

ESSEX COMMUNITY DEVELOPMENT PLAN



Prepared by the Metropolitan
Area Planning Council and Central Transportation
Planning Staff
for the
Essex Planning Board and Essex
Community Development Plan Committee

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EXECUTIVE SUMMARY

Project Overview

Essex was granted \$30,000 in planning services to create a Community Development Plan, pursuant to Executive Order 418. Executive Order 418 allowed communities to address future growth and development by disseminating information, and by creating visions, goals, and strategies in four topic areas: natural resources and open space, housing, economic development, and transportation. Four state agencies provided funding for this Plan: the Executive Office of Environmental Affairs, Department of Housing and Community Development, Executive Office of Transportation and Construction, and the Department of Economic Development. The town's Planning Board and Community Development Plan Committee held six public workshops to gather public input over the course of two years. In April 2004, the Committee and Planning Board presented a draft plan to the public and solicited feedback.

Background

Essex has a wealth of natural resources and is in the process of updating its 1997 Open Space and Recreation Plan that sets forth priorities and strategies for protecting those resources. Issues raised during the public workshops focused on planning for anticipated growth and identifying and increasing the amount of conservation lands. In addition to protecting water supply areas and promoting better stewardship of natural resources, residents felt that the town should hire a conservation agent, provide better training for its town boards and create a management plan for the Essex River and surrounding salt marsh areas.

Essex, a town of just over 3200 residents, is predominantly a family community. Like most of eastern Massachusetts, high housing prices have made it difficult for and low, moderate and even middle income households to afford a house in the town. The growing number of smaller households will lead to a steady housing demand and a greater variety of housing types, with the largest increase coming from people between the ages of 55-74. The town's affordable housing stock consists of elderly housing units and remains below 10%. Through the town's participation in the Community Development Plan process and the Cape Ann Housing Forum, it is beginning to take proactive steps to address the affordable housing needs of its residents.

The portrait of Essex that emerges from its economic profile is of a seasonal, natural-resource/tourism based economy that has shifted to being a predominantly residential, commuter-based economy. Jobs in town increased during the 1990s, but in-town jobs are primarily service and government oriented and pay about 2/3 the regional average. The town's work force grew increasingly "white-collar" during the 1990s and though the town bucked a national trend by showing a slight increase in manufacturing jobs in the period, its commercial and industrial share of total land valuation declined slightly. Residential

property values dominate the tax base as they increased 94% in value between 1990 and 2003. Taxes average \$4081 per home, which is 37 % higher than the state median.

The Causeway is a 0.8-mile section of Route 133/Main Street and is a Rural Minor Arterial that serves both local and through traffic. These dual functions produce conflicts, especially during the summer months, as the Essex town center, through which the roadway runs, is a major tourist attraction. Route 133/Main Street provides access to a number of restaurants, antique stores, churches, and marinas in the town center; consequently, there are numerous curb cuts with frequent left and right turns to and from these abutters. There are approximately fifteen antique dealers and six restaurants in the study area, located on both sides of the roadway, in some cases across the street from each other. In addition, because of narrow sidewalks and inconsistent shoulder widths, conditions for pedestrians and bicyclists are not as “friendly” as they might be.

Community Development Plan Map

The Community Development Plan Map (Map 6) includes mapped strategies where town residents envisioned and described the future of specific areas in town.

1. Essex Woods

The land includes the Parsonage Lot, various tax title parcels and potential tax title land in the Maple Swamp area. Acquire these parcels, working with the Manchester Essex Conservation Trust and other organizations, for water resource protection, wildlife habitat protection, and tourism-related economic development.

2. Hardy’s Hatchery/ Vitale and Benotti Parcels

Explore the feasibility of acquiring fee simple ownership or development rights to these parcels if they become available to the town. These lands include Biomap priority sites of Rare Species Habitat, Endangered Species Habitat, wetlands and Supporting Natural landscapes.

3. Giddings Farm

Explore the feasibility of acquiring fee simple ownership or development rights to these parcels if they become available to the town. This area contains supporting natural landscapes, wetlands and is adjacent to permanently protected land. Note: The eastern end of this property has been preserved as conservation land since the Natural Resources Workshop

4. Land East of Conomo Point

This land, on both sides of Conomo Point Road, abuts town land and provides Supporting Wildlife Habitat and should be considered for conservation easement, fee simple ownership or purchase of development rights if possible.

5. Pennoyer/Febiger/Collier/Allen Lands off Eastern Avenue

These parcels support wetlands, and provide core and natural supporting habitat and should be investigated for protection through conservation easement if they are available in the future.

6. Alewife Brook Overlay District

Consider adopting an overlay district to protect wildlife habitat, shellfish resources and Essex rural character.

7. Conomo Point

Adaptive re-use of existing buildings for tourism-related economic development should be considered here, if they become available. This was suggested by MAPC staff.

8. Causeway Area

Consider limiting new uses to commercial, nonresidential uses only due to flooding and parking concerns and add controls on types of commercial uses allowed.

9. Route 22 Corridor Overlay District

Consider allowing multi-family development of up to 6 units by right if 25% affordable while adding controls to commercial and industrial development.

10. Central Village Overlay District

Consider allowing for mixed-use development on Martin Street, Main Street and Western Avenue area, not including John Wise Avenue. Allow 3-4 multi-families by right if 1 unit is kept permanently affordable.

11. Eastern and Northern Parts of Southern Avenue

Maintain current residential density but consider limiting certain commercial and industrial uses.

12. John Wise Open Space Development District

Lower density with open space preservation. Allow current density of one unit per acre if developments use Open Space Residential Design (OSRD) or if more affordable units are provided.

13. Southern Avenue Open Space Development District

Lower density with open space preservation, as in John Wise OSRD. Allow current density of one unit per acre if OSRD used or if more affordable units are provided.

Additional Strategies and Recommendations

Natural Resources and Open Space

- The town Open Space Committee and Conservation Commission should finish updating the Open Space and Recreation Plan, work cooperatively with area nonprofits and pursue funding opportunities for open space acquisition.
- Hire a conservation agent and require training for town Board members.
- The Town should also pursue passage of the Community Preservation Act.
- Work with Massachusetts Coastal Zone Management and the National Estuaries Program Eight Town's and A Bay to follow up on the National Oceanic and Atmospheric Administration (NOAA) study on the Parker River/ Essex Bay Area of Critical Environmental Concern to see how the Essex River and its surrounding marshes can be better protected and managed.
- Compare the town's current groundwater protection bylaw with the new DEP model Health and Groundwater Protection Bylaws.
- Use "friends of" groups and community service obligations to manage and maintain town conservation lands.

Housing

- Establish a strong public commitment to housing and develop a proactive housing policy.
- Form a housing committee.
- Hire a housing professional or designate a staff person responsible for housing or share resources with a neighboring community.
- Form a housing development non-profit or work with an existing non-profit with skills in housing development, rehabilitation, and financing.
- Encourage regional cooperation among non-profits or housing authorities.
- Explore the idea of joining a consortium to receive an annual allocation of federal HOME funds.
- Ensure continual flow of money into the Housing Trust Fund through mechanisms such as inclusionary zoning.
- Consider adopting the use of Backlot Development Zoning in some areas to manage Subdivision Approval Not Required (ANR) lots.
- Allow the conversion of an existing dwelling into a three family unit by right town wide.

- Adopt inclusionary zoning for all new housing developments.
- Consider allowing accessory dwelling units on a town wide basis.
- Become Housing Certified by the Department of Housing and Community Development to gain access to state grants.
- Offer rehab loans and/or grants to low to moderate income persons with funds from the state CDBG, HOME consortium, or other sources.
- Accept donated or reduced-price property.
- Identify vacant and underutilized properties that may be suitable for housing.
- Investigate if a Planned Production Program will work in Essex.

Economic Development

- Encourage small entrepreneurs.
- Establish an Essex Tourism Committee and develop a goal and marketing plan, perhaps in conjunction with the Cape Ann Chamber of Commerce.
- Consider strategies outlined in the “Environmental Tourism Strategies for the North Shore” report prepared by MAPC in 1996. See Appendices.
- Consider increasing types of business uses requiring a special permit as part of carefully managing siting of larger commercial and industrial uses or consider special permits within certain areas of town, such as the Route 22 Corridor Overlay area or the Causeway.
- Consider adding more extensive site plan review requirements and uses for adding business uses near a residential area.
- Negotiate with MassHighway on final design and then execute agreed upon traffic and pedestrian improvements for the Causeway area.
- Assess near term parking solutions to address strengthening Essex as a tourist destination.
- Identify interest among merchants and residents in extending streetscape/sidewalk and landscaping improvements south from the Causeway.

Transportation

- See CTPS report for Causeway Area Transportation Findings and Recommendations, Appendix VII

INTRODUCTION

In late 2002, the town was granted \$30,000 in planning services to create a Community Development Plan, pursuant to Executive Order 418. Executive Order 418 allowed communities to address future growth and development by creating visions, goals, and strategies in four topic areas: natural resources and open space, housing, economic development, and transportation. Four state agencies provided funding for this plan: the Executive Office of Environmental Affairs, Department of Housing and Community Development, Executive Office of Transportation and Construction, and the Department of Economic Development.

To guide this project, an ad hoc Community Development Plan Committee worked with the Planning Board and the town hired the Metropolitan Area Planning Council (MAPC) and the Central Transportation Planning Staff (CTPS) as its consultants. Over the course of a year, the town hosted six public workshops:

- Town “Information Exchange” Workshop, April 30, 2002
- Town-Wide Visioning Workshop, May 11, 2002
- Natural Resources and Open Space Workshop, April 29, 2003
- Housing Workshop, January 6, 2004
- Economic Development Workshop, March 30, 2004
- Final Plan Workshop, April 28, 2004

This report presents the results of this planning process and provides recommendations for meeting the goals.

Throughout this report, we provide perspective on trends in Essex by comparing the town to larger geographic regions. Often we refer to the “MAPC region.” This is the area covered by the Metropolitan Area Planning Council and includes the 101 communities of metropolitan Boston from Cape Ann to Duxbury and from Boston out to Bellingham, Marlborough, Littleton and other communities along Interstate 495. We also refer to the “subregion”, which in Essex’s case is the North Shore Task Force (NSTF) subregion. The subregion is a subset of MAPC and includes fifteen communities: Essex, Ipswich, Gloucester, Rockport, Manchester-by-the-Sea, Beverly, Peabody, Salem, Marblehead, Swampscott, Danvers, Middleton, Topsfield, Wenham, and Hamilton.

VISION

The Town of Essex seeks a proactive planning process that carefully balances the need for economic development, encompassing residential and non-residential uses, with the preservation of key natural, scenic, historic and recreational resources.

To fulfill this vision, the Community Development Plan shall articulate strategies for the following four elements:

Economic Development

- An economic development climate which takes advantage of the town's close proximity to Boston to encourage striking a balance between appropriate, locally-owned businesses, Essex's outstanding natural beauty and natural resource-based jobs and its strong sense of community.
- Continues the town's traditional entrepreneurial spirit by encouraging home occupations/small businesses, farms and shellfishing while carefully managing the siting of larger commercial and industrial uses.
- Encourages the management of growth through public dialogue and participation, provides public information sources such as a town web-site.
- Recommends useful planning/zoning and financial tools to achieve a sound balance between conservation and appropriate development.

Housing

- A housing objective that retains the town's rural character and uniqueness while preserving existing businesses and allowing housing opportunities for a variety of incomes and family sizes.
- Plans for thoughtful growth using planning/zoning tools such as mixed-use and higher density "in-fill" developments in areas where development already exists.
- Finds ways to provide Essex residents with a greater variety of and more affordable housing options.

Open Space And Natural Resources

- An open space and natural theme that "protects our strengths from our weaknesses" by taking advantage of opportunities to inventory, prioritize and enhance natural resource and open space areas.

- Implements a variety of methods to secure identified priority open space parcels through purchases, gifts, conservation restrictions, state and federal grant programs, and municipal and private conservation groups.
- Conducts a habitat assessment of identified priority habitat parcels using all available resources.

Transportation

- Transportation objectives will include monitoring the improvements and design for existing roads to ensure pedestrian, bike and vehicle safety.
- Creates and implements a plan to improve pedestrian safety, traffic flow and parking along the Causeway.
- Suggests practical ways to increase the alternatives to single occupancy car travel by looking at increasing bikeways, promoting increased public transit scheduling and use.
- Evaluates the enforcement of existing traffic laws.
- Remains active in the regional transportation planning process.

NATURAL RESOURCES AND OPEN SPACE

Key Findings

- Essex's open spaces and natural resources contribute to the town's rural character and quality of life for residents, businesses, visitors, and neighboring communities. Preservation and implementation of sound planning practices may be critical in maintaining Essex as it is now, particularly as the town's proximity to Boston and its undeveloped areas increase the pressure to build. Set between the marshes of the Parker River/Essex Bay Area of Critical Concern (ACEC), the largely undeveloped land of West Gloucester and bordered by the Essex/Manchester Woods on the south, the town contains unparalleled ecological treasures that could provide economic opportunities to the town while maintaining its current high quality of life as well.
- Water supply protection is critical – town wells are replenished by undeveloped land in the South Essex Woods and a fair amount of land in the northern half of the town overlays aquifers.
- Overall surface water quality of the town's streams, river, lake and Essex Bay are critical to maintaining shellfishing, tourism, and the rural/small village character of Essex.

- The town Open Space Committee is working to revise the town's Open Space Plan, which expired in 2002. The 1997 Plan identified three priority goals: to identify local interest in specific land areas and natural resources and develop means to protect those areas; to work to protect specific parcels of land for open space within Essex; and to expand access to the town's natural resources. Essex will use the Community Development Plan to help support the revision of its Open Space Plan.

Process

Approximately 55 persons attended the April 29, 2003 Natural Resources and Open Space Workshop, which was held at the Essex Elementary and Middle School.

Prior to the workshop, MAPC, with input by the Essex Community Development Plan Committee, reviewed Map 2, Existing Natural Resources, and began to identify key natural resource themes and priority areas of protection. These initial themes and areas were presented at the Natural Resources Workshop. Attendees had the option of adding more themes and areas. Map 2 overlays were explained in small group breakouts and MAPC briefly reviewed land protection techniques.

Workshop participants then brainstormed on specific themes and areas that they thought should be protected as open space in the future. They worked off themes developed at the Visioning Workshop, from the 2002 Open Space Plan and the 2002 Essex Open Space Survey results. Participants then voted on their top six open space themes and their top eight open space areas.

Goals as Prioritized at the April 29th, 2003 Workshop

Overall Goals from 2001 Open Space and Recreation Plan

- Slow down the rate of growth and develop plans for future growth (34 votes)
- Identify and increase conservation lands (24 votes)
- Hire a conservation agent; elect conservation-minded boards; require training for staff/Boards (20 votes)
- Protect offshore marine resources; create a management plan for the Essex River and salt marsh buffer zones (19 votes)
- Adopt Conservation Subdivision bylaw and improve the town's wetland bylaw (16 votes)
- Protect drinking water supply (14 votes)

- Provide better stewardship of what we have (13 votes)
- Protect agricultural uses (9 votes)
- Protect scenic views, natural features and scenic features (8 votes)
- Encourage public participation at Town Board meetings and provide better coverage of local meetings in the local press (8 votes)
- Develop a town and inter-community trail system (6 votes)
- Expand and support environmental education (5 votes)
- Increase “ownership” of natural resource preservation (4 votes)
- Protect all unprotected open space of all kinds (4 votes)
- Protect passive recreation areas (picnic, hike, nature study) (3 votes)
- Protect the water quality of Chebacco Lake (2 votes)

Suggested Locations for Open Space or Natural Resource Protection (Refer to Map 3 for locations)

Highest priority Natural Resource Areas, in order, from the Natural Resources Forum of April 29, 2003 were:

- The **South Essex Woods** parcels, including the following lots, (30 votes):
 - A) The approximately 9-acre Parsonage lot that was given to a local church in 1710. The Manchester Essex Community Trust (MECT) owns land just to the north of it and the church owned parcel is exempt from MGL 40-A. This is a key piece of land to the effort by MECT to assemble and protect the South Essex Woods, as it is centrally located. It is a Priority Site for Species Habitat and Core Habitat as well.
 - B) various town owned tax title parcels of about 20-acres in total. These tax delinquent lands are mostly wetlands, Core Habitat and Priority Sites of Rare Species Habitat areas.
 - C) Maple Swamp area of about 50-acres. This is potential tax-title land that contains wetlands, Core Habitat and Priority Species of Rare Habitat designations.
- **Hardy's Hatchery/Vitale/Benotti Parcels (28 votes).** The Hardy Hatchery land contains Priority Sites of Rare Species Habitat, Endangered Species Habitat, Supporting Natural Landscape and wetlands designations. The Benotti parcel contains wetlands and Supporting Natural Habitat.

- **Alewife Brook Buffer between Pond Street and Essex Park or from Library to Chebacco Lake (23 votes).** This area contains Supporting Habitat for Anadromous Fish, is in the town's Wellhead Protection Area, provides Supporting Natural Landscape, wetlands and Core Habitat.
- **Pennoyer/Febiger/Collier/Allen lands off Eastern Avenue (21 votes).** These areas support wetlands, Core Habitat and Natural Supporting Habitat.
- **Giddings Farm (16 votes).** This parcel provides Supporting Natural Landscape, wetlands and is adjacent to Permanently Protected Land.
- **Land east of Conomo Point to town line (16 votes).** Provides Supporting Habitat and is adjacent to town owned land.

Other sites that received votes:

- Land next to John Wise Lane, including Cedar Brook Farm (13 votes)
- Cross Island (12 votes)
- Richardson Land on both sides of Island Road (10 votes)
- Ridge Property at end of Spring Street (9 votes)
- Land south of Choate Street (9 votes)
- Duncan property off Story Street (5 votes)

HOUSING

Key Findings

- After being flat for much of the 1990s, Essex's single family home prices rose 114% to \$363,200 from 1997 to 2002. Median housing values had risen to almost 4.6 times median income by 2000, well beyond the affordability standard of 2.5 times income.
- Two thirds of the housing stock in Essex is single family homes. Under current zoning, the town can expect more low density, high cost houses in the future as builders will seek to recoup their land costs by building larger, more expensive homes.
- There has been an increased demand for housing by families with school age children and the Trade Up (35-54) age group from 1990 to 2000.
- There will be increased demand for housing from people in the 55-74 age group and a decline in the number of families with school age children seeking housing.
- Growing numbers of smaller households will lead to steady housing demand and a greater variety of housing types.

- 39 % of Essex’s households have incomes below the low and moderate income limits that are appropriate for subsidized housing. Thirty per cent of all renters in Essex paid more than 30% of their gross income for rent in 2000. Thirty five per cent of all mortgage holders in Essex paid more than 30% of their gross income toward it in 2000.
- The proportion of rental housing in Essex has remained at 30% since 1980, running counter to the North Shore’s decline in rental housing. Essex has rental vacancy rates well below the national average, which increases rents.
- Essex has a documented need for more senior and handicapped accessible affordable housing and anecdotal evidence suggests a probable demand for multi-family affordable housing in Essex.
- Essex is below the 10% affordable housing threshold. The town has begun to address the issue through the Community Development Plan process and via participation in the January, 2004 Cape Ann Housing Forum.

Assessment of Housing Demand

Recent Population Trends

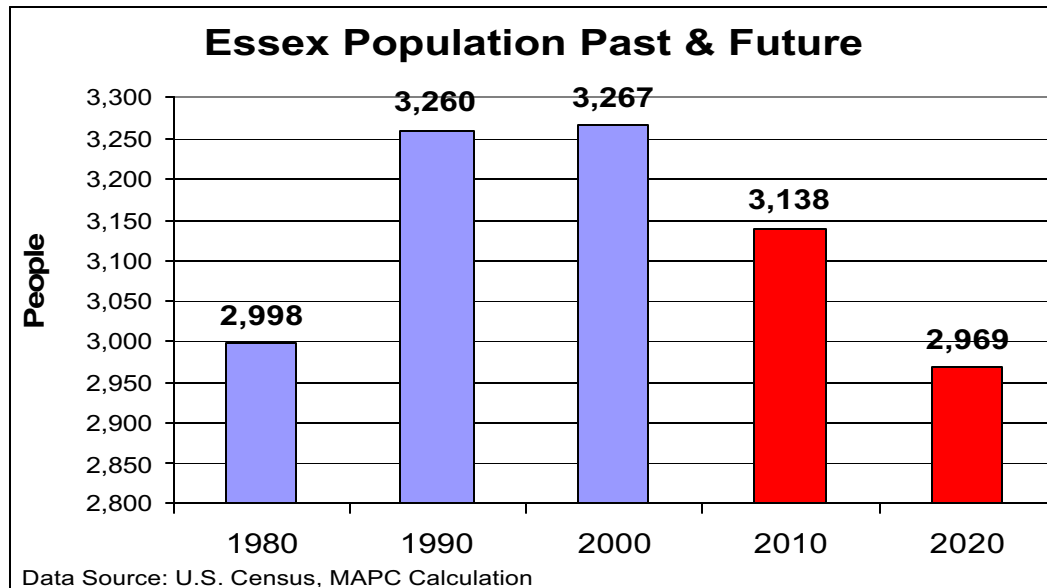
Population trends are among the key factors driving housing demand. Essex’s population grew 9% between 1980 and 2000, with most growth in the 1980s (8.7%) and slower growth in the 1990s (about 0.2%). Over the 20-year period, both the North Shore subregion and the MAPC region as whole grew at a slower rate (about 6% for both). Past and future population trends appear in Figure 1.

Although Essex’s population grew only 0.2% in the 1990s, the number of households grew 2% and the average household size fell. With 2.49 people per household, Essex’s households are slightly smaller than those of the North Shore (2.52) or the MAPC region (2.56). The trend toward smaller households is a nationwide phenomenon, driven largely by the growing diversity of household types and lifestyle choices. People are marrying later, living in a greater variety of household configurations, and living longer, often outliving spouses as the overall population ages.

As we will see, this increase in the number of households contributed to declining vacancy rates and escalating housing costs.

Changes in household size were accompanied by changes in household composition. For the region as a whole, the decade saw a decline in the proportion of family households versus non-family households and an increase in the percentage of householders living alone. Only 22% of the region’s households today are “typical” married couples with children, while 30% consist of a single person living alone. Although the number of single parents grew, they continue to make up 7% of all of the region’s households.

Figure 1. Essex Population.



Of Essex's households, 67% are families and 33% are non-families. The proportion of families is almost identical to what it was in 1990 but is slightly higher than the 61% for the region as a whole. Of households in Essex, 26% are two-parent families with children, 6% are single-parent families, and 10% are elders living alone. Compared to MAPC, Essex has more two-parent families with kids, but fewer single-parent families, non-families, single heads of household with no kids, and elders living alone. The number of single-parent families, however, has grown by about 14%. Figure 2 shows the composition of family and non-family households.

Figure 2. Family Households.

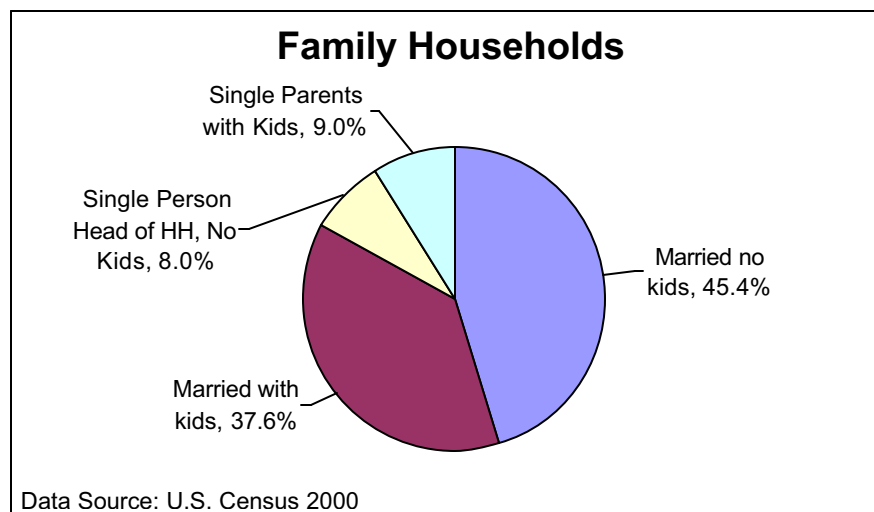
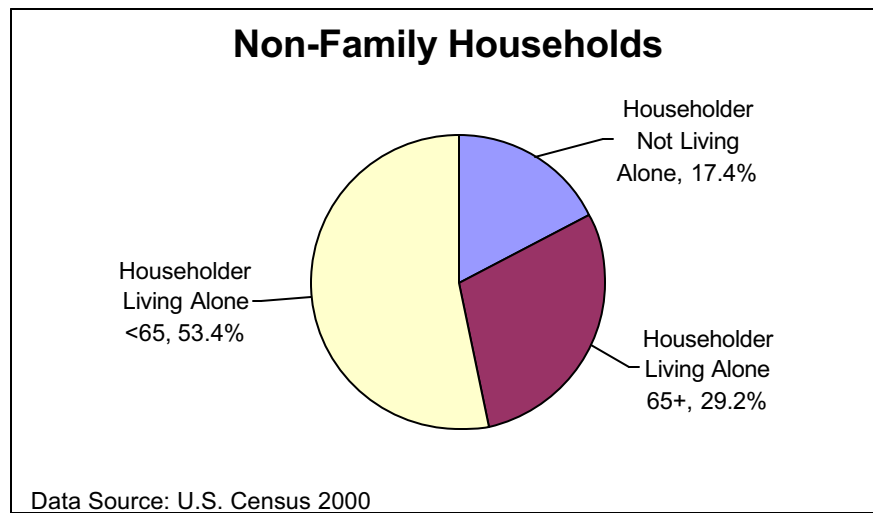


Figure 3. Non Family Households.



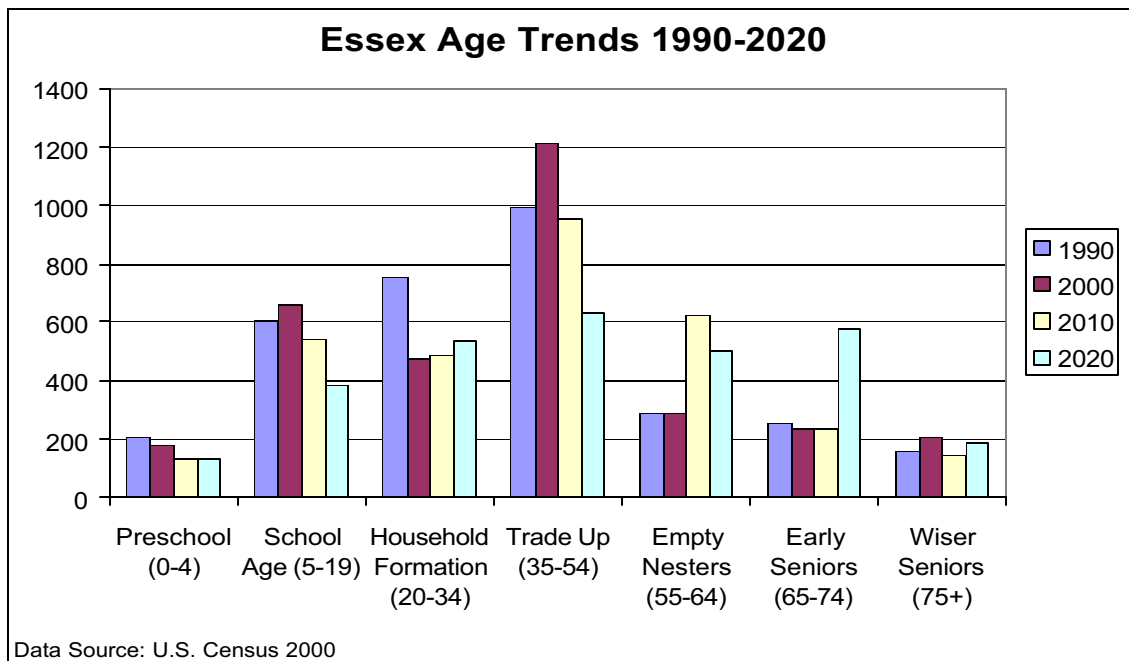
Changes in Essex's age mix also affect housing demand and housing need. To show this relationship, we have clustered age groups to relate them loosely to various stages in the housing market (for past and future trends, see Figure 4). Thus in the last decade, the town has seen:

- A slight decline in the number of pre-school children and a small increase in school-age children, suggesting a fairly stable demand for family housing;
- A relatively sharp drop in the household formation years (ages 20-34), signaling a possible decline in demand for rentals and first-time homebuyer opportunities;
- A steep rise in the middle years (ages 35-54), fueled by the baby boomers and putting pressure on the trade-up market;
- Almost no change in the empty-nester years (ages 55-64) or the early senior ages (65-74), resulting in continued demand for smaller units with less maintenance than larger, single-family homes; and
- A slight increase in the number of seniors, suggesting a need for small-scale housing and housing with services.

This is almost identical to regional patterns.

There are other indicators that Essex's population is aging. The median age in the town has risen from just over 36 years in 1990 to just over 40 years in 2000; 13% of Essex's people were age 65 and over in 1990, while 13.6% were in that age range by 2000.

Figure 4. Essex Age Trends, 1990 to 2020.



Housing Demand: What Will the Future Bring?

According to MAPC's projections (also shown in Figure 4), the town's population is expected to decline by 9% by 2020. During the same period, population in the subregion will also decline, but by only about 1%, while the region will grow about 4%. These estimates are based on past trends in birth and death rates, migration rates, and other variables. Although they are not derived directly from housing data, future zoning changes that affect housing could alter the future mix of households.

The trend toward more but smaller households is likely to continue in Essex, the subregion, and the region as a whole.

Essex can expect:¹

- A decline in the number of pre-school and school-age children;
- A small rise in the household-formation years;
- A fairly steep drop in trade-up demand;
- Significant growth in empty-nesters and, later, early seniors; and

¹ Some of these age categories aggregate more ages than others, which contributes to the visual difference in the proportions of the groups (i.e., trade-up group includes the 20 years from age 35 to age 54, while empty nesters covers only the 10 years from age 55 to age 64).

- A small decline followed by a slight rise for wiser seniors.

In the year 2020, about 26% of the town's population will be age 65 or more, compared to 14% in 2000. This represents a 20-year increase of 74%.

Just as the baby-boomers drove trade-up demand in the last decade, so will the aging of this large group drive future demand, potentially increasing pressure for smaller units that are easier to maintain and closer to transit and services.

Housing Supply Inventory

Quantity and Characteristics of Essex's Housing

The number of housing units in Essex – 1,446 units as of 2000 – grew 16% in the 1980s and then declined 3% in the 1990s for a 20-year growth rate of almost 14%. This is slightly less than the subregion (17%) and about the same as the MAPC region (14%). The region as a whole saw much more housing growth in the 1980s; with a few exceptions, it was primarily the communities farthest from the core that grew more in the 1990s.

