

FOUGERE PLANNING & DEVELOPMENT

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Town of Hamilton, MA

MBTA Communities Fiscal Metrics Report

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Under the MBTA Communities Act (Section 3A) requirements, Hamilton is mandated to zone a minimum area of 49 acres where multi-family housing is permitted by right which could potentially accommodate up to 731 multi-family housing units. The Town is proposing MBTA Communities compliant zoning district which spans 49.3 acres, and which could support up to 732 units under the MBTA Communities Compliance Model developed by the Massachusetts Executive Office of Housing and Livable Communities (EOHLC).

It is important to note that the MBTA Communities requirements mandate that the land proposed to be rezoned must be capable of supporting a total unit count. The requirements do not consider uses already existing, including housing units.

In Hamilton, the areas proposed to meet the requirements are already densely settled areas that contain many existing or previously approved housing units. In fact, a total of 190 housing units already exist on the parcels proposed to be rezoned to meet the requirements in both the Town Center and on Asbury Road. Accordingly, the net number of new units which could be developed under the proposed zoning is measurably less than 732 units representing a total of **542 potential** units. Any developments constructed under these provisions would be required to include 10% of the units as affordable (80% of Area Median Income).

The average time to market for new multi-family housing is a two to three year period from initial proposal to occupancy. Given the lack of larger properties in the planned MBTA Communities-compliant districts, it is extremely doubtful that the construction of 700 units is realistic. A large portion of the district is occupied by small 7,000 square foot lots occupied by single family homes which would require the adjoining sale of 4 – 5 homes in order to garner enough land to undertake a viable development project of significance. In addition, the quality soils onsite will play a critical role in determining density in order to accommodate on-site septic facilities given the lack of sewer system access.

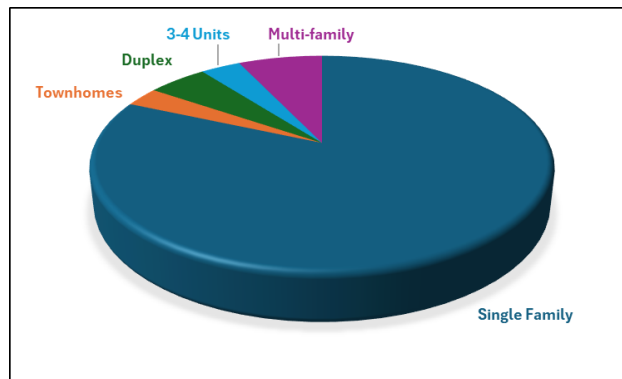
The Consultant agrees with the Finance and Advisory Committee's Key Consideration statement: *"..there is no definitive "impact" statement which anyone could make regarding the 3A Zoning change. Ultimately the "3A" impact will be determined by the economic viability of construction opportunities given the lack of open "buildable" land in Hamilton and the cost to purchase existing properties and redevelop such properties."* Ultimately, land development is extremely sensitive to externalities that are largely outside the municipality's control. While forecasts can be helpful in understanding the potential impacts of

development, accurate projections of growth are not feasible due to the large number of externalities and their combined impacts on land development and the real estate market. With that noted, the Greater Boston real estate market, and particularly the multi-family residential market, has remained remarkably resilient over the last several years. A consistently tight inventory of multi-family units have kept rents steady even in the face of sluggish growth in the employment market since 2023.

Background

A majority of Hamilton's housing is comprised of single family homes, making up 81.6% of the total housing stock as outlined in Figure 1. Townhomes, duplexes, three-to-four unit residential buildings, and multi-family housing make up the remainder of the community's housing supply.

