Enable homeowners to earn additional income, which is particularly important for elderly homeowners, single parents, and others for whom such income may be critical to remaining in their homes. Also, without the flow of income from the rent of an accessory apartment, some young families or moderate-income households might not be able to afford homeownership. **The required occupancy of a family member can limit this income-earning potential.**
- Provide appropriately sized units for growing numbers of smaller households.

- Offer a fairly inexpensive means of increasing the rental housing stock at lower cost than new construction and without significant impact on the surrounding neighborhood.
- Limit fiscal impacts as the creation of accessory units does not require additional Town services such as new streets or utilities and does not involve the loss of open space.
- Provide companionship in some circumstances as well as potential added security and services for the homeowner or tenant.
- Offer good opportunities for keeping extended families in closer contact as recognized by the current bylaw.
- Generate tax revenue in a locality because accessory units typically add value to existing homes.

Changes to state requirements for counting accessory apartments as part of the Subsidized Housing Inventory (SHI) have dampened the enthusiasm of most localities in pursuing an affordable accessory apartment component to their local bylaws. The major change affected the tenant selection process, requiring owners of such units to fill their units from a pre-qualified list established by the municipality in conformance with state requirements including Fair Housing laws. Additionally, deed restrictions are required but can be revoked upon the discretion of the owner, in which case the unit is removed from the Subsidized Housing Inventory.

Next Steps: Because accessory apartments provide small rental units that diversify the housing stock within the confines of existing dwellings or lots, the Town should consider amending the bylaw to better promote such units even if they are not eligible for inclusion in the Subsidized Housing Inventory. These units provide another housing choice for Milton's elder residents and single-person households looking for smaller and typically more affordable units in the local housing stock. Additionally, young people who cannot yet afford to buy a home might be able to do so with the benefit of some rental income as lenders generally count about 75% of rents as additional income in underwriting criteria.

In order to better promote new accessory units, the Town will consider amending its Zoning Bylaw as follows:

- Eliminate the requirement that the occupant be a family member,
- Extend use to detached accessory structures, and
- Explore an amnesty program to allow illegal apartments to receive the appropriate permitting.

There are many variations of accessory apartment bylaws that have been adopted in other communities. Milton's Planning Board, working in conjunction with the Affordable Housing Trust and the Select Board's Housing Subcommittee, will review other bylaws and suggest amendments that will better meet the needs of the community.

Resources Required: Staff time from the Director of Planning and Community Development, Assistant Planner and Building Commissioner as well as donated time of local officials including members of the Planning Board, Affordable Housing Trust, and Select Board.

5. ***Amend the Condo Conversion Bylaw***

Responsible Parties: Planning Board with support from the Select Board's Housing Subcommittee and Affordable Housing Trust
Priority 1: Years 1-2

Current Status: Milton's Zoning By-law allows the conversion of existing buildings on large tracts of land to be converted to single-family condominiums in Residence Districts through a special permit.⁴³ The purpose of this zoning was "to create new housing involving relatively little new construction, to generate tax revenue to the Town, to preserve existing buildings, to preserve the residential character of the Town and to preserve open space in the Town". While these are worthwhile goals, this zoning has been largely ineffective given significant constraints to its use including a minimum parcel size of 10 acres, that the building must be built prior to January 1, 1980, and limitations to the number of units that can be created for example.

Next Steps: The Planning Board should revisit this bylaw and prepare an amendment that will better promote such conversions, also including provisions to ensure that a certain percentage of the units will be affordable.

Resources Required: Staff time from the Director of Planning and Community Development and Assistant Planner as well as donated time of local officials including members of the Planning Board, Affordable Housing Trust, and Select Board.

B. Capacity-Building Strategies

It should be noted that as recommended in the 2014 Housing Production Plan, the Town has created an Assistant Planner position that has been helpful in moving the Town's housing agenda forward. The Town has also operationalized its Affordable Housing Trust.

In order to be able to carry out the strategies included in this Housing Plan, it will be important for the Town of Milton to build its capacity to promote affordable housing activities. This capacity includes gaining access to greater resources – financial and technical – as well as building local political support, further developing partnerships with public and private developers and non-profit service providers, and creating and augmenting local organizations and systems that will support new housing production. Fundamental to building local capacity is the need for local leaders to establish a strong voice for housing, advocating for the siting and funding of affordable housing in Milton.

1. Conduct Community Outreach and Education

*Responsible Party: Affordable Housing Trust
Priority 1: Years 1-2*

Current Status: Because most of the housing strategies in this Housing Plan rely on local approvals, including those of Town Meeting, community support for new initiatives has and will continue to be essential. Strategic efforts to better inform residents and local leaders on the issue of affordable housing and specific new initiatives can build local support by generating a greater understanding of the benefits of affordable housing, reducing misinformation, and dispelling negative stereotypes. These outreach efforts are mutually beneficial as they provide useful information to community residents and important feedback to local leaders on community concerns and suggestions.

⁴³ Milton Zoning By-law, Section VI,L.

Next Steps: The presentation of this Housing Production Plan will continue to offer another opportunity to bring attention to the issue of affordable housing, offering updated information on housing needs and proposed strategies that can help attract community support for affordable housing initiatives. Other education-related opportunities will be pursued such as:

- *Forums on specific new initiatives*

As the Town engages in new housing efforts (e.g., special programs, new zoning, development projects, etc.), the sponsoring entity will hold community meetings to ensure the inclusive and transparent presentation of these initiatives to other local leaders and residents, providing important information on what is being proposed and opportunities for feedback before local approvals are requested.

- *Housing summits*

Most communities lack an effective mechanism for promoting regular communication among relevant Town boards and committees on issues related to affordable housing. Having a forum to share information on current housing issues would help foster greater communication and coordination among these entities. Additionally, inviting residents can help build community interest, improve communication, and garner support. Many communities are sponsoring special events, at least on an annual or regular basis. For example, Truro organized a panel discussion on housing issues, inviting representatives of other towns on the Cape and organizations involved in affordable housing. Yarmouth held a spaghetti dinner and offered an update on their affordable housing initiatives with opportunities for feedback from local leaders and the public.

- *Public information on existing programs and services*

High housing costs are creating substantial burdens for lower income residents. For example, renters continue to confront difficulties finding safe and decent rental units. Owners, including seniors living on fixed incomes, are finding it increasingly difficult to afford the costs associated with taxes, energy costs, insurance and home improvements; and some are even faced with foreclosure. Additionally, some seniors and those with special needs require handicapped adaptations, home repairs, and special services to help them remain in their homes.

The Town will get the word out about existing programs and services that support homeownership, property improvements, or help reduce the risk of foreclosure including first-time homebuyer and foreclosure prevention counseling from regional housing organizations.

- *Educational opportunities for board and committee members*

Local boards such as the Select Board, Board of Appeals, Planning Board, the Affordable Housing Trust, and other interested local leaders should be able to receive ongoing training on affordable housing issues. Well advised and prepared board and committee members are likely to conduct Town business in a more effective and efficient manner. New members without significant housing experience would benefit substantially from some training and orientation. Moreover, requirements keep changing and local leaders must keep up-to-date. Funding for the professional development of staff, including the Director of Planning and Community Development, Town Administrator, and Assistant Town Planner, would also help keep key staff informed on important new developments, best practices, and regulations.

The University of Massachusetts Extension's Citizen Planner Training Collaborative (CPTC) offers classes periodically throughout the year and will even provide customized training sessions to individual communities. The Massachusetts Housing Partnership (MHP) conducts its Massachusetts Housing Institute at least annually to help local leaders better understand the affordable housing development process and play an effective role in initiating and implementing local solutions to increasing housing choices.

Other organizations and agencies, such as DHCD, MHP, CHAPA, and the Community Preservation Coalition, also provide conferences and training sessions on a wide variety of housing issues that would be useful for local officials and staff persons to attend. In addition, there are numerous written resources for localities. For example, DHCD has prepared a procedural "how to" booklet for local communities on the development process, MHP has many technical guides for localities, and CHAPA has a wide variety of reports on many issues related to affordable housing as well.

- *An Enhanced Website*

The Town of Milton has a website that offers an excellent opportunity to provide additional information and links on affordable housing issues, programs and services. For example, the Town of Lexington's website includes a special section on its Affordable Housing Partnership that includes information on the organization, local housing needs, Partnership activities, special events, available housing, etc., which could serve as a model for the Milton website. Needham also has a good housing section as part of the Town's website under the Planning and Community Development Department that would serve as a good model.

- *Cable Programming*

The Town has local cable access, and the Housing Trust and Planning Board could sponsor regular programming to showcase housing issues, highlighting new initiatives as well as ongoing programs and services. For example, the Town of Harwich's Housing Partnership sponsored a monthly program to showcase the issue of affordable housing in the community.

- *Outreach on State Affordability Requirements*

It will be helpful for developers of affordable housing to fully understand all necessary local and state affordability requirements to ensure that all designated affordable units will be eligible for inclusion in the SHI.

Resources Required: Public outreach will require significant time and involvement of the Assistant Planner and significant time from various Town boards and committees including the Fair Housing Committee and Affordable Housing Trust.

2. *Capitalize the Affordable Housing Trust Fund*

Responsible Party: Select Board

Priority 1: Years 1-2

Current Status: The Town of Milton approved the establishment of an Affordable Housing Trust Fund at its 2010 Annual Town Meeting. This action was pursuant to state legislation that passed in 2005, called the Municipal Affordable Housing Trust Fund Act, which simplified the process of establishing such

dedicated funds for affordable housing. Previously cities could create trust funds through their own resolution, but towns had to get approval from the legislature through a home rule petition.

The law provides guidelines on what trusts can do and allows communities to collect funds for affordable housing, segregate them out of the general budget into an affordable housing trust fund, and use these funds without going back to Town Meeting for approval. It also enables these trust funds to own and manage real estate, not just receive and disburse funds. The law further requires that local housing trusts be governed by at least a five-member board of trustees, appointed by the Select Board in the case of towns. While the trusts must comply with Chapter 30B, the law which governs public procurement as well as public bidding and construction laws, most trust funds do not develop properties themselves but convey property to a developer by a sale or long-term lease so as to clearly differentiate the resulting affordable housing development project from a public construction project.

In addition to having a fund available to support affordable housing development, the new Milton Housing Trust has been able to provide the following important capacities:

- Offer an organizational framework for ensuring that new affordable housing is sensitive to local needs and gains the necessary political support.
- Become an effective broker for housing resources, including donated land and money, to be dedicated to affordable housing initiatives and managed by the Trust.
- Serve as an articulate advocate for affordable housing in the community, sponsoring events and special forums to bring attention to the issue and promote local support. This local outreach helps dispel negative stereotypes about affordable housing and establishes a more productive dialogue within the community.
- Work cooperatively with developers, for profit and non-profit, on actual development projects, to ensure better compatibility with local concerns, needs and priorities as well as compliance with state requirements.
- Act as a vehicle for the community to expedite new production efforts such as acquiring property through the housing support fund and overseeing the implementation of local housing strategies.
- Seek funding to manage special programs such as the proposed Small Repair Grant Program (see strategy VI.D.1). The Town has a precedent for providing funding to the Housing Trust through its annual budget, also providing an opportunity to bring attention to the issue before Town Meeting.

Because of such high and rising property values, the affordability gap is increasing and thus requiring higher levels of subsidies to make projects that include affordable units financially feasible. Moreover, because the most critical housing needs are for those earning at or below 50% of area median income, additional levels of subsidy funds are required to reach this population. Consequently, the Town will need to work with developers that have proven track records in obtaining financing from the state and/or federal government including Low Income Housing Tax Credit and HOME funds. It should also explore additional housing resources for tapping into further consistent funding streams that are discussed below, potentially in concert with neighboring communities.

Next Steps: To further capitalize the Affordable Housing Trust Fund, the Town should explore sustainable sources of financing to support local housing initiatives and serve as a gap filler in housing production projects including:

Foremost is funding from the Community Preservation Act which establishes the authority for municipalities in the Commonwealth to create a Community Preservation Fund derived from a surcharge of 1% to 3% of the property tax and matched by the state. Once adopted, the Act requires at least 10% of the monies raised to be distributed to each of three categories – open space/recreation, historic preservation and community housing – allowing flexibility in distributing the majority of the money to any of the three uses as determined by the community. CPA has been a vital resource for many communities in the Commonwealth with the following accomplishments:

- 175 communities have adopted CPA, representing half of the Commonwealth's cities and towns.
- Just over \$2.1 billion has been raised to date for community preservation funding statewide.
- Over 10,000 projects have been approved by local legislative bodies.
- More than 5,700 affordable housing units have been created with an additional 9,450 units supported.
- Nearly 30,000 acres of open space have been preserved.
- Over 5,100 appropriations have been made for historic preservation projects.
- Over 2,200 outdoor recreation projects have been initiated.

CPA funding would be a valuable resource for the Milton community given existing housing needs, its historic character, and the limited amount of undeveloped property available. Moreover, Milton is missing an opportunity to leverage considerable state resources.

The Town has pursued the adoption of CPA in the past. This effort unfortunately failed in November 2012 with a 1.5% surcharge and exemptions for low-income homeowners and the first \$100,000 of residential property value. The Town should embark on another attempt to pass CPA at some point in the future. The Community Preservation Coalition is available to support community efforts related to the CPA and have an excellent web site at www.communitypreservation.org.

In addition to CPA, the following additional sustainable housing funding streams might be considered:

- Continued allocation of funds from the annual budget to the Housing Trust.
- Passing a Town-wide Inclusionary zoning bylaw and allowing payments in-lieu of units (see strategy VI.A.2).

Creative Community Models for Capitalizing the Housing Trust

Scituate's Town Meeting funded its Housing Trust with \$700,000 of Community Preservation funding from its community housing reserves. The Town of Harwich has committed lease payments from its cell tower as well as sale proceeds of a Town-owned property (fetching more than a million dollars) to its Housing Trust Fund. Other communities have obtained funding from developers through negotiations on proposed developments and donations of property or funding. Some communities, like Sudbury and Grafton for example, are annually providing their Affordable Housing Trusts with 10% of the total CPA funding available and encouraging additional housing proposals for specific projects.

- Providing information to owners on the *potential tax advantages* of donating property or selling property at a discounted price for charitable purposes.
- Sponsoring *special fundraising events* that can not only raise awareness on the issue of affordable housing but also raise donations to the Housing Trust Fund.

- If passed, using *regional appropriations of CPA funding* based on the premise that housing that is developed in one community is likely to benefit residents of other nearby communities as well.

Model: Cape Cod Village

The Cape Cod Village (CCV) project provides a safe and caring home environment for 15 income-eligible (80% or less of area median income) adults with autism at a site in downtown Orleans. The project includes two duplex homes with four residences on each side as well as a common building where residents can gather with their families and other members of the community for programs, activities and events. The campus-like setting also includes spaces for outdoor activities. The development is staffed 24 hours a day. The \$5,225,000 development budget included \$950,000 in CPA donations from the following communities:

Orleans	\$450,000
Chatham	\$100,000
Brewster	\$100,000
Wellfleet	\$100,000
Eastham	\$100,000
Truro	\$50,000
Provincetown	\$50,000

Resources Required: Donated time of volunteers to seek support and approval of CPA in Milton. Significant organizational and operational time and effort will be required.

C. Housing Production Strategies

To effectively implement the actions included in this Housing Plan, it will be essential for the Town of Milton to reach out to the development community and sources of public and private financing to secure the necessary technical and financial resources. In fact, most of the production will require joint ventures with developers – for-profit and non-profit – to create affordable units. For example, competitive Requests for Proposals (RFP's) are necessary for the selection of developers of Town-owned property. For-profit developers continue to express interest in developing housing in Milton, and there are a number of pending development proposals. There are also non-profit organizations that have the capacity to undertake the development of affordable housing as they have successfully completed affordable housing projects in and near Milton and throughout the Boston area. Milton in fact has a home-based, non-profit developer with a proven track record in MRE. Partnerships with service providers may also be important in projects that are directed to special needs populations.

Milton also has several additional housing resources since the 2006 Housing Plan was produced. First, Milton has joined the South Shore HOME Consortium that is administered by Quincy and also includes the communities of Holbrook, Weymouth, and Braintree. HOME funding has ranged from about \$50,000 to \$80,000 annually. The Town was able to bank the funding for several years and allocated a substantial amount to support the Work Inc. special needs facility for five disabled young adults. The Town needs to explore other developments that can use HOME funds.

The Town has also established a Municipal Affordable Housing Trust Fund that provides a dedicated funding source for affordable housing. This Housing Plan includes a strategy for capitalizing this important Fund (see strategy VI.B.2). While the effort to adopt the Community Preservation Act (CPA) in 2012 failed, this Housing Plan suggests a renewed effort to obtain approval.

It will be important for Milton to leverage its limited local resources from state and federal agencies as mentioned earlier. The production of new affordable units could involve subsidies from a variety of sources, both public and private. In addition to the state's Department of Housing and Community Development (DHCD), other state and quasi-public agencies that have resources to support affordable and special needs housing include MassHousing, MassDevelopment, Department of Developmental Services (DDS), Department of Mental Health (DMH), Community Economic Development Assistance Corp. (CEDAC), Massachusetts Housing Partnership (MHP), and Massachusetts Housing Investment Corporation (MHIC). Because affordable housing is rarely developed without private financing, project developers will need to reach out to private lenders as well.

The affordable housing production strategies can be divided into three general categories of development:

1. *Development of Public Property*

While the Town has very limited municipally-owned property, the development of publicly-owned property should be pursued including potential state-owned property. Key to this Housing Production Plan is the development of the Governor Stoughton property, also known as the Town Farm.

2. *Larger-scale Private Development Including Mixed-Use and Transit-Oriented Development, Adaptive Reuse and Conversion of Large Properties*

The Town will also support development on private properties that can accommodate greater numbers of units and somewhat denser development. To do this the Town will need to work cooperatively with private developers, for-profit and non-profit, negotiating with these developers to ensure that new development satisfies local needs and priorities. Communities can help shape development proposals, including Chapter 40B comprehensive permit applications. Additional zoning changes will be needed, however, to allow more types of housing in more areas.

3. *Scattered-site Private Development*

This Plan also contemplates development of infill housing in residential neighborhoods that will have relatively limited impacts on any single neighborhood as affordable housing creation will be spread geographically throughout town. Additionally, the promotion of accessory apartments will also be scattered throughout Milton without significant changes to the built or natural environment.

It should be noted that the September 14, 2019 Community Housing Forum provided an opportunity for local leaders and residents to weigh-in on what actions would be included in this Housing Production Plan, also suggesting locations for new development or redevelopment. The following suggested locations varied from the more general to more specific and included a mix of publicly and privately-owned property:

General Locations

- Granite Avenue
- Small scattered infill development as opposed to large-scale denser development
- Milton Village
- East Milton Square

- Affordable housing in all new development irrespective of location
- Town land
- Apartments in existing homes
- State-owned land such as the DPW yard
- Historic estates
- Properties near public transit
- Lower Mills near the trolley
- Pre-existing nonconforming sites that might be suitable for residential use.

Specific Locations

- Town Farm
- Paper Mill Building on the Truman Parkway
- DPW yard
- Old Town dump
- Cunningham Park
- St. Agatha's/churches
- Town Center including the Police Station and Hospital
- Kidder Library
- Legion Post
- Turn deck into bus hub reaching up to Dorchester

The following strategies provide the basic components for the Town to produce new affordable housing:

1. *Make Publicly-Owned Property Available for Affordable Housing*

*Responsible Party: Select Board
Priority 1: Years 1-2*

Current Status: The contribution or “bargain sale” of land owned by the Town but not essential for municipal purposes could enable Milton to make substantial progress in meeting local housing needs, housing production goals, and getting closer to the 10% state affordability goal. The Town has a list of Town-owned and state-owned properties which will involve some greater scrutiny to determine appropriateness for development, including possible affordable housing.

As noted under Section III.C.2 of this Plan, a number of properties have been identified for potential development of affordable housing. Foremost is the Town Farm, which is managed by the Governor Stoughton Trust that is entrusted in ensuring that the restrictions on the deed are upheld, particularly the need to dedicate the property to serving the poor of the community. The property includes about 34 acres of which 30 were sold to Pulte Homes, which plans to build 23 luxury homes.

The Housing Trust has engaged a consultant to undertake a financial feasibility analysis of developing affordable housing on the remaining four acres of the site (includes about 3½ buildable acres). The Governor Stoughton Trust will need to sign-off on any development plans and will be responsible for issuing a Request for Proposals (RFP) to select a developer to build affordable rental housing. Some of the \$5 million sales proceeds could be important in ensuring project feasibility and leveraging other sources of financing.

Other potential publicly-owned properties that might be considered for affordable housing development include:

- *Selectmen's Parcel off Access Road*

The Town owns a 3½-acre parcel that is across from the Golf Course that might accommodate some housing. The property is currently under the control of the Select Board. Additionally, a developer owns an adjacent parcel of more than two acres and has indicated an interest in a potential Chapter 40B townhouse development. Combining the two properties could lead to a more significant housing development that includes affordable units.

- *Kidder Library*

The idea of converting the Kidder Library to housing has been floated as the building or proceeds from its sale must be used for library purposes. The Town does not expect to be able to operate a branch library. Moreover, such a conversion would be challenging given the expected high costs of redeveloping this property for housing.

- *State DPW Site*

The state offered to convey its DPW property on Granite Avenue in the past. The property is located in a flood plain however, and may have other development challenges. It is also unclear as to whether the state would be willing to offer the site to the Town once more.

Next Steps: The Select Board in coordination with the Planning Board and Affordable Housing Trust should conduct a preliminary feasibility analysis on existing Town-owned parcels that might potentially include some amount of affordable housing. If this analysis indicates that housing might be suitably accommodated, the Affordable Housing Trust should request approval from the Select Board and Town Meeting to designate these identified parcels for affordable housing development.

Following the necessary approvals, a Request for Proposals (RFP) should be issued to solicit interest from developers based on the Town's specific project requirements. A developer will be selected based on the identified criteria included in the RFP. It is likely that the projects will require densities or other regulatory relief beyond what is allowed under existing zoning, requiring new zoning as recommended in strategy VI.A or the use of the "friendly" comprehensive permit process through DHCD's Local Initiative Program (LIP). Additionally, the Affordable Housing Trust will need to work with the selected developer to attract the necessary financial, technical and political support. Evidence of municipal support is often critical when seeking financial or technical assistance from state or federal agencies.

Monitoring and enforcing affordability requirements during the term of affordability are critical to the effective provision of affordable housing. The Town will have to ensure that affordable units are counted in the Subsidized Housing Inventory and provide the state with all of the appropriate documentation.

In addition to currently owned Town parcels, the Town of Milton may decide that it will acquire privately-owned sites in the future for the purposes of developing some amount of affordable housing, potentially including open space that can accommodate a cluster development on a portion of the sites. As the Town becomes alert to opportunities for acquiring property that might be suitable for some amount of affordable housing, such properties would ideally meet a number of "smart growth" principles such as:

- Mixed-use properties in appropriate areas,
- The redevelopment of existing nonresidential structures that might become available,
- Infill site development including small home development as starter housing such as a Housing Trust or Habitat for Humanity project,
- Conversion of existing housing to long-term affordability,
- Development of housing in underutilized locations with some existing or planned infrastructure,
- Parcels large enough to accommodate clustered housing, and
- Located along a major road.

Model: Benfield Farms in Carlisle

The Town of Carlisle issued a Request for Proposals to develop 26 units of senior rental housing on a Town-owned site it acquired by bonding a portion of its Community Preservation funding. Most of the parcel was preserved as open space with the development of some athletic fields on a portion of the property projected in the future. The Town provided the land for a nominal amount and approved \$425,000 in CPA funding to support costs related to infrastructure and an additional allocation to further subsidize the development. The Town selected the non-profit organization Neighborhood of Affordable Housing (NOAH) as the developer. The design includes a three-story main house connecting to a two-story barn and incorporates green building, sustainability and universal design standards. Permitting was conducted through the “friendly 40B” process.



Benfield Farms in Carlisle

Resources Required: In addition to the costs of coordinating development, resources will be required to help subsidize the development and perhaps conduct some initial feasibility analyses of site conditions, all of which can ultimately be included in the project’s budget. This strategy will involve staff time of the Director of Planning and Community Development and Assistant Planner or a consultant to work with the Housing Trust and Town’s Chief Procurement Officer to coordinate necessary testing, prepare a Request for Proposals, coordinate the developer selection process, and oversee project development and construction including marketing and tenant/owner selection and occupancy. The Housing Subcommittee of the Select Board and Affordable Housing Trust will need to be engaged in the pre-development and development processes to ensure that development complies with existing requirements, including those related to state affordability requirements.

In an effort to maximize public benefits, the Town should consider requiring all units in a Town-owned property be affordable and eligible for inclusion in the SHI.

Comprehensive permits sometimes do not involve external public subsidies but use internal subsidies by which the market units subsidize the affordable ones. Many communities have used the “friendly” comprehensive permit process to take advantage of these internal subsidies, to create the necessary densities to make development feasible, and to make it easier to navigate the existing regulatory system. Other communities are finding

that they require public subsidies to cover the costs of producing affordable housing for lower income populations with higher levels of affordability and thus need to access a range of programs through the state and federal government and other financial institutions.

Because the costs of development are typically significantly higher than the rents or purchase prices that low- and moderate-income households can afford, multiple layers of subsidies are often required to fill the gaps. Chapter 40B developments frequently access external subsidies to increase the numbers of affordable units, to target units to lower income or special needs populations, and to fill gaps that market rates cannot fully cover.

Beyond the traditional subsidy programs, the state has introduced several new programs that could also be explored in support of future developments that might be considered in Milton including:

- *Workforce Housing Fund*

The state is investing in a Workforce Housing Fund to provide rental housing for those households earning 61% to 120% AMI. It was envisioned that the Fund, when coupled with strategic capital investments by the state, will promote additional private investment in tandem with critical support for middle-income residents. Other components of the Fund include:

- Provides up to \$100,000 per workforce housing unit to create 1,000 new units statewide.
- Leverages resources in development opportunities on state-owned land.
- Ensures that in addition to the workforce housing tier at least 20% of the units will be affordable to those earning at or below 80% AMI.
- Requires deed restrictions for units targeted to those earning between 61% and 120% AMI for generally 30 years or longer.
- Offers support for newly created units as well as the refinancing of existing developments that incorporate new workforce housing units.

- *Community Scale Housing Initiative (CSHI)*

The state has developed a small-scale production program to address non-metro community need for smaller-scale housing that responds to local housing needs and density requirements. These projects, because of their small size, are not a good fit for the Low Income Housing Tax Credit program. Generally, projects that can leverage some debt by having a few higher income units and a gap filler like the Community Preservation Act funding (CPA) are in the best position to utilize such a program. This initiative includes the following eligibility criteria:

- Community must have a population not to exceed 200,000.
- Program sponsors can be both non-profit and for-profit entities with a demonstrated ability to undertake the project.

- The proposed project must include at least five rental units but no more than 20 rental units.
- Project must involve new construction or adaptive reuse.
- A minimum of 20% of the units must be affordable but it is anticipated that most proposed projects will have a minimum of 50% affordable units.
- The host community must provide a financial commitment in support of the project.
- The CSHI subsidy may not exceed \$200,000 per unit unless the developer intends to seek DHCD project-based rental assistance in which case the subsidy may not exceed \$150,000 per unit.
- The total development cost per unit may not exceed \$350,000.
- Projects will receive no more funding than is necessary to make the project feasible.
- Projects must be financially feasible without state or federal Low Income Housing Tax Credits.
- Projects are expected to close and proceed to construction within 12 months of the date of the award letter.



Herring Brook Hill in Norwell

Model: Herring Brook Hill at 40 River Street in Norwell

In 2015, the Town of Norwell proposed to use the property of the former police station at 40 River Street to create affordable senior housing in support of the community's aging population and veterans. This project not only involved a transfer of Town-owned land but also a major local commitment of \$1.3 million in CPA funding. Other funding sources included \$2.6 million of private debt and state financing through the state's Community Scale Housing Initiative (CSHI).

Through a Request for Proposals process, the Town selected Metro West Collaborative

Development, a mission-driven, non-profit community development corporation, as developer and partner with the Town. The project includes a total of 18 units for those age 60 or older based on the unit distribution summarized below. The project has recently been completed, however, is experiencing challenges in filling the two-bedroom units.

Herring Brook Hill Unit Distribution			
Type of Unit	# of Units	# of Bedrooms	Maximum Rent**
80% AMI	10*	1	\$1,425
100% AMI	4	1	\$1,675
100% AMI	4	2	\$2,000

* Four of these units will have access to Project Based Rental Assistance
 ** Projected rents at time of occupancy

- *Starter Home Program*

State legislation was enacted to implement a Starter Home Program as part of the Governor's Economic Development Bill. This was accomplished by modifying the existing Smart Growth Zoning and Housing Production law of Chapter 40R to include \$25 million in new funding over five years for cities and towns that create new starter home zoning districts. The new districts must be a minimum of three acres, restrict primary dwelling size to 1,850 square feet of heated living area, require that 50% of the primary dwelling units contain three bedrooms, allow a minimum of four units per acre by right, and provide 20% affordability up to 100% AMI.

- *State Down Payment Assistance*

While state financing has largely focused on multi-family rental development, particularly for families, the state recently announced an expanded program to assist first-time homebuyers with their down payments under the following conditions:

- Increased assistance of up to 5% of the purchase price or \$15,000, whichever is less.
- More property types are eligible for assistance including single-family homes, condominiums and 2-, 3-, and 4-family properties.
- Higher income limits of up to 135% of the area median income (AMI) in Boston and the Commonwealth's 26 Gateway Cities and up to 100% AMI in other communities, including Milton.
- The assistance is in the form of a 15-year, fixed rate loan at 2%. (Example: \$15,000 down payment assistance loan = 180 payments of \$96.53; 2.011% APR)
- Repayment of the down payment assistance is due upon the sale or refinance of the property prior to the end of the 15-year term and otherwise forgiven.

Projected Number of Affordable Units Produced: 41 Units (from Table V-1)

2. Continue to Pursue Opportunities for Mixed-Use and Transit-Oriented Development

Responsible Party: Planning Board

Priority 1: Years 1-2

Current Status: In the context of good planning and smart growth, the likely location for denser development, certainly for providing housing for smaller households and seniors, is in commercial areas and near transportation. Milton has made significant progress in promoting mixed-use and mixed-income projects as part of recent zoning efforts as described in strategy VI.A.1. Additionally, the rezoning of Milton Village and East Milton Square are important recommendations included in this Housing Production Plan as such zoning provides a number of important opportunities to revitalize these areas, also incorporating public benefits including affordable housing.

Next Steps: The Town should adopt the zoning changes recommended in strategy VI.A.1 to attract interest from developers and make new mixed residential and commercial development economically feasible. As development opportunities arise, it will be important for the Town entities, such as the Select Board, Planning Board and Affordable Housing Trust, to work constructively with developers to make sure that projects reflect community needs, priorities, and requirements.

Resources Required: Donated time from the Planning Board with support from the Housing Subcommittee of the Select Board and the Affordable Housing Trust as well as staff time from the Director of Planning and Community Development. Resources also potentially include some funding (HOME, Housing Trust Fund).

Projected Number of Affordable Units Produced: 90 Units (from Table V-1)

3. Continue to Promote Adaptive Reuse

Responsible Party: Planning Board
Priority 1: Years 1-2

Current Status: As an older suburb of Boston, Milton has less undeveloped property available and needs to look for opportunities to redevelop existing properties. Adaptive reuse, involving the conversion of nonresidential properties to housing, is an example of such redevelopment.

There is some precedent for this type of development in Milton. For example, the redevelopment of 36 Central Avenue into 18 residential units, including two affordable units, and three commercial spaces has recently been completed.

Of particular importance is the Brownfield Planned Unit Development bylaw which was adopted to “permit the reclamation of the sites of a discontinued industrial use which can be characterized as a ‘brownfield’ under federal or state law or state guidelines by the creation of quality residential development and by provision of public amenities”.⁴⁴ This particular area includes the Bay State Paper Mill off of Truman Highway along the Neponset River. The bylaw specified that no more than 90 units could be built and at least 30% of the lot must be preserved as open space. Once again, 10% of the units must be affordable and qualify for inclusion on the SHI.