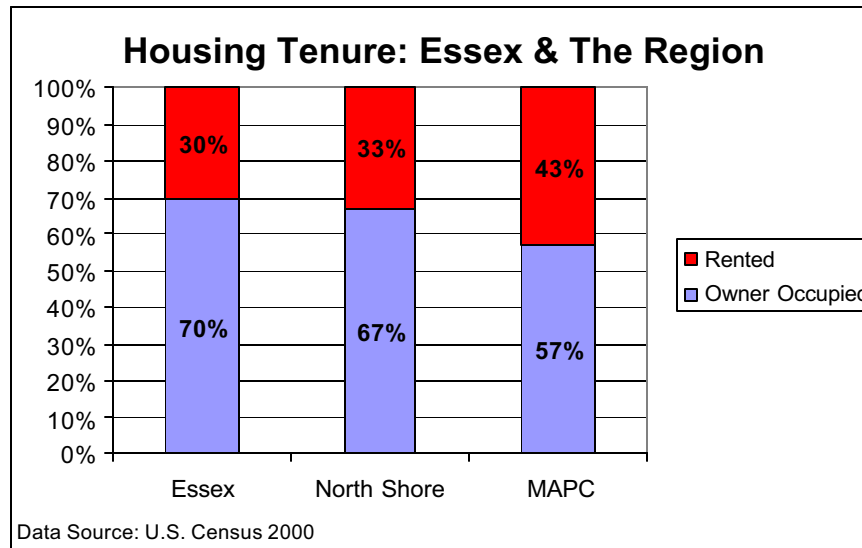
Low vacancy rates indicate high demand and tight supply, generally leading to cost increases. Vacancy rates in Essex, especially for homeownership, were quite low as the 1990s began. Both rental and homeownership vacancies declined substantially during the decade. By 2000, vacancy rates for both rental and homeownership were extremely low, even lower than the statewide figures (see Figure 5).

Figure 5. Essex Vacancy Rates by Tenure, 1990 and 2000.

Vacancy Rates	1990	2000	MA 2000	National Standard
Rental Vacancy	5.4%	3.2%	3.5%	5%
Homeowner Vacancy	1.5%	1%	0.7%	3%

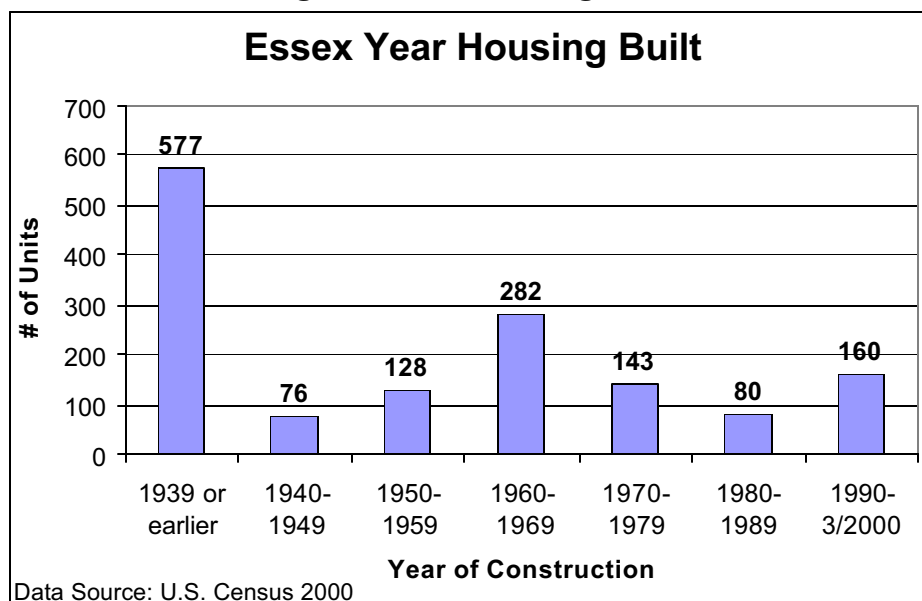
Of Essex's housing stock, 70% is owner occupied and 30% is renter occupied (see Figure 6). The rate of owner-occupancy is higher than the North Shore (67%) and the region (57%). Conversely, there are fewer opportunities for renters in Essex than in the subregion or the larger region. Rental opportunities in Essex have remained the same proportionally since the 1980s.

Figure 6. Housing Tenure.



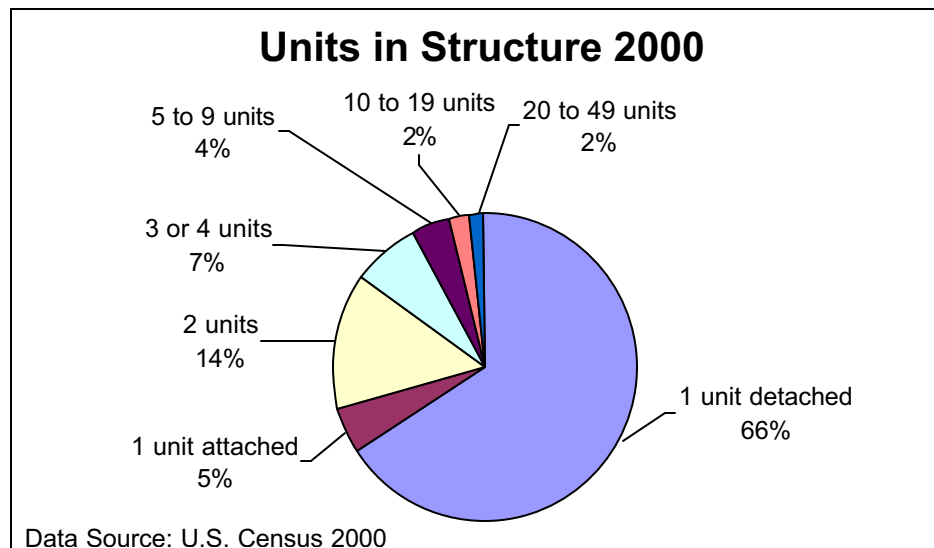
Much of Essex's housing stock – 45% – was built before 1950, and 74% was built before the 1970s, when lead paint laws were enacted (see Figure 7). This older housing may be in need of repairs, remodeling, or lead paint improvements. Essex's pattern generally mirrors that of the region, with some slightly greater growth in the region in years when there was less growth in Essex but then slightly greater growth in Essex in years where there was less growth in the region.

Figure 7. Year Housing Built.



The proportion of single-family detached housing (66%) has not changed at all since 1990. This is much more than the North Shore (56%) and the MAPC region (44%). The remainder of the town's housing is mostly in small multi-family housing (2-4 units) and some larger structures (see Figure 7). The most significant growth in Essex in the last decade was in units in structures with 3 to 4 units (up 66%), followed by one unit attached structures (up 42%), and 2 unit structures (up 36%). However, the overall amount of structures with 5-9 units as well as those with 10-19 units decreased. Building permits issued for 2001-2002 were all single family (16 units).

Figure 8. Units in Structure.



Housing Supply: What Will the Future Bring?

Based on Essex's available land, existing zoning, and land use constraints, the MAPC buildout analysis indicates that the town may see as many as 5,010 additional dwelling units (see Figure 9). All of them will be one and two family, and all will be on lots that are at least 30,000 square feet. There is substantial potential growth in watershed and roadside areas. This "buildout" could result in almost 12,000 new residents and over 1,800 new school children. These results do not consider possible zoning changes, 40B developments outside present zoning, or teardown/redevelopment options.

Figure 9. Potential Housing and Its Impacts.

Zoning District	Lots	Dwelling Units	Residents	Students
G	1,363	2,725	6,513	995
RD	531	1,063	2,540	388
RDWP	124	124	297	45
WP	1,098	1,098	2,625	401
Totals	3,116	5,010	11,975	1,829

Affordable Housing Inventory

According to the state's April 2002 Subsidized Housing Inventory, which keeps track of all housing that qualifies under M.G.L. Chapter 40B, Essex has 40 subsidized housing units, located at Chebacco Terrace. All of these are public housing developments and all of the units are for the elderly.

Essex's 40 subsidized units constitute 2.95% of its 1,357 year-round housing units, or 96 units short of the 10% goal established under M.G.L. Chapter 40B. The goal of 10%, however, is a moving target: as the base number of housing units grows, the 10% grows as well; thus new affordable housing must be added simply to keep pace. The 10% is also an arbitrary number, and is not based on need. As we will see later in this report, about 41% of Essex's households – an estimated 537 households – have low-to-moderate incomes, the level that qualifies for subsidized housing.

As long as the town is below 10% and is not making substantial progress in reaching that goal, it remains vulnerable to developer-driven proposals that may conflict with the town's plans and vision and may exceed local zoning.

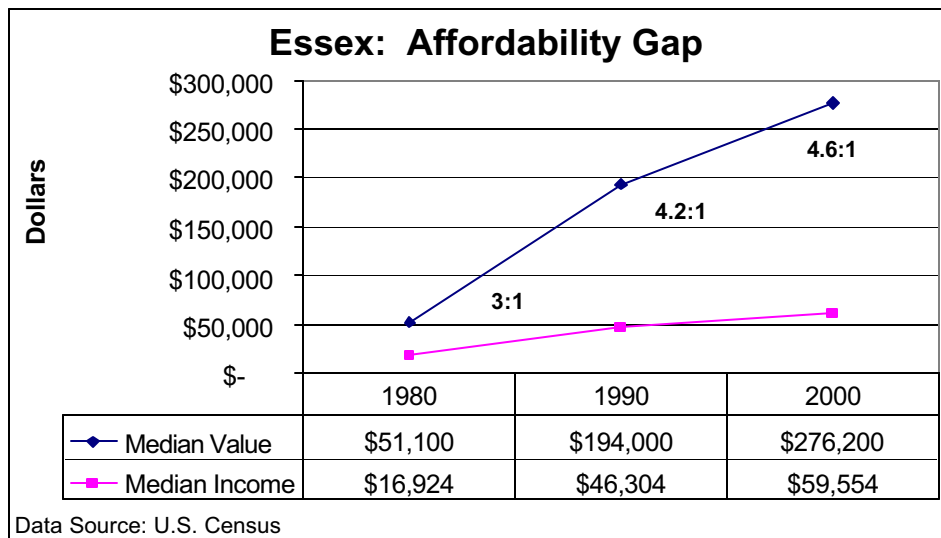
Linking Supply, Demand, and Affordability

High demand and limited supply have cut vacancy rates and forced up the costs of both owning and renting a home.

The Costs of Buying a Home

Essex's "Affordability Gap" – the relationship between median income and median home value – has grown substantially since 1980 (see Figure 10). As a rough rule of thumb, housing is considered affordable if it costs no more than 2.5 times the buyer's household income. Even in 1980, the median-income Essex household could not easily afford the median-value home; home values were 3 times incomes, above the ceiling for affordability. In 2000, home values had risen to 4.6 times incomes, considerably higher than this affordability rule of thumb. The median-income household in 2000 could afford about \$149,000, while the median value was \$276,200; thus this household faced an "affordability gap" of about \$127,000 between what it could afford and what was available.

Figure 10. Affordability Gap.

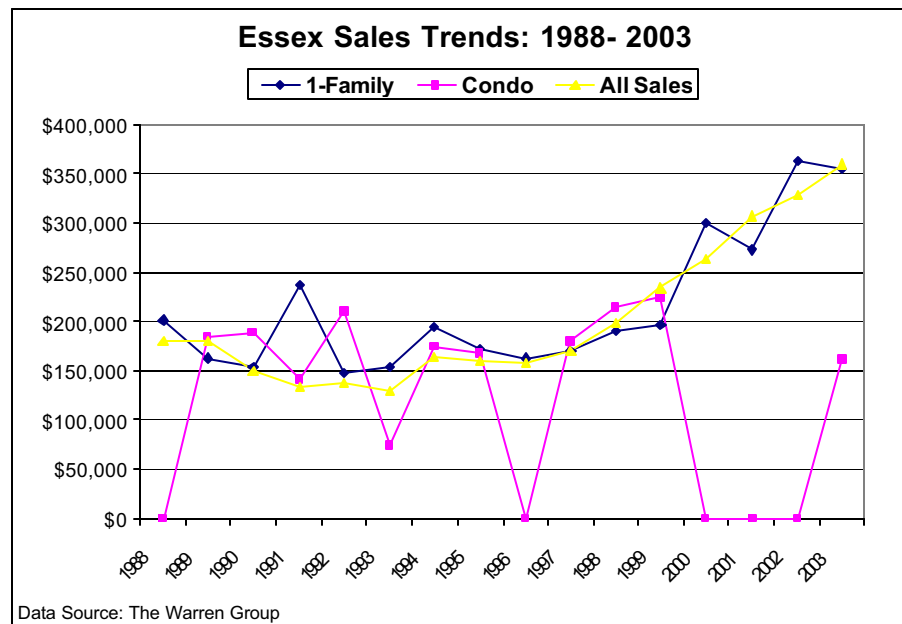


Clearly, housing prices have risen faster than incomes, and housing has become much less affordable. Out of 101 MAPC communities, Essex is in the top half for the highest housing values. Essex's gap is also on the large side compared to the 101 communities in the MAPC region, where the median ratio is almost 4:1, and the highest ratio is 9:1. Bellingham is the only community in the region where the local median-income household can afford the median-value home (and have over \$3,000 left!), while Brookline residents face a gap of a whopping \$432,723. On a regional level Essex remains unaffordable. A household with the regional median income could afford the median value home in only six MAPC communities, and Essex is not one of them.

Home sale prices were relatively flat during much of the 1990s except for a slight rise and then fall in the early 1990s. However, there has been a steep rise in recent years (see Figure 11).² The median single-family home sale price in Essex more than doubled between 1998 and 2003. In 2003, the median single-family home sold for \$354,500, the median condo for \$162,000, and the median for all sales (including 2-4 family dwellings) was \$359,500. A household with the current regional median income – \$82,600 – would face an affordability gap of about \$148,000 between the current sales price and what it can afford. A household at today's regional "moderate" income level – \$66,150 – would clearly face a much wider gap.

² Home values, as shown in Figure 10, are the amounts residents consider to be the value of their homes as provided to the Census. Home sale prices, as shown in Figure 11, are based on actual home sales as recorded at the Registry of Deeds and made available by the Warren Group.

Figure 11. Sales Trends, 1988 to 2003.



To bring the situation closer to home, we estimated how a young family with two town-worker salaries might fare in trying to buy today's typical condo as a starter home. An entry-level union patrolman and union laborer together might earn up to about \$65,000 and could afford about \$162,000. Given the median condo price of \$162,000, that family would be able to buy a condo.

The Cost of Renting

The costs of rental housing also rose substantially during the 1980-2000 time period throughout metro Boston. In Essex, rents jumped 134% in the 1980s and another 22% in the 1990s. By 2000, it had reached \$768, requiring an annual income of \$30,720.

Rents as reported in the Census seem low. They are as reported by tenants in 2000, when the Census was taken. Thus they are relatively old. More importantly, they reflect rents paid by in-place tenants who may be long term and have rents that rise only incrementally from year to year. Newcomers seeking market rentals today most likely face considerably higher rents.

Although accurate current local rent level data are not available, a recent national study found that Massachusetts had the highest rents in the country. The study found that the statewide "fair market rent" (FMR)³ – \$1,165 – required an income of \$46,582, while the metro Boston FMR – \$1,419 – required an income of \$56,760. Furthermore, 61% of Massachusetts renters and 64% of metro Boston renters cannot afford the FMR.⁴

³ FMRs are estimated annually by the Department of Housing and Urban Development (HUD). They determine the eligibility of rental housing units for the Section 8 Housing Assistance Payments program and are used to calculate subsidies under the Rental Voucher program.

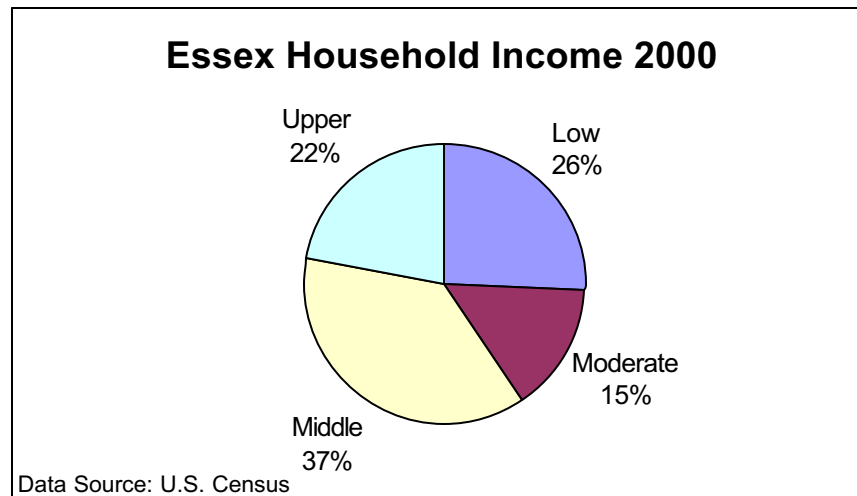
⁴ National Low Income Coalition, *Out of Reach*, 2003.

Housing Cost Impacts and Housing Need

High housing costs have the most severe impact on those on the lowest rung of the income ladder. Of the renter households for which data are available, 28% (109 households) pay more than 30% of their income for rent; 24% (94 households) have incomes below \$35,000 and pay more than 30% of their income for rent; and 56% of elderly renters (41 households) pay more than 30% of their income for rent.

Of Essex's total households, about 41%, or more than 530 households, have incomes below 80% of median (see Figure 11). This is considered to be "moderate income" and is the income level that qualifies for affordable housing. Of these households, about 340 have incomes below 50% of median, considered "low income." Middle income households – those with incomes between 80% and 150% of median – make up 37% of the town's households, while upper-income households constitute about 22%.⁵

Figure 12. Household Income in 2000.



According to HUD, 566 people (39%) in Essex are low-to-moderate income. Also, 40 families (4%) were below the poverty level.

Lower-income households are by far the most burdened by high rents (see Figure 13). Households in the older age ranges are most burdened (see Figure 14). High impacts on older people are fairly typical, although the low impacts reflected here on the younger age categories is more unusual. In most communities, elders are especially burdened but people in the middle years are least burdened; in some cases, the young face high rent burdens.

⁵ This is a statistical estimate only and does not adjust for family size. Cut-offs used in chart are for the year 2000, coincident with Census data. Low income (50% of median) = \$32,750; moderate income (80% of median) = \$50,200; middle (81%-150%) = \$98,250; upper income (over 150%) = over \$98,251.

Figure 13. Rent Burden by Income Range.

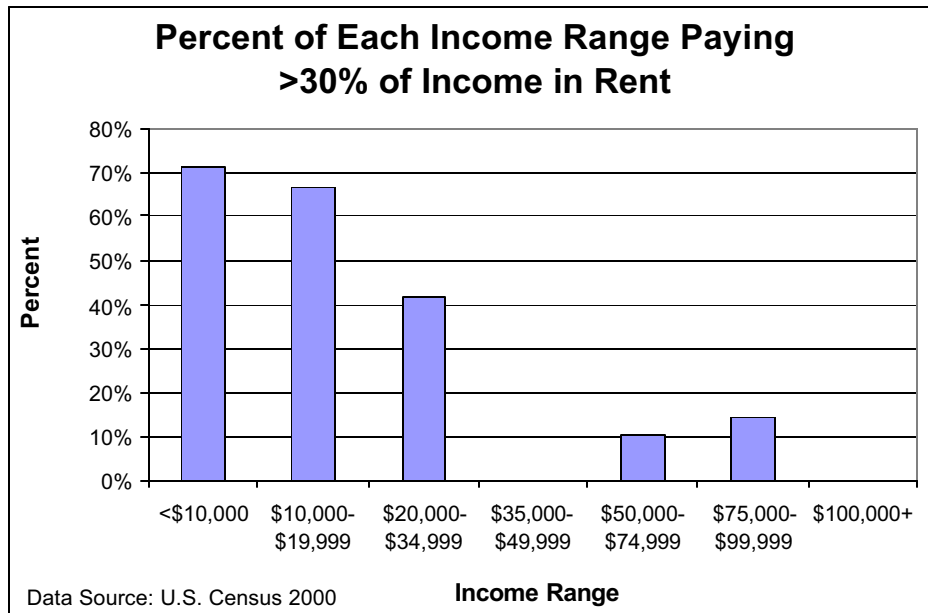
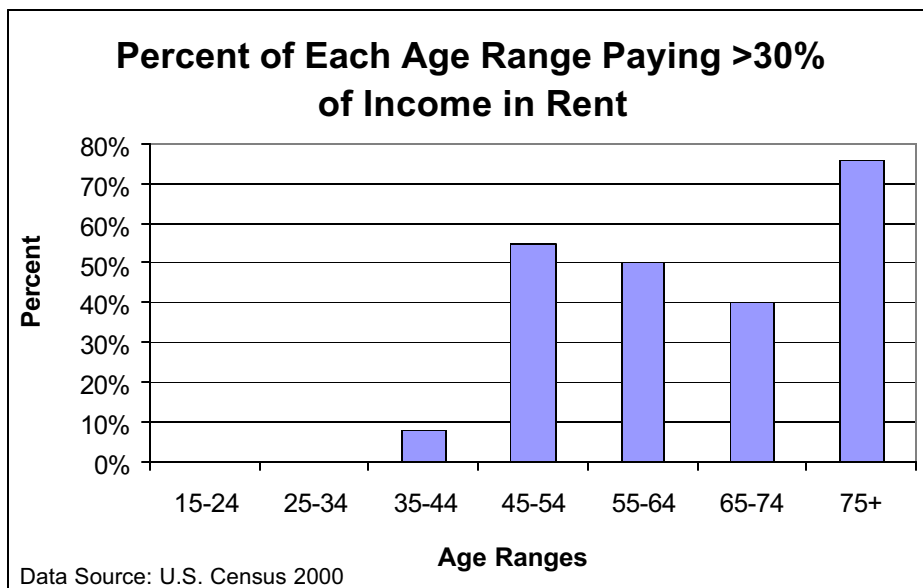
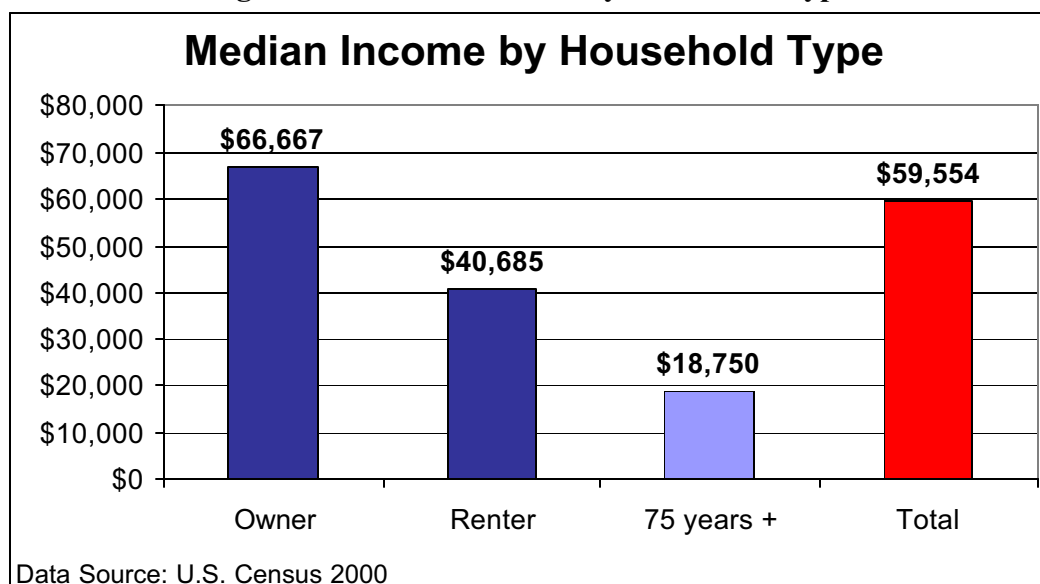


Figure 14. Rent Burden by Age Group.



Owners have the highest incomes, while renters and elders have the lowest incomes (see Figure 15).

Figure 15. Median Income by Household Type.



Low-to-moderate income demand far exceeds available subsidized housing supply. According to the Essex Housing Authority, there were 22 people on the waiting list for elderly housing as of December 2003. The wait can be up to 2 years. The need for family housing is undocumented as no family units exist. The town has not been certified by the state to participate in Section 8 voucher rental system, which is currently frozen due to federal regulations.

Housing Profile Summary and Conclusions

Essex incomes are widely diverse even as the economic character of the town shifts towards more middle and upper income households. Low, moderate and middle incomes are finding it harder to afford rents and mortgages in the town. Young families and senior populations are particularly burdened and in light of current wait lists for subsidized housing units, the need will likely increase in the future. Additional efforts are needed to meet their needs, along with the needs of all income groups for a greater diversity of housing types to choose from in the future. There is documented need for more senior, subsidized housing in Essex. Because the town has only senior units, no families apply for subsidized housing in Essex, pursuing it in neighboring communities instead. Essex does not have a Section 8 voucher program or family units for affordable housing, so there can only be anecdotal evidence of the need for more affordable housing for these groups, but it is safe to assume, based on the waiting lists of its neighboring communities, that the need exists.

Results of Housing Workshop

Process

The Community Development Plan Committee sponsored a housing workshop on January 6, 2004 at the Essex Elementary and Middle School. Fourteen persons attended. MAPC presented the detailed background data and draft housing vision. Participants revisited and added to housing goals developed at the Visioning Workshop, identified housing barriers and enablers in Essex, and mapped housing types and location ideas.

MAPC developed recommendations based on research, the results of the workshop, and discussions with the town.

Essex Housing Forum Summary, Housing Types and Locations

Housing Goals from Visioning Forum

- Create housing opportunities for a variety of income and family sizes.
- Maintain rural character and uniqueness – don't get blindsided by unintended consequences.
- Encourage thoughtful growth using tools such as mixed-use and higher density infill development where development already exists.

Additional Goals Developed at Housing Forum

- Allow for a greater variety of housing types and affordable housing options. Be more flexible. E.g., where 3 units are allowed on a single parcel, go with a mix of single family and apartments instead of all single families.
- Separate housing from industry and heavy commercial uses – consider modifying current zoning.
- Save open space and protect character of town by utilizing open space residential design (OSRD).
- Provide more affordable housing options for younger Essex people.
- Encourage small multi-family developments of 4-6 units that fit with rural character of town.
- Create more affordable senior housing that is handicap accessible.

Housing Barriers

- Lack of sewer capacity may limit infill potential, as there is little extra capacity.
- There is a need to establish overall zoning goals in order to promote desired development.
- No handicap accessible units at Chebacco Terrace.
- There are 20 second-story units at Chebacco Terrace that can not be accessed by some seniors.

Housing Enablers

- Extra sewer capacity could be used for developments that include affordable units – an incentive to build affordable units
- The opportunity exists to change existing zoning to include more affordable housing components.
- There is a need to clarify home occupation businesses versus mixed-use.

Preliminary Housing Types and Locations Ideas (see Map 4, numbers refer to location on map)

- Town wide: Allow accessory apartments on existing lots and make it OK for apartment to be a separate structure if design/safety/parking requirements met. Title V may limit now in some areas.
- Town wide: Conversion of large single-family homes to multiple apartment units or condos.
- 1) Causeway Area: Mixed-use with retail/light commercial on first floor with residential ranging from 1-3 units and 4-6 units on upper floor(s).
- 2) Route 22 Corridor, Pond Street to Hamilton line: Residential area proposed with no more industrial/heavy commercial. Possibility of mixed-use but no specifics given on residential unit sizes.
- 3) Laurel Lane: Multi-unit affordable housing area with mixed ages.
- 4) Conomo Point: Look for adaptive re-use of existing structures if opportunity arises. Lease expires 2011. This was suggested by MAPC.
- 5) Eastern Avenue, From Main Street to Gloucester line: Limit commercial development and propose residential. No specific unit sizes given.

- 6) John Wise Avenue, From Western Avenue/Pickering Street to Ipswich line: promote lower density residential housing and land conservation via Open Space Residential Design. The 2002 Open Space survey lists this as a land protection area as well.
- 7) Western Avenue/Martin Street Triangle area: Consider for higher density mixed use area with restricted commercial uses.
- 8) Northern end of Southern Avenue: Is now a mix of existing residential and business – consider options for this area.
- 9) Added by email on January 7: Elderly housing at town-owned cemetery lot fronting John Wise and Spring Streets that is not completely used for cemetery purposes.

ECONOMIC DEVELOPMENT

Key Findings

For visitors, the Essex economy is perhaps best exemplified by the farms, seafood restaurants and antique shops that line Route 133. However, while restaurants are indeed the largest employers in the town, a number of other enterprises provide employment and serve local residents. Key findings on Essex's economy include:

- Essex has more working residents than it has full and part-time jobs provided by employers. However, almost twice as many Essex residents are self-employed than in the metro region as a whole.
- Seven out of ten working residents commute to other communities. Essex residents fill about one third of the jobs in the town.
- Restaurants and food service businesses provide 40% of the private sector jobs in Essex. While these types of businesses provide opportunities for younger workers, the less skilled, and seasonal and part-time workers, their lower pay and shorter work week contribute to the average wage for Essex jobs being only two thirds the regional average. The town has some relatively higher paying jobs in manufacturing, but relatively few in knowledge-based industries such as professional services.
- Essex residents are increasingly well educated, and likelier to pursue managerial and professional occupations than in the past. However, the resident workforce still generally trails the Boston region in both regards. Town residents remain in the middle of the region in terms of income distribution.

- The contribution of business properties to the tax base is about 60% of the statewide average, and has declined recently due to substantial increases in residential property values.

Economic Profile

Resident Workforce

Essex's population has been relatively stable in recent years, growing by less than 1% from 1990 to 2000. The number of Essex residents active in the workforce has grown considerably faster, increasing by 9% since 1990 to over 2,000 in 2002. Still, because of the town's small size, this represents an average growth of only about 15 workers per year.

The number of jobs in town grew even more impressively, rising to 1,459 in 2000 before declining to 1,360 in the recession year of 2002. The ratio of jobs to working residents has subsequently risen from 0.5 to almost 0.7. But with only two part- or full-time jobs for every three working residents, the town remains a predominantly residential community that 'exports' workers to jobs in other communities. Essex does have a relatively large self-employed population totaling 12.9% of the work force, roughly double the statewide figure. Yet, even if we subtract the self employed from the workforce total, the town's Job to Labor ratio would still only be about the median for the 101-community MAPC region (0.75).

As of 2000, 70% of working residents commuted to other communities, 21% to nearby Gloucester and Beverly. Those remaining in Essex filled slightly over one third of the available jobs in town. Almost 9% (148) of workers worked from home, over twice as many as in metropolitan Boston.