Figure 1



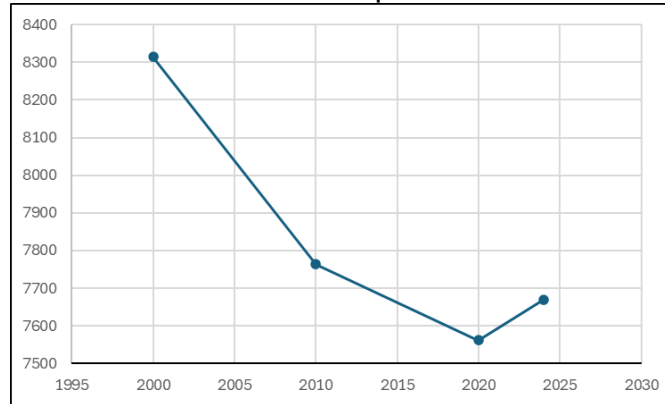
Based upon US Census data, an average of 2.81 persons reside within owner-occupied housing units and 2.35 persons per renter occupied housing unit. It should be noted that the owner-occupied occupancy figure is skewed higher as it includes single family homes. Owner occupied condominiums and apartments typically have lower occupancy rates than noted.

Table 1
Persons Per Household

	Persons Per Household
Avg. Owner Occupied Unit	2.81
Avg. Renter Occupied Unit	2.35

As detailed in Figure II, Hamilton's population has generally declined since 2000. The Town's population reached a peak of 8,315 in 2000 but declined to 7,561 in 2020. This represents a decline in population of 9.5% since 2000. Decennial Census counts produce the most accurate population figures for smaller geographies. Population estimates (not based on formal counts) indicate that the Town's population has recorded modest growth since 2020.

Figure II
Hamilton Population



Density Assumptions

The EOHLC MBTA Communities Model provides a maximum density calculation for each proposed district based on inputs including the acreage of the land area to be rezoned and the zoning requirements regulating housing uses. The density calculations for the MBTA Communities compliant districts, including the three proposed new Town Center zoning districts and the one overlay district, are included in the table below. The Compliance Model calculates an average density of 15.7 housing units per acre of land for the 49.3 acre area.

These calculations meet the minimum MBTA Communities compliance requirements for Hamilton requiring that a minimum of 49.2 acres be rezoned to accommodate an average density of at least 15 housing units per acre.

Table 2
Modeled Density for all Section 3A Compliant Zoning

PROPOSED DISTRICT	TOTAL ACREAGE	MODELED DENSITY
Willow Street Mixed-Use	7.2	15.9
Bay Road Mixed-Use	9.5	13.6
Downtown Residential	13.3	11.2
3A Multi-family Overlay	19.3	20.5
Total Acreage	49.3	
Average Density		15.7

Service Impacts

To assess what level of increased school enrollment and emergency service demands could occur from MBTA development, existing multi-family developments in the community were reviewed.

Schools

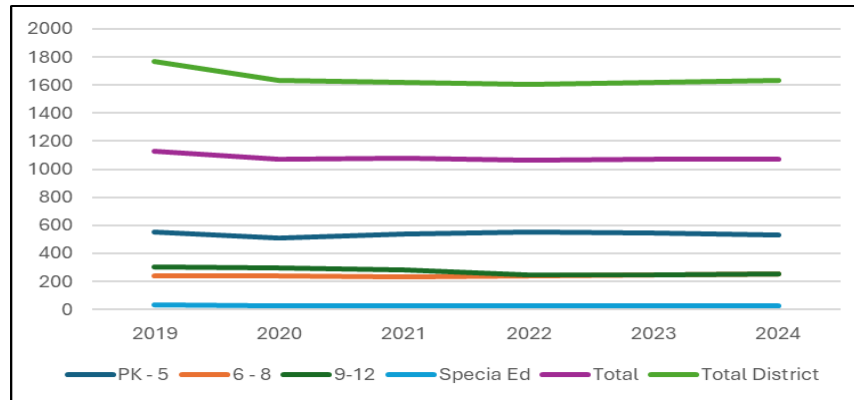
As outlined in Table 2 and Figure III, school enrollment of Hamilton students enrolled in the Hamilton-Wenham School District has declined since 2019, except for enrollment in Grades 6 through 8 which have increased since 2021. Total enrollment in the School District has declined 7.54% since 2019. School enrollments in many parts of New England have remained steady or declined in recent years largely owing to larger demographic trends and a consistently declining birth rate. The birth rate in Massachusetts declined approximately 10 percent between 2013 and 2023.