The property has access issues, however, as it is under the current Readville shuttle line (MBTA commuter rail/Purple Line) in a 9' X 11' box culvert. The owners received an order of conditions to remove the old mill structures from the Milton Conservation Commission.

Next Steps: The Town should continue to support the redevelopment of the Bay State Paper Mill in conformance with the Brownfield Planned Unit Development bylaw. The Town should also continue to identify possible properties for redevelopment and find partners to develop them. For example, there are older brick buildings in Lower Mills that might be suitable for conversion to housing. Underutilized church property has also been raised as a potential opportunity for affordable housing development. Such redeveloped properties could incorporate various residential uses including but not limited to congregate and/or special needs housing, rental housing and first-time homeownership. Adaptive reuse can be amenable to mixed-use and mixed-income development.

Resources Required: Time from the Director of Planning and Community Development as well as the Select Board to continue to pursue and support development opportunities. Predevelopment funding from the Housing Trust Fund, CEDAC, MHIC or another agency should be explored to support project planning.

⁴⁴ Town of Milton Zoning Bylaw, Article III.K.

Projected Number of Affordable Units Produced: 75 Units (from Table V-1)

4. Support Scattered-Site Infill Housing

Responsible Party: Planning Board, Zoning Board of Appeals and Affordable Housing Trust
Priority 2: Years 3-5

Current Status: Some communities are looking for opportunities to create affordable housing through efforts that will spread the impacts of new affordable housing production throughout the community so as not to overburden any particular residential neighborhood. There are potential sites that might accommodate a housing unit, small number of units, or even conversions of existing properties to serve local affordable housing needs, particularly small starter units, affordable rentals, and special needs housing. Such small-scale development can be designed to be harmonious with the existing built environment.

As reported by the Lincoln Institute of Land Policy, “Urban planners and public officials are focused on developing housing types that restore the ‘missing middle’ – row houses, duplexes, apartment courts, and other small to midsize housing designed at a scale and density compatible with single-family residential neighborhoods.” The “missing middle” concept grew out of the New Urbanism movement “to inject more moderately-priced housing into residential neighborhoods, from shrinking or subdividing lots to adding accessory dwelling units (ADUs), to expanding legal occupancy in homes.”⁴⁵ It suggests housing types that “typically have small to medium-size footprints with a width, depth, and height no larger than single-family homes. They can blend into a neighborhood as compatible infill, encouraging a socio-economic mix of households and making more effective use of transit and services.”⁴⁶

Examples of potential development opportunities include but are not limited to the following:

- Habitat for Humanity has expressed great interest in developing new affordable homes in Milton and continues to look for donated public and private land on which to build.
- Two-family homes provide more affordable housing opportunities in the private housing market and are scattered throughout the community. The 2017 census estimates identify 349 owner-occupied units and 477 renter-occupied ones.

Currently zoning only allows the building of a two-family home if it is flanked on both sides by other two-family structures. Consequently, the development of such properties is greatly constrained. Instead the Town should consider allowing the development of two-family dwellings in all zoning districts that allow residential uses as they help diversify the housing stock, provide smaller units for increasing numbers of smaller households, and are typically more affordable.

In fact, the owner-occupied two-family house that includes a rental unit is an exceptionally affordable form of housing as it provides the owners with a stream of rental income that is calculated as part of mortgage underwriting criteria (lenders generally consider about 75% of projected rental proceeds in mortgage calculations), making homeownership more accessible to

⁴⁵ McCormick, Kathleen, “Gentle Infill”, *Land Lines*, Lincoln Institute for Land Policy, July 2016.

⁴⁶ Ibid.

more households. It is therefore not surprising that the two-family house has been successful as starter housing in many communities when zoning allowed this type of housing. These homes could be promoted on infill sites with some attached subsidies, such as HOME funds, to include the units on the SHI.

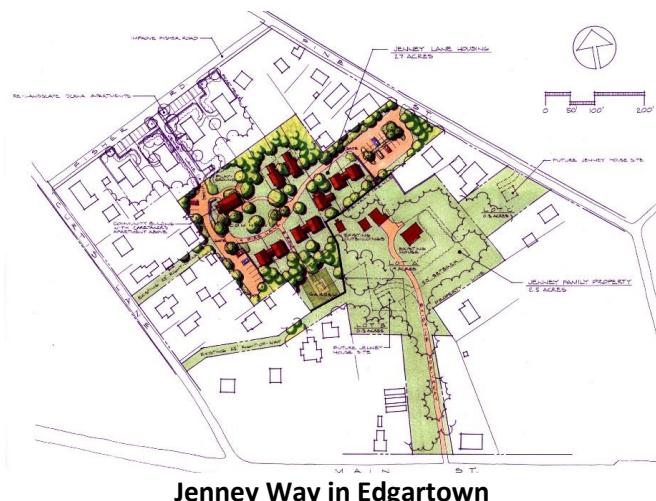
- Organizations that support special needs housing are active in Milton and throughout the Boston area, and are likely to have a continuing interest in developing group homes in Milton if opportunities arise. The Work Inc. house for five disabled young adults, which was supported with HOME Program funding, is an excellent example of this type of infill development.
- There are also models of small comprehensive permit projects or even by-right development in other communities that incorporate affordable units and even several income tiers to meet the housing needs of those within a wide range of incomes.

Model: Junction Place in Needham

Junction Place is a condominium project in Needham comprised of five attached townhouse units. The project was developed on a site with less than 12,000 square feet by a private developer. All of the townhouses were sold at below market prices to eligible families through a lottery. Two of the homes were sold for \$165,000 to families earning up to 80% of the area median income with the remaining three sold for \$310,000 to families earning up to 150% of the area median income. Each of the units contains approximately 1,512 square feet including 3 bedrooms, 2½ bathrooms, laundry room with a washer and dryer, a one-car garage and an outside parking space. All units are deed-restricted and located across from a commuter rail station. The project included some funding from the state's Affordable Housing Trust.

Model: Hingham Affordable Housing Trust Projects

The Hingham Affordable Housing Trust (HAHT) acquired a 2.3-acre parcel of land with a single-family, Cape-style dwelling, and engaged an engineer to undertake a feasibility analysis on siting another home on the property. Once permitted as a “friendly” 40B, both homes would be transferred to income-eligible households and included on the SHI. HAHT also acquired a two-family dwelling which it plans to make repairs and then transfer each of the three-bedroom units to qualifying households subject to long-term affordability restrictions. This type of low-scale development involves high per unit subsidies but still creates units that are affordable without major neighborhood impacts. Having a funding source such as CPA available or other resource as listed in strategy VI.B.2, is critical to such efforts.



Model: Small Cluster Housing

This type of housing has been popular on the West Coast of the country where there is an intense focus on smart growth development principles and the housing needs of increasing numbers of smaller households. The model involves the development of small cottages or bungalows that are clustered around a community green space. This housing type targets empty nesters, single professionals, and young couples. Such development provides

opportunities for the ownership of small, detached dwellings within or on the fringe of existing neighborhoods, often enhancing affordability while simultaneously encouraging the creation of more usable open space for the residents through flexibility in density.

This approach was used in the pocket neighborhoods of Jenney's Way and Eliakim's Way in Edgartown as well as Olde Village Square in Medfield, Cottages on Greene in East Greenwich Rhode Island, Cottages at River Hill in Newbury, Concord Riverwallk, and Emerson Green in Devens among others. Many of these projects have received design awards and some have included multiple income tiers and affordable units.



Emerson Green in Devens

Model: Micro Co-Living Units

Boston area developers have pitched smaller studio micro-units in market-rate buildings as an "affordable" solution. While some such rental units can run as high as \$2,700 in the Seaport District for example, some developers are partnering with co-living companies to make living with roommates feel less like living with strangers and more affordable as well. For example, Arx Urban is partnering with Boylston Properties and Common (a company that manages co-living space) in Allston on the Common Allbright project, a 282-bedroom co-living development. Renters get private bedrooms, but they share common living spaces and a bathroom with their suitemates. WiFi, furniture, a weekly cleaning service and shared goods like toilet paper and olive oil are included in the rent. Compared to market-rate



Common Allbright Project in Allston



studios in the area, co-living space at Common typically runs at a 15% to 25% discount, according to the company. Because utilities and other services factor in the utility costs are included in a Common rent, the discount can grow to as much as 40%, Common claims.⁴⁷ Some developers are also testing the co-living concept for families. Smaller-scale versions of co-living projects could be integrated on the edge of Milton neighborhoods and larger projects could be easily adaptable as part of mixed-use development as suggested in strategy VI.C.2 above.

⁴⁷ Sperance, Cameron, Bisnow Boston, September 19, 2019.

Milton has made strides through its Great Estates PUD bylaw in converting large estates into multi-family housing opportunities. This zoning was created for the Milton Woods development and modified for the Wolcott Woods project. The zoning has a number of conditions that limits its application but could be modified to address a wider range of conversions to multiple units, including affordable housing.

Opportunities to convert larger homes into multiple units should also be explored as such conversions could continue to resemble single-family homes but contain several units as either total independent units or with some shared facilities. Such housing can be particularly appealing to young professionals as well as empty nesters. This Housing Plan suggests that the Town amend its condo conversion bylaw to create more such opportunities.

For example, the Town of Dennis is looking into amending its bylaw to promote what it is referring to as “collaborative housing” and has floated some language for a new use category and definition of shared housing. These include:

Collaborative Living Space – Residential dwelling for those looking to share accommodations for economic or lifestyle reasons and have access to a shared pool of amenities like wi-fi, cable television, internet and tech connections, maid service, trash removal, etc. Collaboration Living Space shall not be subject to the limitations found in the definition of Lodging House.

A number of large properties in the City of Beverly have been carefully redeveloped as multi-family properties for example. This will require some greater flexibility in zoning.



Home Conversion in Beverly

Next Steps: As opportunities arise, the Town should work with developers in support of small-scale infill development and allocate HOME or Housing Trust funding to support project feasibility. Such projects, if not allowed by-right, might take advantage of the “friendly 40B” process through the state’s Local

Initiative Program (LIP) or perhaps zoning changes in the case of the cottage housing models or conversions of larger homes for example.

Resources Required: Some staff time and funding (HOME or Affordable Housing Trust Fund) to support these projects.

Projected Number of Affordable Units Produced: 49 Units (from Table V-1)

D. Housing Preservation Strategies

Housing production is critical to addressing unmet local housing needs, but the Town should also be concerned that it does not lose units already counted as part of its Subsidized Housing Inventory; provides resources to support the deferred home maintenance needs of lower income residents, including seniors; and explores other strategies to help seniors afford to remain independent in their homes.

1. *Introduce a Small Repair Grant Program*

*Responsible Party: Select Board's Housing Subcommittee and Affordable Housing Trust
Priority 1: Years 1-2*

Current Status: Many communities have introduced grant programs for qualifying homeowners to make important health and safety improvements to their homes. Most programs provide grants of up to \$5,000 for such repairs. Because the use of CPA funding for home improvements or housing rehab is limited to projects that were acquired and/or built with CPA funding, most programs must rely on other sources of funding. For example, Sudbury's program is funded through the marketing/lottery fees of its Housing Trust, Norwell's program involved proceeds from the sale of an affordable unit as part of a local development, and Needham received funding from the Town's general budget, for example.

Model: Sudbury Small Grant Program

The Sudbury Small Grant Program is administered by the Sudbury Housing Trust and provides up to \$5,000 for home repairs with no obligation to repay. Examples of repair work include minor plumbing or electrical work, light carpentry, window and door repairs or replacement, tiling, touch-up painting, smoke or CO2 detectors, weather stripping, bathroom grab bars, among many others. Eligibility requirements include:

- The property must be located in Sudbury and be the owner's primary residence.
- Participating owners must plan to stay in Sudbury for the next 12 months after receiving payment.
- Income cannot be higher than the Boston area median income limit.
- The home's assessed value must be lower than the median assessed value.
- Participating owners must inform the Sudbury Housing Trust before they list their home for sale.

Grants are awarded twice a year and prioritized based on health and safety considerations and financial need. Sudbury has found that about 2/3 of the participants are seniors and the average subsidy was less than \$3,000.

Model: Norwell Senior Small Grant Program

The Norwell Senior Small Grant Program provides grants of up to \$2,500 to qualifying property owners to help them make health and safety improvements to their homes. The Program is targeted to seniors 60 years of age or older with the following additional requirements:

- Property is located in Norwell and is the applicant's primary residence. The applicant must agree to reside in the home for at least a full 12 months following completion of the repair work.
- Household income must be less than the "Circuit Breaker" income limit determined by the Massachusetts Department of Revenue. In 2018 this income was \$58,000 for a single individual who is not the head of a household, \$73,000 for a head of household, and \$88,000 for married couple filing a joint return.
- The maximum home value can be no greater than the median single-family home assessment but can be waived in unusual circumstances.

There are also other housing rehab initiatives that are available to qualifying Milton residents, including the following:

- *MassHousing Home Improvement Loan Program (HILP)*

The MHFA Home Improvement Loan Program (HILP) is targeted to one- to four-unit, owner-occupied properties, including condominiums, with a minimum loan amount of \$10,000 up to a maximum of \$50,000. Loan terms range from five to 20 years based on the amount of the loan and the borrower's income and debt. MassHousing services the loans. Income limits are \$92,000 for households of one or two persons and \$104,000 for families of three or more persons. To apply for a loan, applicants must contact a participating lender.

- *Get the Lead Out Program*

MassHousing's Get the Lead Out Program offers 100% financing for lead paint removal on excellent terms that are based on ownership status and type of property. An owner-occupied, single-family home may be eligible to receive a 0% deferred payment loan up to \$20,000 that is due when the house is sold, transferred or refinanced. An owner-occupant of a two-family house could receive up to \$25,000 to conduct the de-leading work. Maximum income limits for owner-occupants are \$107,800 for one and two-person households and \$123,900 for three or more persons. Investor-owners can also participate in the program but receive a 5% fully amortizing loan to cover costs. Non-profit organizations that rent properties to income-eligible residents are also eligible for 0% fully amortizing loans that run from five to 20 years. Applicants must contact a local rehabilitation agency to apply for the loan that includes the Quincy Community Action Program (QCAP).

- *Septic Repair Program*

MassHousing offers loans to repair or replace failed or inadequate septic systems for qualifying applicants. The interest rates vary according to the borrower's income with 0% loans available to one and two-person households earning up to \$25,000 and three or more person households earning up to \$28,500 annually. There are 3% loans available for those one or two person households earning up to \$50,000 and three or more persons earning up to \$57,000. The 5% loans have income limits of up to \$100,000 for one and two-member households and \$114,000 for three or more persons. Additionally, one to four-family dwellings and condominiums are eligible for loan amounts of up to \$25,000 and can be repaid in as little as three years or over a

longer period of up to 20 years. To apply for a loan, applicants must contact a participating lender that includes the Bank of Canton.

- *Home Modification Loan Program (HMLP)*

This state-funded program provides financial and technical assistance to those who require modifications to their homes to make them handicapped accessible. Income limits vary by size of household at \$166,000 for a single-person household and \$213,400 for three persons for example. Metro Housing Boston administers this program for Milton.

Next Steps: The Affordable Housing Trust should work with the Housing Subcommittee of the Select Board to undertake the following process towards the implementation of a Small Repair Grant Program:

- Conduct further research of such programs.
- Prepare a Program Summary that includes information on eligibility criteria, allowed improvements, maximum grant amount, payment or repayment requirements, application procedures, etc.
- Identify the staff responsible for program management. It is likely that the Assistant Planner could handle this work, reporting to the Affordable Housing Trust which would be responsible for overseeing operations.
- Determine funding source(s) and amount and apply for funds.
- Prepare application and outreach materials.
- Prepare and implement an outreach strategy to get the word out on the availability of funding.

Resources Required: Program grant funding, perhaps starting with an allocation in the range of \$25,000 to \$50,000. Staff time from the Assistant Planner and donated time of the Affordable Housing Trust and Select Board's Housing Subcommittee.

2. *Help Residents Access Housing Assistance*

Responsible Party: Affordable Housing Trust

Priority 1: Years 1-2

Current Status: There are regional and state resources available that provide financial and technical support for qualifying owners of homes that need repair, upgrading and de-leading. Many seniors living on fixed incomes are finding it increasingly difficult to afford the costs associated with taxes and home improvements and as a result have deferred maintenance needs. Additionally, some seniors and those with special needs require special handicapped adaptations and repairs to help them remain in their homes. Some Milton residents might also benefit from technical and financial support in the case of septic failures and Title V compliance issues as well as information on assistance in financing homeownership, including fuel assistance for example. Those who are renting in Milton might also need help with information and referrals, housing searches, and rental assistance.

In addition to the funding sources listed above, other programs and services are sponsored by the following entities:

- *Milton Council on Aging*

The Milton Council on Aging is a Town department that supports the quality of life of Milton elders through a wide variety of services. This includes the operation of a Senior Center that offers social programs for seniors, an information and referral service on a wide range of issues, community-based services to promote independence, and in-home support services. The Council on Aging also works with the Town on a program to abate some taxes for low-income seniors in exchange for minor services of approximately 110 hours to the Town such as volunteering at Town Hall, a school or the library.

- *Milton Residents Fund and Related Funds*

The First Parish Church has been instrumental in raising donations in support of special funds that are distributed to Milton residents for emergency purposes such as to prevent utility shutoffs and evictions and to promote safe and stable housing. The funds are managed by a part-time social worker. Most of the funding is raised from members and friends of the First Parish Church and local organizations such as the Copeland Family Foundation and the Governor Stoughton Charitable Fund.

- *Quincy Community Action Program (QCAP)*

Quincy Community Action Program (QCAP) is a private, non-profit organization that serves as the area's community action agency. It provides a wide range of programs and services to achieve its mission to improve the quality of life for low-income people by working with the community to affect social, individual and family change and achieve self-sufficiency. Programs include adult learning and workforce development initiatives, day care and preschool education, food and nutrition services, and energy assistance (i.e., fuel assistance, utility discounts, heating system repair and replacement, and energy conservation support). Housing programs include a range of homeowner services such as first-time homebuyer education, down payment assistance, lead abatement assistance, mortgage default counseling, budget and credit counseling, and home equity mortgage conversion. QCAP also offers assistance to tenants and landlords through fair housing counseling, housing searches, and rental assistance. The organization is also involved in affordable housing development and property management.

Next Steps: Through the community educational campaign recommended in Section VI.B.1, important information on housing improvement resources and other forms of housing assistance could be disseminated, both to real estate professionals, local organizations, and community residents. The Council on Aging is also an important resource for providing seniors with information on available programs and services. Existing efforts to support workshops on housing finance and available assistance to first-time homebuyers should be continued.

Resources Required: The Town, through its Council on Aging, Milton Housing Authority, and the Affordable Housing Trust, should provide the necessary education and referrals to programs sponsored by Quincy Community Action Program, MassHousing and other agencies which provide low-cost financing for repair needs including de-leading, septic system repairs, and other home improvements. A staff person, most likely the Assistant Planner, would be available to answer inquiries, make appropriate referrals and provide community outreach on available resources.

3. **Maintain Subsidized Housing Inventory (SHI) Units**

Responsible Party: Select Board and Affordable Housing Trust
Priority 1: Years 1-2

Current Status: Based on how housing was financed, how long the affordability requirements last, and other stipulations in affordability agreements, the affordable status of housing units may be in jeopardy in many communities in the future. The state maintains a database on the inventory of projects with subsidized mortgages or HUD project-based rental assistance including information on when affordability restrictions are due to expire.

As shown in Table III-27, there are a number of developments where affordability restrictions are due to expire that would remove them from the SHI. These include Unquity House that received an extension of the Section 8 subsidies through 2029 and the Winter Valley projects with an expiration date in 2029 for phase 1 and 2020 for phase II. Because these developments are sponsored by a mission-led organization to promote affordable housing for seniors, it is likely that the owner will work to extend the affordability provisions.

Next Steps: It is important to ensure that all affordable housing units that are produced remain included in the Subsidized Housing Inventory, in perpetuity if possible. The Town should closely monitor developments with affordable units and intervene as necessary to maintain the units as affordable. New affordable units that come into the SHI should be designated as affordable for as long a period of time as possible and, in the case of homeownership, with resale restrictions calculated to preserve affordability in perpetuity.

Resources Required: Staff time from the Assistant Town Planner will be required as well as some oversight from the Affordable Housing Trust.

ATTACHMENT 1

Local and Regional Organizations

The Town of Milton has a number of local and regional agencies and organizations available to help support the production of affordable housing or provide housing-related services.

1. Milton Affordable Housing Trust

The Town of Milton established the Milton Affordable Housing Trust per Massachusetts General Laws Chapter 44, Section 55C in its 2010 Town Meeting through a Warrant Article to provide for the creation of affordable housing for the benefit of low- and moderate-income households. The Housing Trust has six Trustees who are appointed by the Select Board.

The specific charge of the Affordable Housing Trust was to establish a fund to support affordable housing development and provide the organizational framework to ensure that new affordable housing is sensitive to local needs and gains the necessary political support. Its charge also lists the following important responsibilities:

- Become an effective broker for housing resources, including donated land and money that may be dedicated to affordable housing initiatives and managed by the Trust.
- Serve as an articulate advocate for affordable housing in the community, sponsoring events and special forums to bring attention to the issue and promote local support. This local outreach helps dispel negative stereotypes about affordable housing and creates a more productive dialogue within the community.
- Work cooperatively with developers, for profit and non-profit, on actual development projects to ensure compatibility with local preferences and address local concerns, needs and priorities.
- Seek funding to manage special programs in the future.
- Serve as a vehicle for the community to expedite new production efforts such as acquiring property through the housing support fund and overseeing the implementation of local housing strategies.

2. Milton Housing Authority (MHA)

The Milton Housing Authority was incorporated in 1975 and owns and manages 66 units of publically-assisted housing in Milton. The Authority's first project was a 40-unit development on Miller Avenue for the elderly and disabled completed in 1985. In the late 1980's the Housing Authority purchased and rehabilitated six, two-family houses that are scattered throughout town for families that include 10 three-bedroom units, 1 four-bedroom unit and 1 two-bedroom unit. Another two projects were developed as special needs housing to support clients of the Department of Mental Retardation. These group homes are located on Blue Hill Avenue and Central Avenue, totaling two and eight units respectively.

The Housing Authority has also been administering 144 Section 8 housing vouchers although federal cutbacks have decreased these vouchers to 133. These rental vouchers subsidize the rents of low-income households living in private rental units. Until recently, voucher holders were able to find units in Milton without too much difficulty. However, spikes in rental costs have resulted in fewer participants being able to find qualifying units with only about one-third of vouchers holders leasing units in Milton.

Demand for the Town's subsidized housing is very strong, particularly for the family units. According to the Milton Housing Authority, there were about 600 households on the waiting list for elderly and disabled housing, including 39 Milton residents. The length of the wait on this list ranges from two to three years, with the disabled experiencing longer waits. The wait for family units is at least five years and currently the wait list includes about 50 families, including a few Milton residents. The Housing Authority has two handicapped accessible units and waits are at least five years.

3. Milton Fair Housing Committee

In 1978, the Town of Milton's Select Board established the Milton Fair Housing Committee to promote equal and fair access to housing for all.

4. Milton Council on Aging

The Milton Council on Aging is a Town department that supports the quality of life of Milton elders through a wide variety of services including the operation of a Senior Center that offers social programs for seniors, an information and referral service on a wide range of issues, community-based services to promote independence, and in-home support services. The Council relies heavily on local volunteers to support its services.

Each year the Council receives a great number of inquiries related to housing. Most calls relate to searches for housing alternatives, and the Council refers a great many of these inquiries to MRE (see below). During the last few years, an increasing number of calls relate to concerns from seniors about how they can remain financially independent in their own homes and how they might access financing to make necessary home improvements. The Council also receives numerous calls from the grown children of residents who are searching for housing options for their parents in the community. The Council indicates that there are few available housing alternatives in Milton as most of the elderly developments are either expensive or have substantial waits.

The Council on Aging also works with the Town on a program to abate some taxes for low-income seniors in exchange for minor services of approximately 110 hours to the Town such as volunteering at Town Hall, a school or the library.

5. Milton Residences for the Elderly (MRE)

Milton Residences for the Elderly (MRE) is a private, non-profit organization established to produce housing for seniors in Milton. The organization owns and manages 139 units of rental housing at Unquity House on Curtis Road that includes 99 one-bedroom units with about 37 applicants on the wait list and another 40 studio apartments with a handful of applicants. The average wait time for units is about a year.

MRE also owns and manages Winter Valley Housing on Canton Avenue – the first phase with 129 units and the second with 32 units with a mix of assisted living, one-bedroom, two-bedroom, and efficiency units. Most of the units are subsidized but some are market rate but still relatively quite affordable with rents at \$879 for one-bedrooms and \$962 for two-bedrooms. There were 155 applicants on their wait list, 50 who were Milton residents. Some of the applicants were also grown children who live in Milton and are trying to relocate their parents in the community. Wait times ranged from about a year and a half for the subsidized

units and up to four (4) years for the market units because there are so much fewer of them available and many do not qualify for the affordable units because of income.

The organization completed another 321 units at Fuller Village that includes 80 affordable units.

6. Housing Opportunities for Milton's Elders, Inc. (HOME, Inc.)

Housing Opportunities for Milton's Elders, Inc. (HOME, Inc.) was established in the late 1970's as a private, non-profit, tax-exempt entity to create affordable housing opportunities for Milton's residents over the age of 62 as well as those who are physically disabled and of moderate means who were ineligible for government subsidized housing. The organization built 98 two-bedroom units ranging in size from 1,000 to 1,200 square feet and developed them without public funding as an affordable housing option to subsidized housing. The units are configured as part of a 27-building townhouse development, with three to four units per building. The development is surrounded by 20 acres of conservation land.

There are no income qualifications, but at least one member of the household must be 62 years or older and all applicants for the housing must be Milton residents. Because incomes are not used to establish eligibility and affirmative marketing is not part of the selection process, the units do not meet the requirements of Chapter 40B and cannot be counted in the Subsidized Housing Inventory. Nevertheless, the units are priced well below market. Applicants pay 20% below the going market value, pay a monthly fee that is again well below HUD Fair Market Rents, and recoup the amount of money they pay up-front when they leave the development without any accrual of equity.

7. Milton Residents Fund and Related Funds

The First Parish Church has been instrumental in raising donations in support of special funds that are distributed to Milton residents for emergency purposes such as to prevent utility shutoffs and evictions and to promote safe and stable housing. The funds are managed by a part-time social worker. Most of the funding is raised from members and friends of the First Parish Church and local organizations such as the Copeland Family Foundation and the Governor Stoughton Charitable Fund.

8. Quincy Community Action Program (QCAP)

Quincy Community Action Program (QCAP) is a private, non-profit organization that serves as the area's community action agency providing a wide range of programs and services to achieve its mission to improve the quality of life for low-income people by working with the community to affect social, individual and family change and achieve self-sufficiency. Programs include adult learning and workforce development initiatives, day care and preschool education, food and nutrition services, and energy assistance (i.e., fuel assistance, utility discounts, heating system repair and replacement, and energy conservation support). Housing programs include a range of homeowner services such as first-time homebuyer education, down payment assistance, lead abatement assistance, mortgage default counseling, budget and credit counseling, and home equity mortgage conversion. QCAP also offers assistance to tenants and landlords through fair housing counseling, housing searches, and rental assistance. The organization is also involved in affordable housing development and property management.

9. *South Shore Habitat for Humanity (SSHH)*

Habitat for Humanity is an ecumenical, non-profit Christian ministry dedicated to building simple, decent homes in partnership with families in need. The organization has grown over the past two decades into one of the largest private homebuilders in the world with almost 1,600 U.S. affiliates and over 2,000 affiliates worldwide. This includes one on the South Shore that has been able to build new homes for first-time homebuyers through donated land, materials, labor and funding as well as other special financing strategies.

10. *South Shore HOME Consortium*

Milton has joined the South Shore HOME Consortium that is administered by Quincy and also includes the communities of Holbrook, Weymouth, and Braintree. HOME funding has ranged from about \$50,000 to \$80,000 annually. The Town was able to bank the funding for several years and allocated a substantial amount to support the Work Inc. special needs facility for five (5) disabled young adults.