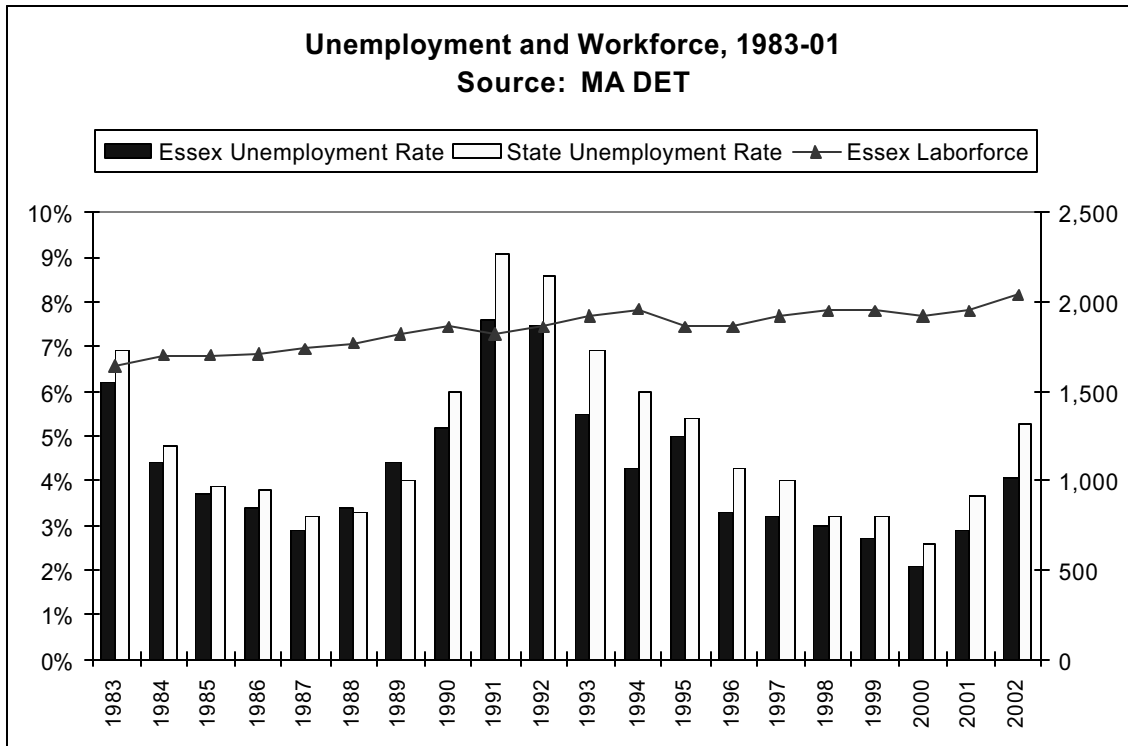
Figure 16. Numbers of Working Residents and Jobs in Essex, 1985-2002.

	Residents in Work force	Jobs	Ratio of Jobs to Workers
1985	1,697	904	0.53
1986	1,715	977	0.57
1987	1,740	1,015	0.58
1988	1,766	1,040	0.59
1989	1,821	1,012	0.56
1990	1,864	1,089	0.58
1991	1,816	999	0.55
1992	1,859	1,044	0.56
1993	1,918	996	0.52
1994	1,960	1,021	0.52
1995	1,856	1,104	0.59
1996	1,859	1,166	0.63
1997	1,918	1,271	0.66
1998	1,947	1,357	0.70
1999	1,948	1,366	0.70
2000	1,923	1,459	0.76
2001	1,946	1,386	0.71
2002	2,041	1,360	0.67
Growth 1990-2002			
	+177	+271	
	+9%	+25%	

Source: MA Division of Employment and Training.

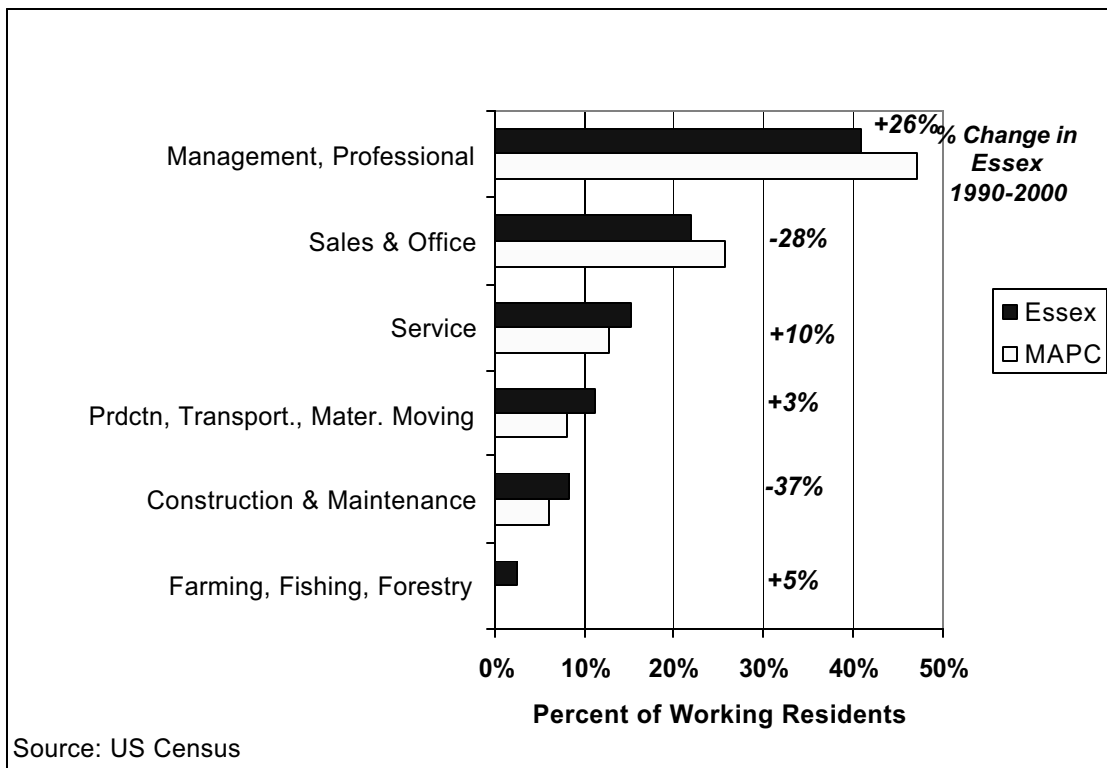
Essex residents have been relatively successful in the employment market in recent decades. Except for two years in the late 1980s, the annual unemployment rate for residents has stayed below the annual statewide rate since 1985. However, local unemployment locally is traditionally higher than the statewide rate during the winter months when Cape Ann tourism experiences a seasonal decline.

Figure 17. Essex Unemployment Rate and Number of Residents in the Workforce.



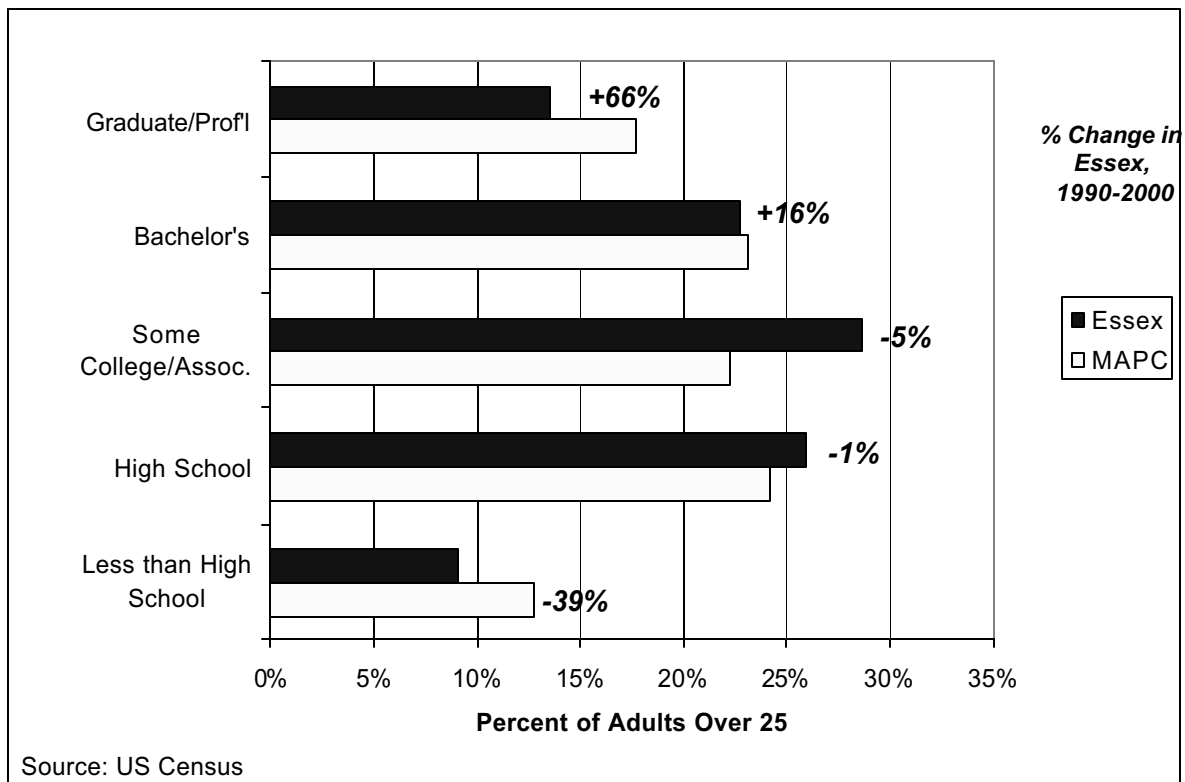
The occupational profile of Essex residents mirrors that of the metropolitan region, with the 2000 census showing the greatest number of residents in managerial and professional occupations, followed by sales and office work. However, the proportion of workers in the managerial and professional category in Essex is considerably lower than region-wide (40% versus 47%). Despite rapid increase in the managerial category locally in the 1990s (+28%) the gap with the region actually grew slightly wider due to faster regional growth (+32%). Consequently, a higher proportion of Essex residents work in sales, service, production, and construction jobs than is true for the region as a whole, although the number of local residents in construction occupations fell sharply during the 1990s. The median age of Essex residents increased in the 1990s from 36 to 40 years, almost 4 years above the metro median of 36.

Figure 18. Occupations of Essex Residents.



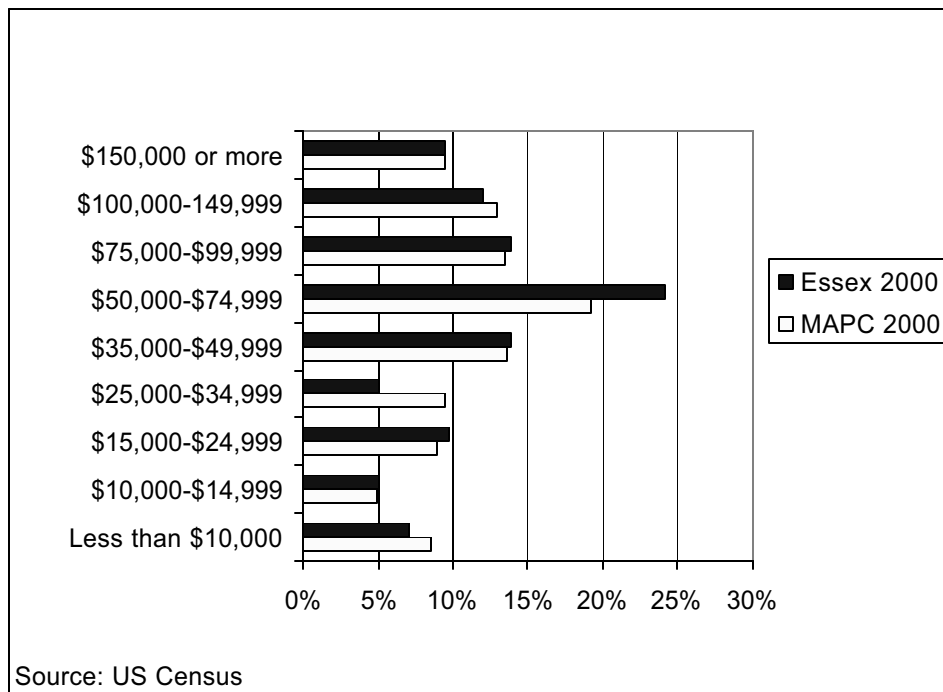
The shift toward managerial and professional occupations accompanies rising educational levels. While Essex's population over age 25 increased by only 1% in the 1990s, the number having a college degree jumped by 31%. Yet, Essex residents in general still have slightly less formal education than the region as a whole – only 37% of local adults had college degrees in 2000, while for the metro region 41% of adults had reached that goal (note that the metro Boston work force is one of the most highly educated in the U.S.). The number of Essex adults having completed some college education declined by 5%, but remained the largest category in the town.

Figure 19. Educational Attainment of Essex Adults, 1990 and 2000.



Median household income in Essex rose by 29% in the 1990s to \$59,554, 8% above the regional median of \$55,200. However, when adjusted for inflation, median income in Essex actually *fell* by 4% in the decade, while growing by 2% growth in the metro region. Essex's income distribution follows that of the region fairly consistently, differing primarily in its much higher proportion in the very middle of the distribution. The number of individuals who lived in poverty doubled to 215 in the 1990s, representing 6.6% of the town's population.

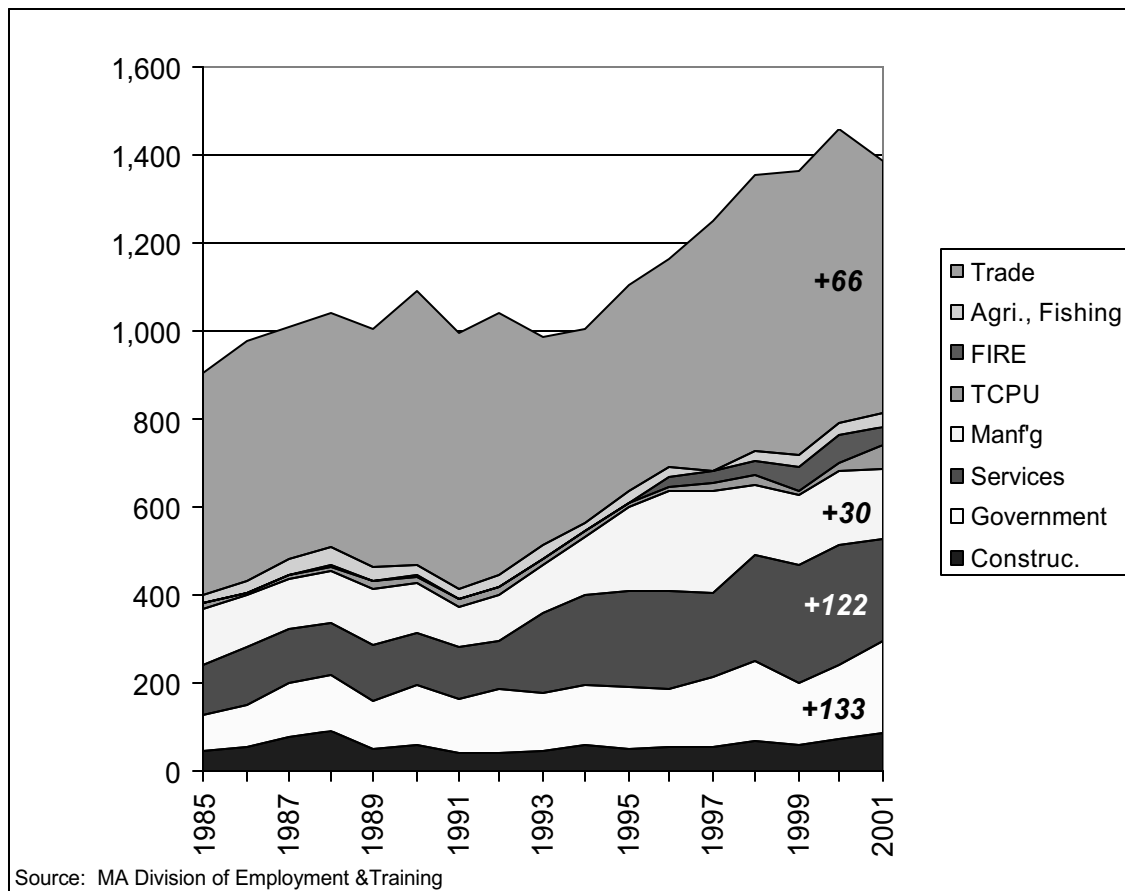
Figure 20. Household Income in Essex and the Region.



Job Base

Essex is a predominantly residential community with a moderately sized base of jobs that mostly serve the local community. The town averaged around 1,000 jobs in the 1980s before beginning to grow in the mid-1990s to total 1,360 (note that these data from MA DET do not include the self-employed). The number of establishments with employees has also grown, but a little less smoothly, and the 2002 total of 170 employers was only slightly higher than in 1995. The average number of employees working at each establishment has generally ranged between 6 and 8 full- and part-time workers, reflecting the relatively small size of businesses serving the local market. The town has only a handful of employers with more than 50 workers, with the restaurants in particular employing a large number of part-time and seasonal workers. Essex's ratio of less than one local full or part-time job for each working resident is near the median for the region's communities.

Figure 21. Jobs in Essex by Sector, 1985-2001.



The trade sector has long provided the largest number of jobs in Essex, and despite leveling off around 600 workers, still represented 40% of the town's jobs in 2001. Services are the next largest employer, closely followed by government, which together account for another third of Essex jobs. Manufacturing remains a presence in the town with 159 jobs in 2001, although industrial employment is down sharply from the mid-1990s. The remaining sectors have all shown strong employment growth in percentage terms, and in total have added an average of about 10 jobs per year since the mid-80s.

Figure 22. Number of Jobs in Essex by Sector.

Year	Number of Establishments	Total Jobs	Trade	Services	Government	Manufacturing	Construction	Transportation, Communications, Utilities	Finance and Real Estate	Agriculture, Fishing, Forestry
1985	108	904	504	108	84	129	46	13	conf	19
1986	120	977	543	129	96	118	54	7	conf	26
1987	129	1,015	528	121	127	112	74	8	conf	39
1988	142	1,040	533	118	128	117	90	9	7	39
1989	145	1,012	547	122	111	130	49	18	conf	30
1990	149	1,089	619	122	137	109	56	16	5	25
1991	141	999	582	116	127	92	38	17	conf	24
1992	132	1,044	599	108	145	106	39	17	conf	26
1993	132	996	477	182	132	111	46	14	conf	28
1994	151	1,021	447	206	136	133	57	12	conf	17
1995	167	1,104	470	220	140	190	49	9	conf	24
1996	165	1,166	475	219	134	226	54	13	25	20
1997	153	1,271	569	189	159	235	55	18	27	conf
1998	155	1,357	629	246	179	161	67	21	31	23
1999	161	1,366	649	271	142	152	58	16	51	27
2000	164	1,459	670	277	167	166	72	18	61	28
2001	158	1,386	570	230	217	159	82	50	41	37
2002	170	1,360								
% of 2001 Jobs			41%	17%	16%	11%	6%	4%	3%	3%
Growth 1990-2001										
	+9	+297	-49	+108	+80	+50	+26	+34	+36	+12
%	+6%	+27%	-8%	+89%	+58%	+46%	+46%	+213%	+720	+48%

Conf = Confidential.

Source: MA Division of Employment & Training.

The most recent annual job data from 2002 shows that food services – restaurants and catering businesses – is the largest-employing private industry in Essex, contributing 450 jobs. These businesses include the seafood restaurants that form the backbone of the Causeway retail district. Fully one third of all the jobs in Essex are in food services (40% of the jobs outside government), which is much higher than in the region as a whole. The town's restaurants draw visitors to the community and provide seasonal and part-time work to students and to workers who have fewer skills, are less-educated, or prefer flexible hours. However, the industry's traditionally low hourly wages and significant use of part-time workers keep the town's average annual private sector wage low at \$33,332 or about two thirds of the regional average.

Manufacturing is the second largest industry in Essex with almost 150 jobs, most of which are in woodworking and fabricated metal production. Manufacturing jobs are more likely than food services to be full time and to pay higher hourly wages. The average wage for

manufacturing jobs in Essex is in fact on par with the industry's regional average at almost \$63,000.

The two largest employers in the region, retail and health care, are relatively underweighted in Essex, due to a combination of the unusually large number of restaurant jobs, and the lack of a hospital in the community. The only three local industries that pay above the regional average wage are small, employing only 30-50 workers each. Businesses in these industries may represent opportunities to expand higher paying jobs locally.

Figure 23. Employment and Wages for Private Sector Jobs in Essex by Industry, 2002.

	Number of Employees	Average Annualized Wage
Accommodation & Food Services	453	\$17,836
Manufacturing	146	\$62,920
Admin.& Waste Services	107	\$32,084
Construction	90	\$42,120
Retail Trade	70	\$24,180
Real Estate & Leasing	59	\$24,908
Other Private Services	53	\$54,028
Professional & Technical Services	31	\$55,380
Wholesale Trade	30	\$66,352
Arts, Entertainment, & Recreation	23	\$23,140
Health Care	18	\$42,848
Finance & Insurance	12	\$22,568
Essex Average Private Job Wage		\$33,332
Metro Boston Average Private Job Wage		\$50,752

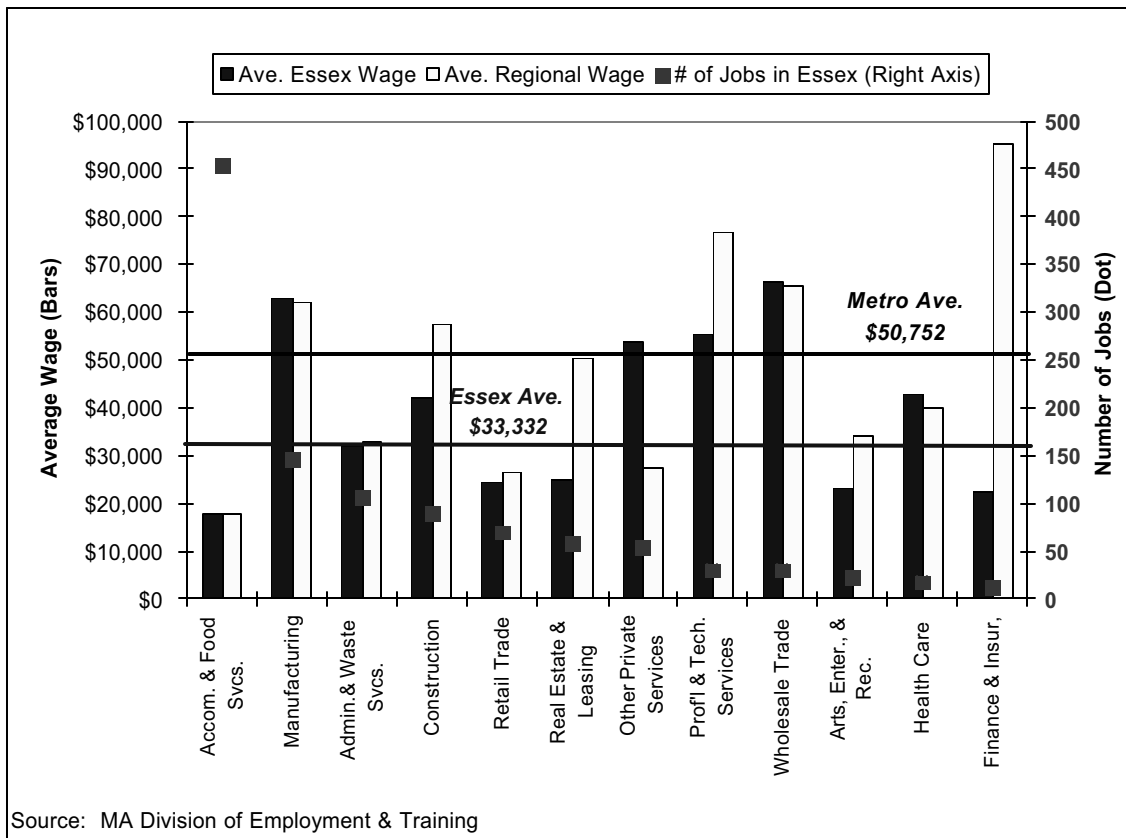
Source: MA Division of Employment & Training.

Figure 24. Largest Employers in Essex, 2003.

Employer	Number of Employees	Industry
Clambakes By Woodman's	250-499	Clambakes
Essex Ambulance	50-249	Government Offices-City, Village & Twp
Essex Elementary School	50-249	Schools
Mark Richey Woodworking Inc	50-249	Woodworkers
Tom Shea's Seafood Restaurant	50-249	Restaurants
Village Restaurant	50-249	Restaurants

Source: Reference USA.

Figure 25. Wages and Employment in Essex Largest Private Sector Industries.



Property Tax Base

The total valuation of Essex real estate for tax purposes reached \$615 million in Fiscal Year 2004. Only 11% of the total valuation (\$68 million) was contributed by businesses (“CIP” or commercial and industrial buildings and land, plus personal property such as business equipment). The CIP share has eroded since the mid-1980s when it stood as high as 18%, and it is now well below the statewide proportion of about 20%. About 70% of Essex’s CIP value is contributed by commercial properties (stores, offices, restaurants) and 18% by industrial.

While the value of business property in Essex has grown over the last two decades, CIP’s *share* of valuation has been driven down by the much larger increase in residential values. The total value of Essex residences increased by \$250 million from 2000 to 2004, an amount almost four times the total value of all business property today. The average value of a single family residential parcel in Essex rose by 85% to over \$400,000 from 1990 to 2004. This increase reflects the soaring values of residences throughout Eastern Massachusetts over the last two decades which has dramatically increased the residential portion of the tax base in most metro Boston communities.

Figure 26. Tax valuation in Essex by Property Class, Fiscal Year 1985-2004.

	CIP % of Valuation	Residential	Commercial	Industrial	Total
1985	18.2%	\$75 M	\$9 M	\$3 M	\$92 M
1990	12.4%	\$282 M	\$26 M	\$8 M	\$322 M
1995	14.0%	\$241 M	\$24 M	\$8 M	\$280 M
2000	12.1%	\$294 M	\$27 M	\$8 M	\$334 M
2004	11.1%	\$546 M	\$49 M	\$12 M	\$615 M
Change over Period					
1985-1990	-5.8 pts	+ \$207 M	+ \$16 M	+ \$5 M	+ \$230 M
1990-1995	+1.6 pts	- \$41 M	- \$1 M	+<\$1M	- \$41 M
1995-2000	-1.9 pts	+ \$53 M	+ \$2 M	-<\$1 M	+ \$54 M
2000-2004	-1.0 pts	+ \$253 M	+ \$22 M	+ \$5 M	+ \$280 M

Source: MA Department of Revenue.

Results of Economic Development Workshop

On March 30, 2004, the Planning Board held an economic development workshop and approximately 6 people attended. MAPC summarized the historical and current data on economic trends in terms of Essex's land use, tax base, jobs, and the workforce. Attendees brainstormed overall goals for economic development in Essex. Participants then identified areas for potential future economic development and described what they would like to see occur in those areas.

Economic Development Themes and Priorities

Economic Development themes identified in the May, 2002 community-wide visioning session were reviewed and discussed by the attendees. Two additional aspects of the overall goal (denoted by *italics*) were elaborated. The themes and primary discussion points are summarized below:

- ***Encourage entrepreneurs in home occupations/small businesses, farms, and shell fishing.***
 - Lack of separate business districts buffered from residences can lead to nuisance conditions (noise, truck traffic, odors).
 - More active enforcement of existing rules would help in some instances; would require more staff resources being applied (e.g. one building inspector now shared with Gloucester).
 - Residents have a long standing tradition of being able to operate businesses in or adjacent to homes – want to maintain that opportunity; would it be possible to phase in any regulations for reducing impacts so that people have a chance to adjust their plans?
 - Suggestion by MAPC that simpler enforcement process (e.g. ticketing for offenses) might be considered.

- ***Carefully manage siting of larger commercial and industrial uses.***
 - Any business can now locate anywhere in town if the parcel size is large enough and wastewater disposal requirements are met.
 - MAPC suggestion that design reviews may help in buffering impacts of developments even if separate business districts are not designated.

- ***Manage growth through public dialogue and participation and provide public information sources such as a town web-site.***
 - Suggestion that most residents are unaware that the town's zoning by-law is relatively unusual and allows all types of uses everywhere in the town rather than identifying specific districts for commercial and residential.
 - Suggestion that education/publicity of the potential negative impacts of the current zoning (i.e. projects being proposed in inappropriate locations) might increase support for designating commercial and residential districts.
 - Suggestion that town explore establishing a long-term planning committee.

- ***Use planning/zoning and financial tools to achieve a sound balance between conservation and appropriate development.***
 - Suggestion that current zoning provides no balance, but instead allows any kind of development to occur anywhere. With development increasing in communities surrounding Essex and alternatives to septic systems now available, it is only a matter of time before developers propose large projects that will be inappropriate to the scale and desires of the community. The planning board will be unable to stop such projects despite the objections of neighbors.
 - Suggestion that town explore establishing districts where commercial/industrial districts are permitted by right and districts where businesses are not allowed. However, a master plan with such districts was voted down in the 1980s.
 - Suggestion that options be explored for increasing tax revenues from business properties (i.e., would it be practical and desirable to institute a higher tax rate on businesses?)
 - MAPC suggestion to identify models of zoning used by other rural Massachusetts communities that are becoming more suburban.

- ***Strengthen Essex as a tourist destination***
 - *Identify and promote attractions that will extend the stays of visitors to the town's restaurants.*
 - *Explore expanding cooperation with neighboring towns and among attractions such as Ship Building Museum, Little Farm (SPNEA), Crane's Beach.*

- ***Support/maintain the clamming industry***
 - *Number of clammers has declined because productivity of beds has fallen and closures are common after rainfall.*
 - *Suggestion for town to support efforts to increase production and better manage the resource, e.g. by eventually creating a rotation plan to allow the flats to recover.*

Applying Economic Development Themes to Locations (see Map 5)

# on Map	Location & Suggested Uses
1	Downtown <ul style="list-style-type: none">▪ Most residents and affected businesses support the project currently in design review to rebuild the roadway and sidewalk along the Causeway (Route 133) to improve traffic flow, safety, and pedestrian access.▪ Causeway area needs more off-street parking at the south end to keep businesses from creating their own individual parking lots that detract from the appearance of the area; needs to be in an area that is perceived as safe and convenient.▪ Will be 80 new parking spaces behind the police station, but that will not be enough; is Bill Allen's property a potential location for more?▪ Center needs more attractions and/or retailers to get people to visit for longer than a few hours at a restaurant and antique store; Ship Building Museum is one existing attraction.▪ MAPC suggestion: ecotourism/visitor center might provide a focal point; place with restrooms and showers for people to park their cars, then rent bikes or kayaks and spend the day hiking or biking without having to drive.
2	Conomo Point <ul style="list-style-type: none">▪ Property reverts to town ownership in 2011, but transfer is very controversial.▪ MAPC suggestion that this location may offer an attraction for visitors as a park, or for the town to generate revenue by operating vacation cottage rentals or a function hall.

TRANSPORTATION

One of the main transportation concerns of Essex residents became apparent during the Visioning Workshop. Issues related to traffic flow, bicycle/pedestrian safety and economic development opportunities, as impacted by traffic congestion, in the Main Street/Causeway (Route 133) area were raised by several discussion groups. The transportation element, as prepared by the Central Transportation and Planning Staff, entails examining the Main Street/Causeway area of the Route 133 corridor in Essex, in relation to vehicular and pedestrian safety, ease of access to the businesses along the causeway, and flow of traffic. The plan's scope of work did not include a Transportation Workshop. For the complete report, see Appendix VII.

PUTTING IT ALL TOGETHER

“Putting it all Together” refers to the process of taking the recommendations from the individual topic areas and reconciling conflicts that may have arisen between the topic areas and identifying how the elements fit together. Map 6, the Community Development Plan Map, is the product of this process – strategies include mapped strategies where the town envisioned and described the future of specific areas in town. This section includes non-mapped strategies also. The non-mapped strategies include town-wide strategies or those strategies that did not receive clear support but are still worth noting.