Table 3
School Enrollment – Hamilton Students enrolled in HWSD, 2019 – 2024

Grade	2019	2020	2021	2022	2023	2024	% Change
PK - 5	552	510	539	549	542	532	-3.62%
6 - 8	240	240	233	241	250	257	7.08%
9-12	302	296	283	246	249	253	-16.23%
Special Ed.	36	26	23	27	27	26	-27.78%
Total	1,130	1,072	1,078	1,063	1,068	1,068	-5.49%
Total District	1,765	1,630	1,620	1,602	1,619	1,632	-7.54%

■ Highlighted fields indicate peak year of enrollment

Figure III
School Enrollment



To assess potential impacts to the local school system, existing multi-family developments (apartments and condominium) were identified to determine how many school age children (SAC) reside within each. Hamilton has a small share of multi-family housing and condominiums and even fewer units that are not age-restricted and include more than 50% Affordable Housing Units. The MBTA Communities Act requires that multi-family housing cannot be required to be age-restricted and include more than 10% of Affordable Housing Units. Accordingly, senior housing developments and Affordable Housing Development (where affordable units make up more than 50% of units) were not considered.

As detailed in Table 3, the average SAC ratio per apartment unit is .120 and for condominiums the SAC ratio is .267. Given the fact that the 59 Willow Street (Willow Street Flats) mixed-use development is new and includes the largest number of units within one building in Hamilton, it is recommended that the noted SAC ratio of .167 be used to estimate school children from apartments. Condominiums tend to accommodate more school age children because, on average, the units are larger and include more bedrooms. Townhouse style condominium development can be popular in more rural or semi-rural communities, even in environments where multi-family housing is permitted, due to the region's strong condominium market and because septic limitations can sometimes favor this form of development. Under such a scenario, the number of units created is likely to be smaller, with less overall density, however the number of bedrooms per unit is typically larger.

Table 4
School Age Children SAC Ratios

Apartments	# Units	SAC	SAC/Unit
59 Willow Street	18	3	0.167
69 Willow Street	4	0	0.000
10-12 Hamilton Ave.	4	0	0.000
Total Average	26	3	0.115
Condominiums			
106-270-275 Asbury St.	6	4	0.667
946-956 Bay Road	6	0	0.000
Junction Lane	22	7	0.318
10-12-14-16 Pleasant St.	4	1	0.250
300 Willow St.	7	0	0.000
Total Average	45	12	0.267

Emergency Services

The Hamilton Police Department responds to over 19,000 calls annually or an average of 376 Calls for Service per week. The Fire Department responds to over 400 fire-related calls annually (an average of 8 calls per week) and over 800 EMS calls annually averaging 16 calls per week. Call volumes were reasonably consistent for both Police and Fire between 2003 and 2004 as indicated in Table 5 below.

Table 4
Police, Fire, and EMS Calls for Service

	2023	2024	Avg. Calls Per Week
Police Calls for Service	19,853	19,562	376
Fire Incidents	407	419	8
EMS Incidents	823	807	16
Total Fire	1,230	1,226	24

Reviewing police and fire department call data from select apartment and condominium developments in the community, as detailed in Table 5, generates average per unit call ratios.

Table 5

Apartments	# Units	Police Calls	Police Calls/Unit	Fire Calls	Fire Calls/Unit	EMS Calls	EMS Calls/Unit
59 Willow Street	18	16	0.889	5	0.278	2	0.111
69 Willow Street	4	11	2.750	2	0.500	0	0.000
10-12 Hamilton Ave.	4	1	0.250	0	0.000	0	0.000
Total Apartment Avg.	26	28	1.077	7	0.269	2	0.077
Condominiums	# Units	Police Calls	Police Calls/Unit	Fire Calls	Fire Calls/Unit	EMS Calls	EMS Calls/Unit
106-270-275 Asbury St.	6	5	0.83	2	0.333	0	0.000
946-956 Bay Road	6	1	0.17	0	0.000	0	0.000
Junction Lane	22	16	0.73	3	0.136	2	0.091
10-12-14-16 Pleasant St.	4	5	1.25	0	0.000	4	1.000
300 Willow St.	7	3	0.43	4	0.571	1	0.143
Total Condo. Average	45	30	0.67	9	0.20	7	0.156