Elementary Space Needs Study

Milton Public Schools

School Committee Meeting

January 16, 2019

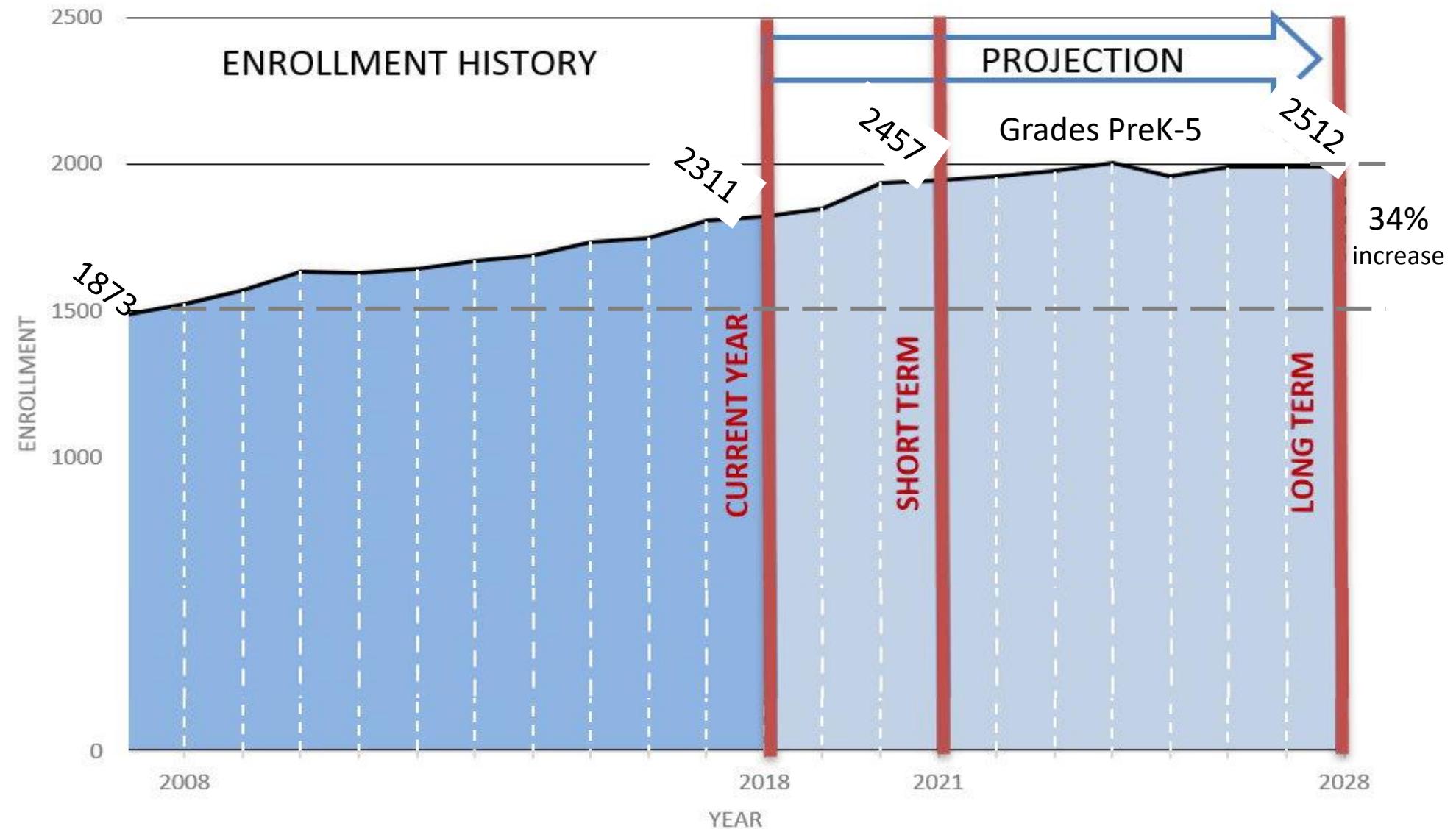


DRA

Goals

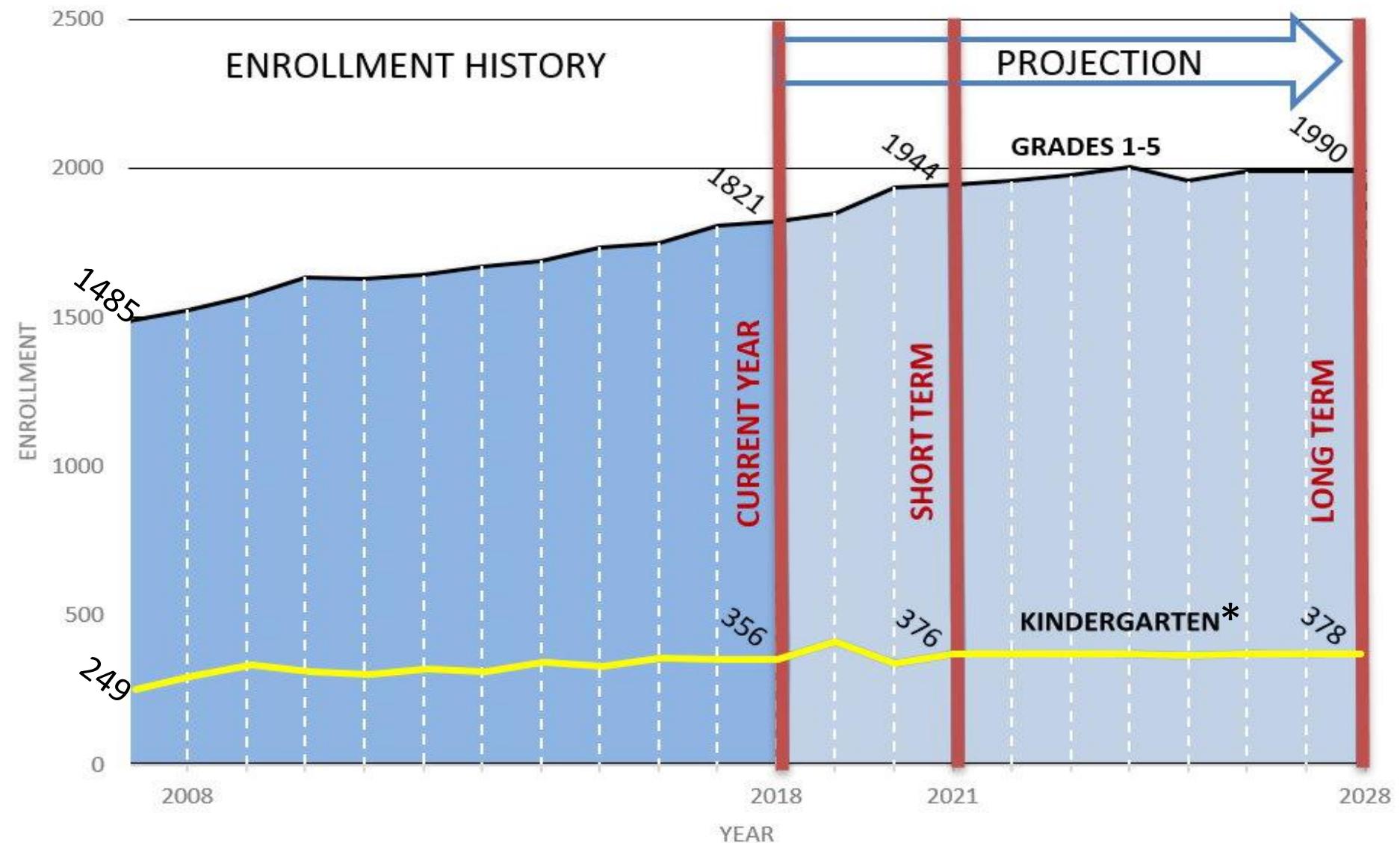
- Review current usage of space at the elementary schools
- Determine projected space needs- current (short-term) & long-term
- Develop options to address short and long- term needs
- Evaluate options
- Summarize & Present recommendations

Elementary Schools Enrollments



Source: New England School Development Council, 10.11.2018

Elementary Schools Enrollments



Source: New England School Development Council, 10.11.2018

*assumes level births; level "move-ins"

Elementary Schools Totals

Current



Current usage

Pre-K Classrooms	5.5
K Classrooms	16
Classrooms (Gr. 1 – 5)	79
Art, Music	6
Computer	1
Special Ed	0 (21 x .5)

Full-size Classrooms: **107.5**

Average Class Sizes:

Kindergarten:	22
Gr. 1 – 5:	23

Elementary Schools Totals

Short-term (3 years)



Current usage	Assumed Program	Shortfall
Pre-K Classrooms	5	(.5)
K Classrooms	20	4
Classrooms (Gr. 1 – 5)	92	13
Art, Music	8	2
Computer	0?	(1)
Special Ed	2?	2
Full-size Classrooms:	127	19.5 _(18%)

Average Class Sizes:	current	if no change
Kindergarten:	22	20-27 avg: 23
Gr. 1 – 5:	23	21-28 avg: 24

Elementary Schools Totals

Long-term (10 years)

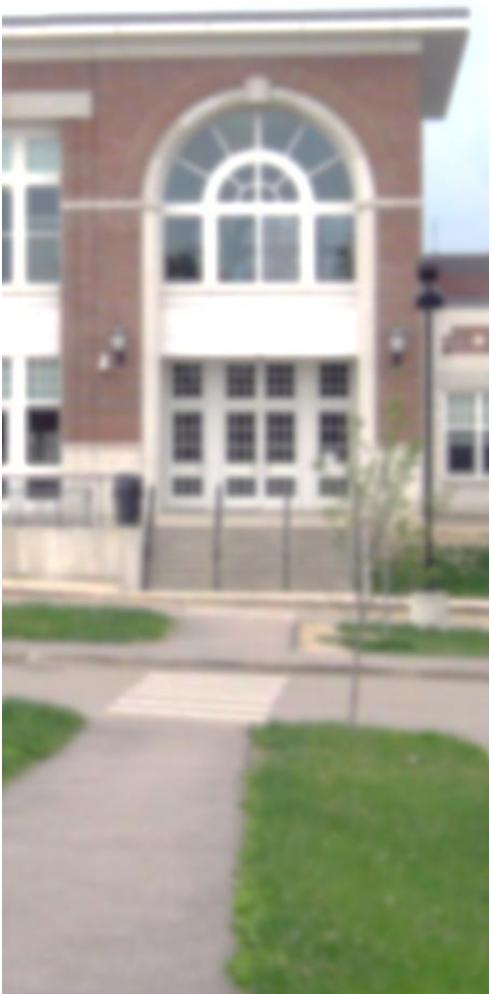


Current usage	Assumed Program	Shortfall
Pre-K Classrooms	5.5	.5
K Classrooms	16	4
Classrooms (Gr. 1 – 5)	79	16
Art, Music	6	2
Computer	1	(1)
Special Ed	0 <small>(21 x .5)</small>	4
Full-size Classrooms:	107.5	25.5 <small>(24%)</small>

Average Class Sizes:	current	if no change
Kindergarten:	22	21-28 avg: 24
Gr. 1 – 5:	23	22-29 avg: 25

Pierce Middle School

Short-term (3 years)



Current usage		Assumed Program*	Delta
Core Classrooms	45	43	2
4-CR Teams (incl. Science), World Language			
Art, Music, Drama, Health	7	7	-
Computer, STEM, Lang.Lab	4	4	-
Special Ed	8	8	-
<hr/>	<hr/>	<hr/>	<hr/>
Full-size Classrooms:	64	62	2

**Assumed program is for 961 students (SY '21-'22), in 9 teams (3 teams per Grade) plus 7 Language classrooms. Average class size: 22 students.*

Pierce Middle School

Long-term (10 years)



Current usage		Assumed Program*	Shortfall
Core Classrooms	45	47	2
4-CR Teams (incl. Science), World Language			
Art, Music, Drama, Health	7	7	-
Computer, STEM, Lang.Lab	4	4	-
Special Ed	8	8	-
<hr/>	<hr/>	<hr/>	<hr/>
Full-size Classrooms:	64	66	2

**Assumed program is for 1097 students (SY 2025-'26), in 10 teams (3 teams per Grade) plus 7 Language classrooms. Average class size: 23 students.*

Milton High School

Short-term (3 years)



Current usage	Assumed Program*	Delta
Core Classrooms incl: Science, World Language	54	50
Art, Music, Drama	6	5
Technology & Vocational	9	6
Special Ed	5	8
<hr/>		
Full-size Classrooms:	74	69
		5

** Assumed program as per MSBA guidelines for 1074 students (SY 2021-'22), average class size = 22 students*

Milton High School

Long-term (10 years)



Current usage	Assumed Program*	Delta
Core Classrooms incl: Science, World Language	54	53
Art, Music, Drama	6	6
Technology & Vocational	9	8
Special Ed	5	9
Full-size Classrooms:	74	76

** Assumed program as per MSBA guidelines for 1242 students (SY 2028 -'29), average class size = 23 students*

Options

Short-term

- Do nothing- allow average class size to increase
- Convert remaining Art, Music Rooms, Computer Rooms
- Create Classroom(s) within Library/ Media Centers
- Utilize existing underutilized spaces in High School, Middle School, Cunningham upper floor
- Rent modular classrooms
- Rent and renovate space, if available
- *Some combination of the above*

Options

Long-term

- Do Nothing – allow average class size to increase
- Convert remaining Art, Music Rooms, Computer Rooms, Libraries
- Construct new space
 - Addition to an existing elementary school
 - 5th Grade addition to Pierce Middle School
 - Early Ed addition to Milton High School site
 - New free-standing Early Ed (Pre-K & K) building
 - New free-standing K-5 school