In all cases, implementing these ideas will take a number of steps, many of which would involve public processes and reviews.

1. Essex Woods

The land includes the Parsonage Lot, various tax title parcels and potential tax title land in the Maple Swamp area. Acquire these parcels, working with the Manchester Essex Conservation Trust and other organizations, to acquire parcels for water resource protection, wildlife habitat protection, and passive recreation.

2. Hardy’s Hatchery/ Vitale and Benotti Parcels

Explore the feasibility of acquiring fee simple ownership or development rights to these parcels if they become available to the town. These lands include priority sites of Rare Species Habitat, Endangered Species Habitat, wetlands and Supporting Natural Landscapes.

3. Giddings Farm

Explore the feasibility of acquiring fee simple ownership or development rights to these parcels if they become available to the town. This area contains Biomap Supporting Natural Landscapes, wetlands and is adjacent to permanently protected land. Note: The eastern end of this property has been preserved as conservation land since the Natural Resources Workshop.

4. Land East of Conomo Point

This land, on both sides of Conomo Point Road, abuts town land and provides Supporting Wildlife Habitat and should be considered for conservation easement, purchase or purchase of development rights if possible.

5. Pennoyer/Febiger/Collier/Allen Lands off Eastern Avenue

These parcels support wetlands, and provide Core and Natural Supporting habitat and should be investigated for protection through conservation easement or if they are available in the future.

6. Alewife Brook Overlay District

Consider adopting an overlay district to protect this wildlife corridor, shellfish resources and Essex’s rural character.

7. Conomo Point

Adaptive re-use for tourism-related economic development should be considered here. This was suggested by MAPC staff.

8. Causeway Area

Consider limiting new uses to commercial, non residential uses only due to flooding and parking concerns and add controls on types of commercial uses allowed.

9. Route 22 Corridor Overlay District

Consider allowing multi-family development of up to 6 units by right if 25% affordable while adding controls to commercial and industrial development.

10. Central Village Overlay District

Consider allowing for mixed-use development on Martin Street, Main Street and Western Avenue area, not including John Wise Avenue. Allow 3-4 multi-families by right if 1 unit is kept permanently affordable.

11. Eastern and Northern Parts of Southern Avenue

Maintain current residential density but consider limiting certain commercial and industrial uses.

12. John Wise Open Space Development District

Lower density with open space preservation. Allow current density of one unit per acre if developments use Open Space Residential Design (OSDD) or if more affordable units are provided.

13. Southern Avenue Open Space Development District

Lower density with open space preservation, as in John Wise OSDD. Allow current density of one unit per acre if OSRD used or if more affordable units are provided.

Additional Strategies

Based on research, discussions with the committee and town officials, and on the results from six public workshops, MAPC offers the following recommendations and strategies for the Natural Resources and Open Space, Economic Development, and Housing elements.

Transportation

The Transportation element was covered by a study performed by Central Planning and Transportation Staff on the section of Route 133 between the Southern Avenue and Western Avenue. That study was submitted to the town and some of the recommendations were used during the March, 2004 MassHighway Design Public Hearing held for the redesign of that section of Route 133. The full report can be found in Appendix VII. Recommendations included:

- Work with MassHighway to come to satisfactory design and implementation of the Route 133 Roadway Reconstruction Project. Many of the design changes outlined in

the MassHighway Project could correct many of the difficulties associated with the Causeway but could cause other parking and access problems for some Causeway businesses.

- Limit on-street parking in the eastern end of the Causeway and use the new municipal lot instead.
- Until the roadway is reconstructed, erect physical barriers in front of the Village Restaurant to prevent egress onto the street except at two designated driveway areas.
- Causeway crosswalks should be painted to be more easily seen and used.

Natural Resources/Open Space

The highest priority Natural Resource/Open Space Themes, in order, from the Natural Resources Forum of April 29, 2003 were:

- *Slow Down Rate of Growth and Plan for the Future*
- *Identify and Increase Conservation Lands*
- *Hire a Conservation Agent and Require Training for Town Boards*
- *Protect Marine Resources: Create a Management Plan for Essex River and Salt Marsh Buffer Zones*
- *Protect Drinking Water Supply*
- *Promote Better Stewardship of Protected Lands*

Theme Based Recommendations

Slow Down Rate of Growth and Plan for the Future: To date, Essex has enjoyed a fairly moderate rate of growth. Development has been limited by the town's location and by the town's wet soils, which have limited on-site septic treatment. Essex is completing its sewer hookup to Gloucester, which will largely sewer existing uses and lots in previously developed areas of town and covering about 2/3 of its residents. Advances in wastewater treatment, such as package wastewater treatment plants, may leave Essex vulnerable to development in the future. Large, quickly built developments could bring rapid increases in service costs to the town in the form of higher school budgets, infrastructure, and fire and police protection.

MAPC recommends that Essex examine the adoption of a Phased Growth Bylaw. This bylaw would cap the number of building permits that could be issued each year or require that large scale residential subdivisions be constructed in phases over a period of years. These controls would be coordinated with the town's ability to provide services such as water, public safety, schools or transportation. Amherst uses a point system to reward developments that match the town's land use goals. Provincetown accelerates developments containing affordable housing units.

In looking at ways to plan more effectively for the future, the town needs to recognize that most Planning Boards spend almost all of their time reviewing permit applications and have little left over for long range planning. Essex could address by establishing an ad hoc Long

Range Planning Committee made up of representatives from the Board of Selectmen, Planning Board, Conservation Commission, Board of Health, Essex Open Space Committee and Cape Ann Chamber of Commerce. The group could establish goals and pursue funding strategies for long range planning in Essex.

Location-Specific Recommendations as per "Identify and Increase Conservation Lands" Theme. Highest priority Natural Resource Areas, in order, from the Natural Resources Forum of April 29, 2003 were:

- The Essex Woods parcels, including the following lots, (30 votes):
 - A) The approximately 9-acre Parsonage lot that was given to a local church in 1710. The Manchester Essex Conservation Trust (MECT) owns the land surrounding it and the church owned parcel is exempt from MGL 40-A. This is a key piece of land to the effort by MECT to assemble and protect the Essex Woods. It is a Priority Site for Species Habitat and Core Habitat as well.
 - B) various town-owned tax title parcels of about 20-acres in total. These tax delinquent lands are mostly wetlands, Core Habitat and Priority Sites of Rare Species Habitat areas.
 - C) Maple Swamp area of about 50-acres. This is potential tax-title land that contains wetlands, Core Habitat and Priority Species of Rare Habitat designations.
- Hardy's Hatchery/Vitale/Benotti Parcels (28 votes). The Hardy Hatchery land contains Priority Sites of Rare Species Habitat, Endangered Species Habitat, Supporting Natural Landscape and wetlands designations. The Benotti parcel contains wetlands, wildlife corridors, and Supporting Natural Habitat.
- Alewife Brook Buffer between Pond Street and Essex Park or from Library to Chebacco Lake (23 votes). This area contains Supporting Habitat for Anadromous Fish, is in the town's Wellhead Protection Area, provides Supporting Natural Landscape, wetlands and Core Habitat.
- Pennoyer/Febiger/Collier/Allen lands off Eastern Avenue (21 votes). These areas support wetlands, Core Habitat and Natural Supporting Habitat.
- Giddings Farm (16 votes). This parcel provides Supporting Natural Landscape, wetlands and is adjacent to Permanently Protected Land.
- Land east of Conomo Point to town line (16 votes). Provides Supporting Habitat and is adjacent to town owned land.

Other sites that received votes:

- Land next to John Wise Lane, including Cedar Brook Farm (13 votes)
- Cross Island (12 votes)
- Richardson Land on both sides of Island Road (10 votes)
- Ridge Property at end of Spring Street (9 votes)

- Land south of Choate Street (9 votes)
- Duncan property off Story Street (5 votes)

Options for Protecting these areas include:

- Fee title acquisition by the town or by the Manchester Essex Conservation Trust could ensure permanent protection. In particular, the town should consider working closely with MECT to identify, acquire and put under the Conservation Commission's control the 20-acres of various tax title parcels in the South Essex Woods. Any funding used to acquire these parcels could possibly be used as a match for any future grant project to protect open space in town. In addition, Essex should work with MECT to identify and put into formal tax title status the approximately 50-acres located within the Maple Swamp area. If up-front funding is not available to buy the priority parcels, the town may wish to consider working with a non profit group such as the Essex County Greenbelt Association and the Trust for Public Land to procure "up front" money. The non-profit typically will "loan" town money and hold land until voters decide to authorize a purchase via town meeting. (The town of Rockport did this in the late 1990s to purchase White Wharf in the Old Harbor downtown.)
- If acquisition of the properties by the town or by an organization such as MECT or ECGA is not an option, the town or a Land Trust could work to obtain Conservation Restrictions (CRs) between a landowner and a public agency on these areas. A CR is a legally binding agreement between a landowner and a public agency or non-profit land trust where the landowner agrees to keep some or all of the land undeveloped and in its natural state. A Conservation Restriction can reduce the landowner's federal income taxes, federal and state capital gains taxes, local property taxes, and estate and gift taxes. The Essex Open Space Committee could explore this option for these areas.
- In regard to the town's desire to protect the Alewife Brook Corridor between the Library and Chebacco Lake, MAPC recommends that the town consider adopting an Alewife Brook Overlay district that would exist between the Essex River and Chebacco Lake. Protecting the brook corridor is key to preserving wildlife habitat but just as important, Alewife Brook represents the clean, rural culture that is connected to Essex's clamming industry and its appeal to tourists and residents alike. The town may wish to protect all of its permanent stream corridors in this way as the town of Chilmark does with its stream overlay district. The overlay would be designed to complement the town's existing Wetlands Overlay District.

An overlay District is a separate zoning district that is placed over the current zoning district and as a result, the regulations and uses of both the underlying zoning and the overlay zone must be adhered to. For example, the town of Falmouth created a Coastal Pond Overlay District in order to protect these environmentally sensitive coastal water bodies.

- Essex should complete the updating of its current Open Space Plan. Using the survey completed by the Open Space Committee, the Community Development Plan Visioning and the Natural Resources Forum, the Open Space Committee, the town should establish its open space and recreational priorities for the next five years. Having a current Open Space Plan will allow the town to compete for various state and privately funded grants more effectively, as well.

Funding Strategies include:

- Attempt to pass the Community Preservation Act (CPA). Virtually all of the site-specific recommendations above could be accomplished with CPA funding. (www.communitypreservation.com).
- Establish a town land acquisition account. Potential funding sources include: annual allocations from the general operating funds, proceeds from the sale of municipal properties, proceeds from the sale of tax possession land, and Chapter 61 rollback taxes on lands removed from the Chapter 61 program.
- Numerous grants are available for natural resource protection from national foundations. Many are only available to non-profits. The town should work closely with the Manchester Essex Conservation Trust and the Essex County Greenbelt Association to see if there are opportunities to apply for grants. Examples of grants include: Timberland (www.timberland.com/cgi-bin/timberland/timberland/candj/tim_index.jsp); New England Grassroots Environment Fund (www.grassrootsfund.org); and REI's Outdoor Recreation Grant (www.rei.com/aboutrei/gives02.html?stat=side_32).
- The Massachusetts Self-Help Program assists municipalities with acquiring land for conservation and passive outdoor recreation. Depending upon a community's equalized valuation per capita decimal rank, the State reimburses 52% to 72% of the acquisition cost (www.state.ma.us/envir/dcs/selfhelp/default.htm).
- The Federal Land and Water Conservation Fund is administered by the State Division of Conservation Services for the acquisition and development or renovation of park, recreation or conservation land. The program reimburses 50% of the total cost of public outdoor recreation projects with a maximum award limit of \$150,000. See www.state.ma.us/envir/dcs/LandWater/default.htm.
- The Massachusetts Greenways and Trails Demonstration Grant Program is administered by the Department of Environmental Management for the planning and construction of trails and greenways. The maximum grant award is \$3,000. See www.state.ma.us/dem/programs/greenway/grants.htm for more information.
- Information on the Recreational Trails Program can be found at www.state.ma.us/dem/programs/trails/grants.htm.

- TEA-21 Transportation Enhancement Funds can be used to fund acquisition of trails, scenic easements, pedestrian and bicycle facilities.
www.state.ma.us/mhd/publications/other.htm.
- The Manomet Center for Conservation Services has a comprehensive grants directory for open space conservation at www.manomet.org/regional/resources. This includes government sources and private funding sources.
- Other private funders that provide grants for open space and natural resource protection include the Kodak American Greenways Award Program (www.conservationfund.org/?article=2106) and Fields Pond Foundation (www.fieldspond.org).

Hire a Conservation Agent and Require Training for Town Boards. In addition, the town may wish to retain professional staff or consultants on a full or part time basis. Some communities, such as Manchester-by-the-Sea, have a professional planner on retainer and use them only when needed. Other communities have opted to share the cost of hiring a planner or conservation agent in conjunction with other communities, just as Manchester-by-the-Sea and Rockport currently share a Building Inspector. Funding could come from a combination of an increase in filing fees, fines and dedicated funding by the town. The Community Preservation Act allows for up to 5% of the money collected by a town to be used for drafting a Community Preservation Plan but can not be used to pay for staff persons. The Citizens Planning and Training Collaborative (<http://www.umass.edu/masscptc/>) offers ongoing training sessions for Planning Board and Zoning Board members as well as a wide range of other services such a how to craft effective bylaws. Similarly, the Massachusetts Association of Conservation Commissions (<http://www.maccweb.org/>) trains new Conservation Commissioners and offers a wealth of information on natural resource protection and open space management.

Protect Marine Resources: Create a Management Plan for Essex River and Salt Marsh Buffer Zones. Most of the Essex River, including Farnhams' Creek is contained within the state designated Parker River/Essex Bay Area of Critical Environmental Concern. Areas of Critical Environmental Concern (ACECs) are places in Massachusetts that receive special recognition because of the quality, uniqueness and significance of their natural and cultural resources. These areas are identified and nominated at the community level and are reviewed and designated by the state's Secretary of Environmental Affairs. ACEC designation creates a framework for local and regional stewardship of critical resources and ecosystems.

For two years a fellowship project through [NOAA's Coastal Services Center](#) and CZM was dedicated to improving stewardship efforts in the ACEC. The goal of the fellowship project was to "expand and coordinate current resource management efforts in the Parker River/Essex Bay ACEC by developing management tools and strategies and increasing local support and stewardship of ACEC resources". For these two years, the fellowship worked on the education, resource and management assessments, and technical assistance projects highlighted in this website. The fellowship project, along with the dedication of scientists doing research, locals working as tireless volunteers, conservation groups advocating for

resource protection, and managers coordinating stewardship efforts, help to protect natural resources in the ACEC.

MAPC recommends that the Essex Conservation Commission, working with the Massachusetts Bays Program Eight Towns and A Bay (<http://www.state.ma.us/envir/massbays/8townsbay.htm>) group and Massachusetts Coastal Zone Management (<http://www.state.ma.us/czm/prebasec.htm>) begin to investigate, prioritize and implement recommendations made during the two year NOAA study regarding how the Essex River and its surrounding salt marshes can be better protected.

Protect Drinking Water Suppl. MAPC recommends that Essex compare its current groundwater protections bylaw provisions with DEP Model Heath and Groundwater Protection Bylaws referenced below. In addition, the Essex Zone Two Wellhead Protection Area is tangential to the northwest section of the South Essex Woods parcels. It is clear that groundwater recharge in this area is directly related to providing groundwater to the town's well field and should be a priority area for acquisition by the town.

Groundwater Protection Model Health Regulation

This land use control tool can be implemented by Boards of Health.

The Groundwater Protection Model Health Regulation is comparable to the model bylaw in its conformance with the requirements of the Massachusetts Drinking Water Regulations in 310 CMR 22.21 for source approval and the Water Management permit program. Regulatory Authority - M.G.L. c.111 s.31 and s.122. January 2002.

[gwpmod.doc](#) 27 KB ☐

Model Groundwater Protection District Bylaw/Ordinance

This model zoning bylaw is available to assist communities and public water suppliers in protecting public wells in the source approval process and the Water Management permit program. Authority - MGL Ch. 40 A Revisions

The Model Groundwater Protection District Bylaw/Ordinance is a zoning tool for controlling land uses in Aquifer Protection Districts and Zone II areas around public drinking water wells. The model complies with the wellhead protection requirements in the Massachusetts Drinking Water Regulations 310 CMR 22.21. January 2002. [modgwpd.doc](#) 33 KB ☐

Promote Better Stewardship of Existing Public Lands. Management of public and conservation lands falls under the jurisdiction of the Conservation Commission under the Wetlands Protection Act. Unfortunately, many Commissions, even those with Conservation

Agents, are usually kept quite busy with reviewing Requests for Determination, Notices of Intent, writing Orders of Condition and checking to make sure that the Orders of Condition are being carried out in the field. Conservation land planning and management often fall by the wayside. A couple of strategies to address this might include the following:

- Use community "friends of" groups to actively manage an assigned piece of conservation land. This could be organized by the Conservation Commission or the Essex Open Space Committee. Much like the popular "Adopt A Highway" programs, "friends of" groups can agree to adopt a piece of conservation property and be responsible for checking for vandalism, litter clean up, access and trail maintenance. Efforts would be noted each year in the town report and an annual Conservation Land Picnic could be held.
- Some communities have begun to use people who have been instructed to complete community service by the courts as a way of maintaining public lands. For example, the town of Stoughton uses community service fulfillments to help maintain its playing fields.

Economic Development

The highest priority Economic Development Themes as established by the Essex Community Visioning in September, 2002 and the Economic Development Forum of March, 2004 were to:

- *Encourage entrepreneurs in home occupations/small businesses, farms and shellfishing.*
- *Carefully manage siting of larger commercial and industrial uses; use planning/zoning and financial tools to achieve a sound balance between conservation and appropriate development.*
- *Manage growth through public dialogue, participation, and provide public information sources such as a town website.*
- *Strengthen Essex as a tourist destination.*

Encourage small entrepreneurs. Establish revolving micro-loan program; classes in starting/running business or volunteer mentoring program; town-owned or cooperative market space in the center to reduce roadside clutter.

Work to better promote good management of shellfish and other marine resources. Look into recommendations for natural resource management put forward in MCZM study of Parker River/Essex Bay ACEC study of 2002. Analyze town subdivision and zoning bylaw to see if they promote good drainage and stormwater practices and lessen nonpoint source pollution runoff to shellfishing and recreation areas.

Carefully manage siting of larger commercial and industrial uses; use planning/zoning and financial tools to achieve a sound balance between conservation and appropriate development. Essex seems ambiguous at present about introducing separate

zoning districts. One source of concern under current zoning is the potential conflict between business and residential uses in close proximity to one another. The trend towards mixed commercial/industrial and residential uses is noticeable along the Route 22 Corridor. MAPC recommends that the town consider adopting a Route 22/Western Avenue Corridor Overlay District between Pond Street and the Hamilton town line. Corridor protection bylaws offer a method of protecting a transportation corridor from inappropriate development. The Route 22 Corridor is a gateway into Essex from the west. The bylaw could prohibit certain uses such as gas stations and drive thru restaurants and would include architectural and signage guidelines for new construction, as well as landscape buffers and common driveways for commercial uses, to reduce curb cuts onto Route 22. The town may also wish to consider allowing smaller multi-family units by right in this overlay area, perhaps up to 6 units, designed to standards set for the district. Mixed use in the overlay should probably be restricted to Western Avenue only and not residential side streets.

An alternative approach would be to require a special permit for any business or commercial use of 2500 SF or greater on a town-wide basis. Currently, site plan review is used by the town for reviewing applications of this size or greater and the use of the special permit would give the special permit granting authority (SPGA) more power in modifying an application or rejecting it.

If the use of the special permit on a town-wide basis was not deemed suitable, the town may wish to consider using it only within the Corridor Overlay area itself. Commercial and industrial uses would be allowed if not deemed harmful to the overall character of the district. All present uses would of course be “grandfathered”.

Essex may also wish to look at expanding the overall uses for which it now requires a special permit. Currently, relatively few types of uses require the issuance of a special permit.

Another approach would be to add design review requirement such as noise, traffic, and other impacts for adding a business use to or near a residential property, maybe requiring a notice requirement with review only if abutters request.

Increase staffing time for code enforcement and consider adopting a ticketing enforcement system rather than proceeding only through the courts.

Other zoning tools to consider:

- Open Space District: see Housing
- Southern/Eastern Avenue Residential Overlay District: see Housing
- Central Village Overlay District: see Housing

Strengthen Essex as a tourist destination. Strategies include:

- Negotiate with MassHighway on final design and then execute agreed upon traffic and pedestrian improvements for Causeway area pedestrian safety, traffic flow, streetscape appearance, parking; make it safer and more pleasant to walk and sit in the area, and easier to drive and park.
- Overall Strategy for the Causeway: Suggestions were made at the Housing Forum that the Causeway should be targeted as a mixed-use, light commercial/retail on the first floor with residential ranging from 1-4 units on the second floor. MAPC feels that the Causeway may not be suitable for additional residential units due to parking and flooding concerns in the Causeway area. The Causeway should remain primarily a commercial area. Like the Route 22 Corridor (or town-wide), the town may wish to consider special permits for any new business, change of use or redevelopment that exceed 2500 SF in this area.
- Façade/signage ordinance and/or revolving loan program with local bank to fund upgrades to storefronts.
- Assess near term parking remedies such as off-site employee parking (perhaps with shuttle service), sharing of parking lots with schools/churches/businesses; try to keep any new parking lots off the main commercial streets, behind buildings, within a block of activity; provide clear signage to off-street parking.
- Identify interest among merchants and residents in extending streetscape / sidewalk / parking improvements south from the Causeway.
- Examine possibility of using town owned land and remaining structures at Conomo Point, after lease expires, as a candidate for adaptive reuse. The town could lease the structures through a vendor as weekly vacation rentals during the tourist season in conjunction with public use of part of the land as a town park. An alternative might be to establish a town-leased hiking/biking/kayaking recreational area at Conomo Point. This facility would include area information, maps, restrooms, showers and camping facilities for recreational users and would provide an alternative, eco-tourism destination for Essex.
- Establish Essex Tourism Committee to work with Cape Ann Chamber of Commerce, Essex National Heritage Commission, etc., to better promote area.
- Consider strategies outlined in the “Environmental Tourism Strategies for the North Shore” report prepared by MAPC in 1996. See Appendix VI.
- Develop a goal and a marketing plan
 - What is the goal? Attracting overnight visitors, just extending the stay of existing visitors, attracting new types of visitors?
 - Survey visitors and see what else they are interested in
 - Decide what is doable and try to provide it, e.g.:
 - ecotourism ideas
 - arts/crafts fairs and other event programs

- attract an inn or encourage B&Bs
- Develop/promote packages/tours of local sites
- Contest/funding for tourist based businesses
- Poll merchants and local sites to identify complementary businesses to fit their market as well as barriers to their expansion

Housing

The following are the highest priority housing goals as established at the Essex Visioning and Housing Forums:

- *Create Housing Opportunities for a Variety of Income and Family Sizes*
- *Maintain Rural Character and Uniqueness*
- *Encourage Thoughtful Growth Using Tools Such as Mixed-Use and Higher Density Infill Development Where Development Already Exists*
- *Allow for a Greater Variety of Housing Types and Affordable Housing Options*
- *Separate Housing from Some Commercial and Heavy Industry*
- *Save Open Space and Protect Character of Town by Utilizing Open Space Design Subdivisions*
- *Encourage Small Multi-Family Developments of 4-6 Units That Fit With the Rural Character of the Town*
- *Create More Affordable Senior Housing That is Handicap Accessible*

Overall, housing discussions in Essex focused on the need to determine the town's overall zoning and planning goals in order to determine the best way to address housing needs. The town's limited sewer capacity was seen as both a barrier and an enabler in that it may limit infill potential to existing lots but could also be used by the town to promote affordable housing units. Excess sewer capacity for municipal uses, estimated by the town to be roughly 40,000 gallons per day, not counting the new high school if it is located in Essex, could be used by the town as an incentive for affordable housing. For example, a four unit multi-family on sewer might be allowed on the condition that one of the units remains permanently affordable.

Location-Specific and Other Recommendations

Based on the results of the housing workshop, MAPC recommends that the town consider the following location-specific ideas:

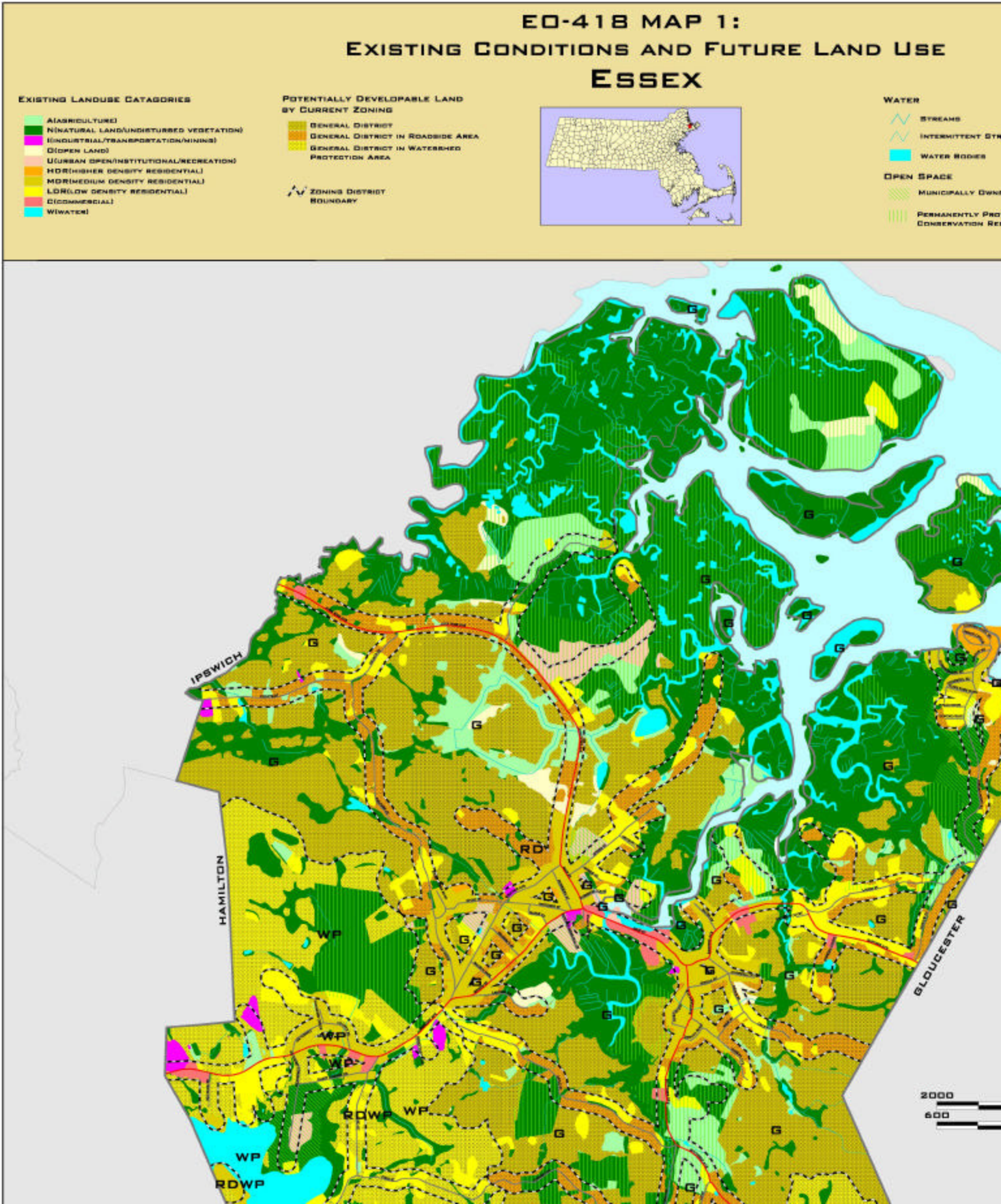
- Consider creating a Rural Open Space District (OSD), with accompanying design guidelines, to create an area of lower density housing that maintains the rural character of Essex. The OSD would start at the intersection of John Wise Avenue and Western Avenue and continue along both sides of John Wise Avenue to the Ipswich town line. The eastern boundary could be the ACEC boundary and the western boundary could be the Hamilton town line. Although not raised at the forums, MAPC suggests that the town consider including land along Southern Avenue, Kings Court, Laurel Lane and Apple Street from where the sewer ends to the Manchester town line as a good candidate for this type of zoning district as well. This would not be an overlay of existing zoning, but a new district. The town could

decide which businesses it wanted to allow in the district and what could be done by special permit.

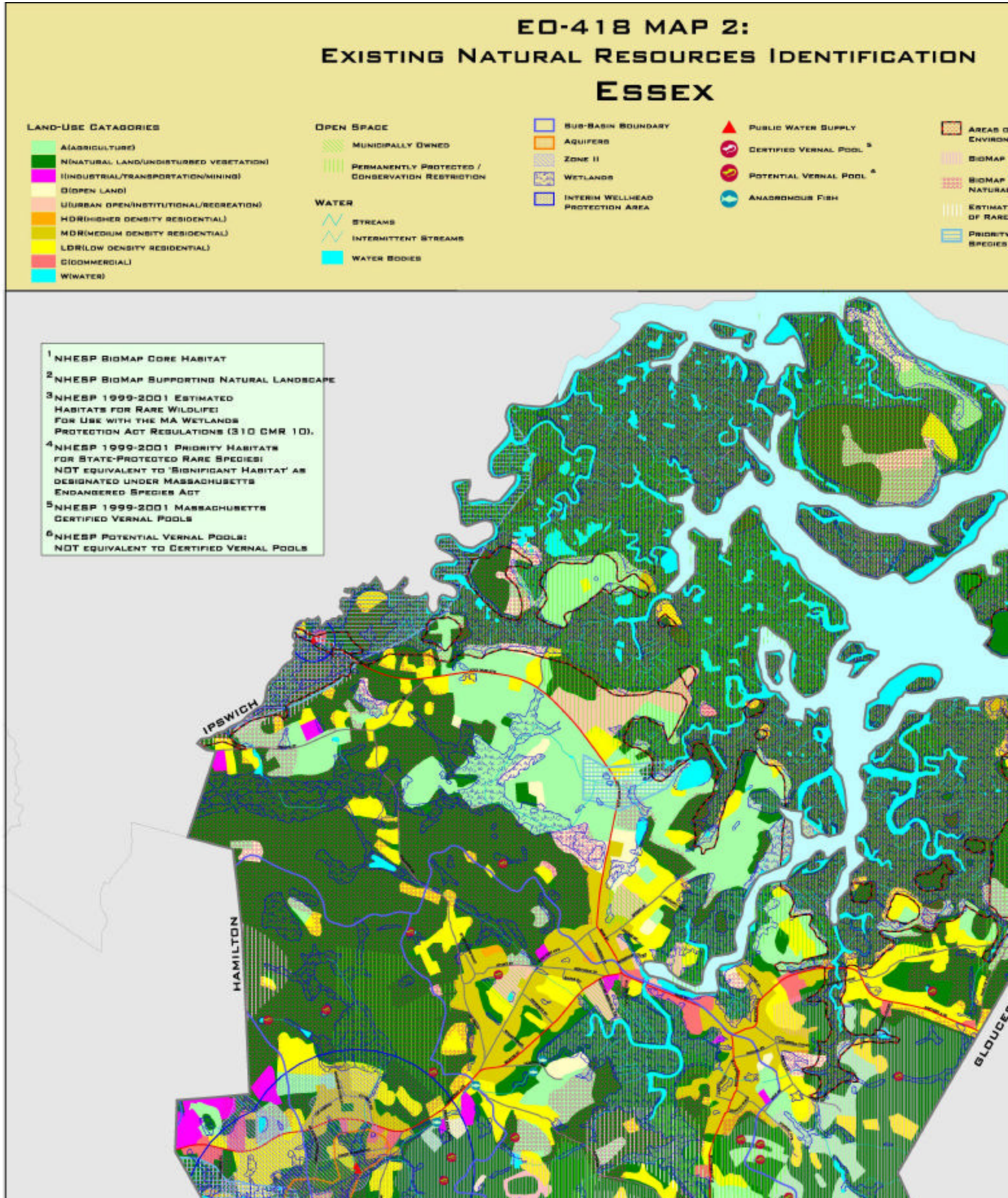
- Open space zoning is a useful technique for preserving open space while still allowing development to occur. It allows smaller residential lots so long as a required amount of acreage is set aside as permanent open space. The open space is either owned by the community or a non-profit and continues in use for agriculture, recreation, scenic views and other benefits. This type of development actually recreates the typical New England Village setting and more economical because streets and utility services are shorter. Incentives are often used to promote the use of open space design instead of conventional subdivisions under open space zoning. For example, Amesbury has a Rural Cluster District in which a conventional subdivision requires a 10 acre minimum lot size. If open space design by right is used instead, the lots can be as small as 10,000 square feet with a 2 acre density throughout the subdivision. This provides a very strong incentive to use the open space option. Providing affordable housing units within the open space development would be another way to have lot size reduced.
- An alternative to this would be establish a new zoning district for the John Wise and South Essex areas based on agricultural preservation and open space and require that all developments greater than five lots or 4 acres would have to be done using open space design and not conventional subdivision. Ipswich and Amherst both use this technique.
- Consider Backlot Development Zoning for the same areas. This could help relieve problems with Approval Not Required lots and prevent the visual suburbanization of the rural parts of Essex like the John Wise and Southern Avenue areas. Backlot development sites houses on the back of the lot and allows the use of shared driveways to reach the homes. The land that fronts on the roadway is then protected from development through a conservation restriction and can remain in active agricultural or recreational use.
- The town expressed an interest in siting appropriately sized multi-family units in previously developed areas and is becoming more concerned about continuing to allow all types of business and commercial uses within residential areas. The town may wish to consider adopting a Residential Corridor Overlay District. This overlay would cover the area on both sides of Eastern Avenue, starting at the Gloucester city line and would include Water, School, Milk, Grove Streets and Southern Avenue out to where the sewer line ends. In this area, one and two family homes would still be allowed and three-family homes would be considered by special permit, as they are now. Certain business uses would be excluded from this area and the town may be interested in looking at design guidelines for this area as well. An alternative here would be to allow three-family homes here by right if the third unit were to be made permanently affordable.

- The town wants to provide a wider array of housing types for people of various income levels and at different stages of life. MAPC suggests the town look at creating a Central Village Overlay District. The district would cover the Western Avenue, Martin Street and Pickering Street “triangle” area. This district would allow the construction of up to three or four unit multi-family units by right, using the same dimensional requirements as for a two-family, if one of the units was made permanently affordable. A three or four unit structure could not exceed 8 bedrooms in size to limit sewer and visual impacts. These units could also be sited using site plan review. Certain commercial and industrial uses would not be allowed in this district and the town may wish to adopt design guidelines for new construction as well.
- Essex currently requires a special permit to convert an existing dwelling into a three family unit. Using the same criteria listed excepting for Planning Board approval of the special permit, MAPC recommends that conversion of a single dwelling unit to up to three units be allowed by right on a town wide basis.
- The town may wish to consider amending its current language in Section 6-5.5 of the bylaw to allow for the construction by right of up to a three unit structure on a single lot, not just separate structures as currently listed, if all other requirements in the section are met.
- Adopt inclusionary zoning for all new developments in town. The town should consider its overall housing needs before establishing parameters for this type of zoning. Typically, a community will require a certain percentage of all new units in developments over a certain size to be made permanently affordable or donate the equivalent value of those affordable units to a town Housing Trust Fund.
- The town should consider allowing accessory dwelling units (ADUs) on a town wide basis. The creation of ADUs within existing structures or on their own lots is one way to increase the supply of housing and improve affordability, both for the current owner and the new tenant. They can be constructed as apartments within existing single family dwellings, as additions to homes, or through the conversion of garages, barns and other outbuildings. They can also be built as free standing cottages. The Department of Housing and Community Development now counts qualified ADUs as subsidized housing and towards its 40B requirement of 10% affordable units.
- The town should complete its Housing Certification under DHCD. Certification will allow the town to compete for PWED, and Self Help grants.

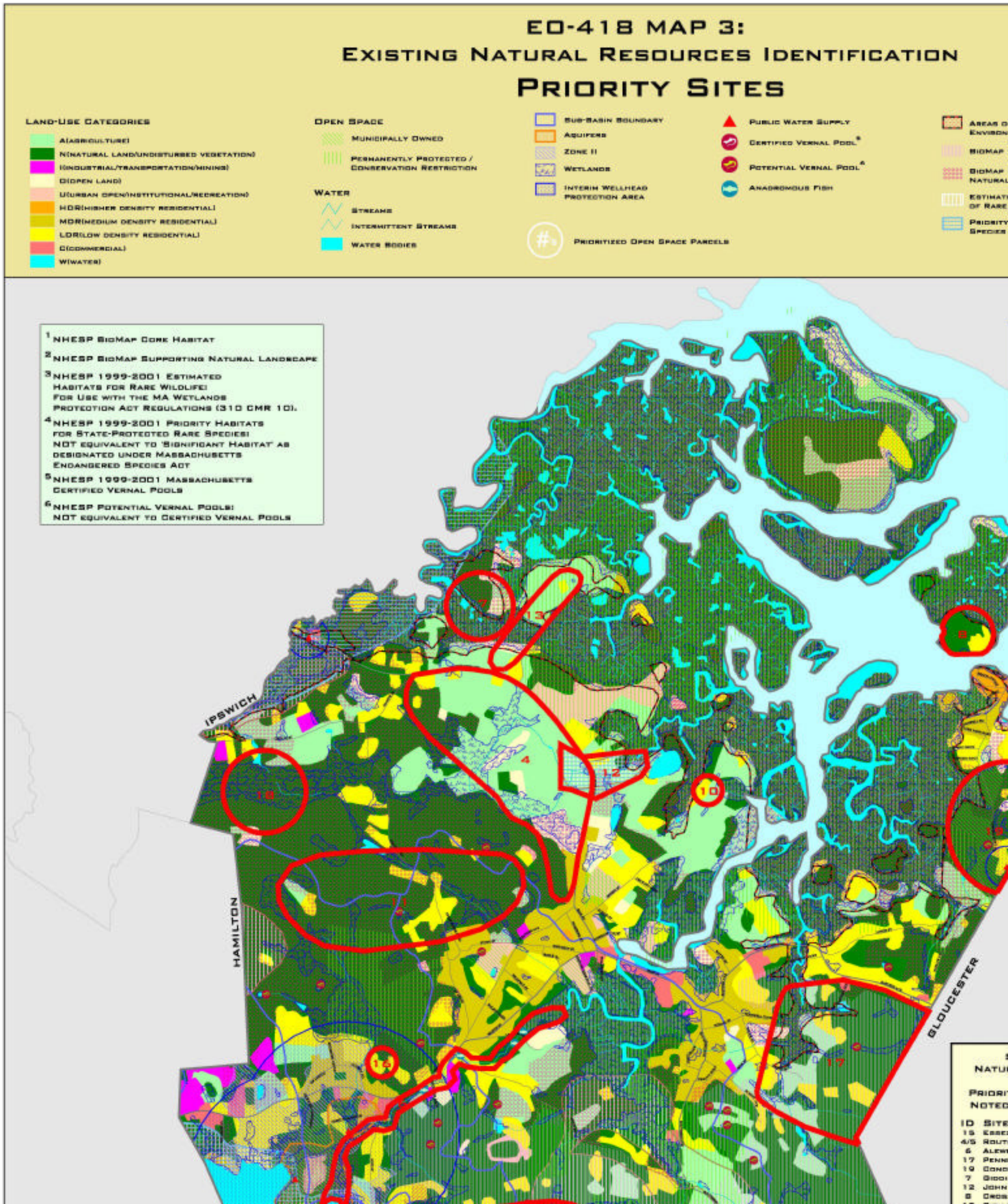
Map 1. Existing Conditions and Future Land Use



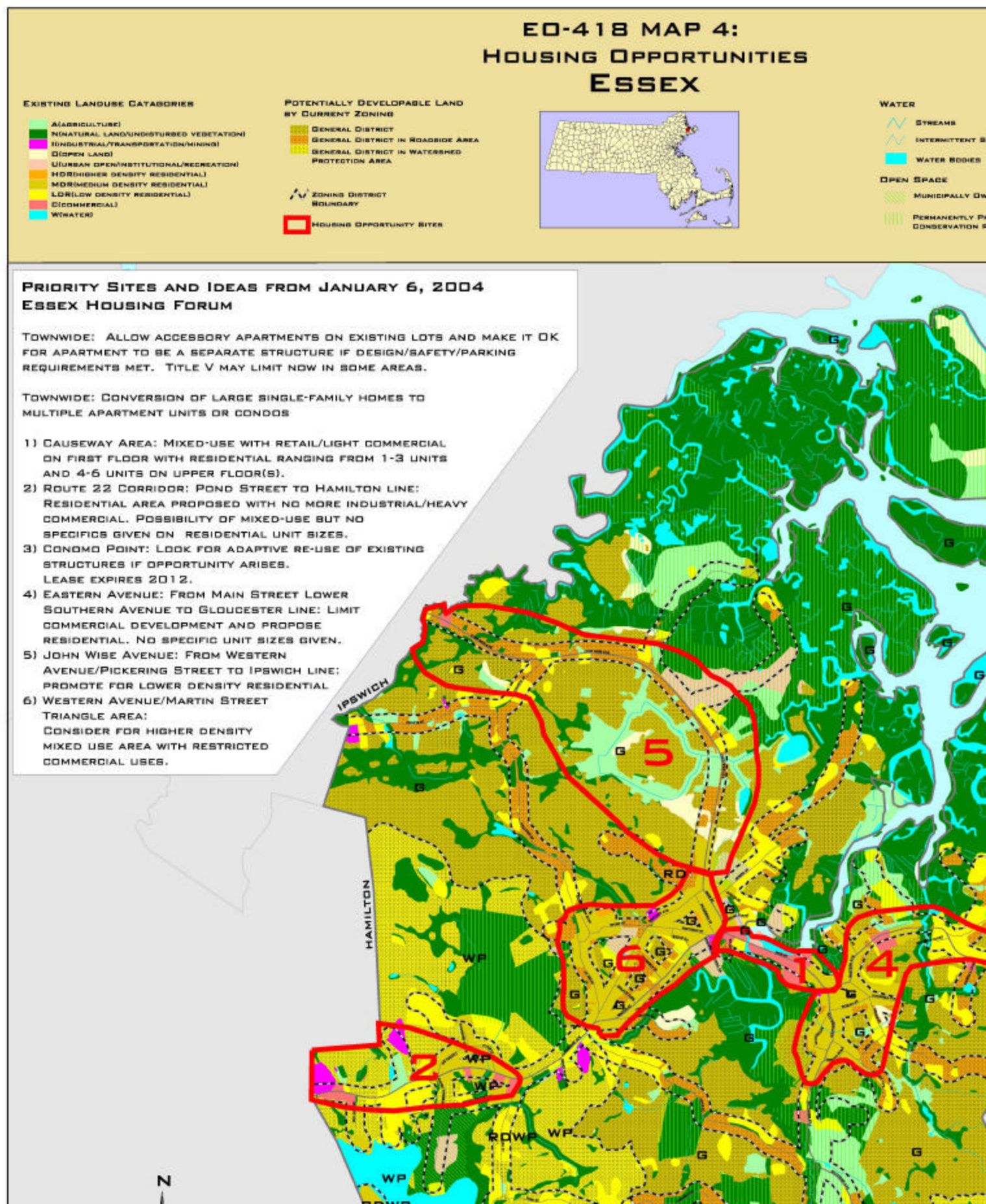
Map 2. Existing Natural Resources Identification



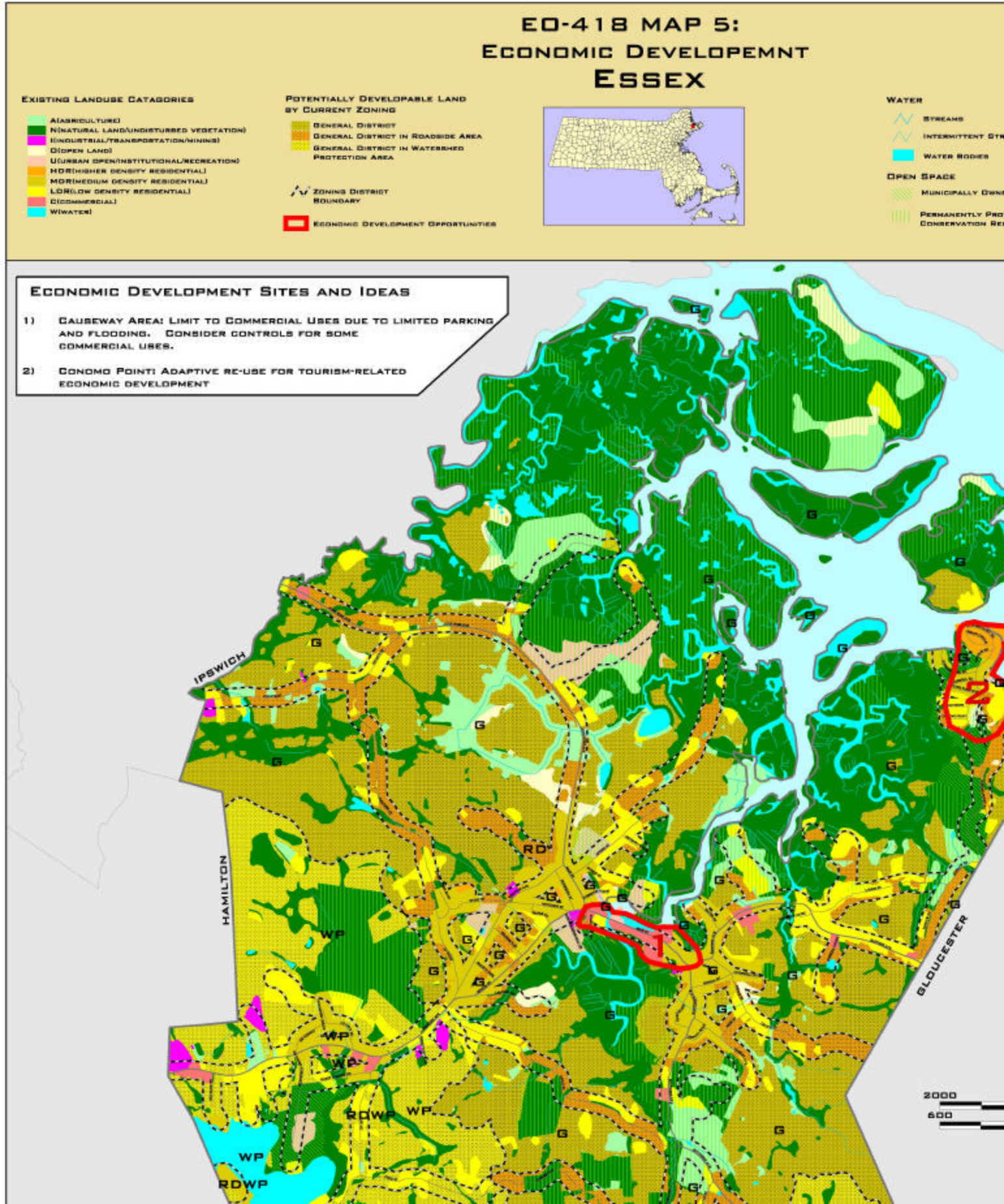
Map 3. Suggested Locations for Open Space and Natural Resource Protection



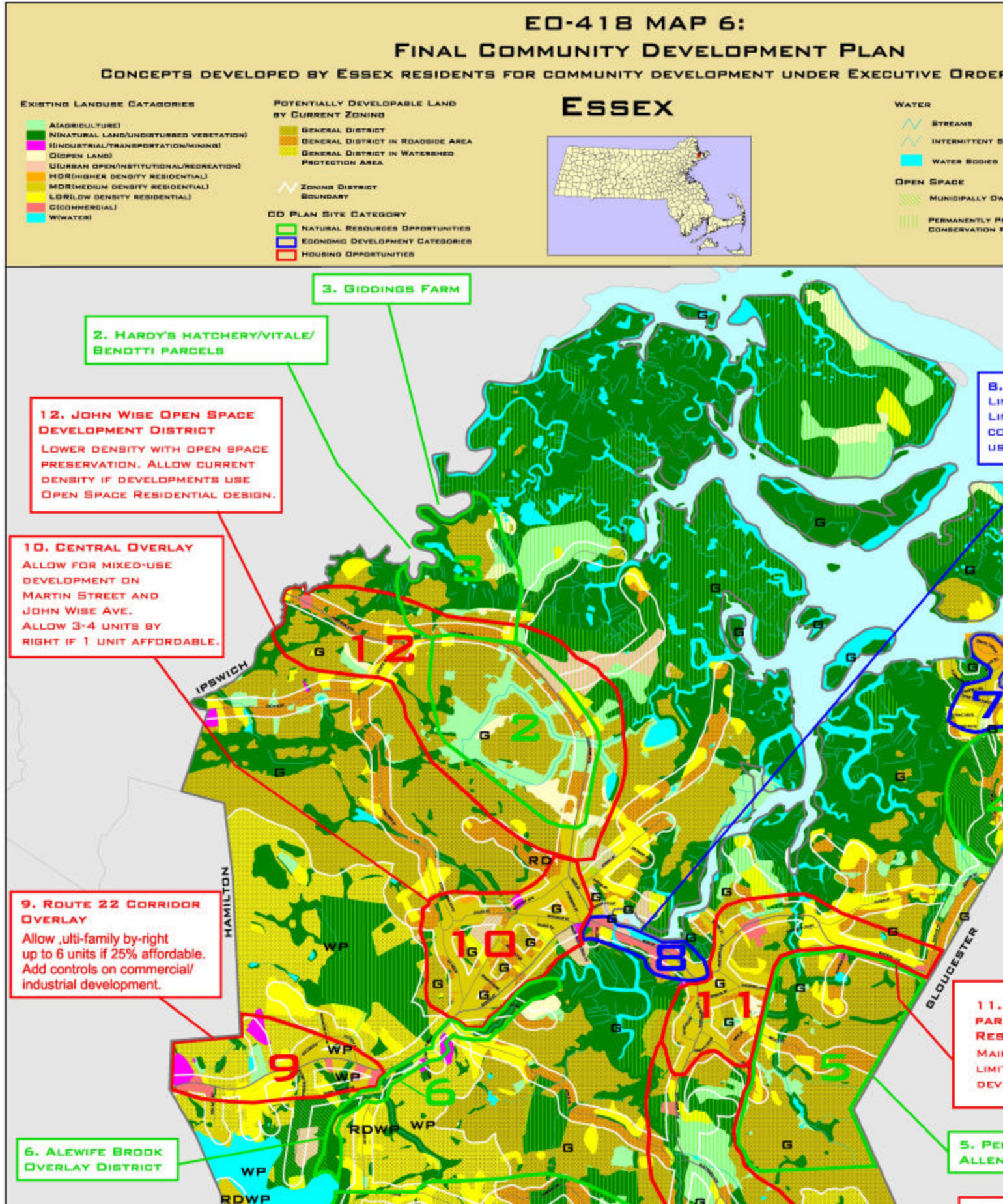
Map 4. Housing Opportunities



Map 5. Economic Development Opportunities



Map 6. Community Development Plan



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APPENDICES

Appendix I – Results of Public Workshops

Essex Vision Day

5/11/02

Summary of Results

Economic Development

STRENGTHS

Significant Investments

Strong village business district

4-Home business-mixed use

6- Locally owned businesses

Natural beauty

Antiques bus contribute character

7-Proximity to large city (Boston)

tourism telecommuting

relocating business here

Equal tax rate for business

4-Strong sense of community and
strong economic diversity

4-Proximity to ocean

Zoning allows mixed use

Easy location of business

4-Opportunity-open to self start

WEAKNESSES

3-Unattractive lack of central area business district

3-Lack of public parking in business district

7-Traffic congestion

Lack of five/police station

No restrooms/sidewalks

Lack of enforcement of traffic regulations

Seasonal nature of business

10-No control over mixed use

Rte 22 development-undermines attractive town

1-Conflict downtown between business location and environment

Lack of Inn/Hotel rooms

4-Lack of public transportation

Lack of bike path

Sewer district limits expansion

Town not well promoted

- 2-Lack of voter participation
- Lack of basic stores
- 1-Lack of breakfast restaurant

OPPORTUNITIES

- 3-Better link, better stewardship of natural resources by business
- 1-Attracting further invest.
- 5-Creation of local shuttle/trolley
- 6-Preserve attractiveness/quality of life of residents through better control
- 1-Redevelopment of town landing downtown
- Coordinate better pkg.
- 6-Manage growth through dialogue
- 2-Preserve appropriate use of home businesses
- 7- Create town website for better info to residents in public places
- 2-Preserve small town character in bus comm.

Themes for Economic Development Goals Statement

Find balance between business use and beauty

Find balance between home occupation/entrepreneurship and larger commercial siting

Consider what controls are available: zoning districts, specific bylaws; stewardship requirements

Tax rates and fees

Housing

STRENGTHS

- Real estate value high
- 2-Desirable town
- 1-Diversity of house types
- 3-High homeownership percentage
- 5-Not many subdivisions (cookie-cutter)
- 6-Still sense of community/neighborhood because of size of Essex
- good bylaws
- 3-Residents abut protected open space

WEAKNESSES

- 2-affordability difficult
- 5-long term Essex residents can't afford housing
- 2-not enough rental units affordable for people in transition
- not enough family-sized units in subsidized housing market (actually zero)
- vulnerability to change in septic technology
- 2-lack of zoning
- houses too spread out
- 2-no state or federal rehab funds used
- 6-vulnerability for large tracts of land to be developed
- changing from agriculture to developed area
- 3-lack of enforceability of bylaws
- 4-lack of residential services in town

OPPORTUNITIES

- 2-state or federal housing rehab funds
 - Northshore Home consortium
- 1-large tracts of land in limbo
- 2-potential for town to establish fund to preserve land
- 2-enforce bylaws to full degree
 - legal review & revision
- 2-potential for use mixed-use in
 - downtown area (i.e. encourage smaller units in downtown
- 5-potential to enhance bylaws to preserve livability (i.e. prohibit certain types of business in certain areas or restrict performance
- 1-creative zoning
 - Performance Zoning
 - Open Space Residential Design
 - Zone for residential near open space
 - 1-maintain current character
 - 7-build where houses & buildings currently are (in-fill)
 - 2-make downtown more viable
 - more pedestrian friendly
 - more residential services in downtown
 - 1-retain historic character

Themes for Housing

Retain local character and uniqueness

Plan for thoughtful growth with zoning such as compatible mixed use, balancing housing and open space and build where development already exists (infill)

Keep Essex people here through housing rehab, affordability and residential service

Open Space and Natural Resources

STRENGTHS

- (9) Essex River and Marshes
- (5) Open Space -large amount
 - Conservation Organizations
 - partnerships
- (1) Our own aquifer
- (3) Awareness of a chance to plan in advance of development
- (3) Tremendous diversity of habitats
- Appreciation by residents for Essex's
 - (2) natural resources
- (1) Historic development associated with River - historic resources
- The people of Essex themselves
- residents are happy to live here
- Isolation
- (1) Potential to pass CPA
- Many people both live and work in Essex -volunteer F.D., etc.
- Residents interface with school to help teach kids/enhance school
- Regional perspective on Natural Resources
- Donation/preservation of historic artifacts
- Tremendous potential for recreation
- State recognition of Essex at a biological resource
- Obstacles to development
- (unbuildable land) exist

WEAKNESSES

- (8) Absence of District zoning
- (4) Lack of funds to maintain recreational fields/uses, etc.
 - Lack of appreciation for potential of Essex resources
 - Open space is limited and can be used up or made less accessible
 - Divisiveness between groups living in different areas of town
 - Technology may allow development in previously vacant area and desirability of land may attract development
- (2) voter/citizen apathy
 - expensive sprawl
- (3) Town land could be better maintained and “presented”: i.e. poor condition of areas like "Woodman's Beach"
 - Erosion of Riverbanks due to boat traffic
 - Smelt/Alewife/Flounder catch in River has decreased
- (1) Non-residents use resources like River and not "giving back"
 - Commercial development of high quality open space may occur if people want services in Town
- (3) Risk of development in inappropriate locations
- (2) No master plan exists

OPPORTUNITIES

- (3) Proactive planning - Master Plan
- (10) Growth Management:**
 - prioritize where and how happens**
 - Cluster development**
 - Zoning - Environmental
- (6) CPA may be voted in**
 - Boat pump out stations/services
- (4) Conservation Restrictions & Gifts**
 - (2) Business partnerships
 - (1) Development Linkage
 - (2) Get residents on board to protect resources
- Historic Preservation District
- Design Standards

Open Space and Natural Resources Goal Statement: Goal Statement

Protect our strengths from our weaknesses by taking advantage of our opportunities.

Objectives: Inventory, prioritize, protect and enhance natural resource and open space

- 1) Purchase, gift, and conservation restriction open space through federal government, state government, town and private conservation agencies
 - 2) Conduct habitat assessment using volunteers, students, environmental group, the state, Conservation Commission and planning
- Use Master Planning
 - Consider Zoning Bylaws and Districts
 - Balance Conservation and Development

Transportation

STRENGTHS

1. Close Proximity to 124 (1)
2. Rt. 22 & 133 Main routes through town (4)
3. Not having train station (7)
but close to stations
4. Senior transport - Dial A Ride (3)
5. For Pedestrians- Narrow roads w/o sidewalks, Beautiful but not safe (8)

WEAKNESSES

1. Close proximity of 128 & Main Roads (1)
leads to trade traffic impacts
2. No public transportation
(CATA discontinued due to lack of use) (0)
3. Traffic/safety issues relating to A.M. /P.M. School busing - fewer kids
take bus now
4. Lack of sidewalks on some streets (4)
Apple Street example)
5. Lack of parking for businesses downtown (2)
6. Excessive speed-Need to address (7)
7. Marine traffic - speed enforcement for safety & wildlife (4)
8. Lack of bikepaths/bikelanes
9. Design impacts of taking state funds for construction (5)

OPPORTUNITIES

1. Determine needs for public transit (4)
schedules & locations & type
2. Examine bus issues -reasons for (3)
Lack of use
3. Use school location discussions
to include transportation/pedestrian improvements
4. Improvements to causeway -Rte 133
for design issues (sidewalks, driveways) (14)
5. Need for traffic management during construction of sewer (2)
6. Maintenance - Sweeping (1)
Crosswalk painting

Transportation Themes

1. Monitor improvements and design
to existing roads to ensure pedestrian & vehicular safety & parking
2. Create & implement an overall vision for improvements to
Causeway- including Economic Development Issues & business participation
3. Make streets "friendlier" for pedestrian & non-vehicular folks
bike paths/sidewalks
4. Examine Alternatives for non-single occupant vehicles-bikes-public transit
5. Evaluate enforcement of existing traffic laws
6. Remain involved in local & regional transit discussions

*Consider infrastructure
Education & process

*Remain Engaged in Transportation Planning process-
use data from today in short term planning
don't wait for long term

Summary

Overall Theme: Balance Laissez Faire with Planning

What would you do if you were King or Queen? :

- Don't look like Gloucester
 - Take best features of Gloucester and use- mixed use, zoning, jobs/commerce
 - Create an attractive Town Common and site a substantial building on it
 - Institute protections for residential uses from business uses adjacent to them
 - Town should have a Master Plan
 - Seek funds to acquire development rights
 - Town needs direction-lacks now; increase communication and cooperation between committees and boards
 - Manage growth to maintain character and Essex characters
 - Refine options to consider alternatives to control home businesses and larger commercial developments
 - Essex should balance its desire to do what it wants with planning
 - Engage in planning and look at zoning
 - Build parking lots and deal with congestion
 - Build on history of Essex to promote sustainable development
 - Make citizens aware of impacts of personal actions
 - Do we want to preserve character or enhance/change it??
 - Essex should increase awareness and education of town resident of this planning process and vision results
-

April 29, 2003 Natural Resources and Open Space Workshop

THEMES

*(24 votes) **Identify and Increase Conservation Lands***

(6 votes) Develop and Town and Inter-Community Trail System

(2 votes) Protect the Water Quality of Chebacco Lake

(5 votes) Improve Communication between Town Boards

(5 votes) Expand and Support Environmental Education

(4 votes) Protect Unprotected Open Space of all Kinds

(14 votes) Protect Drinking Water Supply

(12 votes) Protect Wildlife Habitat

(3 votes) Protect Passive Recreation areas (picnic, hike, nature study)

(9 votes) Protect Agricultural Uses

(4votes) Protect Historic Properties

(8 votes) Protect Scenic Features (i.e. stone walls)

Scenic views

Protect Natural Features (i.e. rock outcroppings)

(34) Slow Down the Rate of Growth

Develop Plans for future Growth

New Themes:

(4 votes) Increase "ownership" of Natural Resource Preservation

(16 votes) Conservation Sub Bylaw & wetland bylaw

(20 votes) Paid Conservation Agent

Elect Boards Interested in Preservation

Require Training for Staff/Boards

(13 votes) Better Stewardship of what we have

(8 votes) Education

Encourage Participation of Public in Board meetings

More Coverage of Board Meetings in Local Press - Agendas & Minutes

(19 votes) Protection of Offshore Marine Resources + Management Plan for River & Salt Marsh Buffer Zones

Connected Series of Parcels (added After Voting Preliminary Open Space Priority
Parcels

Prioritized Open Space Parcels with Noted Outstanding Characteristics

1. Parsonage Lot: Given to church in 1710. Approximately 9 acres in size; MECT owns land to north of it. Currently exempt from MGL 40A zoning as a church parcel. Land around the parcel has not perked well in septic system tests. This is a key parcel to the larger South Essex woods parcel as it is centrally located. Due to wet soils, the land has never been cultivated and so remains virgin forest. It is Priority Sites of Rare Species Habitat and Core Habitat, but not a wetland area. (Combined with #15)

2. Essex Tax Title in Essex Woods

Various parcels of about 20 acres total. These are town-owned lands that are tax delinquent. There are wetlands, Core Habitat and Priority Sites of Rare Species Habitat areas. MECT could possibly help the town acquire and put under Essex Conservation Commission control. They could also be used as match under a Self-Help grant to help acquire the Parsonage Lot. (Combined with #15)

3. Maple Swamp area: approximately 50 acres of potential tax title land that Essex may need help in putting into formal tax title status. This land contains wetlands, Core Habitat and Priority Sites of Rare Species Habitat.
(Three areas above combined with #15)

(28 votes) Rte. 133 Corridor parcels combined: #4, #5 and Vitale parcels

4. Hardy's Hatchery parcel: This land has Priority Sites of Rare Species Habitat, Endangered Species Habitat, wetlands, Supporting Natural Landscape.