Options

Glover

Cunn

Coll

Tucker

Pierce
MS

Milton
High School

New

Potential
Additional
Classrooms

Short-term Options

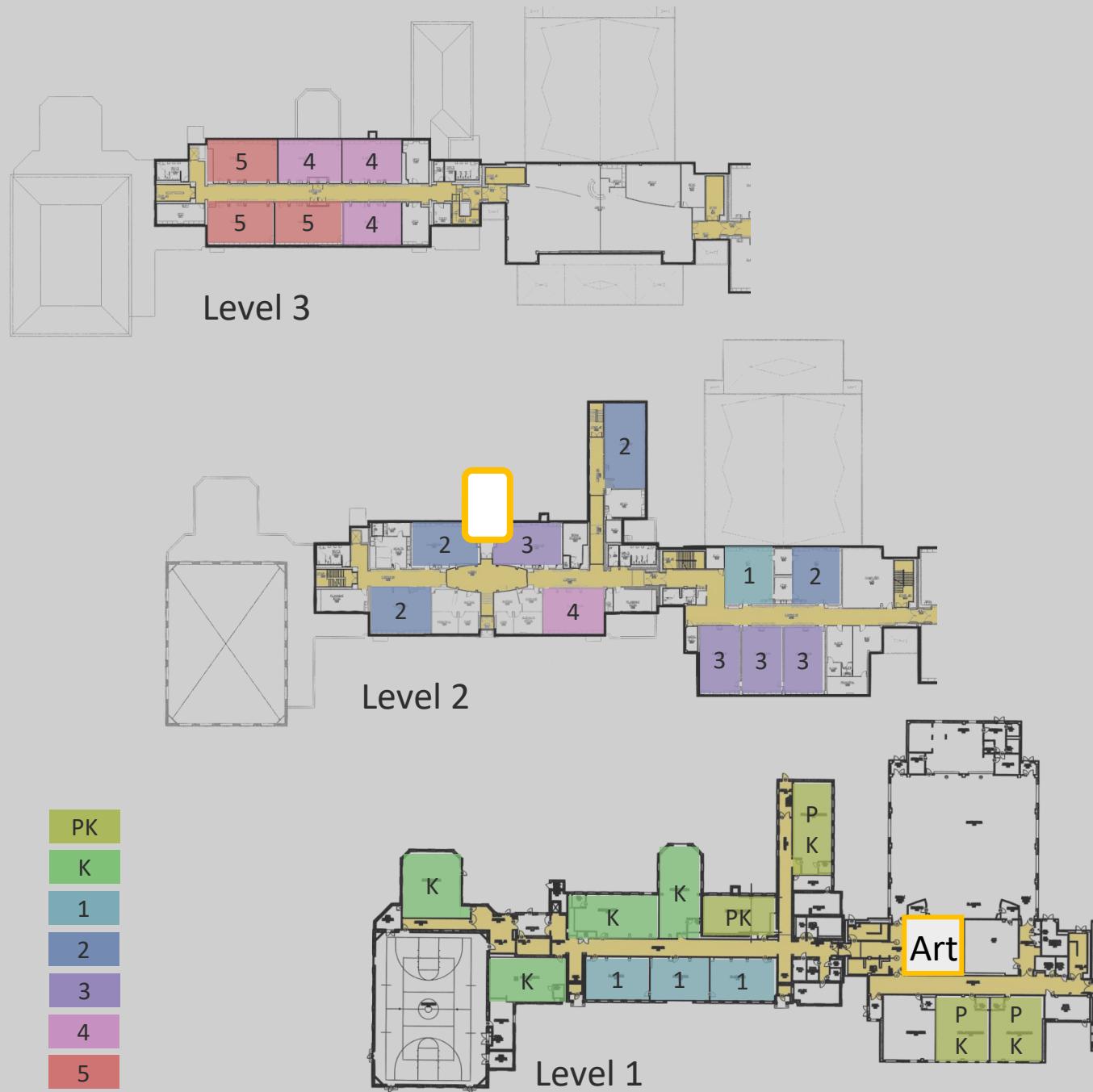


GLOVER

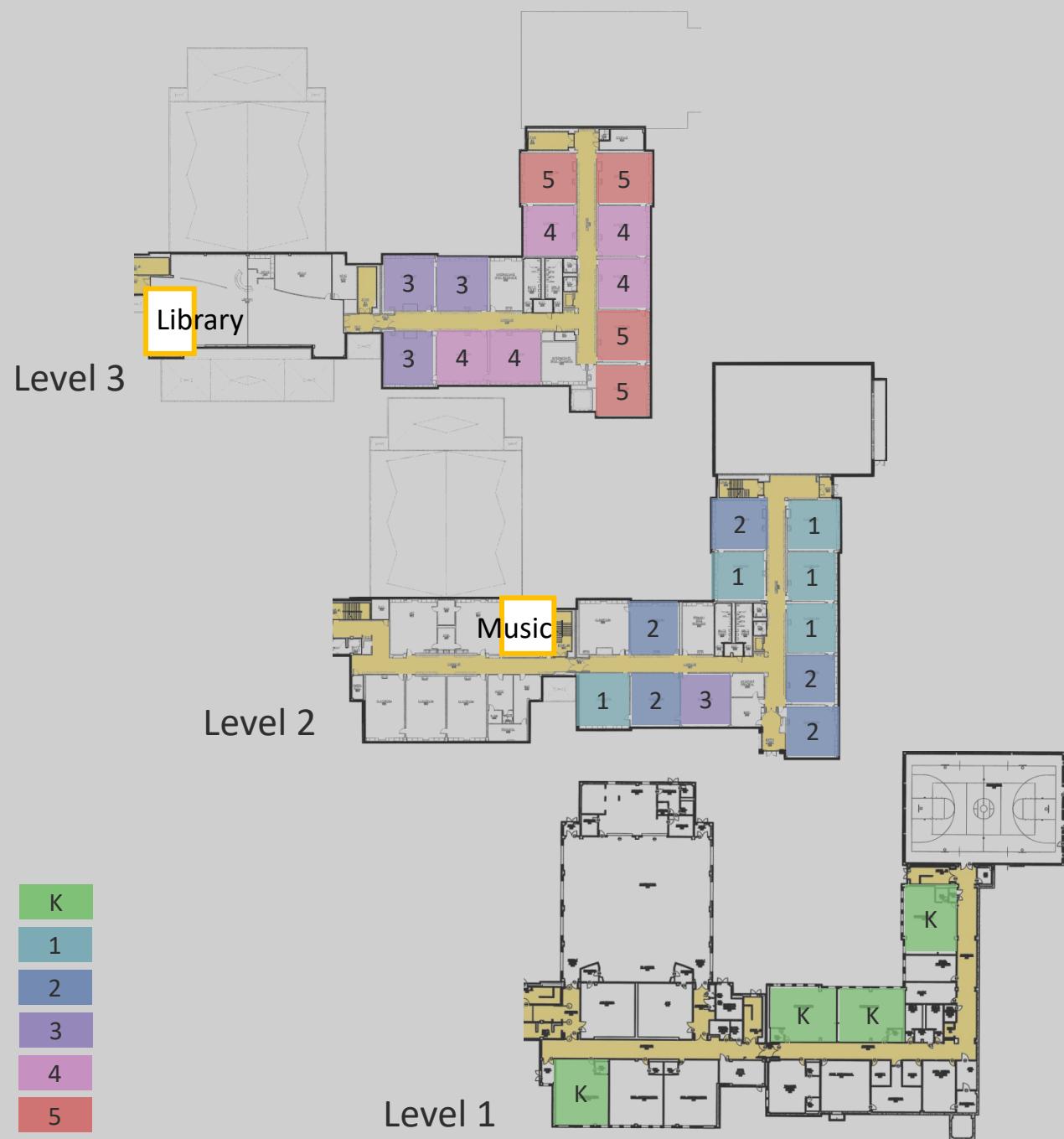
GRADES K-5

5 5 5

Short-term Options



Short-term Options



COLLICOT

GRADES K-5

5 5

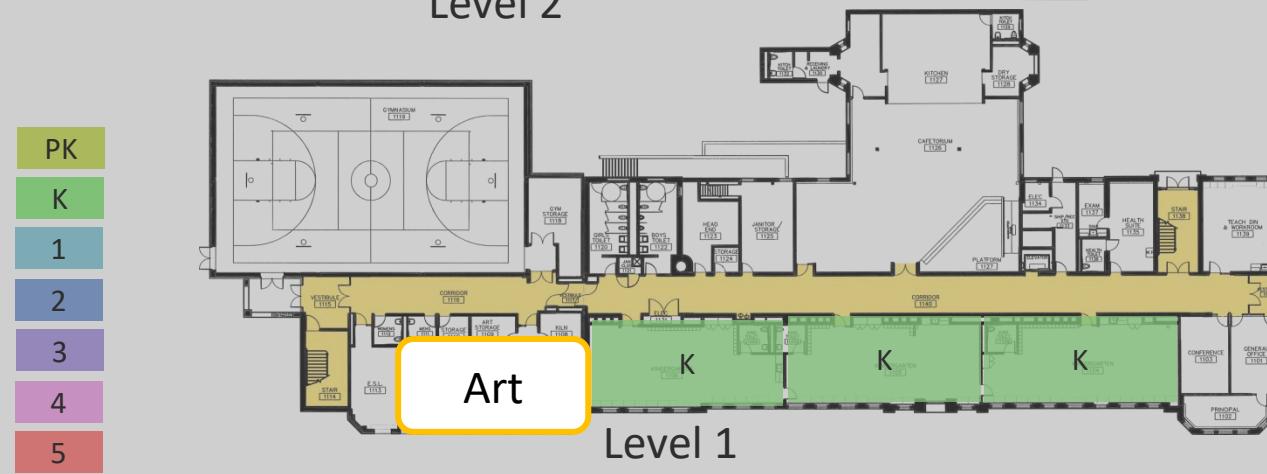
Short-term Options



Level 3



Level 2



Level 1

TUCKER

GRADES PK-5

4 4

Glover Elementary School

Modulars

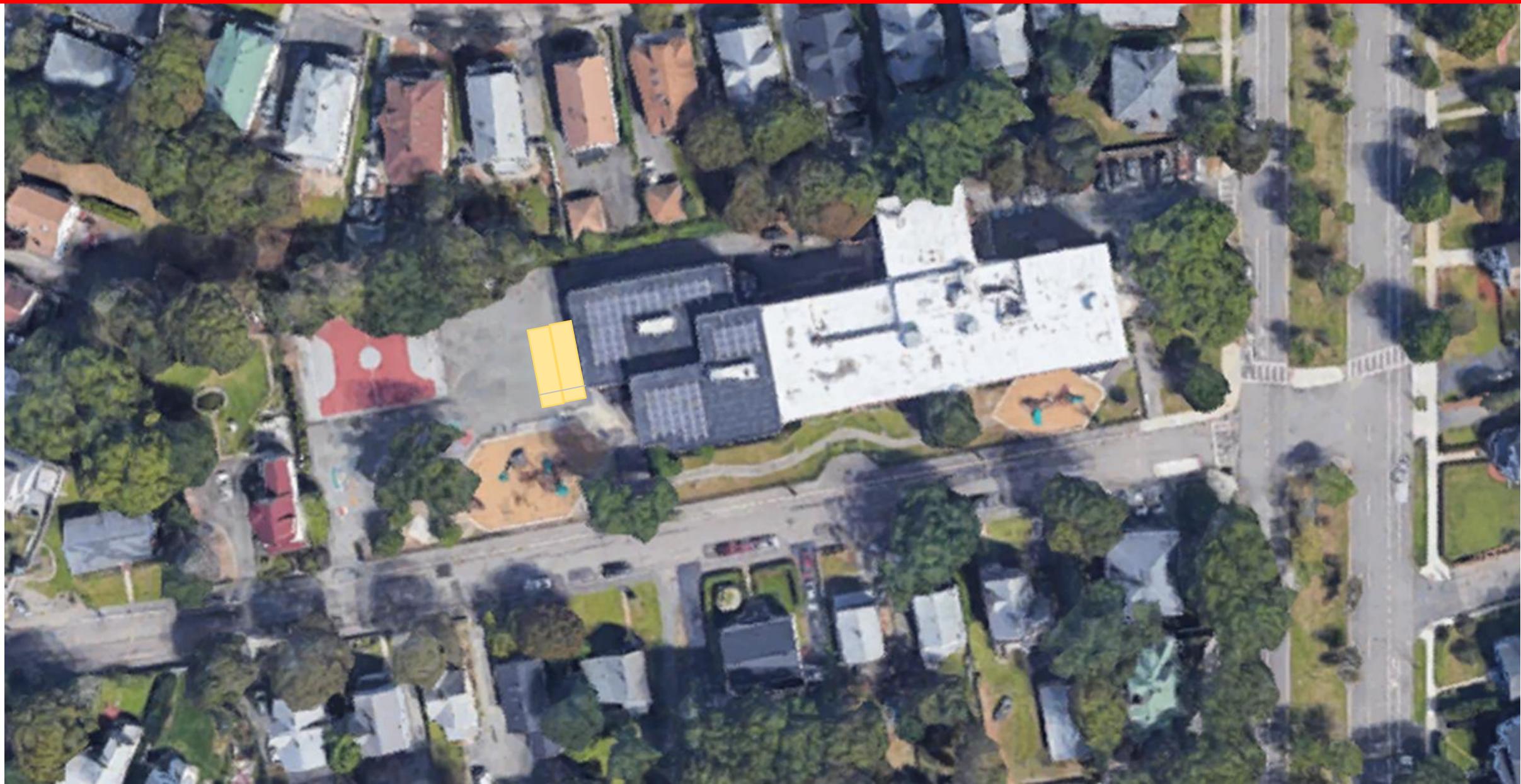


Collicot Cunningham Elementary Schools Modulares

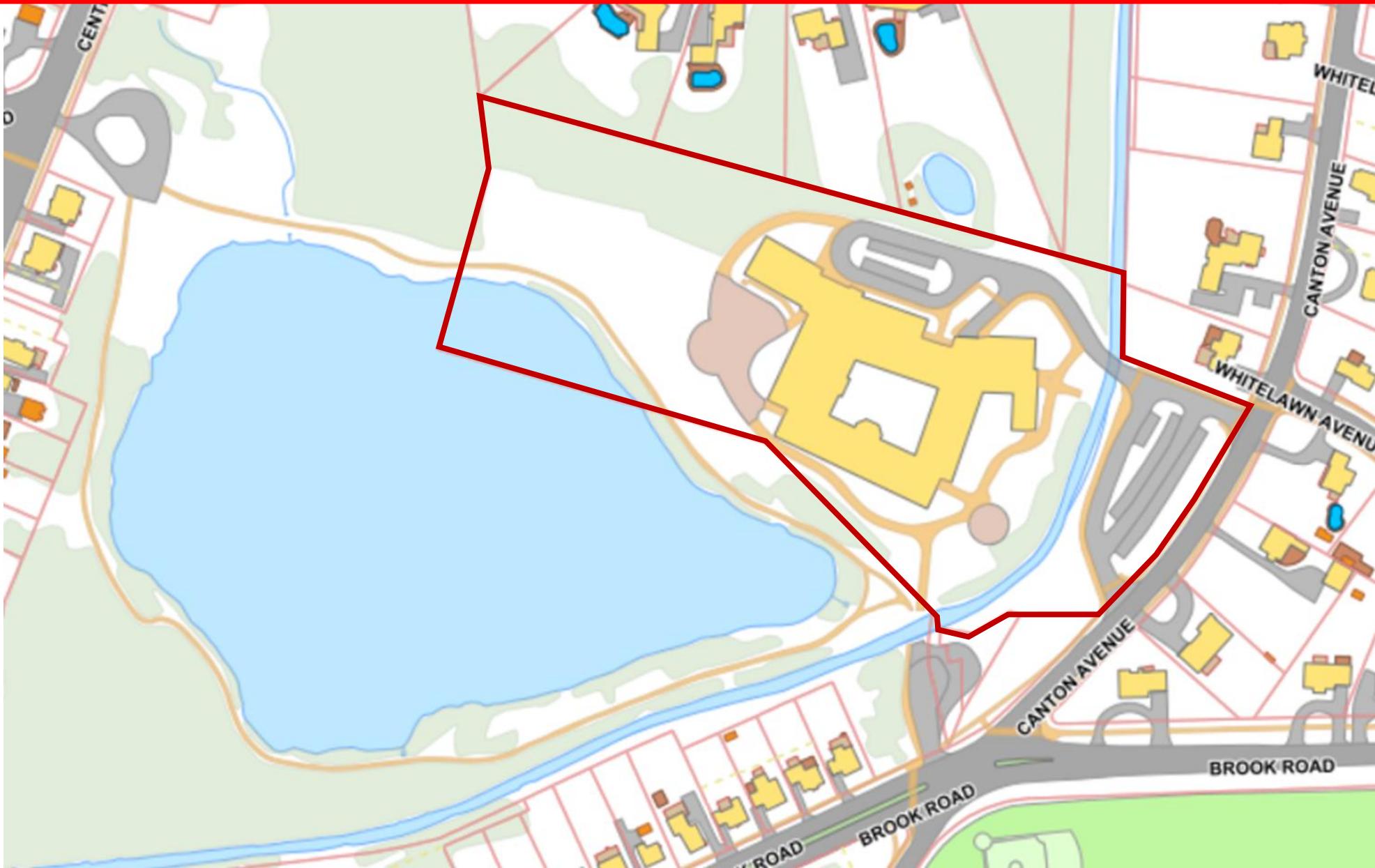


Tucker Elementary School

Modulars



Glover Elementary School



Glover Elementary School

Addition



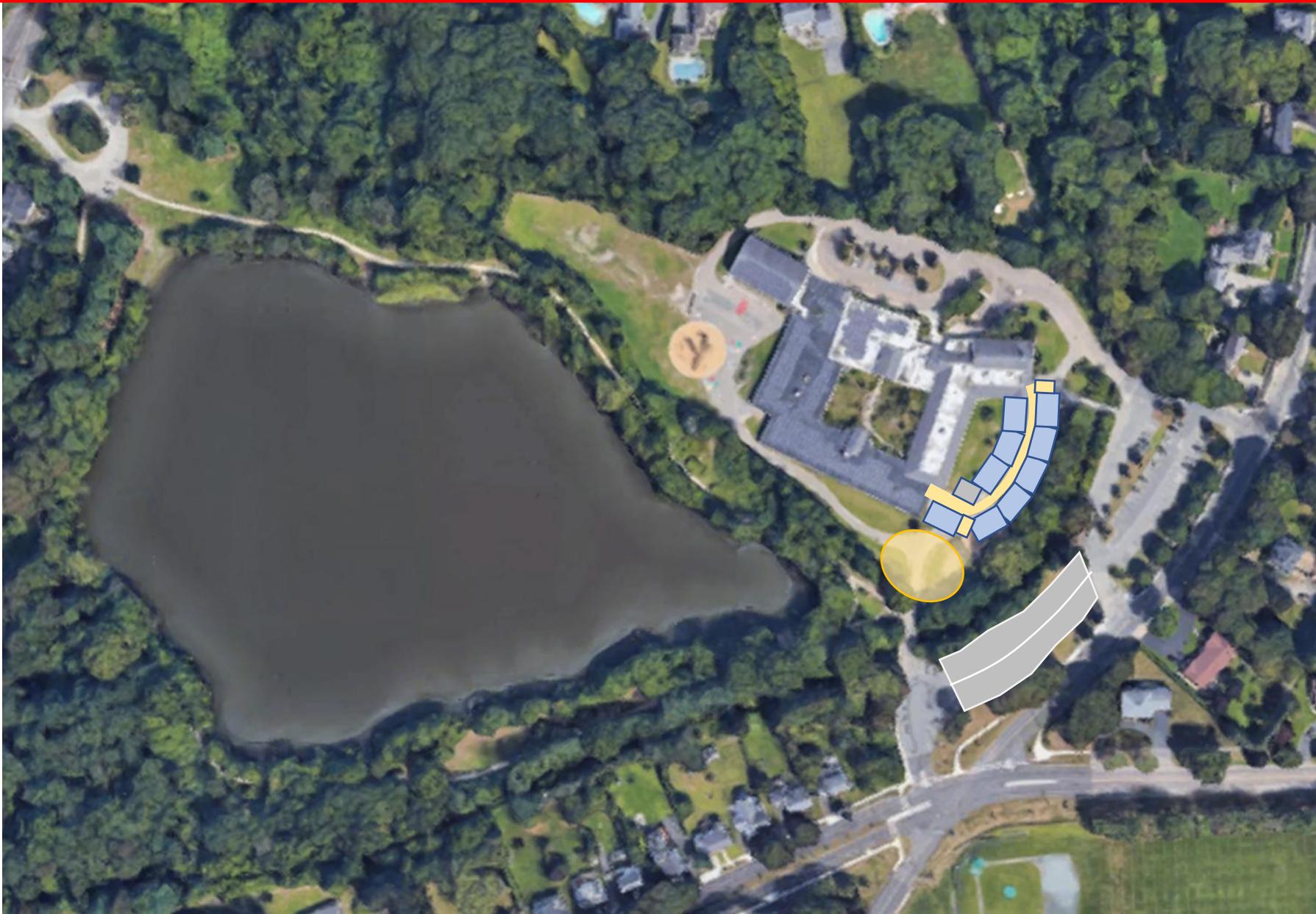
Glover Elementary School

Addition



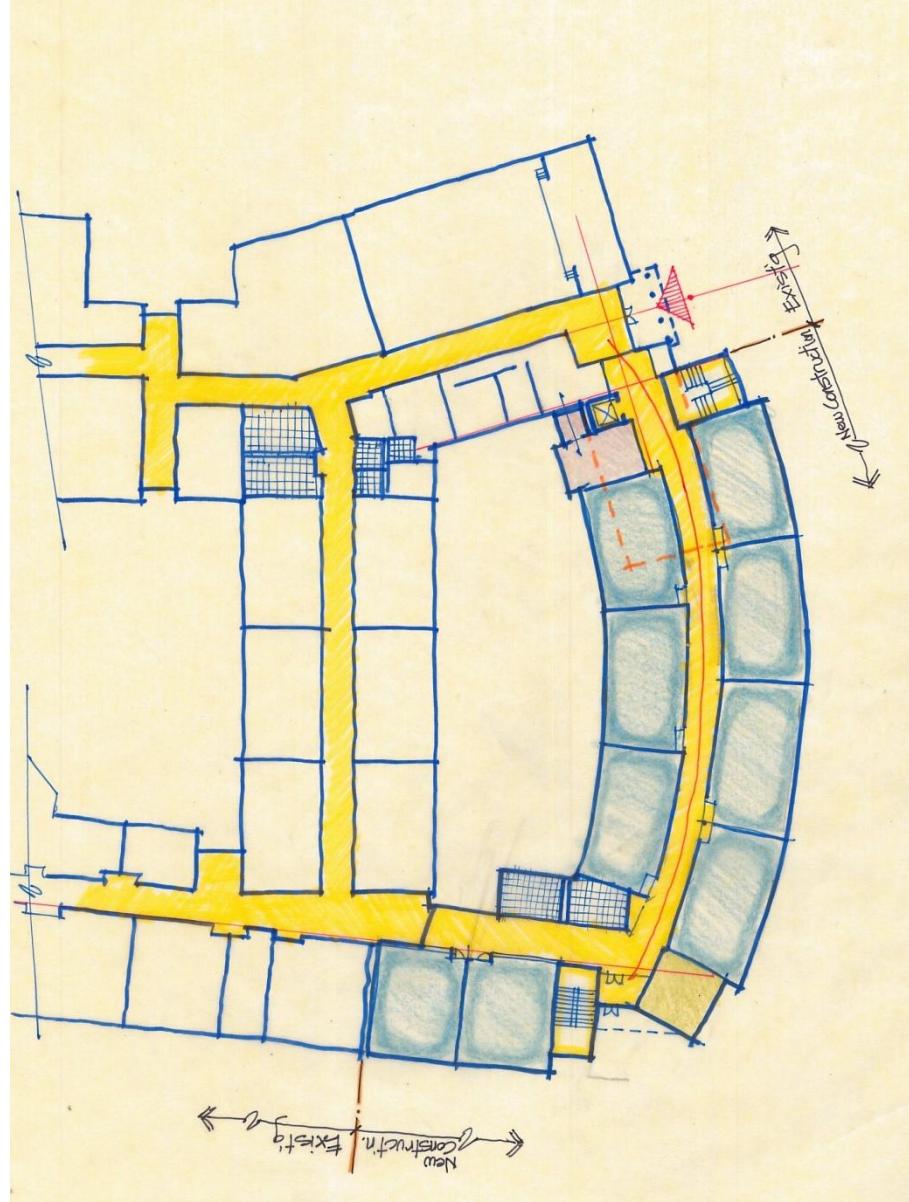
Glover Elementary School

Addition



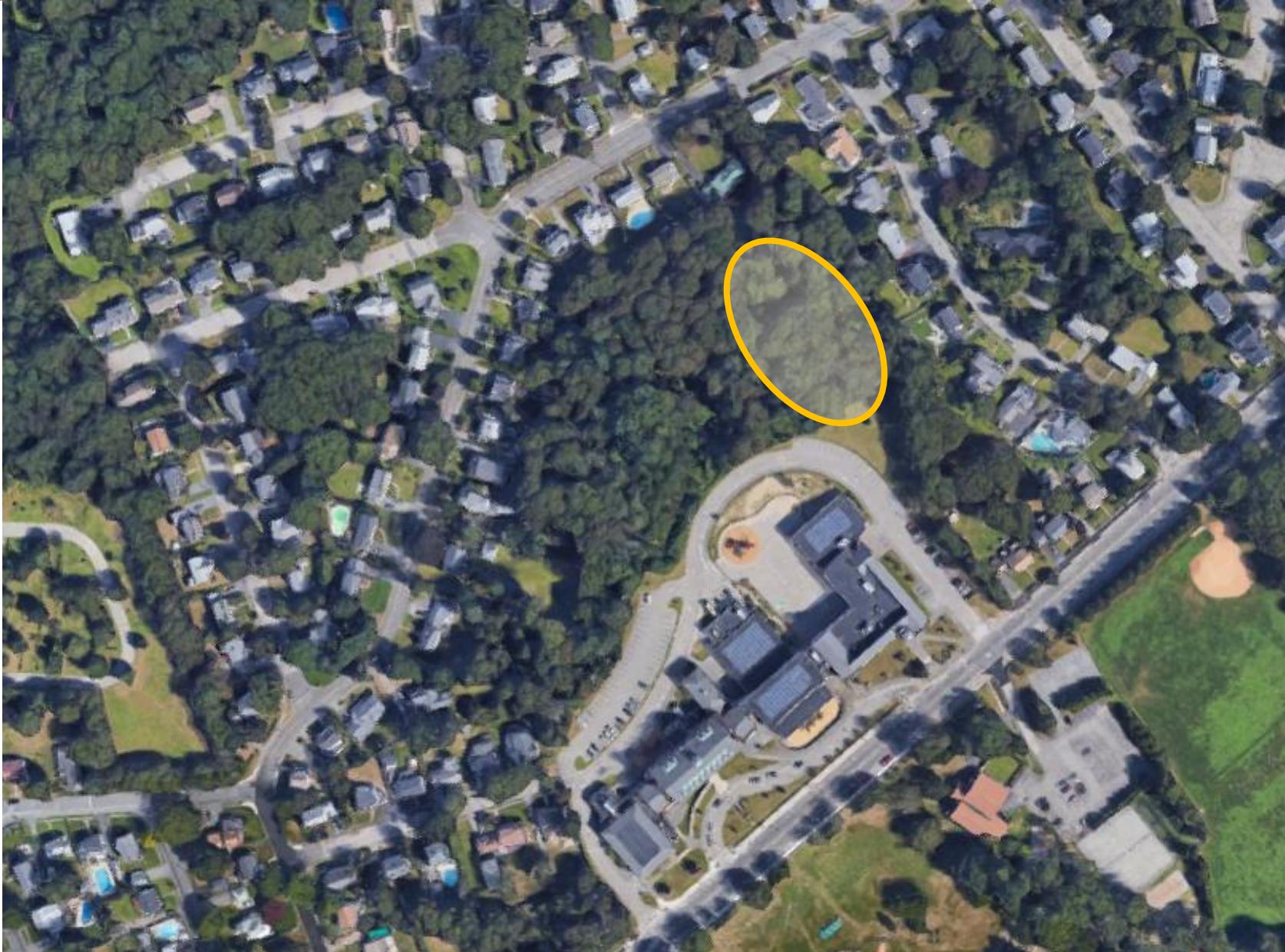
Glover Elementary School

Addition



Collicot Cunningham Site

Early Ed Center



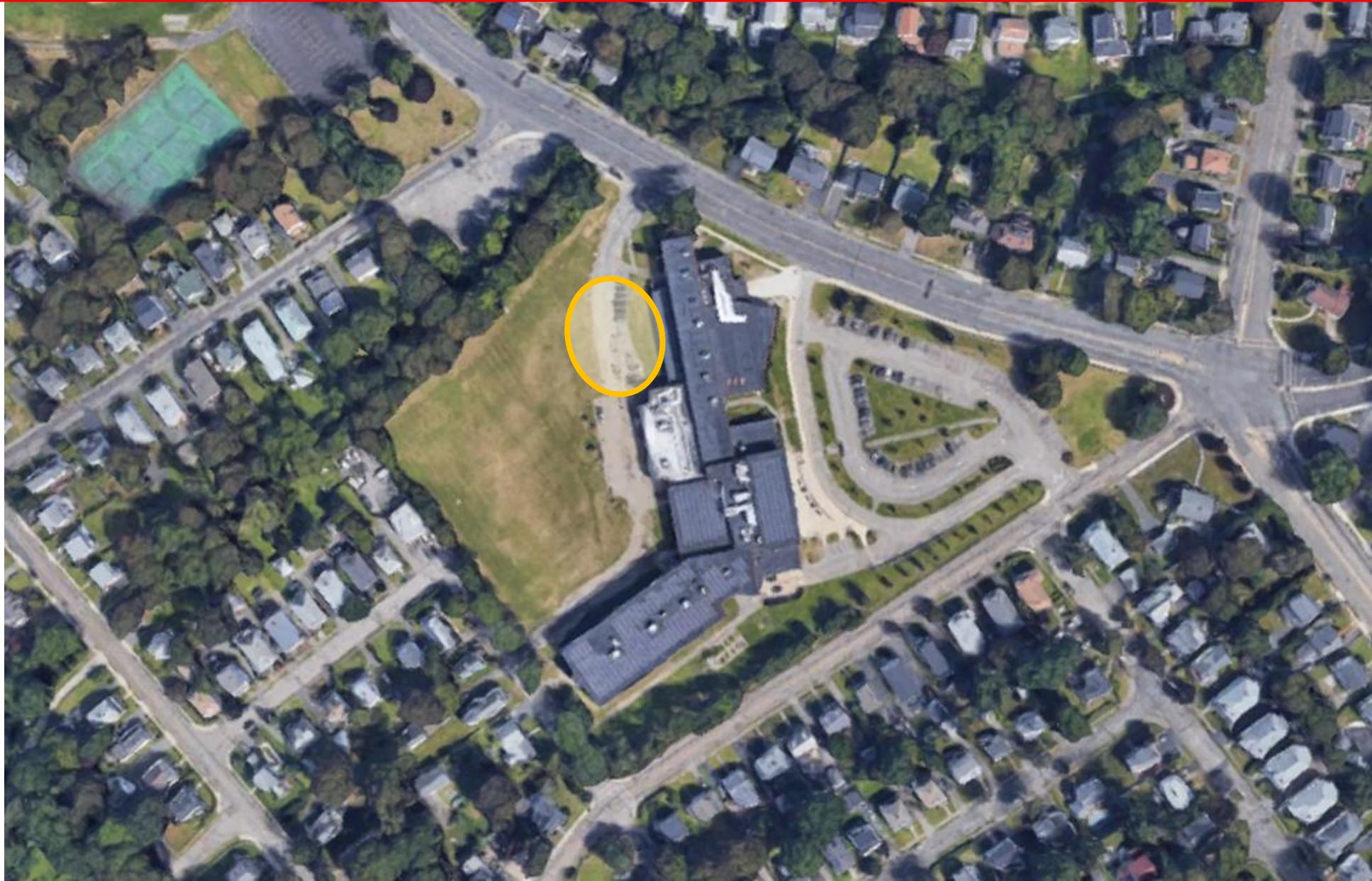
Collicot Cunningham Site

Early Ed Center



Pierce Middle School

Addition



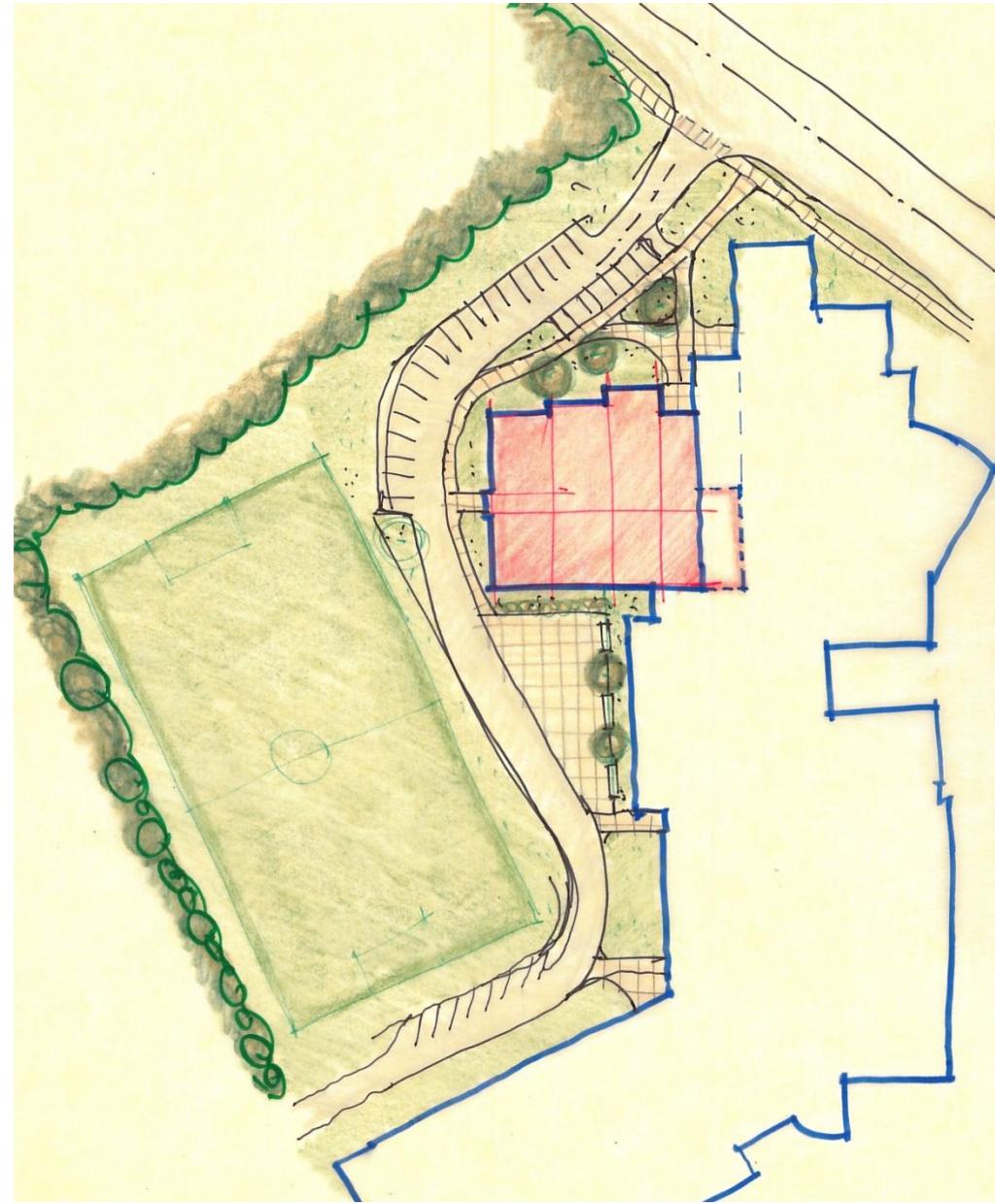
Pierce Middle School

Addition



Pierce Middle School

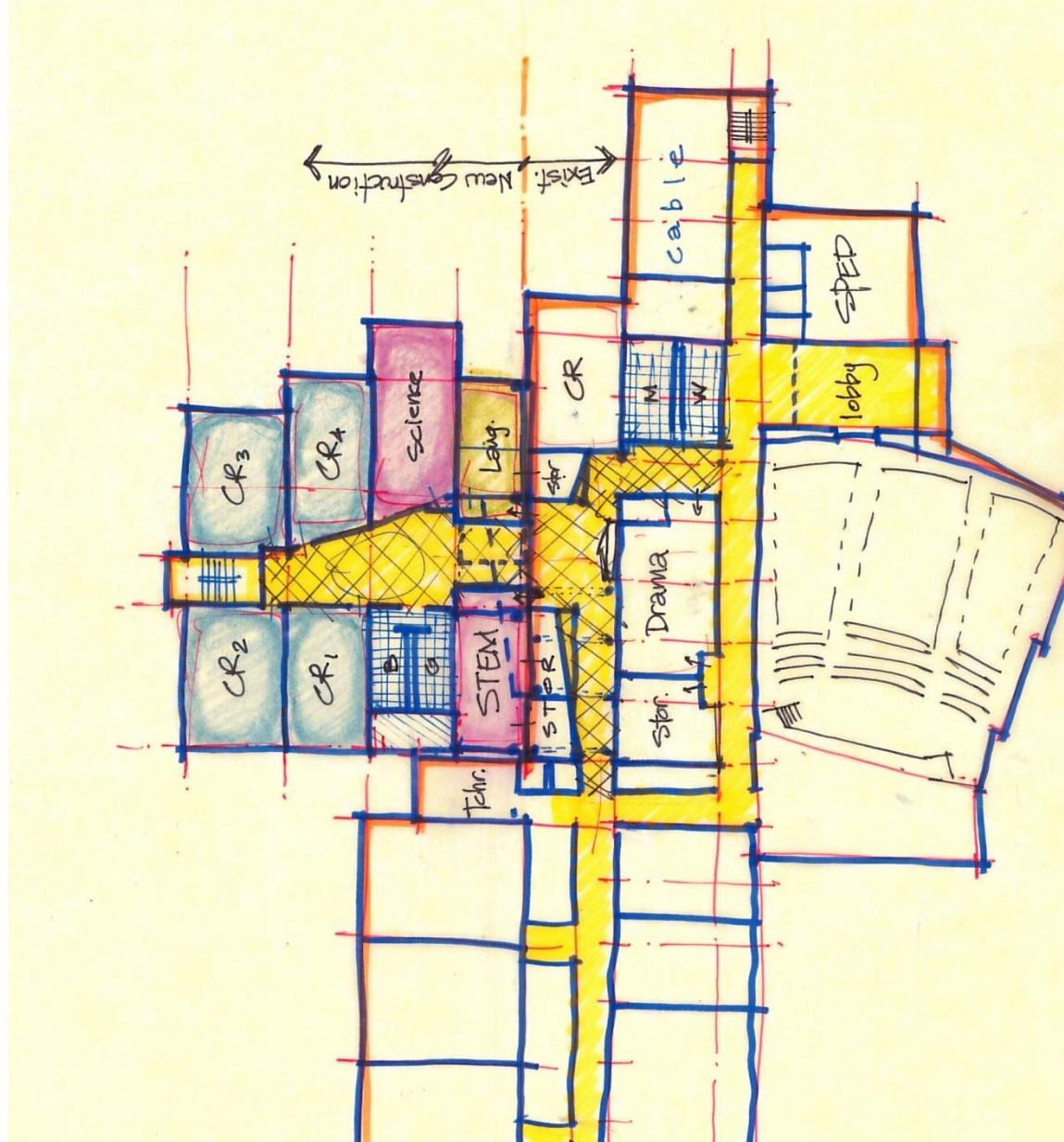
Addition



Site Plan

Pierce Middle School

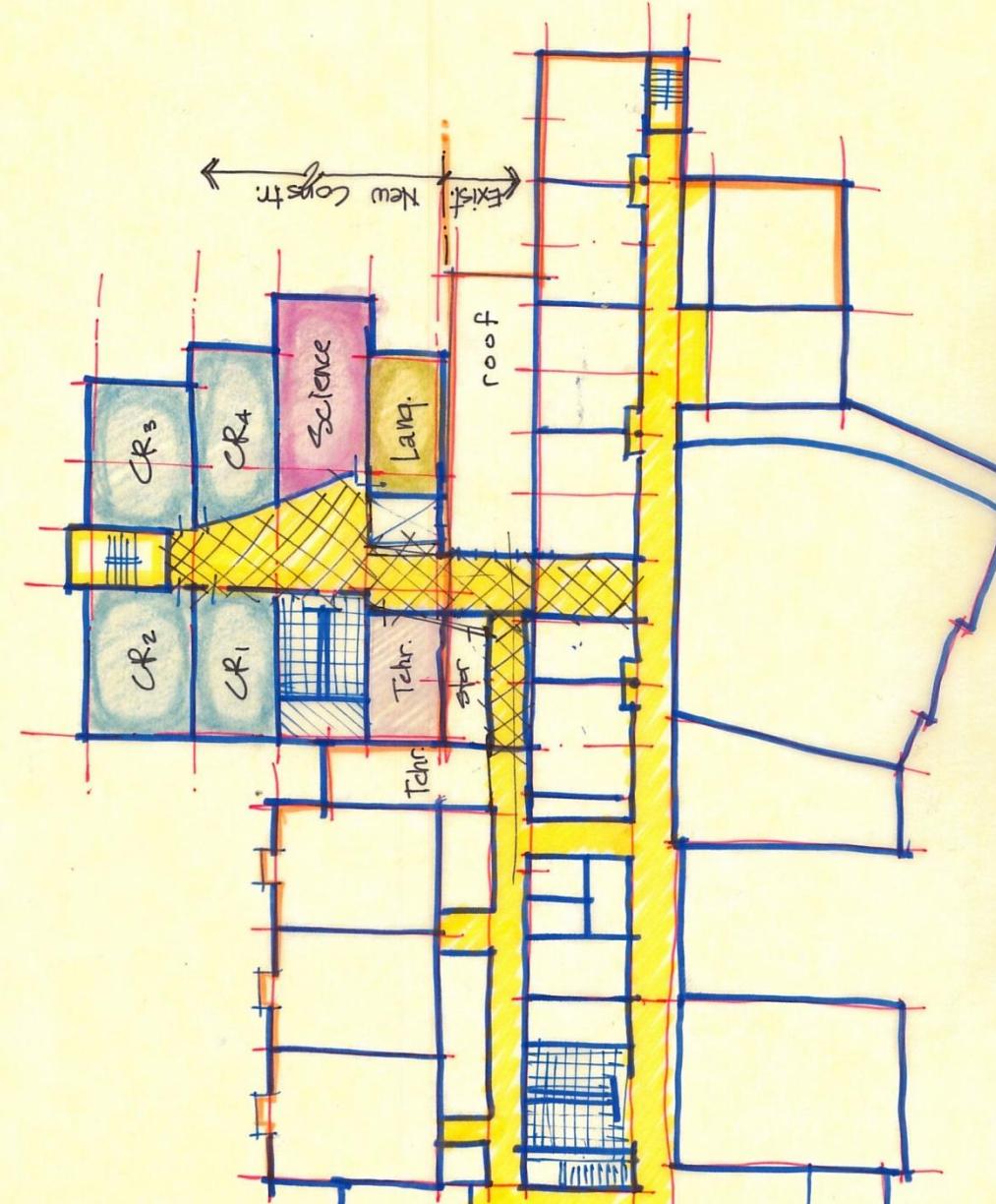
Addition



First Floor Plan

Pierce Middle School

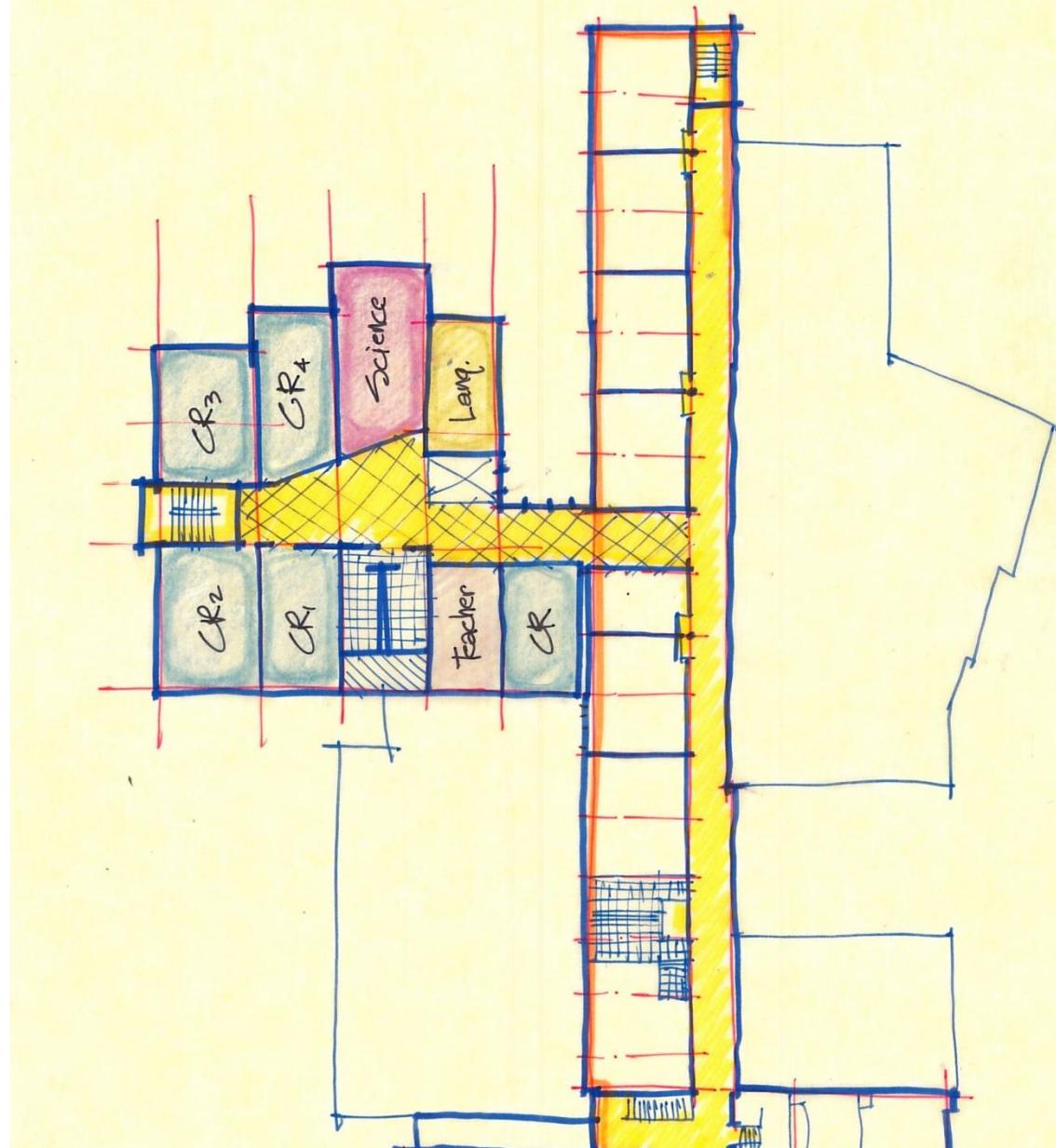
Addition



Second Floor Plan

Pierce Middle School

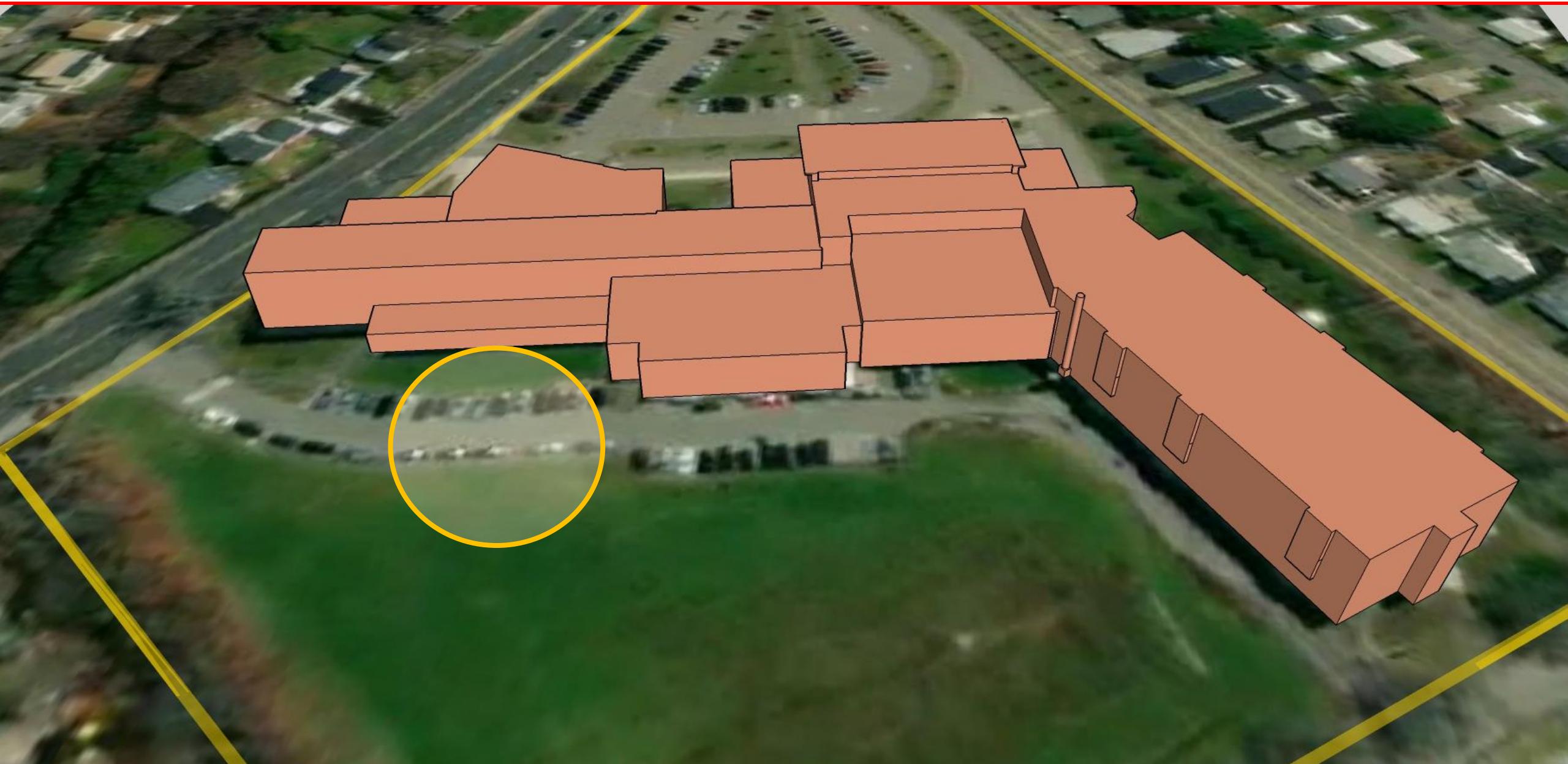
Addition



Third Floor Plan

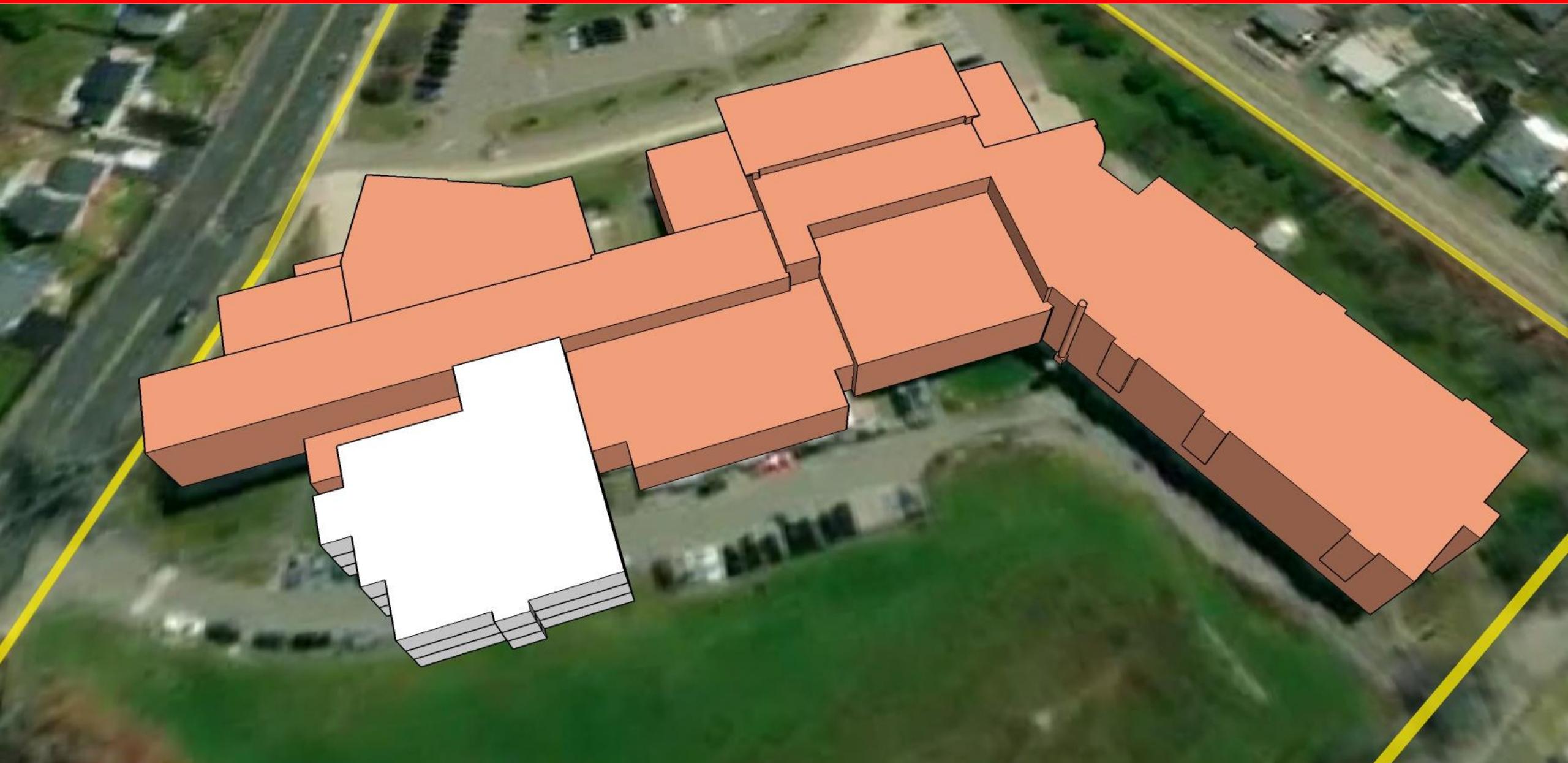
Pierce Middle School

Addition



Pierce Middle School

Addition



Pierce Middle School

Addition



Milton High School

Addition



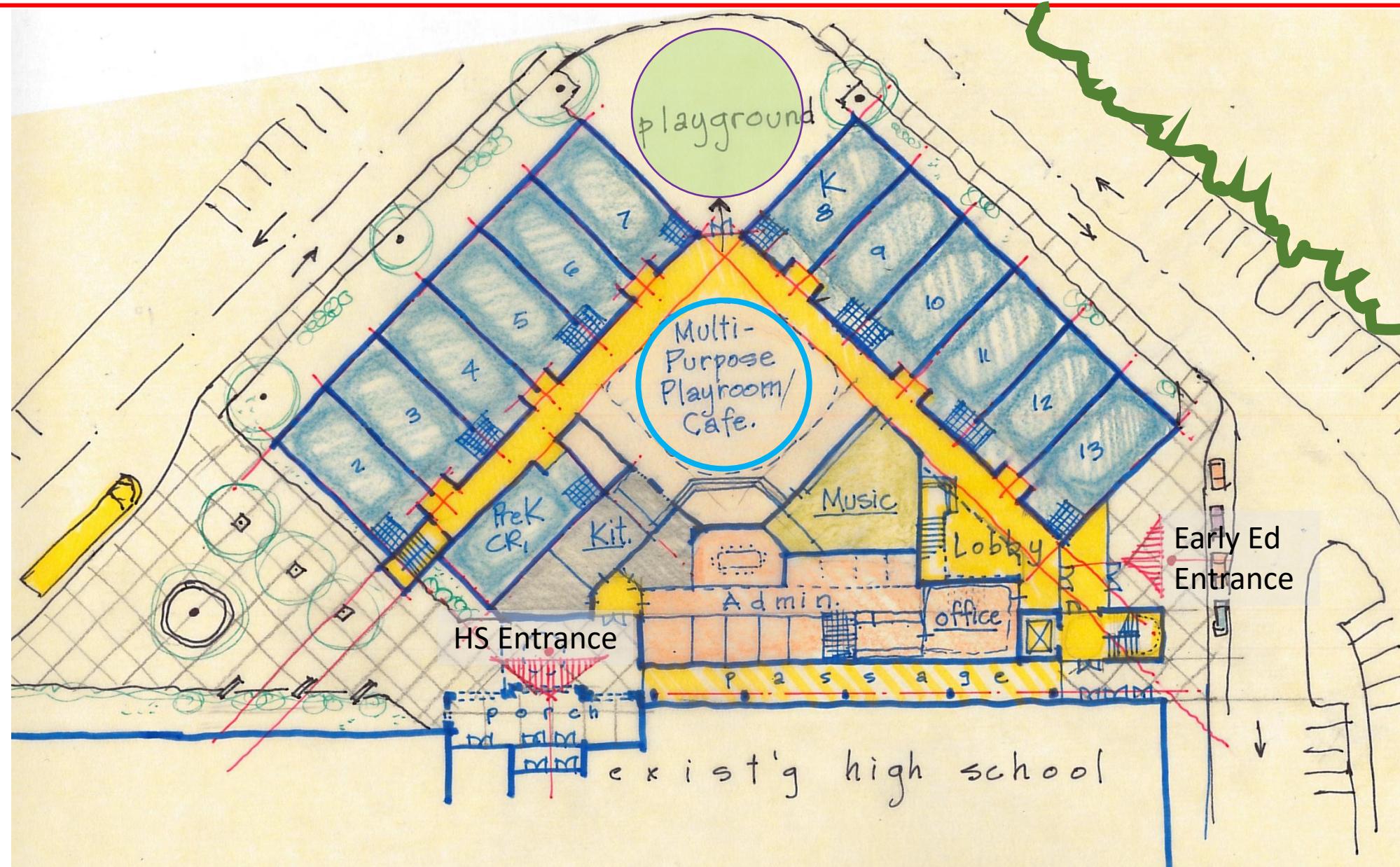
Milton High School

Addition



Milton High School

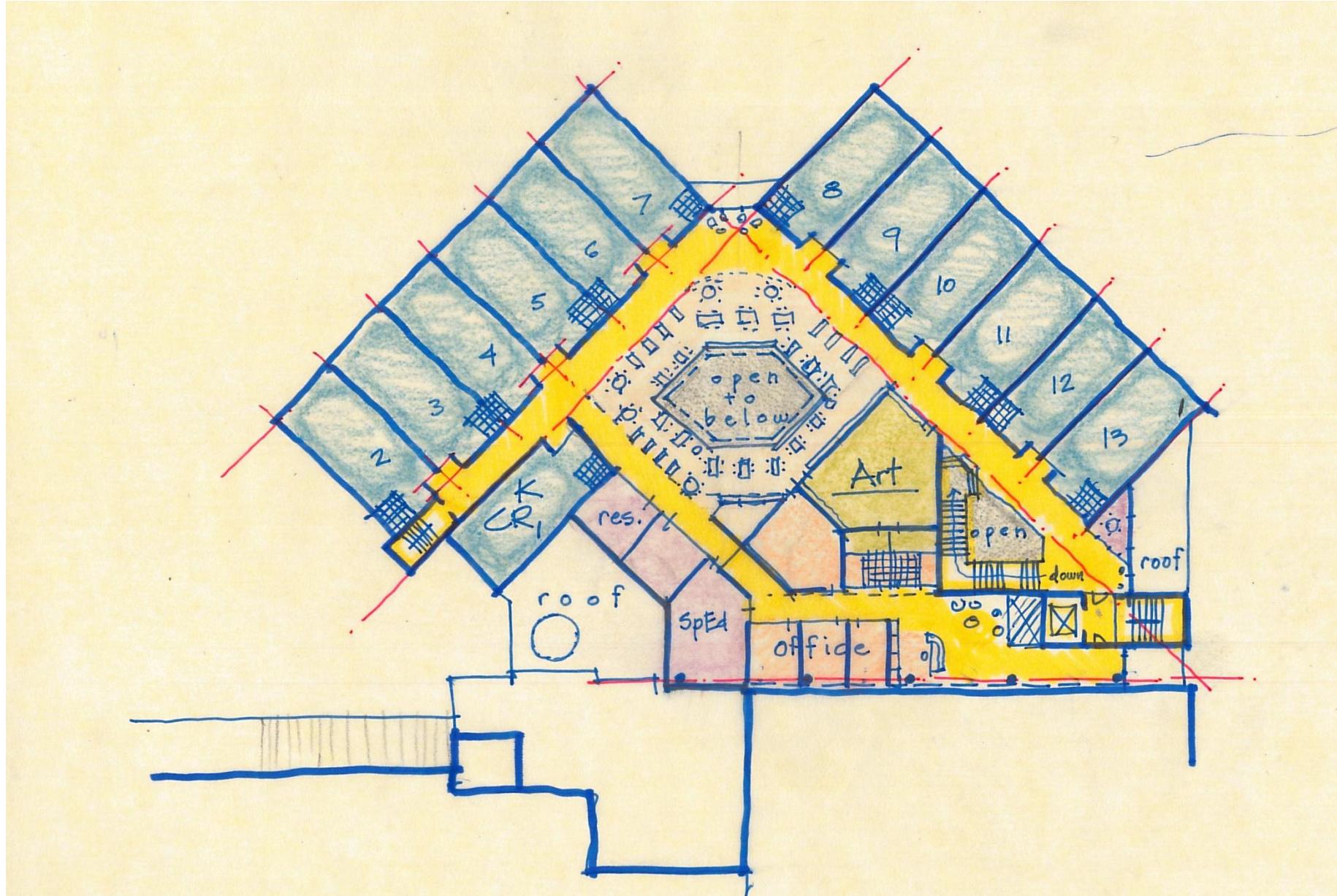
Addition



First Floor Plan

Milton High School

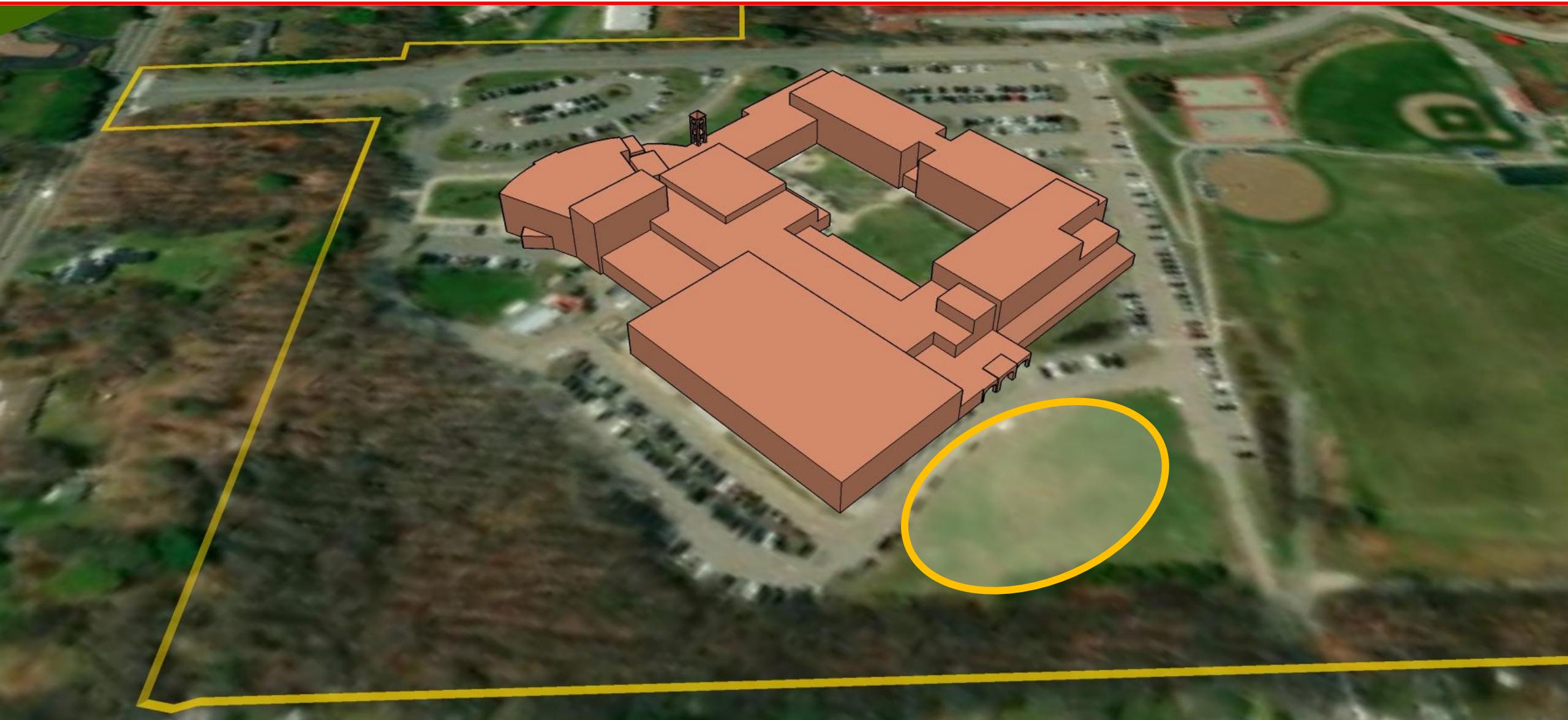
Addition



Second Floor Plan

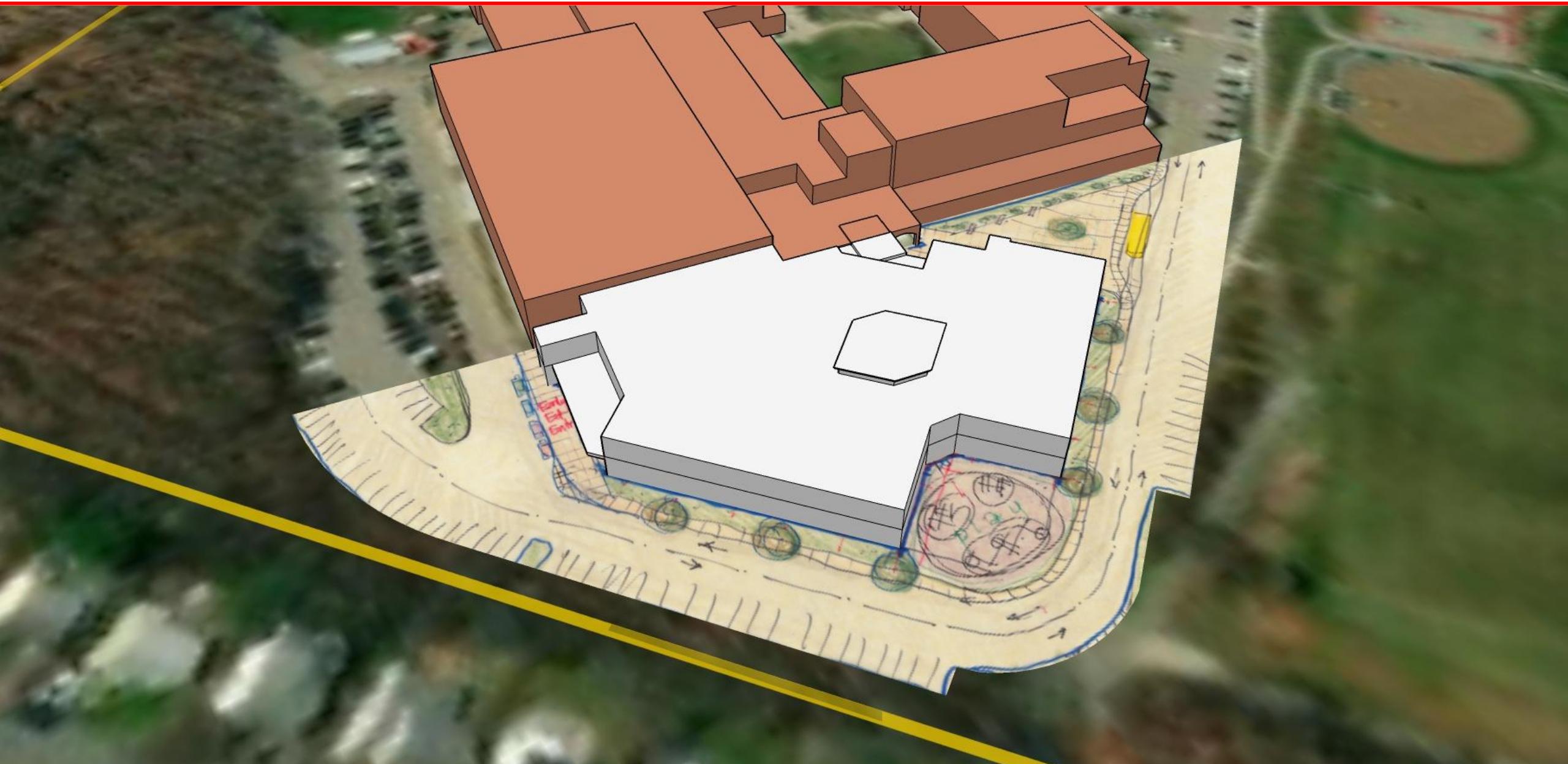
Milton High School

Addition



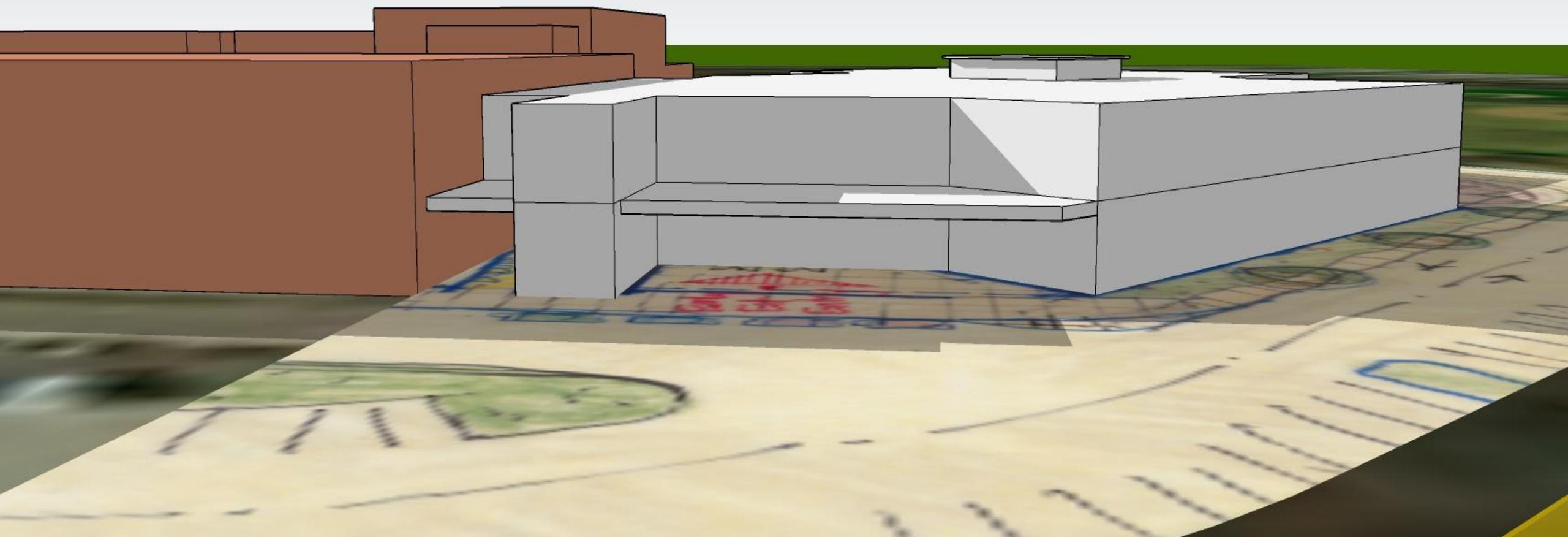
Milton High School

Addition



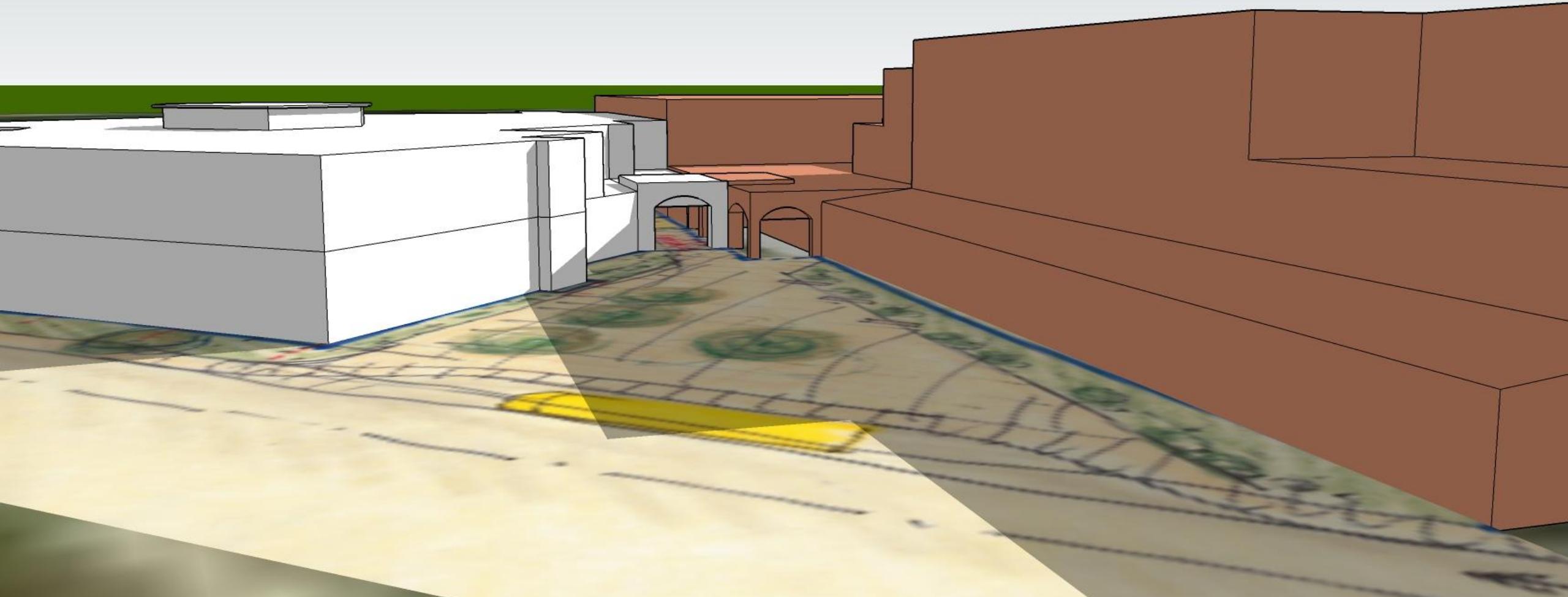
Milton High School

Addition



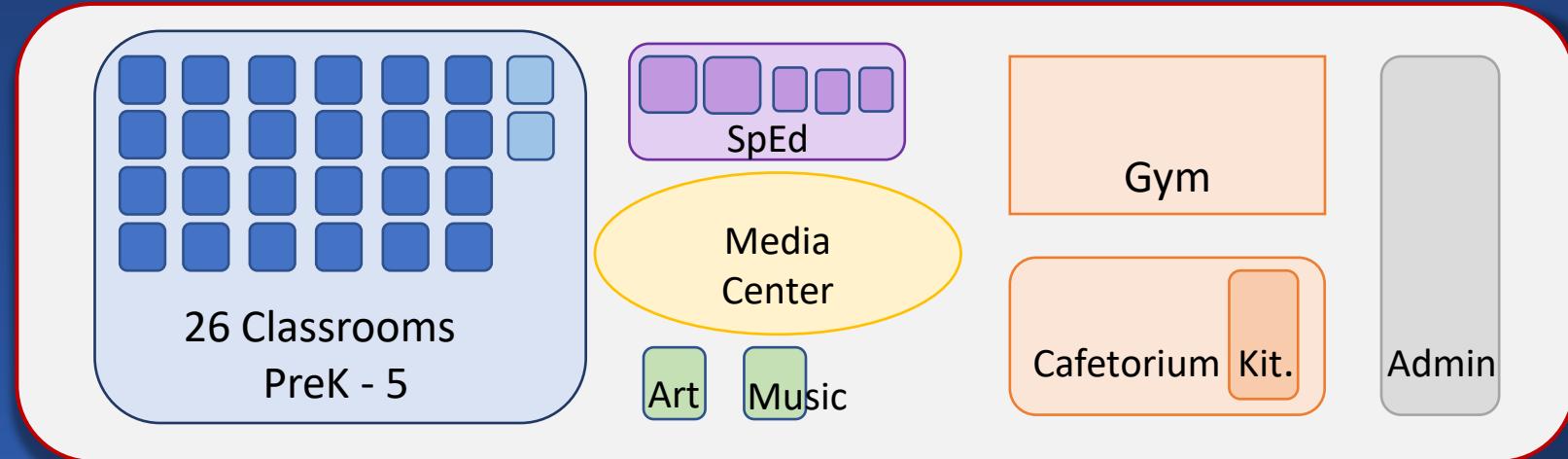
Milton High School

Addition

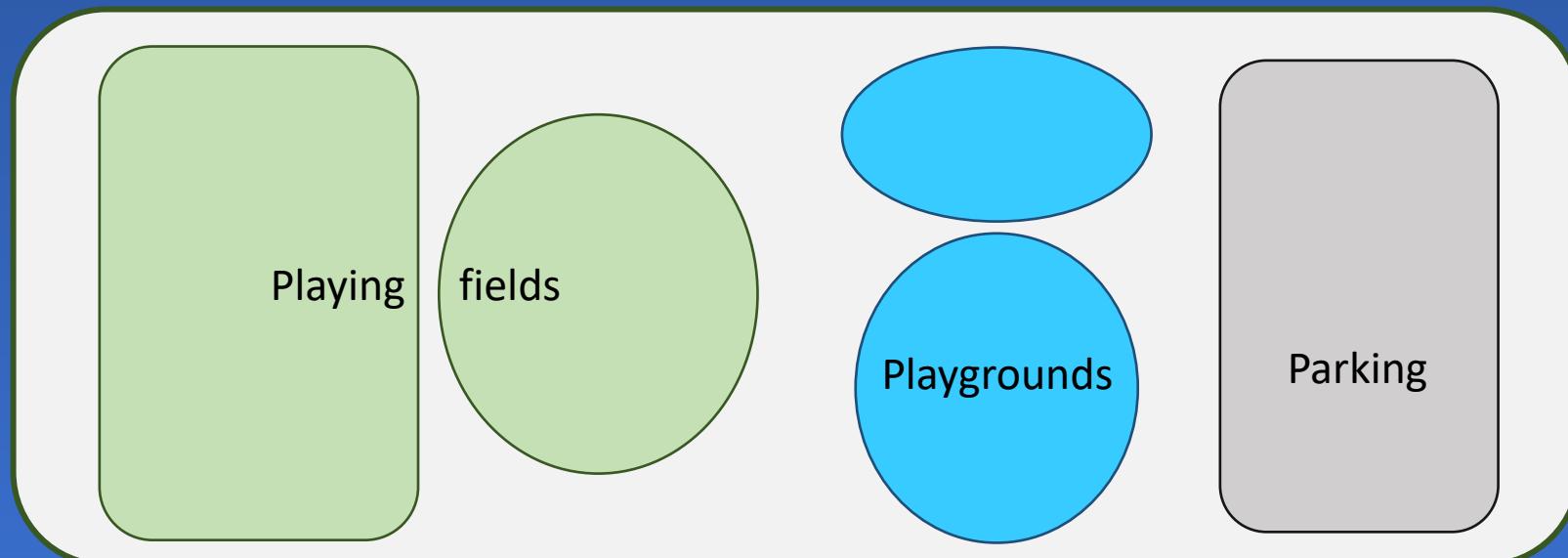


New Elementary School

Addition



Building:
77,500 square feet



Site:
To be determined

Options

Short-term

Option	Description	Construction Cost	Project Cost
Convert	Convert 5 Art, Music, Computer Rooms into Classrooms	\$0	< \$20,000.
Construct	Construct a new Classroom within existing Library/Media Center (3 times)	\$45 - \$60,000.	\$60 - \$80,000.
	Construct 3 new Classrooms within the upper floor of Cunningham	\$800,000 - \$1.1 M.	\$1.0 - \$1.3 M.
Rent	Rent modular classrooms for each school (8 total)	One time: \$50 - \$75,000/CR Lease: \$60 - \$75,000/yr/CR	\$1.8 - \$2.4 Million 3 years

Options

Long-term

Option	Description	Construction Cost	Project Cost (including 3 years of escalation)
Glover One Story Addition	Construct an 11- Classroom addition to the rear of the Glover School. +/- 15,000 gsf	\$6.0 - \$6.4 Million	\$7.5 - \$8.8 M
Glover Two Story Addition	Construct an 18- Classroom addition at the front of the Glover School. +/- 25,000 gsf	\$10.7 - \$11.3 Million	\$14.2 - \$15.8 M
Early Ed Center Freestanding (site tbd.)	Construct a new PreK & K school with 26 Classrooms. +/- 59,000 gsf	\$25.6 - \$28.2 Million	\$34.1 - \$37.6 M