Vitale Parcel

5. Benotti parcel: This parcel contains wetlands and Supporting Natural Habitat

6. (23 votes) Alewife Brook buffer parcels, between Pond Street and Essex Park/or from Library to Chebacco Lake: These parcels contain Supporting Habitat for Anadromous Fish, provide Interim Wellhead Protection, Wetlands, Potential Vernal Pools, and provide Core Habitat.

7. (16 Votes) Giddings Farm parcel: Provides Supporting Natural Landscape, wetlands, adjacent to Permanently Protected Land

8. (12 Votes) Cross Island- Emerson: High community character/view values, adjacent to Core Habitat, Supporting Natural Landscape, wetlands, Permanently Protected Land

10. (9 Votes) Ridge Property at end of Spring Street: Has wetlands and Core Habitat

11. (5 votes) Duncan Property off Story Street: Land is Supporting Natural Habitat

Other Areas

12. (13 Votes) Land between John Wise Lane and including Cedar Brook Farm:
Anagnostis: Bio Map Core Habitat, Wetlands

13. (10 Votes) Richardson Land on either side of road: Support habitat, ACEC, Island Rd.-Hardy etc.

14. Henderson Land: Core Habitat, Priority Endangered Species Habitat, vernal pools, wetlands: this parcel combined with #15

15. (30 Votes) Essex Woods combined parcels: #'s 1,2,3,14 Combined) Rocky Hill Road/Conomo Road south to Manchester Line: including Southern Ave

16. Markham Lot: Supporting Natural Landscape, Adjacent to Town Land

17. (21 Votes) Pennoyer/Febiger/Collier /Allen: Off Eastern Ave: Wetlands, Core Habitat, Natural Supporting Habitat

18. (9 Votes) Land South of Choate Street: Wetland Core Habitat

19. (16 Votes) Conomo Point Rd.: Land east of it to town line: Supporting Habitat. Adjacent to town land

**March 30, 2004 Economic Development Workshop
Economic Development Forum Results
Essex
March 30, 2004**

Funded by the Mass. Dept. of Housing and Community Development, Mass. Dept. of Economic Development, MassHighway, and Executive Office of Environmental Affairs

Purpose: The purpose of the meeting was to elicit input from Essex residents, landowners, developers, and business community as to the goals, themes, priorities, and locations that should inform the economic development element of the

Community Development Plan. MAPC presented background data on the local economy and guided the discussion.

Outcomes: Outcomes included a set of economic development themes and a draft map of locations for future economic development initiatives. With this input, MAPC, working with the Town, will recommend strategies and tools for achieving the goals. The results will be coordinated with the goals, themes, and strategies from the other elements in the Community Development Plan for review at a future public meeting on “Putting it all Together.”

Introduction and Economic Profile

Sam Cleaves of MAPC welcomed participants and introduced Mark Hunsberger, MAPC’s Economic Development Planner, to lead the evening’s forum. Mr. Hunsberger reviewed the evening’s agenda, and then presented slides which outlined the scope of issues within the field of economic development and summarized data on trends in the community’s land use, tax base, jobs, and workforce.

Economic Development Themes and Priorities

Economic Development themes identified in the September, 2002 community-wide visioning session were reviewed and discussed by the attendees. Two additional aspects of the overall goal (denoted by *italics*) were elaborated. The themes and primary discussion points are summarized below:

Economic Development Goal / Theme

Encourage entrepreneurs in home occupations/small businesses, farms, and shell fishing

- Lack of separate business districts buffered from residences can lead nuisance conditions (noise, truck traffic, odors)
- More active enforcement of existing rules would help in some instances; would require more staff resources being applied (e.g. one building inspector now shared with Gloucester)
- Residents have a long standing tradition of being able to operate businesses in or adjacent to homes – want to maintain that opportunity; would it be possible to phase in any regulations for reducing impacts so that people have a chance to adjust their plans?
- Suggestion by MAPC that simpler enforcement process (e.g. ticketing for offenses) might be considered

Carefully manage siting of larger commercial and industrial uses

- Any business can now locate anywhere in town if the parcel size is large enough and wastewater disposal requirements are met

- MAPC suggestion that design reviews may help in buffering impacts of developments even if separate business districts are not designated

Manage growth through public dialogue and participation and provide public information sources such as a town web-site.

- Suggestion that most residents are unaware that the Town's zoning bylaw is relatively unusual and allows all types of uses everywhere in the town rather than identifying specific districts for commercial and residential
- Suggestion that education/publicity of the potential negative impacts of the current zoning (i.e. projects being proposed in inappropriate locations) might increase support for designating commercial and residential districts
- Suggestion that town explore establishing a long-term planning committee

Use planning/zoning and financial tools to achieve a sound balance between conservation and appropriate development

- Suggestion that current zoning provides no balance, but instead allows any kind of development to occur anywhere. With development increasing in communities surrounding Essex and alternatives to septic systems now available, it is only a matter of time before developers propose large projects that will be inappropriate to the scale and desires of the community. The planning board will be unable to stop such projects despite the objections of neighbors.
- Suggestion that town explore establishing districts where commercial/industrial districts are permitted by right and districts where businesses are not allowed. However, a master plan with such districts was voted down in the 1980s.
- Suggestion that options be explored for increasing tax revenues from business properties (i.e., would it be practical and desirable to institute a higher tax rate on businesses?)
- MAPC suggestion to identify models of zoning used by other rural Massachusetts communities that are becoming more suburban

Strengthen Essex as a tourist destination

- *Identify and promote attractions that will extend the stays of visitors to the town's restaurants*
- *Explore expanding cooperation with neighboring towns and among attractions such as Ship Building Museum, Little Farm (SPNEA), Crane's Beach*

Support/maintain the clamming industry

- *Number of clambers has declined because productivity of beds has fallen and closures are common after rainfall*
- *Suggestion for town to support efforts to increase production and better manage the resource, e.g. by eventually creating a rotation plan to allow the flats to recover*

Part II: Applying Economic Development Themes to Locations

Led by Sam Cleaves, participants were asked to identify on a map specific areas that should be improved through economic development initiatives. While attendees were reluctant to endorse specific areas of the town for future economic development, the locations summarized below were addressed in the subsequent discussion of potential opportunities. Reference numbers relate to locations on the draft economic development map.

Map #	Location & Suggested Uses
1	Downtown <ul style="list-style-type: none">• Most residents and affected businesses support the project currently in design review to rebuild the roadway and sidewalk along the Causeway (Route 133) to improve traffic flow, safety, and pedestrian access• Causeway area needs more off-street parking at the south end to keep businesses from creating their own individual parking lots that detract from the appearance of the area; needs to be in an area that is perceived as safe and convenient• Will be 80 new parking spaces behind the police station, but that will not be enough; is Bill Allen's property a potential location for more?• Center needs more attractions and/or retailers to get people to visit for longer than a few hours at a restaurant and antique store; Ship Building Museum is one existing attraction• MAPC suggestion: ecotourism/visitor center might provide a focal point; place with restrooms and showers for people to park their cars, then rent bikes or kayaks and spend the day hiking or biking without having to drive
2	Conomo Point <ul style="list-style-type: none">• Property reverts to Town ownership in 2011, but transfer is very controversial• MAPC suggestion that this location may offer an attraction for visitors as a park, or for the town to generate revenue by operating vacation cottage rentals or a function hall

January 6, 2004 Housing Workshop

Housing Goals from Visioning Forum

- ◆ Create housing opportunities for a variety of income and family sizes
- ◆ Maintain Rural Character and Uniqueness-Don't get blindsided by unintended consequences
- ◆ Encourage thoughtful growth using tools such as mixed-use and higher density infill development where development already exists

Additional Goals Developed at Housing Forum

- ◆ Allow for a greater variety of housing types and affordable housing options. Be more flexible: Example, where 3 units are allowed on a single parcel, go with a mix of single family and apartments instead of all single families.
- ◆ Separate housing from industry and heavy commercial uses-consider modifying current zoning
- ◆ Save open space and protect character of town by utilizing open space residential design (OSRD)
- ◆ Provide more affordable housing options for younger Essex people
- ◆ Encourage small multi-family developments of 4-6 units that fit with rural character of town
- ◆ Create more affordable senior housing that is handicap accessible

Housing Barriers

- ◆ Lack of sewer capacity may limit infill potential, as there is little extra capacity
- ◆ There is a need to establish overall zoning goals in order to promote desired development
- ◆ No handicap accessible units at Chebacco Terrace
- ◆ There are 20 second-story units at Chebacco Terrace that can not be accessed by some seniors

Housing Enablers

- ◆ Extra sewer capacity could be used for developments that include affordable units –an incentive to build affordable units
- ◆ The opportunity exists to change existing zoning to include more affordable housing components

Notes: A current land use map will be used at the Economic Development Forum to help clarify zoning, economic development and housing issues. Visual aids are most helpful in looking at land uses in town.

There is a need to clarify home occupation businesses vs. mixed-use.

Preliminary Housing Types and Locations Ideas

- ◆ Town wide: Allow accessory apartments on existing lots and make it OK for apartment to be a separate structure if design/safety/parking requirements met. Title V may limit now in some areas.
- ◆ Town wide: Conversion of large single-family homes to multiple apartment units or condos
- ◆ 1) Causeway Area: Mixed-use with retail/light commercial on first floor with residential ranging from 1-3 units and 4-6 units on upper floor(s).
- ◆ 2) Route 22 Corridor: Pond Street to Hamilton line: Residential area proposed with no more industrial/heavy commercial. Possibility of mixed-use but no specifics given on residential unit sizes.
- ◆ 3) Laurel Lane: Multi-unit affordable housing area with mixed ages
- ◆ 4) Conomo Point: Look for adaptive re-use of existing structures if opportunity arises. Lease expires 2012.
- ◆ 5) Eastern Avenue: From Main Street to Gloucester line: Limit commercial development and propose residential. No specific unit sizes given.
- ◆ 6) John Wise Avenue: From Western Avenue/Pickering Street to Ipswich line: promote for lower density residential (open space residential design overlay here?)
- ◆ 7) Western Avenue/Martin Street Triangle area: Consider for higher density mixed use area with restricted commercial uses.
- ◆ 8) Northern end of Southern Avenue: Is now a mix of existing residential and business—consider options for this area.

9) Added by email on January 7: Elderly housing at town-owned cemetery lot fronting John Wise and Spring Streets that is not completely used for cemetery purpose

Appendix II – Additional Housing Strategies and Housing Resources

This matrix lists a comprehensive menu of strategies that the town may wish to refer to in the future.

Develop leadership and organizational, planning, and administrative capacity

Strategy	Description / Rationale
Establish a strong public commitment to housing	Obtain strong and visible support from elected leaders to meet housing needs for all income levels
Form a housing committee or housing partnership	Ideally, impetus should come from interested citizens, with active support of chief elected officials. Committee should be appointed & endorsed by these officials & its mission agreed upon. Staff should be assigned.
Hire housing professional or designate staff person responsible for housing	To assist & guide housing committee, liaison to other planning functions, coordinate & lead housing efforts, & enable community to proactively promote housing
Build coalitions with other groups & partners	E.g., chambers & business associations, religious groups, social service & human service providers, & advocates
Develop a proactive housing policy	Policy establishes commitment & guides action. Should be integrated with other local policies & inform zoning goals & provisions
Housing Development Non-Profit	Form a housing development non-profit or work with an existing non-profit with skills in housing development, rehabilitation, & financing. A non-profit would provide access to additional funding sources & provide development expertise
Form a Community Land Trust (CLT)	A CLT is a member-controlled non-profit that acquires & holds land but sells or rents housing on it to residents. Reduces cost of housing by removing land costs from housing equation; limits increases in future housing costs. Ensures permanent affordability
Undertake a public education campaign	Educate people about what is “affordable,” how housing affects local citizens & the region’s economy, ability to attract & retain workers
Simplify, streamline regulations and procedures	Can aid production generally or act as incentive for affordable housing. E.g., reduced fees.
Include explicit housing goals in zoning bylaw	Goals set the stage for specific provisions

Preserve existing housing stock, including existing affordable units, and adapt existing housing stock to meet changing needs

Strategy	Description / Rationale
Develop a system to track and pursue tax title property	The town can abate up to 75% of the taxes and 100% of the interest if tax delinquent properties are turned into affordable housing (for households earning up to 120% of the area median income and kept affordable for at least 45 years).

Facilitate production of new housing units through redevelopment of vacant or underutilized buildings

Strategy	Description / Rationale
Work with the Housing Authority to see if there are opportunities to add units at current developments.	If federal funding is not available, the town may need to seek funding sources.
Allow accessory apartments, accompanied by an “amnesty program” for existing units & affordability provisions	Makes more efficient use of existing buildings; promotes affordability. Helps tenant & owner: owner gets added income, potential upkeep assistance. Can be structured with incentives for affordability. Amnesty could also apply to undeclared duplex & multi-family.
Develop an Affordable Housing Plan under 40B Planned Production Program	Communities develop a plan pursuant to DHCD guidelines and request certification of compliance by demonstrating that low and moderate income housing has increased by at least $\frac{3}{4}$ of 1% of total year round housing units during the calendar year for which certification is requested. Once certified, the town may deny comprehensive permit applications for a year; if they have produced 1.5%, they may deny applications for 2 years.

Work Regionally to Meet Housing Needs

Strategy	Description / Rationale
Regional Coalitions	Regional coalitions advocate for housing, undertake public information/education campaigns, & serve other purposes. The MetroWest Affordable Housing Coalition, formed by clergy, legislators, & others, has over 50 members from 25 community & faith-based organizations, local businesses, etc. They have been raising awareness & stimulating public

	dialogue about the lack of affordable housing & encouraging solutions.
Regional cooperation among non-profits or housing authorities	To eliminate redundancies or fill service delivery gaps. Some local housing authorities provide services to neighboring communities. E.g., Hudson Housing Authority provides rental assistance, LIP program resales, & lotteries services to Stow on a fee basis. Housing authorities also informally share equipment, computer technical assistance, etc. Statewide legal & supportive services are available centrally to housing authorities.
Regional non-profits, housing partnerships, land trusts, & housing trust funds	Community Land Trust of Cape Ann (CLTCA) is a private non-profit to create affordable housing & provide stewardship of land. It retains title to the land, keeping housing permanently affordable. CLTCA has purchased several buildings, rehabbed them, & sold or rented units at affordable prices. There is also a North Shore Housing Trust Fund.
Regional funding campaign	Could tap private donations, businesses & business associations, private foundations, religious organizations, etc., for specific clientele or development or for regional trust fund.
Housing services consortiums	Some housing support services are provided regionally through regional non-profits, CAP agencies, etc.
Potential opportunities under 40B proposed legislation	Option 1 is project-specific; contiguous communities could collaborate to share infrastructure costs associated with housing growth & benefits of housing growth, as reflected in attainment of housing goals. Option 2 is a broader opportunity for contiguous communities to plan proactively & collaborate in addressing regional housing needs. It creates a pilot program for up to 3 housing regions.

Additional Resources

- MAPC, *Local Housing Checklist*, at www.mapc.org
- Citizens' Housing & Planning Association (CHAPA) provides many useful resources, especially *Taking the Initiative: A Guidebook on Creating Local Affordable Housing Strategies*. Call (617) 742-0820 or visit www.chapa.org
- Department of Housing and Community Development, www.state.ma.us/dhcd
- For information on expiring use properties, contact CEDAC at (617) 727-5944 or www.cedac.org
- Local Banks
- Mass. Housing Partnership (MHP) for project-specific technical assistance, identification & packaging of financial resources, rental financing, homeownership programs, technical publications, examples of local strategies, etc. Visit www.mhp.net or call (617) 338-7686.

Appendix III – Housing Strategies: Getting Started

HOUSING STRATEGIES: GETTING STARTED

This section outlines a series of strategies along with some information on how to begin to implement them. You are urged to review these with appropriate committees or boards, establish short-term and long-term priorities, and set up a schedule with milestones for completion of tasks.

Planning & Organizational Resources

- **Develop Leadership and Organizational Capacity**

In order to actively guide housing, it is important to establish a strong voice for housing and an organizational framework to pursue plans. The most important first steps are for local leaders to

- make a strong public commitment to housing; and
- establish a housing partnership or housing committee.

The committee should generally be appointed by the Mayor or Board of Selectmen and should include representatives of housing- and planning-related town boards and relevant agencies (planning board, housing authority); representatives of affected groups (e.g., Council on Aging); and local citizens with interest or expertise in housing (developers, lenders, business leaders, clergy). The committee's role could include recommending policy, planning, guiding action, engaging the public, and reporting regularly to the Mayor or Selectmen.

Communities that already have a Housing Partnership may wish to take steps to enhance its effectiveness and “grow” the constituency for housing. The Housing Partnership, for example, might review its role and procedures to identify ways it might be more effective. Questions to ask include: Does it report regularly to the leadership? Does it have an action plan with a timetable and milestones? Does it get adequate publicity for its successes?

Similarly, officials could look for opportunities to promote housing through public events, contacts with the print media and cable television, or displays in public places. They might also review procedures to ensure that relevant departments interact with each other regularly on housing issues, coordinate and cooperate, and give a consistent message.

- **Designate a staff person responsible for housing**

Each community needs a plan to meet its housing needs and a person charged with implementation. Staff support would serve as staff to the housing committee and as liaison to other planning functions, lead the community's housing efforts, and enable it to be more proactive in promoting housing.

- **Form a housing development non-profit**

Much of the affordable housing preserved, rehabilitated, or created in recent years has been done by non-profit developers. They provide expertise in development and financing, have access to a range of funding sources, and provide an added proactive voice for housing. Most non-profits are created independently and are not officially connected with town government. The Housing Corporation of Arlington, WATCH in Waltham, Caritas Communities, Inc., and Habitat for Humanity are varieties of independent non-profits. Some non-profits are created in conjunction with town government and use town staff; the Brookline Improvement Coalition is an example. Some non-profits are subsidiaries of local housing authorities, enabling them to access added funding, operate with fewer restrictions, and broaden their scope to include homeownership and mixed-income or mixed-use projects. Wayland, Manchester, and Needham have used this model.

An alternative would be to partner with an existing non-profit with skills in housing development, rehabilitation, and financing. Massachusetts has an extensive network of nonprofits and many of them can operate outside their "home" base. Community Builders, for example, the largest urban housing developer in the country, operates nationally; on a smaller scale, groups like the Women's Institute for Housing and Economic Development, Caritas Communities, Inc., and Habitat for Humanity can also develop or rehabilitate housing in many communities. Every community is also served by a regional non-profit; which provides a variety of housing-related services.

For more information, see <http://corp.sec.state.ma.us> and www.mhp.net. For information on regional non-profits, contact the Massachusetts Nonprofit Housing Association.

- **Form a Community Land Trust (CLT)**

A CLT is a member-controlled non-profit that acquires and holds land but sells or rents the housing on it to residents. Founded on the principle that land is a common heritage and not a commodity, the CLT holds title to the land in trust for the community. This technique keeps housing permanently affordable by removing the cost of land from the housing equation and limits the increases in future housing costs. The lease of the land to the homeowner is the legal instrument that allows the trust to control the resale price. Some Community Land Trusts serve multiple purposes, combining affordable housing with open space preservation.

One successful example in the MAPC region is the Community Land Trust of Cape Ann, which has been developing affordable housing since 1990. It has four completed projects, one in progress, and one on the drawing boards. The complexity of the projects has increased with their learning curve. The housing they have produced is very affordable, is addressing the needs of local workers, and is contributing to community revitalization efforts.

For more information about CLTs in general, contact the Institute for Community Economics (ICE) at www.iceclt.org. For information about the Community Land Trust of Cape Ann, visit www.cltca.org.

Public Information & Outreach

- **Undertake a public education campaign**

Many people have misperceptions about what “affordable housing” is, who lives in it, and who cannot afford market-rate housing in the current market. Local governments or citizen groups can undertake a public outreach campaign to educate people about what’s “affordable” and about how housing affects local citizens and the region’s economy.

Many of the materials in your Community Development Plan, including the full set of PowerPoint slides presented at the Housing Forum, are a good start. The local press could publish these materials and supplement them with additional information and human-interest stories of affected citizens. Organizers could also contact local cable for assistance.

Financial Resources

- **Join a consortium to gain access to federal HOME funds**

Many communities that do not have direct access to federal housing funds gain access by joining a consortium with abutting communities. Federal money allows communities to have greater control over housing development and more resources to create and maintain affordable housing. HOME funds can be used for rental housing production or rehabilitation, first-time homebuyer assistance, tenant-based rental assistance, and rehabilitation assistance for homeowners. Funds are relatively flexible; and the predictability of funding allows communities to plan ahead.

As an alternative, communities can apply directly to the state for HOME funds on a competitive basis for rental housing production and rehabilitation programs, first-time homebuyer assistance, and rehabilitation assistance for homeowners.

- **Adopt the Community Preservation Act (CPA)**

To date, 65 Massachusetts communities have adopted CPA, raising over \$55 million. Of this, 42% has been used for housing and has produced at least 260 housing units. Adoption of CPA would provide more locally controlled resources and more partners with resources and expertise. It helps communities balance housing, open space, and other priorities.

For information on local campaigns to adopt CPA and success stories about how funds have been used, visit www.communitypreservation.org and www.tpl.org

- **Set up a Housing Trust Fund**

This can be done in conjunction with inclusionary or incentive zoning; funds could be generated by allowing developers to pay into a fund instead of creating on-site units. Over time, there may be other sources of funds as well. Funds could be used to write down the interest on rehab loans, provide gap financing for property acquisition, write down mortgage interest, provide down payment or closing-cost assistance to first-time homebuyers, or for other purposes. Funds generated locally have more flexibility than state or federal funds with specific program requirements

Zoning

- **Allow mixed-use zoning, including housing above stores, as an overlay or as a new zoning district**

Allowing a mix of residential, commercial, and other uses where there is infrastructure to support it is a prime example of “smart growth.” If your community already allows mixed use in some areas, consider extending the concept to other commercial areas or transit-accessible areas. The Lincoln Institute recently published an excellent working paper with examples of how this concept has been used in various types of settings in metro Boston. See James C. O’Connell, *Ahead or Behind the Curve?: Compact Mixed-Use Development in Suburban Boston*, available at www.lincolninst.edu.

Many communities use “overlay” districts to promote mixed use with or without special affordable housing provisions or to accomplish specific purposes such as resource protection or transit-oriented development. An overlay is a district that is superimposed on existing or underlying zoning to add more restrictions, allow more uses or greater flexibility, or add incentives such as density bonuses. Where it is more permissive than the underlying zoning, it is an alternative to the underlying zoning and generally requires a special permit. It is most appropriate where there is a specific goal and the overlay is relatively consistent with the underlying zoning. Where the new concept differs substantially from the old, it may be less confusing to change the underlying zoning rather than go the overlay route.

- **Adopt Inclusionary or Incentive Zoning**

“Inclusionary” zoning requires residential developers to provide for affordable housing. “Incentive” zoning provides that developers seeking special permits may receive some sort of beneficial treatment, such as increased density, in exchange for providing affordable housing. In either case, the law may limit the developer to producing units within the development or it may allow off-site production or in-lieu payment into a housing fund to support a range of housing programs.

Inclusionary/incentive zoning offers a scattered site, low-impact mechanism for communities to control growth and increase affordable housing in proportion to new market-rate housing. It uses an “internal” subsidy, using the proceeds from the market-rate units to support the affordable units. It does not require additional financial support, and it works especially well in strong markets.

Many communities in Massachusetts have adopted this technique, with varying degrees of success. Communities include Arlington, Belmont, Brookline, Cambridge, Lexington, and Newton. There is considerable difference in the models used. The Newton ordinance is among the oldest, is fairly structured, and promotes housing for those earning low incomes. Lexington, on the other hand, has a policy rather than a by-law, with a series of flexible options including a range of affordability levels. With no land zoned for multi-family housing, the Town uses the policy to guide the Planning Board in determining whether to recommend development-enabling zoning changes to Town Meeting.

In designing a local ordinance, it is probably most useful to look at the most recently adopted laws, since they benefit from the experience of others. Belmont and Arlington are among the most recent, and both by-laws are available on their websites: for Belmont, see Section 6.10 of the Zoning By-law at www.town.belmont.ma.us and for Arlington see Section 11.08 at www.town.arlington.ma.us. In its brief existence, Arlington’s law has been very successful. The Town has six units that are completed and occupied, five that are approved but not yet under construction, and about six to ten in the proposal phase.

For an excellent discussion of the issues involved in formulating a good law, see *Inclusionary Zoning: Guidelines for Cities and Towns*,” prepared by Edith M. Netter, Esq., and appearing on the Massachusetts Housing Partnership website, www.mhp.net. Other relevant documents on the same site are *Inclusionary Zoning: Lessons Learned in Massachusetts* and *Zoning for Housing Affordability*. As with many housing strategies, a good starter discussion also appears in CHAPA’s *Taking the Initiative* (see www.chapa.org).

- **Adopt Linkage**

Linkage is similar to inclusionary zoning but applies to commercial and industrial development and requires either a financial contribution to affordable housing or off-site housing produced through new construction or acquisition and rehabilitation. The basis of linkage is the premise that the new non-residential development causes a direct and measurable need for more affordable housing; thus there must be a documented “link” or “nexus” between the non-residential development and the resultant housing impact.

Boston and Cambridge both have long had highly successful linkage programs. Such programs work best in communities where there is substantial new commercial development with sufficient demand to absorb the added costs of linkage. Where commercial growth is less secure, there may be concern about jeopardizing development revenue by “killing the goose that lays the golden egg.”

If your community wishes to consider linkage, you should first evaluate the strength of the commercial and industrial market to ensure that it can withstand added costs without losing developers to other communities.

- **Increase density in some residential districts**

In the MAPC region, much of the remaining undeveloped residential land is zoned for single-family development, usually at lower densities than existing housing. Often it is farther from town centers, transit, and other services. As a result, future housing is likely to be larger, less diverse, and more expensive than today’s homes. But as baby-boomers age, there will be a need for more smaller-scale, more manageable housing, preferably closer to transit and services.

Many communities are taking steps to allow higher densities in some areas, allowing townhouses, garden apartments, accessory apartments, or more multi-family housing. This is especially appropriate near town centers, near transit, and in “transition” areas between uses.

- **Increase density and housing by means of “adaptive reuse”**

Communities can allow smaller units within larger residential structures or conversion of non-residential structures to residential uses or to a mix of uses, including residential, retail, etc. This technique makes more efficient use of existing buildings, promotes greater affordability and smart growth, and helps revitalize underutilized or distressed properties. Allowing conversion of large residences to smaller units is quite similar to adding accessory apartments (see below). Converting non-residential buildings to housing or to a mix of housing, retail, and perhaps office, is particularly appropriate in communities with considerable older, underutilized property. There are many adaptive reuse “success stories,” such as Woburn’s conversion of the Pilgrim Building to retail with four affordable housing units on two upper floors.

- **Encourage residential uses and phase out industrial uses in some areas**

Residential uses, including more affordable housing, can help revitalize some areas or utilize parcels that are underutilized.

- **Cluster zoning**

Cluster zoning allows more flexible site design than traditional single-family zoning. It allows developers to cluster housing units at greater density in some parts of a site while protecting open space or other natural resources on other parts of the site. Designs respect and work in concert with the natural contours and features of the land. Cluster development makes more efficient use of a site, promotes a balance of housing and open space, improves site design, and offers better protection of critical natural resources

Clusters alone do not necessarily make housing more affordable, but cluster by-laws and ordinances can be designed to encourage inclusion of affordable housing units through use of a density bonus or other benefits.

- **Reduce parking requirements, especially for senior housing, housing near transit, and mixed used housing where shared parking possible**

Parking requirements often act as impediments to development and drive up costs. Sometimes these requirements are unnecessarily onerous, especially when some residents are less likely to have cars and when different users may need parking at different times of day. Seniors and people living near transit may have lower parking need, while mixed-use development may be an opportunity for shared parking.

Communities should review parking requirements for possible reductions.

- **Encourage accessory apartments or other accessory dwelling units (ADUs), accompanied by an “amnesty program” for existing units and affordability provisions**

An accessory apartment is generally a second, subordinate dwelling unit within a single-family house. Accessory units provide rental opportunities for tenants, added income for owners, and more efficient use of space. For older homeowners, tenants may offer additional benefits by assisting with chores or yard work and providing a sense of security.

Other accessory dwelling units (ADUs) may involve the reuse or adaptation of secondary structures – e.g., barns, garages, or carriage houses – on the same lot but in a separate structure. The same general principle applies to the conversion of large, single-family residences to two or more unit structures. In all these variations, units provide similar benefits.

Many communities allow accessory units in some or all residential zoning districts, sometimes by right and sometimes by special permit, usually with some restrictions on size and appearance, and occasionally with provisions to encourage affordable rents, income eligibility of tenants, and inclusion of units in the state's Chapter 40B Subsidized Housing Inventory.

There are also illegal accessory units that remain "under the radar." Some communities have taken steps to legalize these units by enacting "amnesty" provisions to encourage code compliance and more affordable housing.

The examples below show how local communities have used these approaches and how they have designed programs to ensure that units "count" toward Chapter 40B.

Lexington: amnesty and encouragement. Lexington set up an amnesty program as part of a larger program to encourage accessory apartments. According to Lexington's 1983 by-law, the purpose of accessory units is to:

- increase the number of small dwelling units available for rent in the town,
- increase the range of choice of housing accommodations,
- encourage greater diversity of population with particular attention to young adults and senior citizens, and
- encourage a more economic and energy-efficient use of the town's housing supply while maintaining the appearance and character of the town's single-family neighborhoods.

When Lexington passed the by-law, the amnesty provision allowed a two-year period in which to get a certificate of occupancy for a non-conforming second dwelling unit. In 1988, it provided for a way to legalize a dwelling unit in an accessory structure. According to the building commissioner, by June of 1987 the Town had received and reviewed 265 applications, and 234 were determined to be legal units. The remaining 31 were awaiting either special permits, repairs to bring them into compliance with the State Building Code, or additional research to verify their history. Of the 265 units, only 27 would be considered accessory apartments; the others were classified as two-family houses.

Lexington also has fairly lenient rules regarding existing units and creation of new units. Their requirements, for example, limit the accessory unit to two bedrooms but do not specify the number of people who may live in it. They require only one parking space for the accessory unit and specify that only one parking space have direct access to the street.

How Affordable Accessory Apartments can "Count" on the 40B Subsidized Housing Inventory

To encourage local affordable housing initiatives, the state has designed a Local Initiative Program (LIP) setting forth requirements and standards for units that will

qualify as low or moderate income housing on the Subsidized Housing Inventory. Under this program, affordable accessory apartments would be considered “Local Initiative Units” or “LIP Only” units and would need to meet State Sanitary Code requirements, be occupied by a household earning no more than 80 percent of the area median income, and be subject to a Use Restriction of at least 15 years. The latter may be revocable upon sale of the principal residence.