Early Ed Center High School site	Construct a new PreK & K addition with 26 Classrooms +/- 55,000 gsf	\$21.5 - \$23.7 Million	\$28.6 - \$31.6 M
5 th Grade Addition Middle School	Construct a new addition with 18 Classrooms. +/- 30,000 gsf + renovations	\$15.6 - \$17.3 Million	\$21.6 - \$24.0 M
New K-5 School New site (tbd.)	Construct a new PreK – 5 School with 26 Classrooms. +/- 77,500 gsf	\$34.3 - \$37.8 Million	\$45.6 - \$50.3 M

Evaluations

Short-term

Option	Description	Pro's	Con's
Convert	Convert 5 Art, Music, Computer Rooms into Classrooms	Lowest cost option Reduces average class sizes Can be reversed if future space becomes available	Reduces educational opportunity for the arts
Construct	Construct a new Classroom within existing Library/Media Center (3 times)	Relatively low cost option Reduces average class sizes Could possibly be reversed if future space becomes available	Reduces Library/ Media Center space Conflicts with MFE's goals to expand use of libraries
	Construct 3 new Classrooms within the upper floor of Cunningham	Utilizes underutilized space Reduces average class sizes	Safety concerns with using upper floor for students Expensive option for 3 classrooms
Rent	Rent modular classrooms for each school (8 total)	Reduces average class sizes without displacing current educational space	Most expensive temporary option Reduces playground space Classrooms tend to be remote, isolated

Evaluation

Long-term

Option	Description	Pro's	Con's
Glover One Story Addition	Construct an 11- Classroom addition to the rear of the Glover School. +/- 15,000 gsf	Lowest cost option	Not a complete District-wide solution by itself Expands an already tight site
Glover Two Story Addition	Construct an 18- Classroom addition at the front of the Glover School. +/- 25,000 gsf	Provides a District-wide solution with one construction project	Significantly expands an already tight site; Traffic & abutter impacts Doesn't fully restore educ. program
Early Ed Center Freestanding (site tbd.)	Construct a new PreK & K school with 26 Classrooms. +/- 59,000 gsf	Provides a District-wide solution with one construction project	Serious site restrictions, abutter impacts Expands an already tight site
Early Ed Center High School site	Construct a new PreK & K addition with 26 Classrooms +/- 55,000 gsf	Least disruptive addition option Provides a District-wide solution with one construction project	Potential conflict with HS population Impact on abutters?
5th Grade Addition Middle School	Construct a new addition with 18 Classrooms. +/- 30,000 gsf + renovations	Provides a District-wide solution with one construction project	Relocating 5 th Gr is not educationally desirable Expands an already tight site Disruptive construction logistics
New K-5 School New site (tbd)	Construct a new PreK – 5 School with 26 Classrooms. +/- 77,500 gsf	Most flexible long-term solution Maintains current grade configuration Provides a District-wide solution	No identified site available Most expensive long-term option

Next Steps

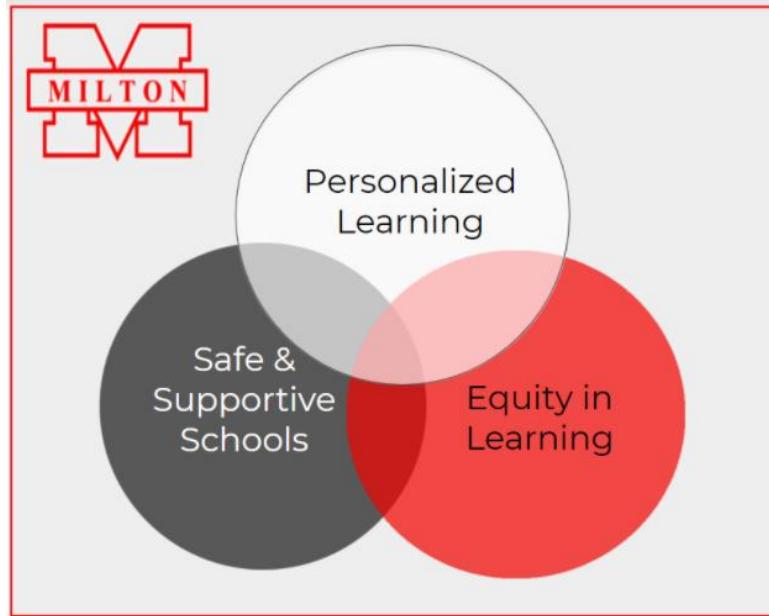
- Evaluate, recommend long & short term option(s)
- Summarize, present results

Elementary Space Needs Study

Thank You!

Milton Public Schools

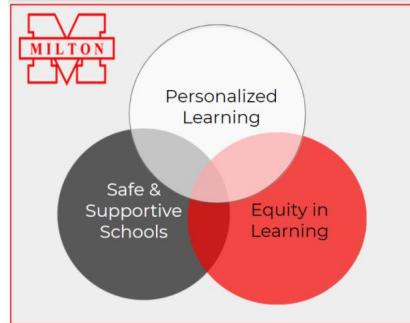
DRA



Milton Public Schools Strategic Plan 2022-2027

Educate, Challenge & Empower

all students to achieve individual post-secondary goals and to be productive, caring, and contributing members of society.