Requirements are detailed in state regulations – 760 CMR 45.00 (especially 45.03). They cover the need for local action, income and asset limits, affordability, use restrictions, reporting, and nondiscrimination in tenant and buyer selection.

Barnstable: affordability. Barnstable has a by-law that links accessory dwelling units to affordability and is designed to ensure that the units “count” toward the 40B Subsidized Housing Inventory. It applies to both new and existing accessory units. New units are limited to single units in single-family homes, while existing units may also include more than one unit in a multi-family structure or in a detached structure such as barn, carriage house, or garage. The original by-law was amended to allow construction of new units attached to existing structures as well as conversion of existing structures. The text of the by-law appears in the Appendix at the end of this report.

The intent of the law is to bring unpermitted units into compliance and to encourage the use of existing dwellings to create additional affordable housing. To comply with state law, Barnstable established a local Chapter 40B program which helps owners of accessory units by waiving certain fees, assisting with the process, and identifying funds for rehabilitation. To qualify for amnesty or to receive a permit for new units, properties must meet several criteria and owners must agree to rent to people with incomes under 80% of median, charge affordable rents, and execute a deed restriction to ensure affordability. Barnstable also uses CDBG money for grants to assist with code compliance and to monitor program compliance (i.e., income verifications and rent restrictions).

In the three years of the program, over 60 units have been approved for inclusion in the 40B Inventory. The program is spurring creation of new units, with the greatest interest in the conversion of detached structures.⁶

Scituate: affordability. More recently, Scituate has proposed revisions to its Zoning By-Law to encourage affordable accessory apartments and to ensure that they will “count” on the Chapter 40B Subsidized Housing Inventory consistent with the most recent regulations and guidance from the state’s Department of Housing and Community Development (DHCD). The proposed revisions, drafted by consultant Judi Barrett, appear in the Appendix to this report. They are probably the most up-to-date in terms of consistency with DHCD guidance.

⁶ Source: Paulette McAuliffe & Kevin Shea, Town of Barnstable.

Property Resources - Preservation

- **Take steps to retain expiring use properties as affordable housing**

Affordability in some privately owned, mixed-income developments is governed by use restrictions that allow owners to sell or rent at market rates after a given number of years. There are steps communities can take to extend affordability, beginning by investigating the status of the property and its restrictions and getting technical advice and assistance. The list of expiring use properties and information about maintaining affordability is available at www.chapa.org. Expert guidance is available at CEDAC at (617) 727-5944 or www.cedac.org.

Communities with expiring use properties should consider this issue a priority; it is almost always preferable and more cost-effective to preserve existing affordable housing rather than build new affordable housing. It is especially important for these developments, which are often well-maintained properties housing long-time community residents.

- **Enact the “residential exemption” to offer a tax incentive for owner occupancy**

At local option, communities may exempt a percentage of the average assessed value of residential parcels from owner-occupants’ bills. The intent is to promote owner occupancy, providing proportionately greater benefit to lower valued homes. Is a disincentive to absentee ownership and may promote better property maintenance and repair. This tool is most appropriate in communities with substantial rental stock.

- **Develop a plan for reuse of surplus municipally owned property, including a property inventory, priority list, and implementation steps.**

Use of public property for housing dramatically lowers acquisition and land costs, thus lowering the cost of housing built there. Surplus property provides an opportunity to address a range of local needs. Communities should view this property and their various needs comprehensively and develop a plan to balance the need for housing, open space, and other priorities. With an overall plan, communities can prepare in advance for timely implementation actions.

- **Identify other potentially available public or institutional property as well as privately owned vacant and underutilized properties.**

Types of properties include those owned state, federal, or county governments; authorities and quasi-publics; the MBTA; colleges and universities; and religious organizations.

- **Develop a system to track & pursue tax title property**

Tax title property may offer affordable housing opportunities. The City of Waltham, for example, acquired a tax title property that is being demolished and rebuilt as affordable housing. Communities where such property is likely to exist should develop a system where the assessor, the planner, and other relevant officials share information in the pursuit of affordable housing opportunities.

- **Offer rehab loans &/or grants with funds from state programs, HOME consortia, or other sources**

These programs maintain and improve existing property. For information, contact DHCD at (617) 573-1100 or at www.state.ma.us/dhcd or contact MassHousing at (617) 854-1000. Appendix B of CHAPA's *Taking the Initiative* (see www.chapa.org) includes a comprehensive catalogue of common funding sources. It includes grants, loans, and financing tools for predevelopment activities; affordable homeownership, rental housing, and housing for seniors and special needs; and preservation of existing affordable housing.

- **Strengthen code enforcement**

For communities where property maintenance and absentee ownership are significant issues, more vigorous and consistent code enforcement programs can help improve property. Advanced publicity alone may encourage improvements. It is less heavy handed to temper the “sticks” of code enforcement with the “carrots” of rehab loans or grants, technical assistance, or other types of help and support.

Local Production Initiatives

- **Develop an Affordable Housing Plan under 40B Planned Production Program**

The state provides an option for communities to exercise greater control over housing development based on an Affordable Housing Plan and progress toward achieving the 10% goal. Communities develop a plan pursuant to DHCD guidelines and request certification of compliance by demonstrating that low and moderate income housing has increased by at least $\frac{3}{4}$ of one percent of total year round housing units during the calendar year for which certification is requested. Once they are certified, they may deny comprehensive permit applications for a year; if they have produced 1.5%, they may deny applications for two years.

The plan must include a needs assessment, housing goals, strategies, and a description of use restrictions. Communities may use existing plans in part or in total, but must include a summary document in the appropriate format. *Guidelines for Planned Production Regulation 760 CMR 31.07 (1) (i)* are available at www.mass.gov/dhcd along with samples of local plans that have received certification.

- **Local Initiative Program (LIP)**

The Local Initiative Program (LIP) is a state housing initiative designed to encourage communities to produce low and moderate income housing. The program operates through state regulation (760 CMR 45.00 et. seq.) and agency-issued *Guidelines*. Communities may produce units eligible for the Chapter 40B subsidized housing inventory through local zoning or other agreement with the developer (see "Local Initiative Units," 760 CMR 45.03). Projects with a minimum of 25% affordable units for households at or below 80% of median income, or 20% of affordable units for households at or below 60% of median income that require the issuance of a Comprehensive Permit are also eligible for inclusion in the inventory through the "Local Initiative General Program" (760 CMR 45.05).

These options offer communities an opportunity to tailor programs to local needs and to get credit toward 40B for housing units meeting the statutory qualifications. In addition to meeting the affordability criteria above, the units must be subject to use restrictions and be sold/rented using affirmative marketing procedures.

The LIP program options could be used to promote accessory apartments, housing above stores, mixed-use development, infill, adaptive reuse, substantial rehabilitation, or other types of housing. The program is especially useful in supporting small, relatively low density, scattered site development consistent with community character as an alternative to large-scale housing development.

Applications and information are available in the 40B section of the DHCD website at www.mass.gov.dhcd.

APPENDIX IV – Accessory Dwelling Unit Bylaws

TOWN OF BARNSTABLE ACCESSORY DWELLING UNIT & AMNESTY PROVISIONS

ARTICLE LXV - Comprehensive Permits for Pre-Existing and Unpermitted Dwelling Units and for New Dwelling Units in Existing Structures.

1.0: Intent and Purpose.

1.1 The intent of this Ordinance is to provide an opportunity to bring into compliance many of the currently unpermitted accessory apartments and apartment units in the Town of Barnstable, as well as to encourage the use of existing dwellings to create additional affordable housing.

1.2 This Ordinance recognizes that although unpermitted and unlawfully occupied, these dwelling units are filling a market demand for housing at rental costs typically below that of units which are and have been, lawfully constructed and occupied.

1.3 It is in the public interest and in concert with its obligations under state law, for the Town of Barnstable to offer a means by which so-called unpermitted and illegal dwelling units can achieve lawful status, but only in the manner described below.

1.4 It is the position of the Town of Barnstable that the most appropriate mechanism for allowing for the conversion of unlawful dwelling units to lawful units is found in GL c.40B, ss. 20-23, and the so-called “Comprehensive Permit” program. This provision of state law encourages the development of low and moderate-income rental and owner occupied housing and provides a means for the Board of Appeals to remove local barriers to the creation of affordable housing units. These barriers include any local regulation such as zoning and general ordinances that may be an impediment to affordable housing development.

1.5 The Local Comprehensive Plan states that the town should commit appropriate resources to support affordable housing initiatives. Under this ordinance, the town commits the following resources to support this affordable housing initiative:

- a. Waiver of fees for the inspection and monitoring of the properties identified under this ordinance;
- b. Designation of town staff to assist the property owner in navigating through the process established under this ordinance;
- c. To the extent allowable by law, the negative effect entailed by the deed restriction involved will be reflected in the property tax assessment, and

d. To assist property owners in locating available municipal, state and federal funds for rehabilitating and upgrading the properties identified under this ordinance

1.6 The Local Comprehensive Plan supports, in conjunction with a variety of other strategies, the conversion of existing structures for use as affordable housing.

1.7 Through the creation of a local Chapter 40B program, which uses state and federal subsidies, the town can create a mechanism to utilize existing structures for the creation of affordable housing units that is consistent with the town's identified housing needs.

2.0: Creation of Local Chapter 40B Program:

As part of the town's efforts to create the type of affordable housing that best meets the needs of the town and its residents, the town manager and staff designated by the town manager, shall establish a screening process and criteria for the preexisting and unpermitted units described herein, as well as for new units in existing structures, as part of a local Chapter 40B program which program will provide the state or federal subsidy necessary to establish standing under Chapter 40B for units being created and/or permitted in existing dwellings and structures.

3.0: Amnesty Program

Recognizing that the success of this Ordinance depends, in part, on the admission by real property owners that their property may be in violation of the zoning ordinances of the town, the town hereby establishes the following Amnesty Program:

3.1: The threshold criteria for units being considered as units potentially eligible for the Amnesty Program are:

a) Real property containing a dwelling unit or dwelling units for which there does not exist a validly issued variance, special permit or building permit, does not qualify as a lawful, non-conforming use or structure, for any or all the units, and that was in existence on a lot of record within the Town as of January 1, 2000; or

b) Real property containing a dwelling unit or dwelling units which was in existence as of January 1, 2000 and which has been cited by the Building Department as being in violation of the zoning ordinance and

(c) The property owner has the burden of demonstrating to the Building Commissioner that the criteria in either paragraphs (a) and/or (b) have been satisfied.

d) If any dwelling unit or units identified herein are occupied during the period of time when amnesty is in effect, said unit must be inspected by the entity

designated by the town manager and found to be in conformance with the State Building Code and State Sanitary Code.

3.2: Procedure for Qualifying for Amnesty for Units that Meet Threshold Criteria:

- a) The unit or units must either be a single unit accessory to an owner occupied single family dwelling or one or more units in a multifamily dwelling where there exists a legal multifamily use but one or more units are currently unpermitted;
- b) The unit(s) must receive a site approval letter under the town's local chapter 40B program;
- c) The property owner must agree that if s/he receives a comprehensive permit, the unit or units for which amnesty is sought will be rented to a person or family whose income is 80% or less of the Area Median Income (AMI) of Barnstable-Yarmouth Metropolitan Statistical Area (MSA) and shall further agree that rent (including utilities) shall not exceed the rents established by the Department of Housing and Urban Development (HUD) for a household whose income is 80% or less of the median income of Barnstable-Yarmouth Metropolitan Statistical Area. In the event that utilities are separately metered, the utility allowance established by the Barnstable Housing Authority shall be deducted from HUD's rent level.
- d) The property owner must agree, that if s/he receives a comprehensive permit, that s/he will execute a deed restriction for the unit or units for which amnesty is sought, prepared by the Town of Barnstable, which runs with the property so as to be binding on and enforceable against any person claiming an interest in the property and which restricts the use of one or more units as rental units to a person or family whose income is 80% or less of the median income of Barnstable-Yarmouth Metropolitan Statistical Area (MSA).
- e) Upon receiving the site approval letter under 3.2(b) above, the property owner shall within three (3) months file an application for a comprehensive permit under the local Chapter 40B program with the Barnstable Zoning Board of Appeals.

3.3: Obtaining Amnesty and Duration.

- a) No zoning enforcement shall be undertaken against any property owner who demonstrates that s/he meets the threshold criteria under section 3.1 and further demonstrates that s/he is proceeding in good faith to comply with the procedures under Section 3.2 to obtain a comprehensive permit.
- b) Any protection from zoning enforcement under this ordinance shall terminate when: 1) A written determination is issued under the local Chapter 40B program that the criteria under Section 3.2 and the local Chapter 40B program cannot be

satisfied; or 2) it is determined that the property owner is not proceeding diligently with his/her Chapter 40B application; or 3) the property owner's Chapter 40B application is denied. A person is deemed "not to be proceeding diligently" if s/he does not receive a comprehensive permit within twelve months from the date of issuance of the site approval letter under the local Chapter 40B program.

c) This amnesty program shall be reviewed by the town council no later than October 1, 2003.

4.0: New Accessory Units in Single Family Owner Occupied Dwellings.

For a proposed new unit to be eligible for consideration under the local chapter 40B program, it must be a single unit accessory to an owner occupied single-family dwelling and comply with the following:

- a) The unit(s) must receive a site approval letter under the town's local chapter 40B program;
- b) The property owner must agree that if s/he receives a comprehensive permit, the accessory dwelling unit will be rented to a person or family whose income is 80% or less of the Area Median Income (AMI) of Barnstable-Yarmouth Metropolitan Statistical Area (MSA) and shall further agree that rent (including utilities) shall not exceed the rents established by the Department of Housing and Urban Development (HUD) for a household whose income is 80% or less of the median income of Barnstable-Yarmouth Metropolitan Statistical Area. In the event that utilities are separately metered, the utility allowance established by the Barnstable Housing Authority shall be deducted from HUD's rent level.
- c) The property owner must agree, that if s/he receives a comprehensive permit, that s/he will execute a deed restriction for the unit, prepared by the Town of Barnstable, which runs with the property so as to be binding on and enforceable against any person claiming an interest in the property and which restricts the use of the one unit as a rental unit to a person or family whose income is 80% or less of the median income of Barnstable-Yarmouth Metropolitan Statistical Area (MSA).
- d) Upon receiving the site approval under 4(a) above, the property owner shall file an application for a comprehensive permit under the local Chapter 40B program with the Barnstable Zoning Board of Appeals.

5.0: Quarterly Reporting.

The Town Manager shall report to the Town Council no less than quarterly as to the use of this ordinance, paying particular regard to the level of participation.

Approved by a vote of the Town Council on November 16, 2000, by a roll call vote of 9 Yes 1 Abstain.

Proposed Scituate Zoning Bylaw Revision – 3/13/04 Annual Town Meeting
REVISE AFFORDABLE ACCESSORY DWELLING PROVISIONS

1. Amend Section 200, Definitions, by adding the following new definitions:

Affordable Accessory Dwelling

An accessory dwelling that is affordable to and occupied by a low- or moderate-income household, meets the definition of low- or moderate-income housing at 760 CMR.30.02, and is eligible for inclusion in the Chapter 40B Subsidized Housing Inventory through the Local Initiative Program.

Low- or Moderate-Income Household

A household with income at or below 80% of area median income, adjusted for household size, for the metropolitan or non-metropolitan area that includes the Town of Scituate as determined annually by the U. S. Department of Housing and Urban Development (HUD).

Local Initiative Program

A program administered by the Massachusetts Department of Housing and Community Development (DHCD) pursuant to 760 CMR 45.00 to develop and implement local housing initiatives that produce low- and moderate-income housing.

Maximum Affordable Rent

Monthly rent, exclusive of utilities, that does not exceed 30% of the monthly income of a household earning 70% of area median income based on household size, except that if the dwelling unit receives a state, federal or local subsidy, the maximum rent may be as allowed by the subsidy program so long as the tenant share of rent does not exceed 30% of the monthly income.

Subsidized Housing Inventory

The Department of Housing and Community Development Subsidized Housing Inventory provided in 760 CMR 31.04.

Qualified Renter

A low or moderate-income household that rents and occupies an affordable accessory dwelling unit.

2. Delete the present Sections 530.5 and 530.6 and replace them with the following:

530.5 Affordable Accessory Dwellings

A. Purpose

The purposes of this bylaw are to encourage accessory dwellings that are affordable to low or moderate-income households and that qualify for inclusion in the Subsidized Housing Inventory under G.L. c.40B, Sections 20-23, as low- or moderate-income housing units.

B. Applicability

An affordable accessory dwelling shall be permitted in the A-1, A-2 and A-3 Residence Districts and the Business District provided that the dwelling complies with the requirements of this bylaw.

C. Relationship to Site Plan Review

An application for an affordable accessory dwelling permit shall be subject to site plan review under Section 730.

D. Basic Requirements for Affordable Accessory Dwellings

The following requirements apply in all zoning districts in which an affordable accessory dwelling is permitted:

1. No more than fifteen new permits for affordable accessory dwellings shall be issued in a single calendar year.
2. The affordable accessory dwelling must comply with low- or moderate-income housing regulations and guidelines of the Local Initiative Program (LIP), 760 CMR 45.00, et seq., in effect on the date of application for a building permit.
3. The affordable accessory dwelling must be rented to and occupied by a qualified renter as defined in Section 200.
4. The monthly rent shall not exceed the maximum affordable rent for a household of appropriate size for the accessory dwelling unit.
5. The affordable accessory dwelling shall be secured by an affordable housing use restriction or a regulatory agreement and declaration of restrictive covenants effective for a minimum of fifteen (15) years, recorded at the Registry of Deeds, in a form that meets the approval requirements of the Local Initiative Program.
6. The owner of the structure with an affordable accessory dwelling shall certify annually to the Scituate Housing Authority or its designee, or another entity determined

by the planning board, that the dwelling is occupied by a qualified renter and the rent is equal to or less than the maximum affordable rent. Failure of the owner to comply shall be deemed a violation of this bylaw and subject to the enforcement provisions of Section 930.

7. The affordable accessory dwelling shall clearly be a subordinate part of the single-family dwelling or business use.

8. Two private off-street parking spaces shall be available for use by occupants of each affordable accessory dwelling.

9. The affordable accessory dwelling must be designed so that the appearance of the building remains unchanged to the maximum extent practical. Unless otherwise required by the Massachusetts Building Code, any new exterior stairs needed to provide primary or secondary means of egress for the affordable accessory dwelling shall be located on the side or rear of the building.

10. The design and size of the affordable accessory dwelling shall conform to all applicable standards in the building, plumbing, electrical, mechanical, fire, health and any other applicable codes

11. The septic system serving the lot shall meet current Title V regulations and shall be reviewed and approved by the board of health.

E. Additional Requirements for Affordable Accessory Dwellings in a Residence District

In addition to the requirements of 530.5 (D), an affordable accessory dwelling permitted in a Residence District must meet the following:

1. The accessory dwelling must be located within the interior of and under the same roof as a single-family home or in a structure attached thereto, except that on conforming lots in Residence A-1 and A-2, the accessory dwelling may be located in a detached structure on the same premises as a single-family home, such as a garage or barn.

2. The lot must conform to the minimum lot area, width and frontage requirements of Section 610.

3. Not more than one affordable accessory dwelling unit shall be permitted in a single-family home or in an attached or detached structure on the same premises.

4. For an affordable accessory dwelling in a single-family home or on the same premises as a single-family home, the owner must occupy one of the units as a permanent legal residence.

5. The living space in an affordable accessory dwelling shall not exceed a maximum of seven hundred and fifty square feet or forty percent of the gross floor area of the single-family home, whichever is greater, and shall contain no more than two bedrooms. For purposes of this section, the computation of maximum floor area shall be limited to the principal residence and shall exclude the floor area in an attached or detached structure.

F. Additional Requirements for Affordable Accessory Dwellings in a Business District

In addition to the requirements of 530.5 (D), an affordable accessory dwelling permitted in a Business District must meet the following:

1. No more than three affordable accessory dwellings may be permitted created in any one building.
2. The dwelling must be located above the first floor or street level of a structure used principally for businesses, except that one affordable accessory dwelling may be located on the first floor if:
 - a. The primary entrance to the dwelling is on an elevation other than the front elevation facing the street, and
 - b. The dwelling unit has direct access to the parking spaces associated with it, and
 - c. The unit is accessible to persons with disabilities, determined by the building commissioner to meet applicable regulations of the Massachusetts Architectural Access Board for dwelling unit interiors, entrances, accessible routes and parking, and
 - d. The unit is occupied by a qualified renter household with one or more persons with disabilities or a qualified renter household of persons over fifty-five years of age.

G. Affordable Accessory Apartment by Special Permit

1. The planning board may waive the requirements of Section E or Section F above by issuing a special permit for an affordable accessory dwelling. Application for a special permit for an affordable accessory dwelling shall be in accordance with the procedures of Section 530.3.
2. The planning board retains the right to revoke a special permit issued hereunder if the applicant violates any provision of this Bylaw or any condition imposed upon the issuance of the special permit. Revocation may occur only after a hearing held on notice to the applicant.

H. Occupancy Permit

1. No occupancy permit shall be issued for an affordable accessory dwelling until the applicant submits the following documentation to the Planning Board, who shall notify the Building Commissioner that it has been provided:

- a. A copy of the affordable housing use restriction or regulatory agreement and declaration of restrictive covenants, signed by the owner and the town, the original of which must be filed at the Registry of Deeds.
- b. A certificate of approval from the Massachusetts Department of Housing and Community Development.
- c. A notarized affidavit from the owner of the property, verifying that the unit will be occupied by a qualified renter, that the owner will provide annual certification of compliance with this bylaw as required in Section D.6 above, and in the case of an affordable accessory dwelling in a single-family home, that the owner will occupy one of the dwelling units on the premises except in bona fide emergencies.

3. Amend Sections 420.1 and 420.2 as follows below:

Section 420.1 Permitted Uses

Insert after subsection J a new subsection K with the following words, and re-letter the existing subsections K-M as L-N:

K. Affordable accessory dwelling, subject to Section 530.5

Section 420.2 Uses Permissible by Special Permit

Insert new sections O and P, as follows:

O. Accessory dwelling, subject to Section 530

P. Affordable accessory dwelling, subject to Section 530.5 G

Appendix V – Additional Information on Regional Housing Strategies and Examples

Regional HOME Consortia

Many communities that do not have direct access to federal housing funds gain access by joining a consortium with abutting communities. There are four existing consortiums in the MAPC region. Quincy, the smallest, serves only two communities. North Shore, based in Peabody, serves 28. Consortiums determine whether to accept additional communities.

Access to federal money gives communities a predictable source of funds, greater control over housing development, and more resources to create and maintain affordable housing. HOME funds can be used for first-time homebuyer assistance, rental rehabilitation, or development of rentals or condos, including acquisition and redevelopment of existing properties; a fixed percentage must go to a qualified non-profit.

For development and redevelopment projects, funds are typically used to fill funding gaps, leveraging funding and financing from a number of sources, including MHP, DHCD, MassHousing, and others. The North Suburban HOME Consortium, for example, has used HOME funds as part of the financing package to develop assisted care facilities (projects included financing from MassHousing and tax credits); support the Housing Corporation of Arlington in acquiring two-family homes for permanent, affordable rental housing; and assisted Caritas Communities, Inc. in redeveloping existing properties for single-room occupancy.

Regional Coalitions

Regional Coalitions can advocate for housing and undertake public information and education campaigns. Examples include:

- ***MetroWest Affordable Housing Coalition.*** This is a group of over 50 individuals representing 25 community and faith-based organizations, local businesses, and concerned citizens. They have been working together to raise awareness and stimulate public dialogue about the lack of affordable housing within their communities and to encourage solutions to address this problem. They have held a series of public forums. They recently sponsored a Candidates' Forum on Affordable Housing, asking "How will our next state senator help solve the Housing Crisis?" Church groups and legislators were prime movers in forming the coalition.
- ***Bolton, Lancaster, & Stow.*** These towns have held meetings to share information and opportunities for shared resources.

Hiring Circuit-Riders or Sharing Staff and Expertise

- Housing planning assistance
- Expertise

- Running a lottery (marketing, applicant screening)
 - Sometimes developers contract with service providers
- Reviewing pro formas
- Preparing annual DHCD certification
- Project compliance monitoring
 - CHAPA does monitoring, under agreements with developers

Cross-Border Sites and Site Planning

- ***Metropolitan State Hospital.*** Former state hospital on the border of Lexington, Belmont, and Waltham. The three communities worked together on the reuse plan, which includes housing, a golf course, and open space.
- ***Weymouth Naval Air Station.*** Former naval air station on the border of Weymouth, Rockland, and Abington. The three communities are working together on a plan which is likely to include a mix of uses, including many new housing units, some of which are expected to be affordable.

New Opportunities under Proposed 40B Reform Legislation

- Under proposed legislation that grew out of the Governor's 40B Task Force, there could be two opportunities for communities to collaborate on affordable housing development, sharing both costs and benefits.

Regional Non-Profits, Partnerships, Trust Funds

- Regional land trusts
 - Community Land Trust of Cape Ann (CLTCA). CLTCA is a private non-profit whose mission is to create affordable housing and provide stewardship of land. It retains title to the land, thus keeping the housing permanently affordable. CLTCA has purchased several buildings, rehabbed them, and sold or rented the units at affordable prices.
 - Housing Land Trust for Cape Cod – See CHAPA, *Taking the Initiative*, at www.chapa.org
 - Can receive tax-deductible charitable contributions and government funding
 - Functions as CHDO (a non-profit eligible to receive HOME funds)
- North Shore Housing Trust
 - Created in July 2000, the North Shore Housing Trust can receive funds and undertake development. Its members are drawn from North Shore HOME Consortium communities. It is a 501 (c) (3) non-profit. It was designated by Ipswich to develop 10 units of housing in the former Whipple School. Funds come from member dues, area banks, the Forest Foundation, and other sources.

Regional campaign for funding

- Private donations
- Businesses & business associations
- Foundations

Housing Services Consortia

- Example: Woburn gets homeowner assistance services through the Community Services Network located in Stoneham.
- ACTION (Gloucester CAP agency) – Potential opportunity to support housing regionally

Appendix VI – Environmental Tourism Strategies for the North Shore



**ENVIRONMENTAL TOURISM
STRATEGIES
FOR THE NORTH SHORE**

**A Special Project prepared by the Metropolitan Area
Planning Council for the North Shore Task Force**

Spring 1996

ABOUT THIS REPORT

The Metropolitan Area Planning Council (MAPC) is the officially designated regional planning agency for 101 cities and towns of metropolitan Boston. The Council helps its member communities plan in the areas of economic development, land use, housing, demographics, transportation, and environmental quality.

This report is part of a “Special Project” of the North Shore Task Force (NSTF), a subregion of MAPC. NSTF communities are: Beverly, Danvers, Essex, Gloucester, Hamilton, Ipswich, Manchester, Marblehead, Middleton, Peabody, Rockport, Salem, Swampscott, Topsfield, and Wenham.

MAPC project staff and NSTF members worked closely on this project and wish to thank all those who provided information, suggestions, and support in preparing this document and in making the project a success.

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NSTF Past Chair:	Jay Grande, Gloucester
MAPC Officers:	1995-1996
President:	William G. Constable
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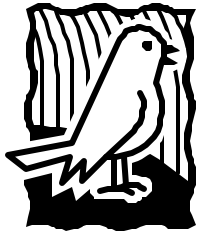
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ENVIRONMENTAL TOURISM STRATEGIES

For the North Shore

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ENVIRONMENTAL TOURISM STRATEGIES FOR THE NORTH SHORE

Highlights

- The North Shore Task Force (NSTF), a subregion of the Metropolitan Area Planning Council (MAPC), has long been interested in preserving its natural resources as an economic resource. As an outgrowth of previous activities, the NSTF this year chose to investigate strategies to promote “environmental tourism,” tourism based on the active and passive recreational enjoyment of the area’s natural resources.
- The goals are to
 - promote environmental tourism (ET)
 - to create a subregional identity around the ET theme
 - to foster links among diverse but related ET resources
- The task force is acutely aware of potential conflict between preservation and economic development and recognizes that capturing the economic value of its natural assets depends on preserving them. The NSTF is committed to an environmentally responsible approach to attracting visitors.
- “Outdoor enthusiasts” are the most promising market. Typically they are relatively affluent families with children, are repeat visitors, and drive from a radius of 3-4 hours. Strategies should help potential visitors plan in advance and should highlight activities for all ages.
- The North Shore is competing for this market with Vermont, Cape Cod, New Hampshire, and Maine. Their strategies include colorful maps, thematic brochures, and regionally organized, cooperatively marketed festivals spotlighting environmental activities in many communities simultaneously.
- One of the North Shore’s primary assets is the plethora of organizations actively engaged in some facet of environmental tourism. These groups are potential partners in a cooperative effort, and the NSTF anticipates coordinating with them.
- There are many strategies the NSTF or others could undertake to promote ET. They include strategies to create regional linkages, market the region, create or

participate in regional events, and encourage regional cooperation. These ideas are presented in Part 5.

- **The report draws from the menu of strategies to recommend activities where the NSTF can play a useful role, in partnership with others, to fill gaps or complement existing activities. It recommends that the NSTF:**
 - **Create a subcommittee to further environmental tourism activities**
 - **Identify and pursue next steps as part of next year's work program**
 - **Organize at least one follow-up conference/working session with outside groups**
 - **Organize "cross-training" among communities (e.g., a "trade show," guided bus tours, seminars or workshops)**
 - **Facilitate coordination of a "Festival North Shore," a weekend-long event linking ET activities in all communities, perhaps starting with existing Earth Days**
 - **Facilitate periodic meetings bringing together NSTF communities and tourism, environmental, and economic development interests**
 - **Prepare informational materials to help people plan ahead (e.g., theme brochure, map, GIS database, "trip-tiks")**
 - **Seek grants and/or seek sponsorship from private interests**
- **A sample list of North Shore environmental resources and a supplemental list of relevant organizations appear in the Appendix.**



ENVIRONMENTAL TOURISM STRATEGIES FOR THE NORTH SHORE

An MAPC “Mini-Project”

Part 1: Background

The North Shore has an abundance of natural resources that attract visitors. It has many miles of shore line with beautiful beaches and harbors for fishing and boating; wildlife sanctuaries, state parks, and nature preserves; active farms; hiking and biking trails; and horseback riding – just to name a few.

As its “mini-project” for FY 1996, the North Shore Task Force (NSTF), a subregion of the Metropolitan Area Planning Council (MAPC), decided to explore strategies to promote “environmental or eco-tourism,”⁷ tourism based on the active and passive enjoyment of the area’s natural and environmental resources. Strategies would be developed to achieve three related goals:

- to promote environmental tourism (ET);
- to create a subregional identity around the theme of environmental tourism; and
- to foster links among diverse but related environmental tourism resources, encouraging visitors to “surf” from one activity to another.

This White Paper presents the project’s results –

- background information on tourism – markets, demographics, lifestyles;
- some examples of strategies in other areas;
- information on the related activities of area organizations;
- a menu of strategies, with commentary; and
- a series of recommended actions.

The Appendix includes sample strategy materials, Focus Group highlights, a sample list of North Shore attractions, and a list of organizations.

⁷ The term “eco-tourism” is sometimes used synonymously with “environmental tourism” as we are using it here: tourism based on enjoyment of natural and environmental resources. “Eco-tourism” has another connotation, reflecting concern for ecosystem balance, often on a global basis. This project is focusing mostly on the former, but within the context of the latter.