MILTON PUBLIC SCHOOL VISION STATEMENT:

We, the Milton Public Schools, envision a district with excellent instruction in every classroom, where learning experiences are aligned with students' individual strengths and needs, and where attention to academic and social emotional growth are balanced so that every child achieves at high levels and develops a strong sense of self. We see a district of intellectual discourse and professional learning at all levels- students, faculty, and administration- in which there are structures and processes for continual reflection, innovation, and data driven decision-making. We know that such a district is achievable if: we facilitate instruction that instills a passion for learning, curiosity, and critical thinking skills; we are committed to cultural competency; we foster a positive approach to the behavioral health of children; and we build strong partnerships with families and the community.

STRATEGIC GOAL:

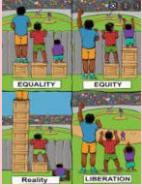
Milton Public Schools will provide all students with highly personalized, developmentally appropriate, emotionally safe and equitably balanced daily learning experiences designed to ensure each student becomes a productive, caring, and contributing member of society and can achieve his/her/their post-secondary goals, as measured by the analysis of information obtained via the district data cycle.

MPS has identified three strategic initiatives in this Strategic Plan. It is our belief that when these three initiatives are realized:

- students will experience a robust and academically rich school experience
- the district will experience growth in high stakes testing outcomes, and
- Performance outcomes, such as achievement/opportunity gaps will be reduced and or eliminated.

At the district level, these are the [student and equity outcomes](#) we would achieve via the Strategic Goal.

Three Pillars	Definition:	Strategic Initiatives:
Personalized Learning 	<p>A path in education that takes into account the specific strengths, interests and needs of each student and creates a unique learning experience based on those individual traits. This is done through existing curricula.</p>	<p>All educators will learn about, use, and monitor personalized teaching, learning, and instructional practices in order to ensure that all students are making progress academically, socially, emotionally, behaviorally, cognitively and culturally.</p>
Safe & Supportive Schools 	<p>Safe and Supportive Schools foster a safe, positive, healthy and inclusive whole school learning environment; support students holistically in key areas of development; and integrate services and align the many student support initiatives that aim to address particular areas of need in our schools. Access to culturally, linguistically, clinically, age, and developmentally appropriate practices and services, integrated into a welcoming school culture, are critical components of safe and supportive learning environments.</p>	<p>All educators will learn, understand, and implement practices grounded in trauma-informed instruction and SEL competencies (self-awareness, social awareness, relationship skills, responsible decision-making, and self-management); embed their use across daily instruction; and monitor for effective use and implementation, to foster Safe & Supportive Learning Environments.</p>

<h2>Equity in Learning</h2> 	<p>Equity means creating conditions in which all learners (students and adults) of all identities and abilities have the resources and support they need to thrive.</p>	<p>All educators will have opportunities to build their capacity, practice, progress monitoring skills designed to improve the implementation of Equitable, Restorative and Inclusive Educational Practices to leverage each students' unique identities while ensuring that all students are making progress academically, social-emotionally, behaviorally, cognitively and culturally.</p>
---	---	--

IMPLEMENTATION OVERVIEW

Comprehensive review of data identifies:

Rationale: Milton Public Schools has developed a robust strategic plan that has evolved over several years. Initiatives have grown over time, and the document has had several revisions. The work guided by this process is designed to create a clearer path for next steps, as well as clear action steps related to Impact Benchmarks and Measuring Outcomes. It is also designed to identify Key Terms (guiding vocabulary) for consistency and Resources (funding, professional development, curriculum, et. al) needed to reach the goals. The Strategic Plan is designed to be the foundation that drives instruction, school improvement plans, and staff professional development (teaching & learning and professional practice).

History: For the past 3 ½ years, the Strategic Planning Committee has been composed of members who served as liaisons to strategic goal task forces that have been addressing the work of the strategic plan. The goal of this revised document is to streamline the strategic plan to ensure that all the below mentioned data in conjunction with current initiatives are clearly articulated in terms of outcomes for students.

Milton Public Schools has completed several SWOT and Root Cause Analyses in alignment with preparing for this strategic plan related to work in all areas of educational need and growth. This has included formal and informal program reviews, data analysis and stakeholder engagement.

- **Summaries include:**

1. The SEL Task Force reports: The need for trauma-informed practice and instruction has been clearly demonstrated and the capacity of all staff and educators to support the ever-changing and complex needs of all learners continues to build. Through data collection and intentional, tiered support for students, we will be better able to track, monitor, and intervene effectively with at-risk students.
2. The Teaching and Learning SubCommittee reports: Following school closure related to the Covid-19 Pandemic, the Teaching and Learning SubCommittee focused on Return to School Planning.

3. The Cultural Competency subcommittee reports: Identifying a focus on increasing the effective participation and outcomes for students in all subgroups as well as a focus on increasing the cultural competency of all staff towards increasing engagement across all community members and increasing home to school collaboration and coherence.
4. The Personalized Learning SubCommittee reports: The PL subcommittee determined that the utilization of a digital platform would offer an initial repository to collect student work. Next steps need to include professional development designed to support understanding of Personalized Learning and data interpretation and analysis. Following this understanding, professional development of platform navigation will be necessary.
5. Cambridge Consulting Group completed a comprehensive [quality program review](#) with a lens on equity in learning and provided the following feedback: CCG made some strong recommendations regarding district practices that offer enrichment as well as limitations to student learning across subgroups.
6. The Office of Pupil Personnel Services completed a root cause analysis of the district's [disproportionality](#) in special education as well as a [Special Education Program Review](#), and developed a robust action plan to address equity for all students. Initiatives are focusing on staff support and training to enhance instruction, further social emotional support for all students, and provide intensive early intervention services for students who may be at academic and learning risk and ensure Restorative Justice Practices drive student outcomes related to social issues, equity in instructional practices and discipline.
7. Academic Program Reviews:
 - a. [ELA Program Review](#) and [5 year review](#): K-5 review during the 2016-1017 academic year, 6-8 review during the 2019-2020 academic year
 - b. A [Social Studies Program Review](#) [InquirEd rubric](#), [explanation](#)
 - c. Science K-8 initiatives align with the revision of the [Advancement Budget](#)
 - d. [Math Program Review](#) is in progress (2021)
 - e. [Arts Program Review](#):
8. District-wide Data Review: MPS has also completed a [comprehensive review of data](#) related to student performance on high stakes testing. This process has indicated that the Covid-19 global pandemic has had a significant impact on student academic achievement and progress, as shown through our standardized assessments - MCAS, AP, SAT. Across all assessments, including our universal literacy and math screeners - Lexia and iReady - there are pervasive and historical performance gaps between subgroups. Those subgroups experiencing the lowest outcomes include: students with disabilities, low income students, African American/Black students, Hispanic/Latino students, and English learners.
9. DESE Sponsored Audits and Program Reviews in the past few years has included:
 - a. Office of Civil Rights/Special Education Tiered Focus Monitoring [Review](#), noting area of opportunity related to academic access for all students and appropriate use of restraint
 - b. MPS is also in process of a Targeted Program Review and will be integrating findings into this document as appropriate. *(in process)*

PRIORITIES FOR EACH STRATEGIC INITIATIVE:

<p>Personalized Learning: All educators will learn about, use, and monitor personalized teaching, learning, and instructional practices in order to ensure that all students are making progress academically, socially, emotionally, behaviorally, cognitively and culturally.</p>	<p>Safe & Supportive Schools: All educators will learn, understand, and implement practices grounded in trauma-informed instruction and SEL competencies (self-awareness, social awareness, relationship skills, responsible decision-making, and self-management); embed their use across daily instruction; and monitor for effective use and implementation, to foster Safe & Supportive Learning Environments.</p>	<p>Equity in Learning: All educators will have opportunities to build their capacity, practice, progress monitoring skills designed to improve the implementation of Equitable, Restorative and Inclusive Educational Practices to leverage each students' unique identities while ensuring that all students are making progress academically, social-emotionally, behaviorally, cognitively and culturally.</p>
---	--	---

Using an equitable lens, MPS will complete the following benchmarks as measured by growth in the evidence collected with the district [data cycle](#).

<ul style="list-style-type: none">Leadership will provide opportunities for teachers to see Personalized Learning modeled within specific lessons.Educators will identify places in their instruction where Personalized Learning can be used successfully and leverage provided examples to plan units and lessons.Educators will integrate Personalized Learning modalities in daily practice to support student understanding.Educators will help students determine their strengths, interests, and needs and how to integrate those into the student's educational experience.Educators will assess achievement towards standards using student's strengths, interests, and needs.Educators will reflect on individual needs as learners and track progress on learning goals and standards.	<ul style="list-style-type: none">Educators will model and utilize and practice trauma-informed skills in their classrooms to create safe and supportive, equitable learning environmentsEducators will use SEL and behavioral health assessment data using district identified screeners and tools, such as IntellisparkEducators will collect, analyze and use data to inform instruction, foster safe and supportive learning environments, and support equitable learning environmentsEducators will develop and implement an MTSS system of support for Tiers 1, 2, and 3 interventions for SEL and behavioral healthEducators and school leaders will continue to utilize and implement a Positive Behavioral Interventions and Supports (PBIS) system to establish and maintain a foundation of universal,	<ul style="list-style-type: none">Educators will implement an equitable PreK-12 curriculum that supports ALL learners of ALL identities and abilitiesEducators and district leaders will create structures that provide opportunity for student voice to inform the provision of appropriate instruction and needed supports.Educators and district leaders will routinely conduct curriculum reviews in accordance with the schedule identified in the review cycle,Educators will apply and assess equitable grading practices.Educators will implement best instructional practices that are culturally relevant.Educators and leaders will use the principles of restorative justice to build school & classroom communities.
--	---	--

<ul style="list-style-type: none"> • Educators will develop a rubric defining the levels of achievement on each <u>standard</u>. • Educators will routinely monitor and evaluate data collected and use data to inform instruction. 	<p>consistent, and proactive support for all students school-wide</p> <ul style="list-style-type: none"> • Educators will be provided opportunities, resources and support to ensure they effectively enter the district and grow as an educator and community member-resources and support may include <u>mentoring</u> and <u>affinity groups</u> 	<ul style="list-style-type: none"> • All staff will <u>strengthen partnerships</u> with family/community outreach and engagement to ensure strong home/school coherence and collaboration • Educators and staff will review, iterate, and implement with fidelity an equitable behavioral <u>incident reporting process</u>. • Recognizing the rich backgrounds and experiences within Milton Public Schools, educators and leaders will research and utilize best practices for recruitment of diverse faculty. • Milton Public Schools will conduct a needs assessment that examines barriers experienced by families when seeking and accessing quality care and education for their preschool aged children with an emphasis on the need to examine whether all ethnic-racial groups and families from varied socio-economic labels have equal and equitable access to high-quality early education and care opportunities.
---	--	---

RESOURCES and PROFESSIONAL DEVELOPMENT:

Personalized Learning

Adopt a common data platform (e.g. [Otus](#)) for all grade levels and determine what information will be collected.

[Data Cycle](#)

Expanding on what has been [started](#):

[Data Cycle](#) implementation

[Standards Based Grading](#) with equity lens

[District current report cards K-5](#)

Resources and Professional Development

Year One and Two

Direct Instruction hours: (Directors/Outside Providers/Personalized Learning Committee)	Coaching/Mentoring hours: (Coordinators, Department Heads, Personalized Learning Committee, Leadership Team)	Teacher Collaboration hours: (Teachers)
<ul style="list-style-type: none">* New staff training on using multiple modalities in lessons/units* Training on how to link standards to all teaching and learning* Training on how to track progress on standards in a common platform, pending commitment to platform* Training on how to empower students to track progress on standards	<ul style="list-style-type: none">* All leaders promote the use of the MPS Data Cycle: Common language, MPS Data cycle, Learner Centered Problem, & Problem of Practice* All leaders support teachers with mastery learning - link standards to lessons, track progress, remediation, expanding, and assessing student progress with an effective rubric	<ul style="list-style-type: none">* After viewing sample lessons teachers identify lessons/units to embed PL initiatives* Using common planning time, teachers develop PL lessons* Teachers use common planning time, department/grade level meetings to discuss how to meet needs of all students* Use common planning, dept. meetings, grade level meetings to brainstorm ways to incorporate multiple modality instruction into lessons/units

<ul style="list-style-type: none"> * Training on how to remediate and expand knowledge on standards * Training on how to create an effective rubric on standards 		<ul style="list-style-type: none"> * Common planning, dept. Time, principal time, half-day PD...to create rubrics for standards
--	--	--

Years Three, Four and Five		
Direct Instruction hours: (Directors/Outside Providers/Personalized Learning Committee)	Coaching/Mentoring hours: (Coordinators, Department Heads, Personalized Learning Committee, Leadership Team)	Teacher Collaboration hours: (Teachers)
<ul style="list-style-type: none"> * New staff training on using multiple modalities in lessons/units * Additional training on how to remediate and expand knowledge on standards * Training on how to assess the effectiveness of a rubric on standards 	<ul style="list-style-type: none"> * All leaders continue to promote the use of the MPS Data Cycle: Common language, MPS Data cycle, Learner Centered Problem, & Problem of Practice * All leaders continue to support teachers with mastery learning - link standards to lessons, track progress, remediation, expanding, and assessing student progress with an effective rubric 	<ul style="list-style-type: none"> * Teachers view samples lessons from year one (other grade bands) and continue to identify lessons/units where PL can be embedded * Using common planning time, teachers develop PL lessons * Teachers use common planning time, department/grade level meetings to discuss how to meet needs of all students * Use common planning, dept. meetings, grade level meetings to brainstorm ways to incorporate multiple modality instruction into all lessons/units * Common planning, Dept. Time, principal time, half-day PD...to calibrate assessments against rubrics and continue to develop rubrics for standards

Safe and Supportive Schools

Develop a Tiered Systems of Support for SEL and Behavioral Health
Classroom, School, and District-Wide Implementation of [Tiered SEL supports within MTSS](#)

Expanding on what has been started:
SEL and Behavioral Health Screeners and Assessments (i.e. Intellispark)
Continued implementation of PBIS (Positive Behavioral Interventions and Supports)
Trauma-Informed Work

Resources and Professional Development

Year One and Two

Direct Instruction hours: (Directors/Outside Providers, SEL Advisory Team)	Coaching/Mentoring hours: (Coordinators, Department Heads, SEL Advisory Team, Leadership Team)	Teacher Collaboration hours: (Teachers)
<ul style="list-style-type: none">*Training for teachers on using the Intellispark platform and analyzing the data*Training on how to use the Intellispark data to inform practice and determine necessary interventions and supports for individual students*Training on Tiered Systems of Support related to Mental and Behavioral Health*In-depth training on the provision of tiered interventions and supports within the classroom: focus on Tier 2 interventions	<ul style="list-style-type: none">*All leaders continue to promote the use of trauma-informed practices and the integration of SEL/Behavioral Health data as integral components of conversations about student progress, growth, and achievement*All leaders continue to advocate for SEL and Behavioral Health supports and interventions for individual students at the Tiers 1 and 2 level of need*All leaders continue to support teachers in implementing and assessing efficacy of SEL and Behavioral Health interventions	<ul style="list-style-type: none">*Common planning time dedicated to comparing and calibrating data across classrooms*Common planning time, department time, pd time, and principal meetings dedicated to the various ways teachers are providing interventions based on demonstrated need*Common planning time, department time, pd time, and principal meetings dedicated to ongoing PBIS implementation, revisions, improvements, and strategies

<p>*Training on trauma-informed practice and classroom/instructional implications</p> <p>*Training on utilizing trauma-informed practices to create safe and supportive learning environments</p>	<p>*PBIS coaches at each school will continue to assess efficacy of PBIS implementation with teacher teams and administration, determining necessary next steps and coaching new staff on the PBIS model</p>	<p>*Development of a Tiered Systems of Support for Mental and Behavioral Health, focusing on Tier 2 interventions- led by SEL Advisory Team, Student Support Teams, and Behavioral Health Support Teams at each school</p> <p>*Common planning time, department time, pd time, and principal meetings dedicated to the development and implementation of Tier 1, 2, and 3 SEL and Behavioral Health interventions</p>
---	--	--

Year Three, Four and Five		
Direct Instruction hours: (Directors/Outside Providers, SEL Advisory Team)	Coaching/Mentoring hours: (Coordinators, Department Heads, SEL Advisory Team, Leadership Team)	Teacher Collaboration hours: (Teachers)
<p>*Additional training to maximize the possibilities associated with the Intellispark platform (including incentives, tracking of interventions, and student-teacher communication tools)</p> <p>*Continued training on Tiered Systems of Support related to Mental and Behavioral Health</p> <p>*Training on the provision of tiered interventions and supports within the classroom: focus on Tier 3 interventions with a focus on partnerships with outside agencies, providers, and in-district resources to support our most at-risk students</p> <p>*Additional trauma-informed practice training focusing on reflective practice and classroom-based and school-wide implications of the adoption of a trauma-informed approach</p>	<p>*All leaders continue to promote the use of trauma-informed practices and the integration of SEL/Behavioral Health data as integral components of conversations about student progress, growth, and achievement</p> <p>*All leaders continue to advocate for SEL and Behavioral Health supports and interventions for individual students at the Tiers 1 and 2 level of need</p> <p>*All leaders continue to support teachers in implementing and assessing efficacy of SEL and Behavioral Health interventions</p>	<p>*Common planning time dedicated to best practices around assessing SEL and Behavioral Health utilizing district-provided platforms</p> <p>*Common planning time, department time, pd time, and principal meetings dedicated to analyzing and determining school and district-wide implications of SEL/Behavioral Health data collected</p> <p>*Development of a Tiered Systems of Support for Mental and Behavioral Health, focusing on Tier 3 interventions- led by SEL Advisory Team, Student Support Teams, and Behavioral Health Support Teams at each school (</p> <p>*Common planning time, department time, pd time, and principal meetings focused on best practices and strategies for supporting our most at-risk students</p>

		*School-based and district-level leadership meetings dedicated understanding the impact that trauma-informed practice has had and next steps/implications
--	--	---

Equity in Learning

Expanding what has been started:
 Cultural Proficiency Professional Development
 Tier 1, 2, 3 Restorative Justice Training for all administrators
[Restorative Justice PD](#) for all staff
 Teachpoint DEI Professional Development Modules
 Disproportionality in Special Education PD and training
 Mentoring and Affinity Groups for Students and Staff
 Anti-Biased Hiring and Recruitment Practices

Resources and Professional Development

Year One and Two

Direct Instruction hours: (Directors/Outside Providers, Cultural Competency Committee, Steering Committee, Director of Educational Equity)	Coaching/Mentoring hours: (Coordinators, Department Heads, Cultural Competency Committee, Steering Committee, Leadership Team)	Teacher Collaboration hours: (Teachers)
*Cultural Competency PD for new staff, ongoing and robust PD * Facilitate learning with the use of a core text to create common language and strategies across the district using tools that focus on a book that focuses on shifting mindset but also	*All leaders continue to incorporate, implement, assess, and coach diversity, equity, and inclusion by embedding professional development around diversity, equity, and inclusion in the district's teaching and learning practices (ongoing). Evaluation cycle should align with the disciplines in the cycle of review.	*Common planning time, department time, pd time, and principal meetings dedicated to review policies and procedures around grading practices including development of rubrics to support procedures

<p>outlines practical strategies that teachers and counselors can start right away.</p>		
<p>*Restorative Justice Tier 1,2,3 for Administrators</p> <p>*Restorative Justice Tier 1 and 2 for teachers and counselors who opt into the 10-hour strand</p> <p>*Those who finish the Restorative Justice PDs can support Restorative Justice Coach in co-leading Restorative Justice PDs for future cohorts (teacher leadership approach, building a movement from the ground up.</p>	<p>*All leaders use Restorative Practices within their discipline model and ask for ongoing feedback and collaboration with teachers and counselors.</p> <p>*Restorative Justice Coach models the circle practice for both proactive and reactive circles, and provides one-on-one coaching for administrators, teachers, and counselors.</p>	<p>*Common planning time, department time, pd time, and principal meetings dedicated to educators identifying variables in content that may create instructional bias in lessons and anticipate student impact during planning</p>
<p>*All school leaders provided with yearly formal training on anti-biased hiring and recruitment practices</p>	<p>*All school leaders provided with yearly formal training on anti-biased hiring and recruitment practices</p>	
<p>How do staff work across disciplines</p>		

Years Three, Four and Five		
Direct Instruction hours: (Directors/Outside Providers, Cultural Competency Committee, Steering Committee, Director of Educational Equity)	Coaching/Mentoring hours: (Coordinators, Department Heads, Cultural Competency Committee, Steering Committee, Leadership Team)	Teacher Collaboration hours: (Teachers)
<p>*Cultural Competency PD for new staff that discuss topics such as developing Culturally responsive Teaching, and learning meaningful conversations about Race in the classroom.</p>	<p>*Director of Equity and Restorative Justice Coach provide in-classroom support for teachers by modeling how to plan and implement lessons that create meaningful dialogue about issues related to equity and inclusion.</p>	<p>*Common planning time, department time, pd time, and principal meetings dedicated to review policies and procedures around grading practices</p>
<p>*Restorative Justice PD Tier 1,2,3 for Teachers and Counselors</p>	<p>*Restorative Justice Coach models the circle practice for both proactive and reactive circles,</p>	<p>*Common planning time, department time, pd time, and principal meetings dedicated to</p>

and provides one-on-one coaching for administrators, teachers, and counselors.

educators reflecting on lessons and ensuring any follow up/response is done utilizing the principles of [restorative justice](#)

Town of Milton, Massachusetts
Contract for Design Services for [Project Name]
[Contract #]

This Contract is made as of this [REDACTED] day of [REDACTED], 2023, by and between the Town of Milton, Massachusetts, with an address of Milton Town Office Building, 525 Canton Avenue, Milton, MA 02186, acting by the Milton Select Board (hereinafter the "Town"), and [CONTRACTOR NAME], organized under the laws of Massachusetts, with a principal office located at [REDACTED] (hereinafter the "Contractor").

The words "he," "him" and "his" in this Contract, as far as they refer to the Contractor, shall so refer whether the Contractor is an individual, partnership or corporation. All prior contracts, if any exist between the Town and the Contractor, are hereby terminated and shall be of no force and effect.

1. Scope

In consideration of the obligations herein contained, the Contractor shall provide design services related to the design and construction of a new educational facility in Milton, Massachusetts, as set forth in the Request for Qualifications for Designer Services Services Related to the Design and Construction of a New School Project in Milton, Massachusetts ("RFQ"), issued by the School Building Committee of the Town of Milton, Massachusetts, which is incorporated herein by reference, specifically the [REDACTED] (the "Proposal"), which is incorporated herein by reference and attached hereto as **Exhibit B**. The Designer shall perform services as describe in **Exhibit A**. The list of items in Exhibit A is meant to represent standard services required under the scope, but is not inclusive of all tasks to be performed by the Contractor.

The "General Contractor" is the person or firm with whom the Town has contracted to perform the construction of the Project. The General Contractor shall be solely responsible for construction means, methods, techniques, sequences and procedures and for safety precautions and programs in connection with the Project and for performing in accordance with the contract between the Town and the General Contractor. The Contractor shall have no responsibility to stop the work of the General Contractor. However, the Contractor shall promptly report to the Town any concerns or questions that arise as a result of its inspections of the Project.

Nothing in this Agreement shall be construed as an assumption by the Contractor of the responsibilities or duties of the **architect** or the General Contractor. The Contractor's services shall be rendered compatibly and in coordination with the services provided by the **architect**. It is not intended that the services of the Contractor and **architect** be competitive or duplicative, but rather complementary. The Contractor shall be entitled to rely upon the **architect** and the General Contractor for the proper performance of their obligations pursuant to their respective contract with the Town.

2. Standard of Care

Town of Milton, Massachusetts
Contract for Design Services for [Project Name]
[Contract #]

The Contractor shall exercise due care and diligence in the rendering of all services under this Contract in accordance with the applicable professional standards in the Eastern Massachusetts area. The Contractor's services shall be performed as expeditiously as is consistent with such standards, with professional skill and care, and with the orderly progress of the work.

3. Term

In the sole discretion of the Town, the start of work for the Feasibility Study/Schematic Design services, as outlined in the Proposal, shall begin on the date set forth in the first line above, and shall be completed by _____, unless otherwise agreed to in writing by the parties.

4. Incorporation of the RFQ/Order of Priority of Contract Documents

The provisions of the RFQ and the Contractor's Response are incorporated herein by reference. In the event of any conflict among the Contract Documents, the Documents shall be construed according to the following priorities:

Highest Priority:	Amendments to Contract (if any)
Second Priority:	Contract
Third Priority:	Addenda to the RFQ (if any)
Fourth Priority:	RFQ
Fifth Priority:	Contractor's Response/Proposal.

5. Payment

In consideration for performance of the work in accordance with the requirements of this Contract, the Town shall pay the Contractor the price set forth in the Contractor's Proposal, totaling _____

This Contract is a fixed price/fixed rate contract and therefore miscellaneous expenditures associated with the Contractor's work shall not be paid by the Town. In the event that an unforeseen miscellaneous expense is incurred, the Contractor shall receive the Town's approval in writing prior to incurring the expense if it will subsequently seek payment of said expense from the Town.

Payment shall be made to the Contractor for work completed in accordance with this Contract. All requests for payment shall be submitted to the Town as an invoice and shall specify all services rendered.

The Town shall not make payments in advance.

If the Town objects to all or part of any invoice received by Contractor, the Town shall notify the Contractor in writing within two (2) weeks of the date of receipt of the invoice,

Town of Milton, Massachusetts

Contract for Design Services for [Project Name]

[Contract #]

and shall pay that portion of the invoice not in dispute within thirty (30) days after the date of receipt of the invoice.

Should it be necessary for the Contractor to engage the services of a specialized contractor or companies other than those originally proposed in the Contractor's response to the Town's Request for Qualifications (RFQ), the Contractor shall take such measures only with the Town's prior written approval. Charges for such services, with no mark-up, shall be billed directly to the Town unless otherwise agreed upon by the parties.

Payment of the amounts due under this Contract shall release the Town and its officers, employees, boards, commissions, committees, agents and representatives, from any and all claims and liability in any way relating to payment for work provided under this Contract or anything done in pursuance thereof.

No payment by the Town to the Contractor shall be deemed to be a waiver of any right of the Town under this Contract or a ratification by the Town of any breach hereof by the Contractor.

6. The Contractor shall furnish all tools, equipment, labor and other services necessary for the performance of the work which is required by this Contract.

7. **Compliance with Laws**

The Contractor shall comply with all provisions of Federal, Massachusetts and Town of Milton law applicable to its work including, without limitation, statutes, by-laws, rules, regulations, orders and directives, as amended, and including, without limitation, the Williams-Steiger Occupational Safety and Health Act of 1970, as amended, and related regulations, as amended, in effect throughout the term of this Contract and any extension or renewal thereof. Without limitation, the Contractor shall comply with the applicable provisions of Chapter 149, Section 26 to 27D of the Massachusetts General Laws, as amended, and the applicable minimum wage rates as determined by the Massachusetts Commissioner of Labor and Industries. This Contract shall be considered to include in their entirety all terms respecting workers' compensation insurance and other terms required to be included in it by Chapter 152 of the Massachusetts General Laws, as amended, as though such terms were set forth in their entirety herein.

8. **Insurance**

The Contractor shall provide and maintain throughout the term of the Contract and any extension or renewal thereof the following insurance with companies that are authorized and licensed in the Commonwealth of Massachusetts to issue policies for the coverages and limits so required.

a. Workers' Compensation Insurance as required by the laws of the Commonwealth of Massachusetts and employer's liability insurance in the

Town of Milton, Massachusetts

Contract for Design Services for [Project Name]

[Contract #]

amount of \$1,000,000/\$1,000,000/\$1,000,000.

- b. Commercial General Liability Insurance, \$1,000,000 each occurrence and \$2,000,000 aggregate limit. Commercial General Liability insurance shall include personal injury liability, broad form property damage liability, products/completed operations liability and broad form contractual liability.
- c. Automobile Liability Insurance, covering all leased, owned, non-owned, and hired vehicles - Combined single limit of \$1,000,000.
- d. Professional Liability Insurance, \$2,000,000 each occurrence. If written on a claims-made basis, each such policy shall remain in effect for at least six (6) years following the termination of this Contract.
- e. Excess Liability Insurance, Umbrella Form - \$1,000,000 each occurrence and \$2,000,000 aggregate, which shall be following form, providing coverage over commercial general liability insurance, automobile liability insurance, and employer's liability under workers' compensation insurance.
- f. The Town shall be named as an additional insured on each such policy of Commercial General Liability Insurance, Excess Liability Insurance, Umbrella Form, and Automobile Liability Insurance.
- g. All certificates and policies shall contain the following provision:

“Notwithstanding any other provision herein, should any of the above policies be cancelled or materially amended before the expiration date thereof, the issuing company will mail thirty (30) days prior written notice thereof to the named certificate holder and to the Milton Town Administrator, Milton Town Office Building, 525 Canton Avenue, Milton, MA 02186 before such cancellation or amendment shall take place.”
- h. Certificate evidencing such insurance shall be furnished to the Town at the execution of this Contract. The certificate shall not merely name the types of policy provided, but shall specifically refer to this Contract and shall state that such insurance is as required by this Contract. The Contractor shall make no claims against the Town or its officers for any injury to any of its officers or employees or for damage to its equipment arising out of work contemplated by the Contract.
- i. The Contractor shall also be required to provide to the Town with its proof of insurance coverage endorsements or riders to the policies of commercial general liability insurance, automobile liability insurance, and excess liability insurance, umbrella form, which indicate that the Town is named as an additional insured on each such policy.
- j. No insurance shall be obtained from an insurer which:
 - i. is not licensed to sell insurance in the Commonwealth of Massachusetts; or
 - ii. is not authorized to provide insurance as an excess or surplus lines insurer, and does not have a current Best's rating of A or better.
- k. Failure to provide and continue in force such insurance as aforesaid shall be deemed a material breach of this Contract and shall operate as an immediate termination thereof.

Town of Milton, Massachusetts
Contract for Design Services for [Project Name]
[Contract #]

9. Indemnification

The Contractor shall compensate the Town for all damage to Town property of any nature to the extent caused by the Contractor's negligent performance of its work or willful misconduct. To the fullest extent permitted by law, the Contractor shall indemnify and hold harmless the Town and all of its officers, employees, boards, commissions, committees and representatives (the "Indemnitees") from and against all claims, causes of action, suits, costs (including reasonable legal costs and attorneys' fees), damages, and liability of any kind which arise out of a third-party claim to the extent caused by (i) the breach by the Contractor of its obligations under this Contract, or (ii) the willful misconduct or negligent act or omission of the Contractor, its subcontractors, or their officers, employees, agents and representatives or anyone directly or indirectly employed by them, or anyone for whose acts or omissions they may be liable, regarding the work to be performed by the Contractor under the Contract, or (iii) Contractor's violation of any Federal, Massachusetts or Town of Milton statute, by-law, rule, regulation, order or directive. Contractor shall also indemnify and hold the Indemnitees harmless from any claim for personal injury or property damage suffered by the Contractor or any of its officers or employees regarding the subject matter of this Contract, except to the extent caused by the negligence or willful misconduct of the Indemnitees.

10. No Personal Liability

Neither the Town, nor its officers, employees, boards, committees, commissions, agents and representatives shall be under any personal obligation or incur any personal liability by reason of this Contract, the execution thereof or anything relating thereto which arises out of the breach or violation of any provision of this Contract, or the violation of any Federal, Massachusetts or Town of Milton statute, by-law, rule, regulation, order or directive, or which relates to personal injury or property damage suffered by the Contractor or its employees, regarding the subject matter of this Contract.

11. Familiarity with Area of Work

By signing this Contract, the Contractor acknowledges that it has examined the area of work which is the subject matter of this Contract and that it is familiar with all conditions of the RFQ and of this Contract. The Contractor has entered into this Contract in reliance on its own examinations and estimates as to the amount and character of its work, and conditions which may be encountered in the performance thereof, and shall assume all risks and bear all losses pertaining thereto.

12. Performance Bond
a. N/A

13. Labor and Materials Payment Bond

Town of Milton, Massachusetts
Contract for Design Services for [Project Name]
[Contract #]

a. N/A

14. Independent Contractor Status/Key Personnel

The Contractor shall provide services under this Contract as an independent contractor with the Town and not as an employee of the Town. No employee, agent or representative of the Contractor shall be entitled to receive any benefits of employment with the Town, including without limitation salary, overtime, vacation pay, holiday pay, sick leave, health insurance, life insurance, pension or deferred compensation.

The Contractor's key personnel assigned to this project and their project roles are as stated in the Response submitted by the Contractor attached hereto.

There shall be no change to these personnel assignments without the prior written consent of the Town, which consent shall not be unreasonably withheld. In the event substitution of personnel is requested by the Contractor or the Town, written notice of such request shall be timely provided in writing to the other party. The Town shall have authority to reject any proposed replacement personnel if it reasonably and timely deems such proposed replacement to be unsatisfactory.

15. Use of Alcohol and Controlled Substances Prohibited

The Contractor hereby acknowledges that the use of alcoholic beverages, narcotics, and mood altering substances, except for current valid, legal prescriptions, by any officer, employee, agent, or representative of the Contractor is prohibited on Town property which is the subject matter of this Contract and during all hours of work under this Contract. If any officer, employee, agent, or representative of the Contractor violates the foregoing provision, the Town shall have the right to order that such officer, employee, agent, or representative of the Contractor shall not be permitted to return to work on this Contract. Under such circumstances, the Contractor shall promptly remove the subject officer, employee, agent, or representative from the job site and shall not permit the subject officer, employee, agent, or representative to perform further work in conjunction with this Contract.

16. No Smoking

Pursuant to Massachusetts General Laws (M.G.L.) c. 270, §22, the Commonwealth of Massachusetts Smoke free Workplace Law, the Contractor, its officers, employees, agents, and representatives shall refrain from smoking and from using tobacco products in any public building in the Town.

17. Criminal Background Screening

For each employee of the Contractor who is rendering services under this Contract, the

Town of Milton, Massachusetts

Contract for Design Services for [Project Name]

[Contract #]

Contractor shall, subject to its confidentiality and privacy obligations owing to its employees and third parties, provide a written confirmation to the Town that such employee passed the Contractor's pre-employment criminal background screen. In the event that any employee refuses to permit the Contractor to provide such information to the Town, the Contractor shall not assign such employee to perform services for the Town, and such employee shall not be authorized to perform services for the Town. The Town shall be permitted to keep such information in its files.

18. Delays/Force Majeure

Except as specifically set forth in this Contract, neither party shall hold the other responsible or liable for damages or delays in performance caused by acts of God, interruptions in the availability of labor, or other events beyond the control of the other party, or that could not have been reasonably foreseen or prevented. For this purpose, such acts or events shall include unusually severe weather affecting performance of services, floods, epidemics, wars, riots, strikes, lockouts, or other industrial disturbances, protest demonstrations, and project site conditions which could not have been reasonably anticipated. Should such acts or events occur, both parties shall use their best efforts to overcome the difficulties arising and to resume as soon as reasonably possible the normal pursuit of performance.

19. Termination

- a. If the Contractor shall breach any provision of this Contract, which breach is not cured within twenty-one (21) days of written notice thereof from the Town to the Contractor, the Town shall have the right to terminate this Contract upon written notice to the Contractor.
- b. If any assignment shall be made by the Contractor or by any guarantor of the Contractor for the benefit of creditors, or if a petition is filed by the Contractor or by any guarantor of the Contractor for adjudication as a bankrupt, or for reorganization or an arrangement under any provision of the Bankruptcy Act as then in force and effect, or if an involuntary petition under any of the provisions of the Bankruptcy Act is filed against the Contractor and such involuntary petition is not discharged within ninety (90) days thereafter, in any event the Town may terminate this Contract upon written notice to the Contractor.
- c. The award of this Contract and the continued operation of this Contract are contingent upon appropriation by Milton Town Meeting of sufficient money to fund the Contract. Should Milton Town Meeting fail to appropriate necessary funds therefor, the Town shall no longer be under any obligation to tender performance, including payment, under the terms of this Contract. In that event, the Town may terminate this Contract upon written notice to the Contractor.
- d. The Town may terminate this Contract upon written notice to the Contractor if a source of money to fund the Contract is lost during the Contract term. In the alternative, the parties may agree in writing to amend the Contract to provide

Town of Milton, Massachusetts

Contract for Design Services for [Project Name]

[Contract #]

for a Contract price which represents a reduced appropriation for the Contract term.

- e. The Town may also terminate this Contract for convenience upon thirty (30) days' written notice to the Contractor.
- f. In the event of termination, the Contractor shall be entitled to be paid for services rendered in accordance with this Contract prior to termination.
- g. In the event that this Contract is terminated pursuant to Section 18a. or 18b. above, the Town may make any reasonable purchase or contract to purchase services in substitution for performance due from the Contractor and may deduct the cost of any substitute contract, or damages sustained by the Town due to non-performance or non-conformance of services, together with incidental and consequential damages, from the Contract price, and shall withhold such damages from sums due or sums which become due.

20. Notices

Except as otherwise provided in this Contract, each notice required or permitted to be given hereunder shall be in writing and shall be delivered by certified mail or registered mail, return receipt requested, to the parties at the following address or such other address or addresses as to which a party shall have notified the other party in accordance with this section.

If to the Town: Nicholas Milano, Town Administrator
Milton Town Office Building
525 Canton Avenue
Milton, MA 02186

If to the Contractor:

21. License

The Town shall have unlimited rights, for the benefit of the Town, in all drawings, designs, specifications, notes and other work developed in the performance of this Contract, including the right to use same on any other project of the Town, without additional cost to the Town; and with respect thereto, the Contractor agrees and hereby grants to the Town an irrevocable royalty-free and nonexclusive license to all such data, which he may cover by copyright, and to all designs as to which he may assert any rights or establish any claim under any patent or copyright laws. The Contractor shall obtain similar irrevocable royalty-free nonexclusive licenses from the Contractor's consultants consistent with this Contract.

22. Certifications

The Contractor hereby certifies that the Project Director shall also be registered by the Commonwealth of Massachusetts as an architect or professional engineer, shall have at least five (5) years relevant experience in the construction and supervision of construction

Town of Milton, Massachusetts
Contract for Design Services for [Project Name]
[Contract #]

and design of public buildings with a particular emphasis on animal shelter buildings, and shall be a LEED Associate; or, if the Project Director is not registered as an architect or professional engineer, the Project Director shall have at least seven (7) years' experience in the construction and supervision of construction, commissioning and design of public buildings, with a particular emphasis on animal shelter buildings.

The Contractor hereby certifies that it has not given, offered or agreed to give any person, corporation or other entity any gift, contribution or offer of employment as an inducement for or in connection with, the award of this Contract.

The Contractor hereby certifies that no consultant to or subcontractor for the Contractor has given, offered or agreed to give any gift, contribution or offer of employment to the Contractor, or to any other person, corporation or entity as an inducement for, or in connection with, the award to the consultant or subcontractor of a contract by the Contractor.

The Contractor hereby certifies that no person, corporation or other entity, other than a bona fide full time employee of the Contractor, has been retained or hired by the Contractor to solicit for or in any way assist the Contractor in obtaining this Contract upon an agreement or understanding that such person, corporation or other entity be paid a fee or other consideration contingent upon the award of this Contract to the Contractor.

The Contractor hereby certifies that it has internal accounting controls as required by subsection (c) of section thirty-nine R of chapter thirty of the Massachusetts General Laws and that the Contractor has filed and will continue to file an audited financial statement as required by subsection (d) of said section thirty-nine R.

The Contractor is hereby prohibited from receiving any extra payments for work for basic services that should have reasonably been anticipated by the Contractor.

The Contractor shall maintain all books, records and accounts related to the Project in compliance with the following:

1. The Contractor shall make, and keep for at least six (6) years after final payment, books, records and accounts which in reasonable detail accurately and fairly reflect the transactions and dispositions of the Contractor.
2. Until the expiration of six (6) years after final payment, the Owner, the Office of the Inspector General and the Commissioner of Capital Asset Management and Maintenance shall have the right to examine any books, documents, papers or records of the Contractor and of its subcontractors and consultants that directly pertain to, and involve transactions relating to the Project and to the Contractor or its consultants in relation to the Project.
3. The Contractor shall describe any change in the method of maintaining records or

Town of Milton, Massachusetts
Contract for Design Services for [Project Name]

[Contract #]

recording transactions which materially affects any statements filed with the Owner, including in the Contractor's description the date of the change and reasons therefor, and shall accompany said description with a letter from the Contractor's independent certified public accountant approving or otherwise commenting on the changes.

4. The Contractor has filed a statement of management on internal accounting controls prior to the execution of this Contract.
5. The Contractor has filed prior to the execution of this Contract and will continue to file annually, an audited financial statement for the most recent completed fiscal year.
6. The Contractor shall file with the Owner a statement of management as to whether the system of internal accounting controls of the Contractor and its subsidiaries reasonably assures that:
 - (a) Transactions are executed in accordance with the management's general and specific authorization;
 - (b) Transactions are recorded as necessary (i) to permit preparation of financial statements in conformity with generally accepted accounting principles, and (ii) to maintain accountability for assets;
 - (c) Access to assets is permitted only in accordance with management's general or specific authorization; and
 - (d) The recorded accountability for assets is compared with existing assets at reasonable intervals and appropriate action is taken with respect to any difference.
7. The Contractor shall also file annually with the Owner a statement prepared and signed by an independent certified public accountant, stating that such accountant has examined the statement of management on internal accounting controls, and expressing an opinion as to:
 - (a) whether the representations of management are consistent with the result of management's evaluation of the system of internal accounting controls; and
 - (b) whether such representations of management are, in addition, reasonable with respect to transactions and assets in amounts which would be material when measured in relation to the Contractor's financial statements.
8. During the term, the Contractor shall annually file with the Commissioner of Capital Asset Management and Maintenance and the Owner of this Contract a financial statement prepared by an independent certified public accountant on the basis of an audit by such accountant. The final statement filed shall include the date of final payment. All statements shall be accompanied by an accountant's report. Such statements shall be made available to the Owner upon request.

Town of Milton, Massachusetts

Contract for Design Services for [Project Name]

[Contract #]

9. Records and statements required to be made, kept or filed in compliance with the provisions of this Contract shall not be public records, as defined in section seven of chapter four of the Massachusetts General Laws.

23. Miscellaneous Provisions

- a. Any action at law or suit in equity instituted by the Contractor as a result of the performance, non-performance or alleged breach of this Contract shall be filed in the Superior Court of the Commonwealth of Massachusetts for Norfolk County, MA, and in no other court or jurisdiction.
- b. No action or failure to act by the Town shall constitute a waiver of a right or duty afforded to the Town under the Contract, nor shall such action or failure to act constitute approval of or acquiescence in a breach thereunder, except as may be specifically agreed in writing. No forbearance or indulgence in any form or manner by the Town shall be construed as a waiver or in any way limit the legal or equitable remedies available to the Town. No waiver by the Town of any default or breach by the Contractor shall constitute a waiver of any subsequent default or breach.
- c. If the Contractor discovers or is informed of any discrepancy or inconsistency in the Contract Documents in relation to any law, statute, ordinance, by-law, decree, code, rule, regulation, or order, the Contractor shall promptly, before commencing performance under this Contract, report the same to the Town in writing.
- d. The Contractor acknowledges that it has not been influenced to enter into this Contract, nor has the Contractor relied upon any warranties or representations not set forth in this instrument.
- e. The Contractor shall maintain the confidentiality of information designated by the Town as confidential, unless withholding such information would violate the law or create a risk of significant harm to the public, or unless the Contractor has been required to release such information by final judgment or order of a court of competent jurisdiction, or unless the Town has expressly waived such confidentiality in advance in writing.
- f. The Contractor shall not represent or purport to represent that it speaks for the Town vis-à-vis the media or the public at-large without the Town's express, written consent in advance.
- g. Prior to commencing performance under this Contract, the Contractor shall furnish the Town, in writing, the names, addresses and telephone numbers of not fewer than two (2) principal employees of his business who are to be contacted in the event of an after-hours emergency.
- h. By entering into this Contract, the Contractor certifies under penalties of perjury that its Proposal was made and submitted in good faith and without collusion or fraud with any person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Town of Milton, Massachusetts

Contract for Design Services for [Project Name]

[Contract #]

- i. By entering into this Contract, the Contractor certifies under the penalties of perjury, pursuant to M.G.L. c.62C, Section 49A(b), that it has complied with all laws of the Commonwealth relating to taxes, to reporting of employees and contractors, and to withholding and remitting child support.
- j. The Contractor understands that the Massachusetts Conflict of Interest Law, Chapter 268A of the Massachusetts General Laws, applies to the Contractor with respect to the services required to be provided under this Contract. The Contractor and its officers, employees, agents, subcontractors and affiliated agencies shall not participate in any activity which constitutes a violation of the Massachusetts Conflict of Interest Law or which creates an appearance of a violation of the Massachusetts Conflict of Interest Law.
- k. Prevailing wage rates, as contained in the Proposal documents, shall be paid, pursuant to M.G.L. c.149, §§26-27G, if they are applicable.
- l. The Contractor shall not discriminate against or exclude any person from participation herein on grounds of race, color, religious creed, national origin, sex, gender identity, sexual orientation (which shall not include persons whose sexual orientation involves minor children as the sex object), age, genetic information, ancestry, children, marital status, veteran status or membership in the armed services, the receiving of public assistance, and handicap. The previous sentence shall include, but not be limited to, the following: advertising, recruitment; hiring; rates of pay or other forms of compensation; terms; conditions or privileges of employment; employment upgrading; transfer; demotion; layoff; and termination. The Contractor shall take affirmative actions to insure that applicants are employed, and that employees are treated during their employment, without regard to race, color, religious creed, national origin, sex, gender identity, sexual orientation (which shall not include persons whose sexual orientation involves minor children as the sex object), age, genetic information, ancestry, children, marital status, veteran status or membership in the armed services, the receiving of public assistance, and handicap.
- m. **To the extent that any of the foregoing sections required by Massachusetts law are inconsistent with other, non-statutory sections in this Contract, any statutorily-mandated provisions contained herein shall control.**
- n. The Contractor shall not assign or subcontract in whole or in part this Contract or in any way transfer any interest in this Contract without the prior express written approval of the Town.
- o. The Contractor shall not assign any money due or to become due to the Contractor unless the Town shall have received prior written notice of such assignment. No such assignment shall relieve the Contractor of its obligations under this Contract.
- p. This Contract may be amended only by written consent of the parties.
- q. This Contract constitutes the entire agreement of the parties and any other agreement, written or oral, that may exist is excluded from this Contract. When executed, this Contract supersedes any prior agreement between the parties in

Town of Milton, Massachusetts

Contract for Design Services for [Project Name]

[Contract #]

connection with the transaction contemplated.

r. If any provision, or portion thereof, of this Contract shall be adjudged to be invalid or unenforceable by final judgment or order of a court of competent jurisdiction the remaining provisions shall continue in effect to the extent permitted by law.

s. The provisions of this Contract shall be binding upon and shall inure to the benefit of the heirs, assigns and successors in interest of the parties.

t. This Contract shall be governed by and construed in accordance with the laws of the Commonwealth of Massachusetts, regardless of choice of law issues or principles.

u. This Contract is executed in triplicate as a sealed instrument.

[The remainder of this page is left intentionally blank.]

Town of Milton, Massachusetts
Contract for Design Services for [Project Name]
[Contract #]

The Town of Milton, Massachusetts

by: its Town Administrator, authorized
by a vote of the Select Board: _____

Signature

Printed Name

Title

Dated: _____

(Printed Name of Contractor)

by:

Signature

Printed Name

Title

Dated: _____

APPROVED AS TO AVAILABILITY OF APPROPRIATION:

This is to certify that an appropriation in the amount of this Contract is available therefor, and that the Town Administrator is authorized to execute this Contract and to approve all requisitions and execute change orders.

Finance Director/Town Accountant
Town of Milton

Dated: _____

APPROVED AS TO FORM:

Clifford Rhodes, Esq.

Dated: _____

Town of Milton, Massachusetts
Contract for Design Services for [Project Name]
[Contract #]

Exhibit A
Scope of Services

Feasibility Study Phase

The Designer shall perform services for the Feasibility Study in accordance with feasibility studies undertaken in partnership with the Massachusetts School Building Authority's program.

The Designer shall meet with the Owner to arrive at a mutual understanding of the requirements of the Feasibility Study. The Designer shall submit a proposed work plan including anticipated tasks and submittals.

The Designer shall cooperate with the Owner to define and develop a few reasonable, educationally sound, cost effective, and practical solutions for the Owner's evaluation that satisfy the Owner's educational program requirements that were provided by the Owner to the Designer. The alternatives considered shall address the following as a minimum:

- (a) Analysis of school district student school assignment practices and available space in other schools in the district; and
- (b) Tuition agreements with adjacent school districts (per M.G.L. c.70B §8); and
- (c) Rental or acquisition of existing buildings that could be made available for school use. (per M.G.L. c.70B §8); and
- (d) Renovation and/or addition to existing building(s) and related facilities or fields, if appropriate to the Project; and
- (e) No-build or status quo option, to be used as a benchmark for comparative analysis of all other alternatives; and
- (f) In some cases, it may also be appropriate to consider construction of new building and the evaluation of potential locations.

The Designer shall present and explain the Feasibility Study to the Owner at local public meetings, as necessary.

The Designer shall meet with the Owner every other week during this Phase and attend all School Building Committee meetings.

Schematic Design Phase

Upon receipt of written approval to proceed to the Schematic Design Phase, the Designer shall meet with the Owner to arrive at a mutual understanding of the requirements of the Final Design Program approved in writing by the Owner.

Town of Milton, Massachusetts
Contract for Design Services for [Project Name]
[Contract #]

The Designer shall submit a proposed design work plan pursuant to this Contract including anticipated tasks and submittals. The Designer shall also submit to the Owner a proposed schedule consistent with any Project Schedule included in the RFS modified as required by any subsequent schedule changes or delays outside of Designer's control. The schedule shall contain dates for submittals, deliverables, actions, milestones, design workshops, meetings and the critical path through all design service activities. It shall include time for the Owner's review and approval of submittals and for necessary submissions for permits in connection with the Project. The work plan shall also include a work plan schedule of values consistent with the schedule, which shall be the basis for which payments of the Fee for Basic Services within each Phase shall be made. The work plan schedule of values shall identify deliverables within each Phase and percentages of the phase fee payable upon completion of such deliverable.

When approved by the Owner, the work plan schedule of values shall govern the timing of payments of the Fee for Basic Services upon completion of deliverables within each Phase and as each Phase progresses.

The Designer shall: Prepare a preliminary evaluation of the Recommended Preferred Solution from the Feasibility Study, the Final Design Program, and Proposed Total Project Budget; collect and study all available drawings, reports, maintenance reports, and other existing data pertaining to the Project; conduct a thorough on-site review of conditions relating to the Project; assure that the "Recommended Preferred Solution" complies with all applicable codes and regulations; and meet with local building officials to identify and confirm applicable standards, codes and any project specific criteria.

The Designer shall develop the Recommended Preferred Solution to a full schematic design level. Schematic design level documentation shall be based on the Final Design Program, shall incorporate Owner comments and shall include each of the following, to the extent applicable to the Recommended Preferred Solution:

- (a) Traffic Analysis - analyze the impact of anticipated vehicular and pedestrian traffic, including impacts to existing infrastructure, to determine efficient and safe site access.
- (b) Environmental and Existing Building Assessment – Provide additional site and building assessments as may be required to quantify presence of unsuitable materials and scope of possible remediation efforts.
- (c) Geotechnical and Geoenvironmental Analysis – Provide additional geotechnical analysis as may be required to describe soil conditions, remediation requirements and appropriate foundation.
- (d) Program Analysis - a space measurement analysis for the design which shall verify that the sum of all program floor areas plus all other floor areas equal the gross floor area of the Final Design Program.

Town of Milton, Massachusetts
Contract for Design Services for [Project Name]
[Contract #]

(e) Code Analysis – Determine the impact of all applicable federal, state, regional and local codes, regulations and ordinances, including a listing of permitting and other regulatory filing requirements.

(f) Utility Analysis – Determine the availability and capacity of all required building utilities. Provide soils analysis and preliminary design for on-site septic/sewage treatment facilities, if required.

(g) Massing Study – an analysis of the building's integration into its surroundings and neighborhood with drawings, models, or photographs.

(h) MA-CHPS or LEED-S Scorecard – Complete a MA-CHPS or LEED-S for Schools Scorecard and describe sustainable design features and each high-performance green school prerequisite and credit included in the proposed design and a plan for implementation or inclusion of any appropriate public utility energy conservation design programs.

(i) Accessibility - an analysis of the design's compliance with the Americans with Disabilities Act (ADA) and the Massachusetts Architectural Access Board requirements (MAAB).

(j) Building Systems Descriptions – Describe in narrative and on schematic plans basic information relative to:

1. Building Structure - a written narrative of the design approach to the structural systems including discussion of the feasible options for foundations and superstructure as well as treatment of special situations such as unusual soils conditions or long spans.
2. Plumbing and HVAC - written narratives of the basic systems and proposed fuel source(s) and a preliminary life cycle cost analysis pursuant to the criteria of M.G.L. c. 149 § 44(m). Provide schematic plans indicating basic distribution concepts and the location of major equipment items such as boilers, water heaters, cooling towers, chillers, air handling units, heat recovery units, exhaust stacks, and special systems (e.g. fume exhausts).
3. Fire Protection - written narratives of the basic systems and design criteria. Provide schematic plans indicating basic distribution concepts and the location of major equipment items such as fire pumps, standpipes, and fire department connections.
4. Electrical (including power, lighting, communications, fire alarm, video/CATV, security/surveillance) - written narratives of the proposed electrical and communications systems resources, needs, and proposed scope. Provide schematic plans indicating basic distribution concepts and the location of major

Town of Milton, Massachusetts
Contract for Design Services for [Project Name]
[Contract #]

equipment items such as switchgear, standby generator, and control centers/panels.

5. Information Technology - written narratives of the proposed information technology system resources, needs, and proposed scope. Provide schematic plans indicating basic distribution concepts, and location of major equipment items such as switches and hubs.

(k) Outline specifications in accordance with applicable CSI Divisions that clearly define the scope of construction, identify the sub-trades pursuant to M.G.L. c. 149 § 44F, establish the quality of materials, finishes, products, equipment and workmanship, and the special or unique conditions of construction.

(l) Project Schedule - Provide a reasonable level of design-related input to the OPM such that the OPM can prepare a draft schedule for the proposed project for the Owner in the form of a graphic representation (Gantt Chart) of the duration of all tasks, activities and phases of the design and construction processes against the progression of time up to a proposed occupancy date. Dependencies between activities and tasks will be delineated. Individual tasks and activities will be rolled up to the major project milestones. Provide input to the OPM regarding priority actions and activities that may have a major impact on the schedule. The OPM, not the Designer, is responsible for preparing and maintaining the draft and updated project schedule document, except as it pertains to the project design schedule developed under Article 7.4.2.

(m) Construction cost estimate - in Uniformat II Level 3 format with aggregated unit rates and quantities supporting each item. If independent cost estimates are prepared for the Owner by the OPM in this or subsequent phases, then the Designer shall work with the OPM to resolve such any differences in a cost reconciliation process and shall involve any relevant parties in such process.

(n) Siting analysis, including content, traffic and access, topographic and utilities recognition.

(o) Site Development Plan – Site plan shall be at a minimum scale of 1 inch equals 40 feet and include property lines with bearings and distances, building setbacks, site acreage, wetlands information, proposed and existing topography, proposed and existing buildings and site features, floor and roof elevations for all buildings, proposed and existing utilities and utility connections, and emergency equipment access.

(p) Schematic Building Floor Plans of all floors and roof at a minimum scale of 1/16" =1'-0" showing all elements of the building including overall dimensions, gross square footage of each floor and net square footage of each space, response to functional requirements of program, major and minor access, circulation, and room data sheets.

Town of Milton, Massachusetts

Contract for Design Services for [Project Name]

[Contract #]

(q) Schematic Exterior Building Elevations for all sides and orientations indicating all exterior finishes and fenestration.

Schematic design phase drawings, specifications, construction cost estimates and other submittals shall be subject to the written Approval of the Owner, which Approval shall not be unreasonably delayed, withheld, conditioned, or denied. Unless a lesser number is requested by the Owner, the Designer shall submit to the Owner for approval six (6) copies of schematic design drawings, specifications, cost estimates, and other submittals.

The Designer shall present and explain the Schematic Design to the Owner, the OPM at local public meetings, as necessary.

The Designer shall meet with the Owner every other week during the Schematic Design Phase and attend all School Building Committee meetings.

Prior to the issuance of an Approval to proceed to the Design Development Phase, the Designer and the Owner shall meet to finalize the design work plan, project schedule, and schedule of values and they shall if necessary execute an amendment to the Contract to include all required modifications to govern the subsequent phases of the Designer's services.

Construction Delivery Method Evaluation and Selection

(a) The Designer shall assist the Owner in determining the appropriate construction delivery methodology for the Proposed Project. In providing such assistance, the Designer, in conjunction with the Owner's Project Manager, shall advise the Owner on the relative advantages and disadvantages associated with each of the construction delivery methods provided in M.G.L. Chapters 149 and 149A. The decision to pursue a particular construction delivery method shall be within the sole discretion of the Owner, subject to the approval of the Inspector General as provided in M.G.L. c. 149A, §4. The services provided by the Designer in assisting and advising the Owner in its determination of the appropriate construction delivery methodology shall be included in Basic Services.

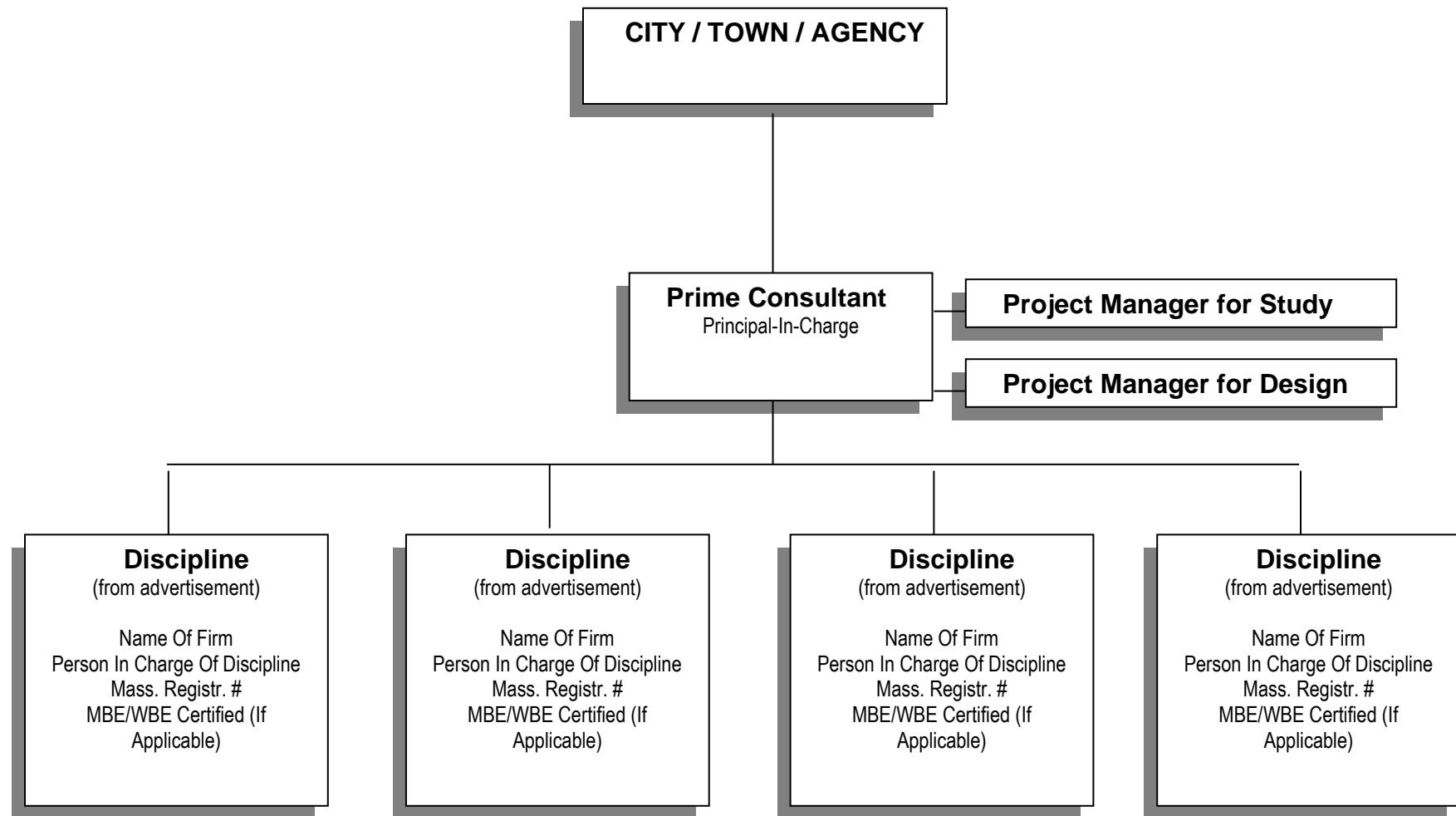
Town of Milton, Massachusetts
Contract for Design Services for [Project Name]
[Contract #]

Exhibit B

Contractor's Proposal

Commonwealth of Massachusetts Standard Designer Application Form for Municipalities and Public Agencies not within DSB Jurisdiction (Updated July 2016)	1. Project Name/Location For Which Firm Is Filing:						
	2. Project # This space for use by Awarding Authority only.						
3a. Firm (Or Joint-Venture) - Name and Address Of Primary Office To Perform The Work:		3. Name Of Proposed Project Manager: For Study: (if applicable) For Design: (if applicable)					
3b. Date Present and Predecessor Firms Were Established:		3f. Name and Address Of Other Participating Offices Of The Prime Applicant, If Different From Item 3a Above:					
3c. Federal ID #:		3g. Name and Address Of Parent Company, If Any:					
3d. Name and Title Of Principal-In-Charge Of The Project (MA Registration Required): Email Address: Telephone No.: Fax No.:		3. Check Below If Your Firm Is Either: (1) SDO Certified Minority Business Enterprise (MBE) <input type="checkbox"/> (2) SDO Certified Woman Business Enterprise (WBE) <input type="checkbox"/> (3) SDO Certified Minority Woman Business Enterprise (M/WBE) <input type="checkbox"/> (4) SDO Certified Service Disabled Veteran Owned Business Enterprise (SDVOBE) <input type="checkbox"/> (5) SDO Certified Veteran Owned Business Enterprise (VBE) <input type="checkbox"/>					
4. Personnel From Prime Firm Included In Question #3a Above By Discipline (List Each Person Only Once, By Primary Function -- Average Number Employed Throughout The Preceding 6 Month Period. Indicate Both The Total Number In Each Discipline And, Within Brackets, The Total Number Holding Massachusetts Registrations):							
Admin. Personnel	(____)	Ecologists	(____)	Licensed Site Profs.	(____)	Other	(____)
Architects	(____)	Electrical Engrs.	(____)	Mechanical Engrs.	(____)		(____)
Acoustical Engrs.	(____)	Environmental	(____)	Planners: Urban./Reg.	(____)		(____)
Civil Engrs.	(____)	Fire Protection	(____)	Specification Writers	(____)		(____)
Code Specialists	(____)	Geotech. Engrs.	(____)	Structural Engrs.	(____)		(____)
Construction Inspectors	(____)	Industrial	(____)	Surveyors	(____)		(____)
Cost Estimators	(____)	Interior Designers	(____)		(____)		(____)
Drafters	(____)	Landscape	(____)		(____)	Total	(____)
5. Has this Joint-Venture previously worked together?			<input type="checkbox"/> Yes	<input type="checkbox"/> No			

6. List **ONLY** Those Prime And Sub-Consultant Personnel Specifically Requested In The Advertisement. This Information Should Be Presented Below In The Form Of An Organizational Chart. Include Name Of Firm And Name Of The One Person In Charge Of The Discipline, With Mass. Registration Number, As Well As MBE/WBE Status, If Applicable:



7. Brief Resume of ONLY those Prime Applicant and Sub-Consultant personnel requested in the Advertisement. <u>Include Resumes of Project Managers</u> . Resumes should be consistent with the persons listed on the Organizational Chart in Question # 6. Additional sheets should be provided only as required for the number of Key Personnel requested in the Advertisement and they must be in the format provided. By including a Firm as a Sub-Consultant, the Prime Applicant certifies that the listed Firm has agreed to work on this Project, should the team be selected.	
a. Name and Title Within Firm:	a. Name and Title Within Firm:
b. Project Assignment:	b. Project Assignment:
c. Name and Address Of Office In Which Individual Identified In 7a Resides:	c. Name and Address Of Office In Which Individual Identified In 7a Resides:
MBE <input type="checkbox"/> WBE <input type="checkbox"/> SDVOBE <input type="checkbox"/> VBE <input type="checkbox"/>	MBE <input type="checkbox"/> WBE <input type="checkbox"/> SDVOBE <input type="checkbox"/> VBE <input type="checkbox"/>
d. Years Experience: With This Firm: _____ With Other Firms: _____	d. Years Experience: With This Firm: _____ With Other Firms: _____
e. Education: Degree(s) /Year/Specialization	e. Education: Degree(s) /Year/Specialization
f. Active Registration: Year First Registered/Discipline/Mass Registration Number	f. Active Registration: Year First Registered/Discipline/Mass Registration Number
g. Current Work Assignments and Availability For This Project:	g. Current Work Assignments and Availability For This Project:
h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm):	h. Other Experience and Qualifications Relevant To The Proposed Project: (Identify Firm By Which Employed, If Not Current Firm):

8a. Current and Relevant Work By Prime Applicant Or Joint-Venture Members. Include ONLY Work Which Best Illustrates Current Qualifications In The Areas Listed In The Advertisement (List Up To But Not More Than 5 Projects).				
a. Project Name And Location Principal-In-Charge	b. Brief Description Of Project And Services (Include Reference To Relevant Experience)	C. Client's Name, Address And Phone Number (Include Name Of Contact Person)	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)
				Construction Costs (Actual, Or Estimated If Not Completed)
(1)				
(2)				
(3)				
(4)				
(5)				

8b. List Current and Relevant Work By Sub-Consultants Which Best Illustrates Current Qualifications In The Areas Listed In The Advertisement (Up To But Not More Than 5 Projects For Each Sub-Consultant). Use Additional Sheets Only As Required For The Number Of Sub-Consultants Requested In The Advertisement.					
Sub-Consultant Name:					
a. Project Name and Location Principal-In-Charge	b. Brief Description Of Project and Services (Include Reference To Relevant Experience)	c. Client's Name, Address And Phone Number. Include Name Of Contact Person	d. Completion Date (Actual Or Estimated)	e. Project Cost (In Thousands)	
				Construction Costs (Actual, Or Estimated If Not Completed)	Fee For Work For Which Firm Was/Is Responsible
(1)					
(2)					
(3)					
(4)					
(5)					

9. List All Projects Within The Past 5 Years For Which Prime Applicant Has Performed, Or Has Entered Into A Contract To Perform, Any Design Services For All Public Agencies Within The Commonwealth.					
# of Total Projects:		# of Active Projects:	Total Construction Cost (In Thousands) of Active Projects (excluding studies):		
Role P, C, JV * Phases St., Sch., D.D., C.D.,A.C.*	Project Name, Location and Principal-In-Charge	Awarding Authority (Include Contact Name and Phone Number)	Construction Costs (In Thousands) (Actual, Or Estimated If Not)	Completion Date (Actual or Estimated) (R)Renovation or (N)New	
	1.				
	2.				
	3.				
	4.				
	5.				
	6.				
	7.				
	8.				
	9.				
	10.				
	11.				
	12.				