**An Environmental Caution:
Don't Kill the Plover that Lays the Golden Egg!**

Attracting visitors to share and appreciate the region's natural bounty presents somewhat of a quandary, one faced by any group whose mission is to encourage visitation of our natural and environmental resources. The naturalist is attracted by the quality of the experience, the opportunity to "commune" with nature in a restive setting. He or she is not looking for a mall experience or for a highly commercialized setting. For the naturalist, the experience may be spoiled by too many visitors and too much traffic, congestion, bustle, and noise. And the natural settings themselves may be disrupted or spoiled by too many people or insensitive behavior.

The North Shore clearly needs to take a balanced approach to attracting environmental visitors and to include strategies to educate them to the need to respect and protect the region's natural features. The quest for environmental tourists should be informed by this familiar theme: "Leave nothing but footprints; take nothing but photographs."

Part 2: Potential Visitors⁸: Who Are They & How Can We Attract Them?

This section highlights some key findings about the types of visitors who come to Massachusetts, the types who select vacation destinations rich in natural and outdoor recreation opportunities, some challenges the North Shore faces, and some implications for strategy development.

Who visits Massachusetts?

- 75%-80% of Massachusetts visitors are domestic.
- Domestic visitors to Massachusetts come primarily from the nearby New England and mid-Atlantic states.
- Most Massachusetts visitors drive.
- Typically they drive
 - 3-4 hour maximum with children
 - 5 hour maximum without children
- Visitors to Massachusetts tend to be affluent, educated, and hold white-collar jobs.

Overseas visitors are also a good market

- Both for overnight & day trips
- They get more vacation & stay longer.
- New England is very compact, and the North Shore (N.S.) may be able to capture visitors en route to northern N.E. or elsewhere

Why and when do domestic visitors come?

- Two-thirds of the trips to Massachusetts are for pleasure.
- Summer is the most popular season, and spring is second.
- Most trips to Massachusetts are short getaways
 - 37% are weekend trips
 - the average length of stay is 3.7 nights.
- The vast majority of travel to the state is repeat visitation.

Are there distinct “vacation mentalities?”

- Studies show that there are three prime target vacation mentalities:
 - “Sands & bands” (young, active, self-indulgent)
 - “Outdoor enthusiast” (family-oriented, loves the outdoors)
 - adults, 25-49 with children
 - dual household income \$50,000+
 - “Culture seeker” (wants intellectual stimulation)

⁸ “Visitors,” in the parlance of the tourism industry, are those who travel at least 100 miles one way or spend at least one night in paid accommodations. This definition is used in information from Mass. Office of Travel and Tourism (MOTT), the source of most data in this section. Note that by this definition a beach day tripper to Gloucester from Boston would not count as a visitor.

- adults, 45-64; empty nesters
- household income \$50,000+
- “Sands & bands” are most prevalent, and “outdoor enthusiasts” are close behind
- “Outdoor enthusiast” is prime target for environmental tourism
- Culture seekers and outdoor enthusiasts have complementary interests

What are the characteristics of the “outdoor enthusiast?”

- Biggest market cluster is family groups.
- Family groups do most trip planning research.
- Women/mothers do most of the research.
- Destinations are competing not only for their money but for their time.
- They look for places
 - they can get to quickly
 - lots to do
 - low cost
 - good value for the money
 - come back revitalized
- Strongest concentrations are in central and northern Connecticut and upstate New York
- Are most likely to have had previous experience with Massachusetts

What nearby areas compete for the outdoor enthusiast?

- Cape Cod
- Vermont

The North Shore as a visitor destination

- Essex County generates 4th largest share of hotel tax revenues (after Suffolk, Middlesex, and Barnstable)
- Most visitors to N.S. are on short trips with a short planning horizon

What about marketing to conventions?

- Inadequate facilities for big national conventions
- Most advertising done at trade shows for convention planners
- Most promising niches
 - associations (professional, fraternal, military, etc.)
 - corporate retreats
- Noone seems to have budget for “niche marketing”

Challenges for the North Shore

- **No. Shore not neatly laid out.** It’s an “**explorer’s destination**” -- good for people who want to explore. **Most people don’t travel that way.** Most want guidance, sense that they’ll be taken care of. Families especially want to know ahead of time that there are interesting things for all.

- Imbalance in location of accommodations relative to visitor destinations. MOTT *Destination Planner* lists accommodations⁹, by numbers of rooms, as follows:

Community	# rooms
Danvers	822
Peabody	460
Gloucester	193
Salem	170
Rockport	64
Swampscott	16

Strategy Implications

- Strategies to attract the environmental tourist should:
 - Target the “outdoor enthusiast”
 - Target families, highlighting activities for all ages
 - Target the repeat visitor
 - Target areas within a 3-4 hour drive
 - Seek to lengthen the stay of day-trippers
 - Seek to lure one season’s visitors back in other seasons
 - Create links guiding visitor from one activity to the next
 - Be geared to advanced planning

The Mass. Audubon Society has prepared some interesting facts relevant to attracting environmental tourists. Their findings are summarized in *Selected Facts about Natural History Travel and Tourism*, which appears in the Appendix.

⁹ This does not include bed & breakfasts.

Part 3: Sample Strategies From Other States And Regions

In seeking to attract “outdoor enthusiasts” from a 3-4 hour radius, the North Shore is competing primarily with Vermont and Cape Cod. This section describes some of the approaches and ideas they use to attract environmental tourists, as well as some ideas from elsewhere.

Vermont

Vermont is one of the first locations people associate with “environmental tourism.” It immediately conjures up images of nature, health, and the outdoors. Skiing, mountain ranges, strict environmental protection laws, maple syrup, and Ben & Jerry’s all reinforce each other. “Vermont Pure,” the brand name of a bottled water, captures the spirit.

What does Vermont do to promote this image and capture the “outdoor enthusiast”? According to state officials, the private sector has spearheaded most marketing efforts, and the state itself is just beginning its own initiative.

The “Moosalamoo Partnership”

The “Moosalamoo Partnership” is a prime example of a private venture. Initiated about five years ago by the utility company and a hotel owner, the partnership brings together state and federal parks and facilities, tour operators, colleges, inns, and a range of other organizations with an interest in nature, the environment, recreation, and tourism (see next page).

The partnership has published an exemplary brochure to attract the “eco-tourist.” Glossy and appealing, the brochure highlights nature, recreation, and those aspects of history that relate to natural resources. “Moosalamoo” is itself a Native American word, and the tribe’s relationship to nature is a regional selling point. The photographs show all seasons, thus reflecting diverse interests and inviting each season’s visitors to return for other season’s activities. The verbiage is rich and suggestive, capturing the imagination with references to wild low bush blueberries, the endangered peregrine falcon, red-spotted newts, the nation’s oldest hiking trail, primitive campsites, artifacts, rugged cliffs, and quiet lakes. We are told that Robert Frost, the poet, “summered here for 40 years, finding inspiration and solitude.” What better endorsement for a place to “relax and experience nature?”

In addition to this brochure, the partnership promotes the region in other ways. It has developed a series of interpretive signs to explain various features in the region, and it publishes an annual calendar of summer adventure activities. The group meets quarterly, primarily as a marketing cooperative. It has also acted as a mediator, providing a forum to resolve conflicts between the lumber and trails interests.

Partnership members, the area chamber, and a consultant provide various staff functions. Financial support comes from partner contributions and grants from such groups as the Vermont Department of Travel and Tourism and the University of Vermont's Environmental Studies Program.

MOOSALAMOO PARTNERSHIP
County and area chambers of commerce
Branbury State Park
Green Mountain National Forest
Catamount Trail Association (cross-country skiing)
Central Vermont Public Service Corporation
Private inns
Country Inns Along the Trail (hiking, biking, x-country ski trips)
Green Mountain Club (trail maps and guidebooks)
Private campgrounds
A summer camp
Middlebury College Snowbowl (ski facility)
Otter Creek Audubon
Rikert Ski Touring Center
Vermont Association of Snow Travelers
Vermont Ecology Tours
Vermont Institute of Natural Science
Vermont Ski Museum

Vermont Department of Travel and Tourism

The state of Vermont is just beginning to consider environmental tourism initiatives. The Department of Travel and Tourism is organizing an Outdoor Task Force to assess existing efforts and recommend ways to relate them. The overall goal is to link existing materials. The group is expected to set up subcommittees to focus on ecotourism and active recreation.

Cape Cod

This section presents highlights of a telephone interview with the Executive Director of the Cape Cod Chamber of Commerce.

The Chamber and its organizational partners

- The Cape Cod Chamber is the **Regional Tourist Council** for Cape Cod.
- It also works closely with the **Cape Cod Commission** (e.g., received a joint grant to do a computerized calendar of events)

The Cape promoted environmental tourism long before it was fashionable.

- Has many bike paths
- Is working on walking trail to extend the length and breadth of the Cape

- Publicity highlights fragile environment, lists nature walks

What are the key marketing strategies?

- Three regional visitors centers, visited last year by 3 million people
- Lots of publicity: newspapers, magazines, TV
- Trade publications, trade shows

“Festival Cape Cod” links environment & economic vitality (see attached)

- First annual festival, October 1995
- Weekend-long event, venues from the Canal to Provincetown
- Activities stress nature, outdoors, health, and ecology
 - Sunrise breakfast on the beach
 - Ecology train
 - Marine life exhibits at Woods Hole
 - Night sky viewing through telescopes
 - An “owl prow”
 - Fly-fishing demonstration
 - “Bounty of the Bay” seafood sampling & clambake
- Participants buy a button (a la First Night) to cover attendance & discounts
- Cooperative effort of Association for the Preservation of Cape Cod & Chamber
- October date designed to extend tourist season

How do you capture repeat visitors?

- 60-70% of visitors must be repeat visitors
- Hotel owners & other business write to their customers in the off-season to encourage return visits, tell them why to come back
- Has done a Heritage Discovery Network brochure with the Cape Cod Commission

Marketing to different audiences, different seasons

- 75% of summer business is families
- Most off-season weekend business is also families
- Off-season weekday visitors include many seniors, empty-nesters
- Families less price-conscious: “I earned it; I deserve it.”
- Seniors more price-conscious, prefer package deals
- “Shoulder” seasons -- spring & fall -- offer greatest potential to increase visitors
- Cape is warmer & more attractive in fall; still cold & raw in spring
- Marketing to off-season seniors: stress no crowds, good hospitals
- No budget for niche marketing

Marketing to conference and business visitors

- Alternative to cities
- Stress outdoor activities, beaches, golf
- Conventions can pay more than seniors
- Off-season prices lower than cities

Computers as a marketing medium?

- Has a Web page; will have full Internet program soon
- Too soon to know what the impact will be
 - May increase demand for brochures, other print media
 - No info yet on whether computer marketing will reach different, more, or fewer people

Highlights from Other Locations

Martha's Vineyard publishes a "Farm Trails Guide." The fold-out brochure includes a map, a product guide showing where over 50 different products are grown, and a "piggybank note" ("in hogs we trust") entitling the bearer to a discount on purchases from participating farms. The guide lists farm activities include pony rides, hay rides, weddings, farm tours, and golf. It was produced with help from a student intern, University of Massachusetts Cooperative Extension, the Conservation District, the Martha's Vineyard Commission, the Agricultural Society, and with funding from the Massachusetts Department of Food and Agriculture,

Bristol County Convention and Visitors Bureau has four "county unifiers," publications listing and mapping activities likely to attract similar visitors. The "Nature" brochure features wineries, bird watching, herring runs, and whale watches. Funding is from the Massachusetts Office of Travel and Tourism.

Boulder, Colorado, the "little town nestled between the mountains and reality," includes in its promotional packet a brochure advertising a "Tour of Tea" at Celestial Seasonings, a company that strives to "bring truth, beauty and goodness to grocery shelves."

Part 4
Key Organizations & Potential Partners:
Who They Are and What They Do

Many groups on the North Shore are active in some facet of environmental tourism. This section presents brief descriptions of a few of the key organizations whose activities focus on promotion of regional tourism, economic development, the environment, and nature. A more comprehensive list appears in the Appendix. The North Shore Task Force anticipates coordinating with many organizations to further our shared goals.

Essex Heritage Commission

140 Washington Street
Salem, MA 01970

Contact: Annie Harris, (978) 741-8100

Essex Heritage works to establish an Essex Heritage District based on nationally significant resources, foster regional tourism sensitive to the area's unique resources, and plan actions to link and preserve historic, cultural, and natural resources. The group has developed three "trails," Industrial, Early Settlement, and Maritime, and is now developing uniform signage. Its jurisdiction is Essex County. Promotion is mostly through other groups (see below). The **Salem Partnership**, a public-private business coalition dedicated to promoting economic revitalization and cultural development, helped spawn the effort and is the umbrella organization.

National Park Service

New Liberty and Essex Sts.
Salem, MA

Contact: Steven Kesselman, (978) 740-1650

The National Park Service works closely with Essex Heritage, promoting the trails and running the Regional Visitor Center in Salem and the following eight Satellite Visitor Centers:

Custom House Maritime Museum
25 Water St., Newburyport

Gloucester Visitor Welcoming Center/Stage Fort Park
Rts. 133 and 127, Gloucester

Haverhill Historical Society & Buttonwoods Museum
240 Water St., Haverhill

Ipswich Visitor Center/Hall Haskell House
32 South Main St., Ipswich

Lawrence Heritage State Park

One Jackson St., Lawrence

Lynn Heritage State Park
Union and Washington Sts., Lynn

George Peabody House Civic Center
205 Washington St., Peabody

Saugus Iron Works National Historic Site
244 Central St., Saugus

North of Boston Convention and Visitors Bureau (CVB)

P.O. Box 642
Beverly, MA 01915
Contact: Michelle Meehan, (508) 921-4990

North of Boston CVB is one of thirteen regional centers of the **Massachusetts Office of Travel and Tourism (MOTT)**. Its purpose is to promote the region as a designation for individual tourists, group tours, and conventions. Its territory includes all of Essex County (north to the New Hampshire border), the Merrimack Valley, and some of Middlesex County. It is membership based; businesses pay dues to belong and fees to be listed or to advertise. CVB offers matching mini-grants to private groups.

Essex County Greenbelt Association

82 Eastern Avenue
Essex, MA 01929
Contact: Edward O. Becker, (508) 768-7241

Essex County Greenbelt is a private organization whose purpose is to preserve the open space heritage of Essex County by acting as a land trust and to help local communities and landowners safeguard ecosystems, foster agriculture, and protect scenic vistas and special natural resources. Its main goal is to create a network of “greenbelts” consisting of river, trail, and other natural corridors, coastal systems, and visually intact landscapes.

Mass. Audubon Society / North Shore

346 Grapevine Rd.
Wenham, MA 01984
Contact: Kathy Leahy

Mass. Audubon is a private organization dedicated to promoting the biological conservation of Massachusetts’ natural resources. Its North Shore office focuses on issues such as coastal water quality, protection of coastal habitats, conservation, watershed and drinking water supply protection, land use planning, fisheries conservation, and open space protection.

Part 5: Environmental Tourism Opportunities

Strategies

This section presents a menu of strategies the North Shore may consider to promote environmental tourism. The ideas could be implemented by the North Shore Task Force, by existing organizations such as Essex Heritage or the North of Boston CVB, by some combination of groups, or by a new organization or coalition.

The question of who implements and how existing groups coordinate is key. The NSTF supports existing activities and organizations, does not want to duplicate efforts, and is not prepared to devote substantial on-going resources to this activity. These ideas are presented as a “shopping list,” offered as potential tools for all interested parties.

Strategies to Create Regional Linkages

- Develop and promote an Environmental Tourism “Trail,” similar to the three Essex National Heritage Area trails (Industrial, Maritime, and Early Settlement Trails).
- Adopt a regional name. Other areas (e.g., “Cape Cod & the Islands”) have a clear geographic identity. North Shore is fuzzy, defined differently in different contexts. There is overlap and relationship to Essex County and to Newburyport/Plum Island, a birding mecca, but Newburyport is not in the MAPC/NSTF region.
- Develop visual links to support the ET theme -- uniform signage, a logo, a color scheme. Businesses could pay a fee to display the enviro-friendly symbol.

Strategies to Market the Region

- Create “unifier” marketing materials advertising and linking environmental tourism resources.
 - A brochure
 - A subregional enviro-tourism map
 - One or more bookmark style “trip-tiks” available at each attraction, at visitors’ centers, etc.
 - A regional Calendar of Enviro-Tourism Events
 - Ads, articles, editorials in targeted trade publications (e.g., Yankee Magazine, Audubon publications, etc.)
 - A “trip-tik” available through AAA
 - A video (cooperative effort of students & local cable)
 - A subregional Web page

Strategies to Create Regional Events

- Sponsor or promote a “Festival North Shore” modeled after the “Festival Cape Cod,” a weekend-long event with jointly advertised activities stressing nature, the outdoors, health, and ecology, routing environmental visitors throughout the region (see Part 3 for details). Existing Earth Day festivities could be a starting point, linking all North Shore communities around environmental themes and impelling visitors from one destination to another.

Strategies to Encourage Regional Cooperation

- Encourage appropriate organizations and/or enviro-businesses to work together to develop cooperative ventures (e.g., discount or coupon books; package deals, package tours, “trip-tiks” guiding visitors from one place to another)
- Recommend reduced rates for children and families
- Solicit convention and conference business and corporate retreats from companies or associations geared toward the nature, health, the outdoors, and the environment (e.g., Audubon Society, Sierra Club, health care industry, camping & outdoor gear companies, walking shoe companies, bicycle manufacturers, etc.).
- Convene environmental, economic development, and tourism groups on a regular basis

RECOMMENDATIONS

To review these strategies and generate new ones, the NSTF held a focus group, inviting a range of associations dealing with tourism, nature, economic development, and the environment (see Appendix for meeting highlights, attendance, and list of invitees). Participants provided many helpful ideas, suggesting opportunities to coordinate and partner with existing groups and their initiatives, and identifying potential gaps where the NSTF could lead or facilitate new and complementary activities.

With these comments in mind, the NSTF is focusing on the following activities where it can play a useful role, in partnership with others, in coordinating or facilitating important components of an overall regional environmental tourism strategy.

- Facilitate or organize “cross-training” among communities
 - A “trade show” where communities could educate each other about their ET resources; and/or
 - A series of guided bus tours, where each community’s representatives guide a tour of their resources
- Facilitate coordination of a “Festival North Shore,” a weekend-long event linking ET activities in all communities, perhaps starting with existing Earth Days as the jumping off point
- Facilitate regular (biannual or quarterly) meetings to bring together tourism, environmental, and economic development interests, along with the NSTF communities
- Prepare informational materials
 - A comprehensive environmental tourism brochure
 - A regional ET map, starting with existing trails map (question of \$ for preparation and duplication is key; see below)
 - Complete list of ET resources (see Appendix for starter sample)
 - List of players (see Appendix)
- Seek grants to support any or all of the above

INFORMATION SOURCES

Michael Fucci, Cape Cod Chamber of Commerce

Dianna Hazelton, Essex Heritage

Jonathan Hyde, Mass. Office of Travel and Tourism

Christopher Leahy, Director, Center for Biological Conservation, Mass. Audubon Society

Mass. Office of Travel & Tourism (MOTT), *A Marketing Overview*, 1994.

MOTT, *Analysis of Travel Planning and Key Motivators of Getaway Destination Selection*, 1995.

MOTT, *Consumer Attitude Research Study*, 1993.

MOTT, *Destination Planner*, 1992.

MOTT, *Profile of U.S. Travelers to Massachusetts*, 1994.

Bobbie Maynes -- Vermont Department of Travel and Tourism

Michelle Meehan, North of Boston Convention and Visitors Bureau

Mary Jeanne Packer, Ghostwriters Communications, Poultney, VT, (802) 287-4284.
[Consultant to the Moosalamoo Partnership.]

Kara DiFruscia Viola, Mass. Office of Travel and Tourism

Appendix VII – CTPS Causeway Transportation Report

MEMORANDUM

**TO: Brendhan Zubricki
 Sam Cleaves, MAPC**

December 5, 2003

FROM: Alicia Wilson

**RE: Improving Pedestrian and Vehicular Access in Essex on Route 133 (Main
 Street) between Southern and Western Avenues**

Executive Order number 418, signed by the governor in January 2000, established the Community Development Plan Program. The Secretaries of the Executive Office of Environmental Affairs and the Executive Office of Transportation and Construction, and the Director of the Department of Housing and Community Development were ordered to develop a program to provide technical assistance and resources to cities and towns to create community development plans that should include plans for:

- Where the community will create new housing opportunities.
- Where the community will target commercial or industrial economic development.
- How the community will improve its transportation infrastructure or how its existing infrastructure will handle any growth.
- Where and how the community will preserve open space.

This study addresses the transportation element of the Town of Essex's Community Development Plan.

Introduction

Under the transportation element of its Community Development Plan, the Town of Essex wanted the Metropolitan Area Planning Council (MAPC) and the Central

Transportation Planning Staff (CTPS) to develop a plan to improve traffic flow and pedestrian and bicycle access on Route 133/Main Street between Western and Southern Avenues. During the course of the study, it was found that a 25% Design Plan for the reconstruction of the entire length of the roadway in the study area already exists¹⁰. A review of the plan revealed that many of the existing problems would have been corrected after reconstruction. Because current reconstruction plans exist, no additional count or crash data were collected.

The roadway runs in a north/south direction between Western Avenue and Martin Street and in an east/west direction between Martin Street and Southern Avenue. To lessen confusion, it will be referred to in this memorandum as an east/west road. This 0.8-mile section of Route 133/Main Street is a Rural Minor Arterial that serves both local and through traffic. These dual functions produce conflicts, especially during the summer months, as the Essex town center, through which the roadway runs, is a major tourist attraction. Route 133/Main Street provides access to a number of restaurants, antique stores, churches, and marinas in the town center; consequently, there are numerous curb cuts with frequent left and right turns to and from these abutters. There are approximately fifteen antique dealers and six restaurants in the study area, located on both sides of the roadway, in some cases across the street from each other. In addition, because of narrow sidewalks and inconsistent shoulder widths, conditions for pedestrians and bicyclists are not as “friendly” as they might be.

This memorandum will discuss existing conditions, how reconstruction will correct some existing trouble areas, and other changes that can be implemented in addition to the planned reconstruction.

Existing Conditions

Roadway

The width of the existing roadway ranges from 31 to 43 feet with one travel lane in each direction. The shoulder width varies throughout the study area, and on-street parking is allowed in those areas where the shoulder width is sufficient, 6.5 to 8.2 feet, so bicyclists usually have to use the travel lane.

The majority of the study area falls under state jurisdiction. Only the section of roadway between 136 Main Street and Southern Avenue falls under county jurisdiction. The right-of-way (ROW) in the state layout is generally 50± to 65± feet. The ROW in the county layout ranges from 40± to 50± feet. In general, both state and local ROW lines are located at or near the back of the existing sidewalk in the more developed area.¹¹

¹⁰ Mistry Associates, Inc., *Preliminary Design Report, Route 133 Main Street/Eastern Avenue, Essex, Massachusetts*, November 2001.

¹¹ *Ibid.*, p. 3.

The average daily traffic (ADT) at the Route 133 Bridge over the Essex River for 2001 was 15,800 vehicles. The flashing yellow light on the eastbound approach at the Route 133/Martin Street intersection is the only traffic signal in the study area.

Sidewalks

There is a sidewalk on the eastbound side of the roadway throughout the study area with the exception of a 164-foot length along the front of the Village Restaurant. On the westbound side, the sidewalk runs between Western Avenue and the bridge over the Essex River at the beginning of the Causeway and from the east end of the Causeway to Southern Avenue. The width of the sidewalk ranges from 3 to 6 feet. There is little or no buffer between the sidewalk and the travel lane in areas where the shoulder width is narrow.¹² This environment could be unpleasant for some pedestrians.

Crosswalks

There are seven crosswalks in the 0.8-mile corridor. They seem to be appropriately placed where there is pedestrian activity. Some of the crosswalk markings are fading.

Parking

Parking is generally prohibited on state roads. However, it does occur in some communities. During reconnaissance of the study area, parked vehicles were observed in several locations. Among them were:

- Both sides of the street between Western Avenue and Martin Street (a distance of approximately 1,700 feet or one-third mile). The shoulder on the eastbound side is wide enough for parking. However, parked vehicles on the westbound side encroach on the travel lane in some locations.
- Eastbound between 60 and 69 Main Street. 67 and 69 Main Street have space in the rear and on the side, respectively, where patrons can park.
- In an unpaved area parallel to the street on the westbound side at 112 Main Street.
- In an unpaved area parallel to the street on the westbound side at 132 Main Street.

¹² [Ibid., p. 2.](#)

- Eastbound in front of 161 Main Street.

In addition to the on-street parking, there are several areas with head-in parking that can affect roadway operations. One of these areas is the aforementioned 164 feet in front of the Village Restaurant where there is a double row of marked parking spaces and no curbing. Vehicles parked here can drive out onto the roadway unimpeded. Another such area is the parking lot in front of 122 Main Street, where there are 17 parking spaces in front of the restaurant.

The locations of many of these existing problems are shown in Figure 1.

Crashes

A total of 45 crashes occurred in the study area between January 1998 and September 2001.¹³ (Table 1). This is equivalent to 2.6 crashes per 1,000,000 vehicles annually. The dominant crash types are rear-end (46.7%) and angle (42.2%). Rear-end crashes generally indicate congestion, stop-and-go conditions, and insufficient left-turn opportunities. Angle crashes generally indicate problems with left turns. In most cases, the locations of the crashes are not specific enough to identify specific problem areas.

The days of the week on which the crashes occurred appear to reflect the fact that this is an area that attracts tourists. Forty-two percent of the crashes occurred on Saturday and Sunday. All of the Sunday crashes occurred between May and October with two-thirds of them occurring in August and September.

As previously mentioned, exact crash locations could not be determined from much of the data. However, the data indicate that at least 20% of the crashes occurred at the Route 133/Martin Street intersection. In addition, both the bicycle and pedestrian accidents occurred at this location.

Problem Areas

In General

On-street parking with constant maneuvering in and out of traffic tends to slow the flow of traffic and creates opportunities for crashes.

The Route 133/Martin Street Intersection and the Lack of Curbing at the Village Restaurant

Technically, the intersection of Route 133 and Martin Street is a 3-way intersection. However, it operates as a 4-way intersection because of the approximately 164-foot opening in front of the Village Restaurant. Vehicles were observed leaving the parking lot at the westernmost end and proceeding across two lanes to enter Route 133

¹³ [Ibid.](#), Appendix B.

westbound. Vehicles were also observed making the reverse maneuver from Route 133 eastbound into the lot at the westernmost end. Vehicles parked in the first row at the edge of the lot can enter the roadway unimpeded. The geometry of the intersection creates an awkward left-turn maneuver from Route 133 westbound to Martin Street. The lack of sidewalks and curbs in front of the restaurant makes this an unfriendly environment for pedestrians and bicyclists.

As mentioned in the section about crashes, most of the crash data is not site specific; however 20% of the crashes were identified as occurring at this location. The actual percentage is probably higher, indicating that there is a problem with left turns and stop-and-go conditions.

Parking at 122 Main Street

There are 17 parking spaces in front of this restaurant. Vehicles can enter or exit at either of the two entrances. Another restaurant with a parking lot in the rear is located across the street. This location has the potential for many conflicts.

Roadway Reconstruction

According to the design report

...the Route 133/Martin Street intersection will be redesigned to include a two-lane approach (Left/Thru) on Route 133 westbound at Martin Street and a two-lane approach (Left/Right) on Martin Street. The lane width on these approaches would be 9.8 feet. There would be a raised island on the Martin Street approach. Lane-widths elsewhere would be 11.5 feet. Shoulder widths would vary between 8.2 feet where ROW permits to 3.3 feet minimum elsewhere. Sidewalks would be 6.0 feet reduced to 5.0 feet wherever a planting strip is located adjacent to the roadway edge. The only new sidewalk areas to be constructed are along the front of the Village Restaurant, just east of the Martin Street intersection, and along the Causeway east of the Bridge where there is currently no curbing.¹⁴

The parking lot in front of the Village Restaurant would be restriped to 11 spaces with an entrance/exit at the eastern and western edges. A 3.3-foot shoulder, a 4-foot planter strip, and a 5-foot sidewalk would be added. The placement of the westernmost driveway and the island on the Martin Street approach would eliminate the current maneuvers from the parking lot directly to Route 133 westbound and from Route 133 eastbound into the parking lot.

¹⁴ [Ibid., p. 4.](#)

The parking spaces at 122 Main Street would be striped in a manner that would force vehicles to enter at the easternmost end and exit at the westernmost end of the lot.

Recommendations for Areas Not Covered by the Reconstruction Project

The roadway reconstruction plans, when implemented, will correct most of the difficulties associated with the roadway in the Essex town center. The following sections list recommendations about how to deal with problems that will not be addressed by the reconstruction project and about how to address current problems prior to roadway reconstruction.

- *On-Street Parking*

As far as the roadway reconstruction plans are concerned, on-street parking would still be allowed in those areas where shoulders are wide enough to accommodate it. This type of parking is less of a problem in the western end of the corridor, where there are more residences than businesses and the parking turnover rate is lower. However it should be restricted in the eastern end of the corridor, where more of the antique stores and restaurants are located, particularly if those businesses have areas for off-street parking. A municipal lot behind the fire station on Martin Street is now under construction.

Vehicles should be directed to this lot with appropriate signing, and parking should be prohibited in less desirable locations. This lot is a little over one-quarter mile from the eastern end of the corridor. Parking restrictions may be implemented as soon as the municipal lot is constructed.

- *Lack of Curbing in Front of the Village Restaurant*

Until the roadway is reconstructed, some type of physical barrier should be erected in front of the Village Restaurant to prevent vehicles from entering the roadway from any point along the 164-foot open area except for two designated driveway areas. The westernmost entrance/exit should be signed to allow only right turns out of the lot in order to prevent exits to Route 133 westbound. This movement and all left turns should be made from the eastern end of the lot.

- *Crosswalks*

Crosswalks should be repainted in such a manner as to make them more distinctive. Some communities have painted their crosswalks green, rather than white. Green crosswalks are visible from a much greater distance to both pedestrians and motorists.

TABLE 1**Total Recorded Crashes in the Study Area by Type,
January 1998– September 2001**

Collision Type	Number	% Total
Rear-end	21	46.7%
Angle	19	42.2%
Head-on	1	2.2%
Bicycle	1	2.2%
Pedestrian	1	2.2%
Other	1	2.2%
Unknown	1	2.2%
Total	45	100.0%

Severity	<i>Number</i>	% Total
Fatality	0	0.0%
Personal Injury	11	24.4%
Property Damage	34	75.6%

Day of Week	<u>Number</u>	% Total
Sunday	12	26.7%
Wednesday	8	17.8%
Saturday	7	15.6%
Monday	6	13.3%
Friday	5	11.1%
Tuesday	3	6.7%
Thursday	4	8.9%
Total	45	100.0%

Month	Number	% Total
September	7	15.6%
June	6	13.3%
July	6	13.3%
October	6	13.3%
March	5	11.1%
May	5	11.1%
April	3	6.7%
August	2	4.4%
December	2	4.4%
January	1	2.2%

February	1	2.2%
November	1	2.2%
Total	45	100.0%