* P = Principal; C = Consultant; JV = Joint Venture; St. = Study; Sch. = Schematic; D.D. = Design Development; C.D. = Construction Documents; A.C. = Administration of Contract

10. Use This Space To Provide Any Additional Information Or Description Of Resources Supporting The Qualifications Of Your Firm And That Of Your Sub-Consultants For The Proposed Project. If Needed, Up To Three, Double-Sided 8 1/2" X 11" Supplementary Sheets Will Be Accepted. **APPLICANTS ARE ENCOURAGED TO RESPOND SPECIFICALLY IN THIS SECTION TO THE AREAS OF EXPERIENCE REQUESTED IN THE ADVERTISEMENT.**

Be Specific – No Boiler Plate

11. Professional Liability Insurance:

Name of Company	Aggregate Amount	Policy Number	Expiration Date
-----------------	------------------	---------------	-----------------

12. Have monies been paid by you, or on your behalf, as a result of Professional Liability Claims (in any jurisdiction) occurring within the last 5 years and in excess of \$50,000 per incident? Answer **YES** or **NO**. If YES, please include the name(s) of the Project(s) and Client(s), and an explanation (attach separate sheet if necessary).

13. Name Of Sole Proprietor Or Names Of All Firm Partners and Officers:

Name	Title	MA Reg #	Status/Discipline	Name	Title	MA Reg #	Status/Discipline
a.				d.			
b.				e.			
c.				f.			

14. If Corporation, Provide Names Of All Members Of The Board Of Directors:

Name	Title	MA Reg #	Status/Discipline	Name	Title	MA Reg #	Status/Discipline
a.				d.			
b.				e.			
c.				f.			

15. Names Of All Owners (Stocks Or Other Ownership):

Name And Title	% Ownership	MA. Reg.#	Status/Discipline	Name And Title	% Ownership	MA. Reg.#	Status/Discipline
a.				d.			
b.				e.			
c.				f.			

16. I hereby certify that the undersigned is an Authorized Signatory of Firm and is a Principal or Officer of Firm. I further certify that this firm is a "Designer", as that term is defined in Chapter 7C, Section 44 of the General Laws, or that the services required are limited to construction management or the preparation of master plans, studies, surveys, soil tests, cost estimates or programs. The information contained in this application is true, accurate and sworn to by the undersigned under the pains and penalties of perjury.

Submitted by _____ Printed Name and Title _____ Date _____
(Signature)

Tax Compliance Certification

Certification of Compliance

I certify under the penalties of perjury that I, to my best knowledge and belief, have filed all state tax returns and paid all state taxes required under law.

*Signature of Individual or Corporate Name
(Mandatory)

Corporate Officer
(Mandatory, if applicable)

**Social Security Number (Voluntary) or
Federal Identification Number

*Approval of a contract or other agreement will not be granted unless this certification clause is signed by the applicant.

** Your social security number or federal identification number will be furnished to the Massachusetts Department of Revenue to determine whether you have met tax filing or tax payment obligations. Providers who fail to correct their non-filing or delinquency will not have a contract or other agreement issued, renewed or extended. This request is made under the authority of Massachusetts General Laws c.62C s. 49a.

NON-COLLUSION AFFIDAVIT OF BIDDER

State of:

Federal Identification No:

County of:

_____ being first duly sworn, deposes and says that:

1. He/She is (Owner, Partner, Officer, Representative or Agent) of:
the bidder that has submitted the attached bid;
2. He/She is fully informed respecting the preparation and contents of the attached bid and all pertinent circumstances respecting such bid;
3. Such bid is genuine and not a collusive or sham bid;
4. Neither the said bidder nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affidavit, has in any way colluded, conspired, connived or agreed, directly or indirectly with any other bidder, firm or person to submit a collusive or sham bid in connection for which the attached bid has been submitted or to refrain from bidding in connection with such Contract or has in any manner directly or indirectly, sought by agreement or collusion or communication or conference with any bidder, firm or person to fix the price or prices in the attached bid or of any other bidder, or to fix any overhead, profit or cost or to secure through any collusion, conspiracy, connivance or unlawful agreement any advantage against the Town of Hingham or any person interested in the proposed contract; and
5. The price quoted in the attached bids is fair and proper and is not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the bidder or any of its agents, representatives, owners, employees, or parties in interest, including the affiant.

By: _____

Title

Subscribed and sworn to before me

This _____ day of _____, 2021

Title

My Commission expires:

CERTIFICATE OF VOTE
(to be filed if Contractor is a Corporation)

I, _____ hereby certify that I am (Secretary of the Corporation) the duly Qualified and acting Secretary of _____ (name of corporation) and I Further certify that a meeting of the Directors of said Company, duly called and held on _____, (date of meeting) at which all Directors were present and voting, and the following vote was unanimously passed:

Voted: To authorize and empower

Anyone acting singly, to execute Forms of General Bid, Contracts or Bonds on behalf of the Corporation.

I further certify that the above vote is still in effect and has not been changed or modified in any respect.

By: _____
Secretary of Corporation

A True Copy:

Attest _____
Notary Public

My Commission Expires: _____

Date: _____

Town of Milton
Designer Selection Procedures

Adopted by the Select Board: November 14, 2023

These procedures govern the selection of designers for any Town of Milton (the "Town") building project subject to the state designer selection law, M.G.L. c. 7C, §§ 44-58. Any other local law governing the procurement of services will be inapplicable to these procurements.

The Select Board may delegate any duties described herein to the extent such delegation is permissible by law.

The Select Board shall designate the individual or group of individuals (hereinafter referred to as "the Committee") who will conduct the designer selection process. No member of the Committee shall participate in the selection of a designer for any project if the member, or any of the member's immediate family:

- has a direct or indirect financial interest in the award of the design contract to any applicant.
- is currently employed by, or is a consultant to or under contract to, any applicant.
- is negotiating or has an arrangement concerning future employment or contracting with any applicant; or
- has an ownership interest in, or is an officer or director of, any applicant.

A Request for Qualifications (RFQ) for each contract subject to these procedures shall be advertised in the *Milton Times* (or a newspaper of general circulation in the Town), in the Central Register published by the Secretary of the Commonwealth, and in any other place required by the Select Board, at least two weeks before the deadline for filing applications, in accordance with Massachusetts General Laws.

The advertisement shall contain the following information:

- a description of the project, including the specific designer services sought, the time period within which the project is to be completed, and, if available, the estimated construction cost.
- If there is a program for the building project, a statement of when and where the program will be available for inspection by applicants.
- when and where a pre-bid meeting (if any) will be held.
- the qualifications required of applicants.
- the categories of designers' consultants, if any, for which applicants must list names of consultants they may use.
- whether the fee has been set or will be negotiated; if the fee has been set, the amount of the fee must be listed in the advertisement.
- when and where the RFQ can be obtained, and the applications must be delivered.

The RFQ shall include the current "Standard Designer Application Form for Municipalities and Public Agencies not within DSB Jurisdiction," which is available for download from the Massachusetts Designer Selection Board website at Procedures for Municipalities and Public Agencies not within DSB Jurisdiction. The Application Form may be amended to include additional information on a project-specific basis.

The Committee shall evaluate applicants based on the following criteria:

- prior similar experience.
- past performance on public and private projects.
- financial stability.
- identity and qualifications of the consultants who will work with the applicants on the project; and
- any other criteria that the Committee considers relevant to the project.

The Committee shall shortlist at least three applicants following a thorough review of submissions. With Select Board approval, the Committee may designate a subcommittee to develop the shortlist.

The Committee shall then conduct interviews with the shortlisted applicants and conduct reference checks for each of the finalists.

At the conclusion of the interviews, the Committee shall rank the finalists in order of qualification, considering the submissions, interviews, and reference checks. After reviewing the rankings, the Committee shall make a final recommendation to the Select Board of a designer for which a contract shall be awarded. The recommendation shall be presented to the Select Board in the form of a ranking with the recommended designer being the top ranked designer. No person or firm, including applicants' listed consultants, debarred pursuant to M.G.L. c. 149, § 44C, shall be included as a finalist.

The Committee shall include with their rankings a written explanation of the reasons for selection, including the recorded vote, if any. The written explanation and recorded vote, if any, shall be public records and shall be maintained in the contract file.

If the fee was set prior to the selection process, the Select Board shall award the contract to the Committee's recommended finalist if they so choose but must do so at the pre-established fee. If the Select Board wishes to select a designer other than the one recommended by the Committee, the Select Board shall file a written justification for the selection with the Committee and maintain a copy in the contract file.

If the fee is to be negotiated, following approval of the rankings by the Select Board, the Committee shall request a fee proposal from the top-ranked designer and begin contract negotiations. If the Committee is unable to negotiate a satisfactory fee with the first ranked designer, negotiations shall be terminated and undertaken with the remaining designers, one at a time, in the order in which they were ranked by the Committee until agreement is reached. In no event may a fee be negotiated which is higher than the maximum fee set by the Committee prior to selection of finalists.

Upon successful negotiation of a fee with the recommended designer, the Committee shall forward the fee to the Select Board for final approval and contract execution.

The Select Board may allow a designer who conducted a feasibility study to continue with the design of a project. However, the Select Board may commission, at its discretion, an independent review, by a knowledgeable and competent individual or business doing such work, of the feasibility of the designer's work to insure its reasonableness and its adequacy before allowing the designer to continue on the project, provided the Select Board otherwise complies with the statutory requirements for selecting a designer under Chapter 7C of the General Laws, including those set forth in M.G.L. c. 7C, § 54(a)(i).

Every contract for design services shall include the following:

- certification that the designer or construction manager has not given, offered, or agreed to give any person, corporation, or other entity any gift, contribution, or offer of employment as an inducement for, or in connection with, the award of the contract for design services.
- certification that no consultant to, or subcontractor for, the designer or construction manager has given, offered, or agreed to give any gift, contribution, or offer of employment to the designer or construction manager, or to any other person, corporation, or entity as an inducement for, or in connection with, the award to the consultant or subcontractor of a contract by the designer or construction manager.
- certification that no person, corporation, or other entity, other than a bona-fide full-time employee of the designer or construction manager, has been retained or hired by the designer or construction manager to solicit for or in any way assist the designer or construction manager in obtaining the contract for design services upon an agreement or understanding that such person, corporation, or other entity be paid a fee or other consideration contingent upon the award of the contract to the designer; and
- certification that the designer has internal accounting controls as required by M.G.L. c. 30, § 39R(c), and that the designer has filed and will continue to file an audited financial statement as required by M.G.L. c. 30, § 39R(d).

All fees shall be stated in design contracts, and in any subsequent amendments thereto, as a total dollar amount. Contracts may provide for equitable adjustments in the event of changes in scope or services.

The Select Board shall not enter into a contract for design services unless the Select Board or the designer has obtained professional liability insurance covering negligent errors, omissions, and acts of the designer or of any person or business entity for whose performance the designer is legally liable arising out of the performance of the contract. The total amount of such insurance shall at a minimum equal the lesser of one million dollars or ten percent of the project's estimated cost of construction, or such larger amounts as the Select Board may require, for the applicable period of limitations. A designer required by the Select Board to obtain all or a portion of such insurance coverage at its own expense shall furnish a certificate or certificates of insurance coverage to the Select Board prior to the award of the contract.

Every contract for design services shall include a provision that the designer or its consultants shall not be compensated for any services involved in preparing changes that are required for additional work that should have been anticipated by the designer in the preparation of the bid documents, as reasonably determined by the individual responsible for administering the design contract.

In the event of an emergency that precludes the normal use of these designer selection procedures, the Select Board may elect to authorize expedited procedures to address the emergency. The Select Board shall document in writing the reasons for the emergency declaration, the proposed scope of work, the estimated cost of construction, the established fee for the needed design services, and any other relevant information.

The Select Board may select three finalists from any standing list of designers who have applied for projects of a similar nature or may otherwise select three designers to be considered as finalists for the project. The Select Board shall rank the finalists in order of qualification and select the designer for the emergency work.

The Select Board shall publish the name of any designer awarded a contract in the Central Register.

The following records shall be kept by the Select Board:

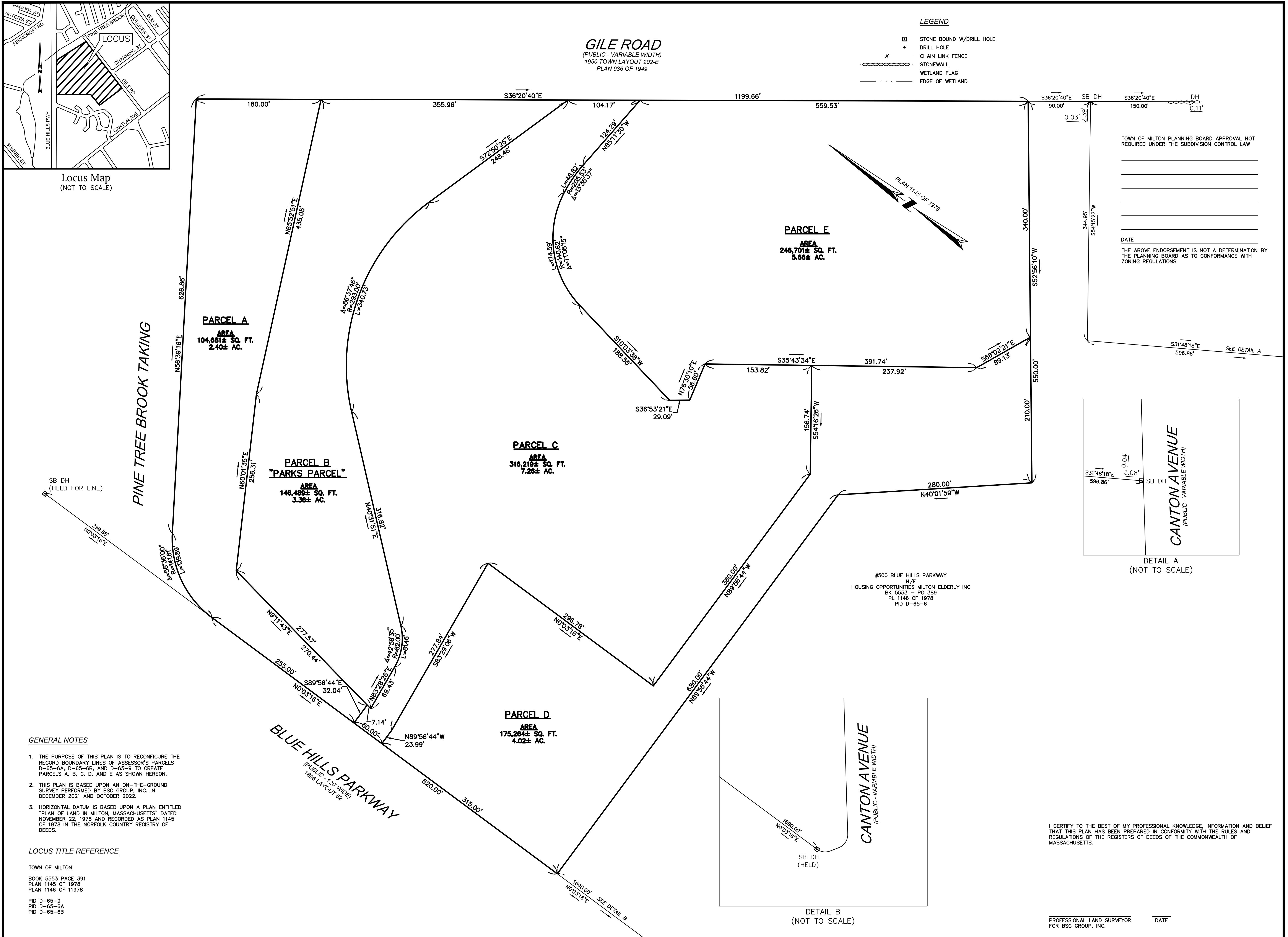
- all information supplied by or obtained about each applicant.
- all actions taken relating to the project; and
- any other records related to designer selection.

All records shall be available for inspection by the state Designer Selection Board and other authorized agencies.

The Select Board and/or their designee shall evaluate designers' performance on contracts using the Designer Selection Board evaluation form(s) in accordance with M.G.L. c. 7C, § 48(h), and file completed evaluations with the Board and any other agency named in M.G.L. c. 7C, § 48(h).

Nothing in these Procedures shall be interpreted to require the establishment of a board or waive or reduce the requirements of any other applicable law or regulation.

For any municipal design or construction project that includes funding provided by the Commonwealth, in whole or in part (such as reimbursements, grants and the like), cities and towns must incorporate minority-owned business enterprise and women-owned business enterprise participation goals. If applicable, the Select Board shall take steps to assure that it complies with all Supplier Diversity Office requirements.



THE ABOVE ENDORSEMENT IS NOT A DETERMINATION BY THE PLANNING BOARD AS TO CONFORMANCE WITH ZONING REGULATIONS

APPROVAL NOT REQUIRED PLAN OF LAND
BLUE HILLS PARKWAY
IN
MILTON
MASSACHUSETTS
(NORFOLK COUNTY)

MARCH __, 2023

SBC PARCEL 2 OPTION

PREPARED FOR:
TOWN OF MILTON
525 CANTON AVENUE
MILTON, MA 02186

BSC GROUP
803 Summer Street
Boston, Massachusetts
02127
617 896 4300

© 2023 BSC Group, Inc.
SCALE: 1" = 60'
0 7.5 15 30 METERS
0 30 60 120 FEET

PROJ. MGR.: K. THOMPSON
FIELD: J. PINTAVALLE, B. SNEESBY
CALC./DESIGN: S. BONIN, K. THOMPSON
DRAWN: S. BONIN, K. THOMPSON
CHECK: S. EWALD
FILE: P:\4593304\S\4593304ANR
DWG.: 4593304ANR SHEET
JOB. NO: 4-5933.04 1 OF 1



TOWN OF MILTON
MASSACHUSETTS

Attachment C

SUSAN M. GALVIN
Town Clerk

To Whom It May Concern:

This is to certify that the following is a true copy of Article 31 of the Warrant for the Annual Town Meeting held May 4, 2023, and May 8, 2023, and of the vote passed thereunder.

ARTICLE 31 To see if the Town will vote:

- (1) to transfer to the care, custody, management and control of the Select Board, for school purposes, approximately 2.81 acres of land located between Blue Hills Parkway and Gile Road, as shown on a plan, a copy of which is on file at the office of the Director of Planning and Community Development, which are presently under the care, custody and control of the Milton Conservation Commission, and
- (2) to transfer to the care, custody, management and control of the Select Board, for school purposes, approximately 4.4 acres of land located between Blue Hills Parkway and Gile Road, as shown on a plan, a copy of which is on file at the office of the Director of Planning and Community Development, which are presently maintained by the Parks and Recreation Department for recreation purposes, and
- (3) to authorize the Select Board to petition the General Court to enact special legislation, in accordance with Chapter 274 of the Acts of 2022, otherwise known as the Public Lands Preservation Act, to authorize the Town of Milton to use said land for school purposes, and without any restrictions imposed on such use by Article 97 of the Amendments to the Massachusetts Constitution ("Article 97"), and
- (4) to transfer to the care, custody, management and control of the Conservation Commission, and to be subject to the provisions of Article 97, approximately six (6) acres of land located on Randolph Avenue, and approximately three (3) acres of land located on Herrick Drive, and approximately one (1) acre of land located on School Street, and possibly other land to be determined prior to Town Meeting, which are all held by the Town for general municipal purposes, as shown on plans, copies of which are on file at the office of the Director of Planning and Community Development, and
- (5) to authorize the Select Board to obtain all necessary Governmental approvals necessary to accomplish the purpose of this article;
- (6) and provided that, in the event that the Town does not appropriate funding for the aforementioned school purposes on the Blue Hills Parkway Parcel on or before June 30, 2028, the



Blue Hills Parkway Parcel shall be transferred back to the care, custody and control of the Milton Conservation Commission, to be subject to the provisions of Article 97, the Randolph Avenue Parcel, the School Street parcel, and the Herrick Drive Parcels shall be transferred back to the Select Board to be used for general municipal purposes, and the Gile Road Parcel shall be transferred back to the Parks and Recreation Department for active recreation purposes, and the Select Board shall be authorized to petition the General Court to enact special legislation to authorize the Town of Milton to use the Randolph Avenue Parcel, the School Street parcel, and the Herrick Drive Parcels for general municipal purposes and without any restrictions imposed on such use by Article 97 and to act on anything relating thereto.

VOTED. The Town voted:

(1) to transfer to the care, custody, management and control of the Select Board, for school purposes, approximately 2.81 acres of land located between Blue Hills Parkway and Gile Road, as shown on a plan, a copy of which is on file at the office of the Director of Planning and Community Development, which are presently under the care, custody and control of the Milton Conservation Commission, and

(2) to transfer to the care, custody, management and control of the Select Board, for school purposes, approximately 4.4 acres of land located between Blue Hills Parkway and Gile Road, as shown on a plan, a copy of which is on file at the office of the Director of Planning and Community Development, which are presently maintained by the Parks and Recreation Department for recreation purposes, and

(3) to authorize the Select Board to petition the General Court to enact special legislation, in accordance with Chapter 274 of the Acts of 2022, otherwise known as the Public Lands Preservation Act, to authorize the Town of Milton to use said land for school purposes, and without any restrictions imposed on such use by Article 97 of the Amendments to the Massachusetts Constitution (“Article 97”), and

(4) to transfer to the care, custody, management and control of the Conservation Commission, by deed, and to be subject to the provisions of Article 97:

(1) Approximately six (6) acres of land located on Randolph Avenue, shown on the Town of Milton Assessor’s Maps as Map I, Block 38D, Lot 10A;

(2) Approximately three (3) acres of land located on Herrick Drive, shown on the Town of Milton Assessor’s Maps as Map E, Block 17, Lot 34 and Map E, Block 17, Lot 35;

(3) Approximately one (1) acre of land located on School Street, shown on the Town of Milton Assessor’s Maps as Map E, Block 17, Lot 19;

(4) Approximately five (5) acres of land located at the corner of Highland Street and Canton Avenue, shown on the Town of Milton Assessor's Maps as Map K, Block 2, Lot 1A;

(5) Approximately forty-one (41) acres of land located around and inclusive of Pope's Pond, shown on the Town of Milton Assessor's Maps as Map C, Block 34A, Lot 4, a portion of which, not to exceed four (4) acres, shall be transferred to the care, custody, management and control of the Parks and Recreation Department to be used for the creation of a playground; and

(6) Approximately 18.94 acres of land off Randolph Ave shown on the Town of Milton Assessor's Maps as Map I, Block 38E, Lot 3 and Map I, Block 38E, Lot 2 (A to F included); and

(5) to transfer to the care, custody, management and control of the Parks and Recreation Department, and to be subject to the provisions of Article 97:

(1) Approximately 4.86 acres of land off Randolph Ave consisting of portions of land shown on the Town of Milton Assessor's Maps as Map I, Block 38D, Lot 6 and Map I, Block 38D, Lot 7; and

(6) to authorize the Select Board to obtain all necessary Governmental approvals necessary to accomplish the purpose of this article; and

(7) provided that, in the event that the Town does not appropriate funding for the aforementioned school purposes on the Blue Hills Parkway Parcel on or before June 30, 2028:

(1) the 2.81 acres of land located between Blue Hills Parkway and Gile Road shall be transferred back to the care, custody and control of the Milton Conservation Commission, to be subject to the provisions of Article 97, and

(2) the 4.4 acres of land located between Blue Hills Parkway and Gile Road shall be transferred back to the Parks and Recreation Department, to be subject to the provisions of Article 97."

YES: 174 NO: 87 ABSTAIN: 0

The Moderator declared a two-thirds vote.

A true copy, Attest

Susan M. Nahm
Town Clerk



TOWN OF MILTON
MASSACHUSETTS

SUSAN M. GALVIN
Town Clerk

To Whom It May Concern:

This is to certify that the following is a true copy of Article 32 of the Warrant for the Annual Town Meeting held May 9, 2023, and of the vote passed thereunder.

ARTICLE 32 To see if the Town will vote to authorize the Select Board to acquire for school purposes, by purchase, taking by eminent domain or otherwise, all or a portion of parcels of land owned by the Town of Milton and located off Gile Road and Blue Hills Parkway, which parcels are shown on the Town of Milton Assessor's Maps as Map D, Block 65, Lots 6A and 6B; and to see what consideration the Town will vote for the purposes of this Article, whether by appropriation, transfer of land including approximately six (6) acres of land located on Randolph Avenue, approximately three (3) acres of land located on Herrick Drive, approximately one (1) acre of land located on School Street, approximately five (5) acres of land located at the corner of Highland Street and Canton Avenue, approximately forty-one (41) acres of land located around and inclusive of Pope's Pond, and possibly other land to be determined prior to Town Meeting, which are all held by the Town, as shown on plans, copies of which are on file at the office of the Director of Planning and Community Development, or otherwise; and to act on anything relating thereto.

VOTED. The Town voted to authorize the Select Board to acquire for school purposes, by purchase, taking by eminent domain or otherwise, a portion of parcels of land owned by the Town of Milton and located off Gile Road and Blue Hills Parkway, said portion constituting approximately 7.21 acres, which parcels are shown on the Town of Milton Assessor's Maps as Map D, Block 65. Lots 6A and 6B, as shown on plans, copies of which are on file at the office of the Director of Planning and Community Development; and in consideration therefor to transfer the following land to the Conservation Commission, which are also shown on plans, copies of which are on file at the office of the Director of Planning and Community Development:

1. approximately six (6) acres of land located on Randolph Avenue, shown on the Town of Milton Assessor's Maps as Map I, Block 38D, Lot 10A;
2. approximately three (3) acres of land located on Herrick Drive, shown on the Town of Milton Assessor's Maps as Map E, Block 17, Lot 34 and Map E, Block 17, Lot 35;
3. approximately one (1) acre of land located on School Street, shown on the Town of Milton Assessor's Maps as Map E, Block 17, Lot 19;



4. approximately five (5) acres of land located at the corner of Highland Street and Canton Avenue, shown on the Town of Milton Assessor's Maps as Map K, Block 2, Lot 1A; and
5. approximately forty-one (41) acres of land located around and inclusive of Pope's Pond, shown on the Town of Milton Assessor's Maps as Map C, Block 34A, Lot 4, a portion of which, not to exceed four (4) acres, shall be transferred to the care, custody, management and control of the Parks and Recreation Department to be used for the creation of a playground; and
6. Approximately 18.94 acres of land off of Randolph Ave shown on the Town of Milton Assessor's Maps as Map I, Block 38E, Lot 3 and Map I, Block 38E, Lot 2 (A to F included);

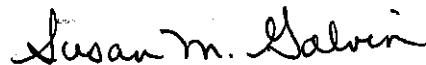
And to transfer to the care, custody, management and control of the Parks and Recreation Department, and to be subject to the provisions of Article 97:

1. Approximately 4.86 acres of land off of Randolph Ave consisting of portions of land shown on the Town of Milton Assessor's Maps as Map I, Block 38D, Lot 6 and Map I, Block 38D, Lot 7.

YES: 165 NO: 72 ABSTAIN: 1

The Moderator declared a two-thirds vote.

A true copy, Attest



Town Clerk



TOWN OF MILTON
MASSACHUSETTS

SUSAN M. GALVIN
Town Clerk

To Whom It May Concern:

This is to certify that the following is a true copy of Article 33 of the Warrant for the Annual Town Meeting held May 9, 2023, and of the vote passed thereunder.

ARTICLE 33 To see if the Town will vote to authorize the School Building Committee to employ an Owner's Project Manager, architects, engineers, or other professionals for the purposes of conducting feasibility studies and/or preparing detailed plans, specifications, working drawings, and other necessary documents for the construction and furnishing of a school building; to see what sum of money the Town will vote to appropriate for the purposes of this article; to determine how said appropriation shall be raised, whether by borrowing, transfer from available funds, or otherwise; and to act on anything relating thereto.

VOTED. The Town voted to authorize the School Building Committee to employ an Owner's Project Manager, architects, engineers, or other professionals for the purposes of conducting feasibility studies and/or preparing detailed plans, specifications, working drawings, and other necessary documents for the construction and furnishing of a school building and appropriate \$275,000 from funds certified by the Department of Revenue as free cash for the purposes of this article, provided that such funding may not be used for construction or material destruction of the land.

YES: 199 NO: 11 ABSTAIN: 1

The Moderator declared a two-thirds vote.

A true copy, Attest

Susan M. Galvin
Town Clerk