Development Scenarios

Estimating the rate of new development from MBTA zoning is extremely speculative and involves a host of varying factors including:

- ❖ Economic/Real Estate Market Conditions
- ❖ Quality of on-site soils meeting septic requirements
- ❖ Size of properties
- ❖ Challenges and costs of consolidating ownership of numerous adjoining properties
- ❖ Nature of proposed development (garden style multi-family or townhouses, and whether the units are renter or owned-occupied)

Given these challenges, four development scenarios were generated considering 50 and 100 units of apartments and condominiums. For each scenario estimated revenues, costs¹, population, school age children, police and fire calls were generated. These metrics may be applied to any future development to gauge impacts to the community.

¹ Cost assumptions: Schools: Fincom estimate of \$13,962 school cost per student. Police: cost per call total budget/annual calls (reduced by 20% to remove minor calls). Fire/EMS: cost per call total budget/annual calls for fire and EMS. General Government: Assumption of minor incremental cost given no new town roads and minor increases in service demands; \$125 per unit.

Apartment Scenarios

50 Apartments	
Estimated Population: 2.35/unit	118
Assessed Value	\$282,000/unit
Total Assessed Value	\$14,100,000
Property Taxes	\$220,665
Vehicle Excise Taxes	\$169/Vehicle
# Vehicles/ 1.2 per unit	60
Estimated Vehicle Reg. Excise	\$10,140
Total Estimated Revenue	\$230,805
Key Services	
School Age Child: .167 unit	8
Estimated Police Calls: 1.12/unit	56
Estimated Fire Calls: .280/unit	14
Estimated EMS Calls: .08/unit	4
Potential Expenses	
Schools @ \$13,962/student	\$116,583
Police @ \$150/call	\$8,400
Fire/EMS @ \$940/call	\$16,920
General Government @ \$125/unit	\$6,250
Total Estimated Expenses	\$148,153

100 Apartments	
Estimated Population: 2.35/unit	235
Assessed Value	\$282,000/unit
Total Assessed Value	\$28,200,000
Property Taxes	\$441,330
Vehicle Excise Taxes	\$169/Vehicle
# Vehicles/ 1.2 per unit	120
Estimated Vehicle Reg. Excise	\$20,280
Total Estimated Revenue	\$461,610
Key Services	
School Age Child: .167 unit	17
Estimated Police Calls: 1.12/unit	112
Estimated Fire Calls: .280/unit	28
Estimated EMS Calls: .08/unit	8
Potential Expenses	
Schools @ \$13,962/student	\$233,165
Police @ \$150/call	\$16,800
Fire/EMS @ \$940/call	\$33,840
General Government @ \$125/unit	\$12,500
Total Estimated Expenses	\$296,305

Condominium Scenarios

50 Townhomes	
Estimated Population: 2.81/unit	141
Assessed Value	\$800,000/unit
Total Assessed Value	\$37,500,000
Property Taxes	\$586,875
Vehicle Excise Taxes	\$169/Vehicle
# Vehicles/ 1.2 per unit	60
Estimated Vehicle Excise	\$10,140
Total Estimated Revenue	\$597,015
Key Services	
School Age Child: .267 unit	13
Estimated Police Calls: .67/unit	34
Estimated Fire Calls: .20/unit	10
Estimated EMS Calls: .156/unit	8
Potential Expenses	
Schools @ \$13,962/student	\$186,393
Police @ \$150/call	\$5,025
Fire/EMS @ \$940/call	\$16,732
General Government @ \$125/unit	\$6,250
Total Estimated Expenses	\$214,400

100 Townhomes	
Estimated Population: 2.81/unit	281
Assessed Value	\$800,000/unit
Total Assessed Value	\$75,000,000
Property Taxes	\$1,173,750
Vehicle Excise Taxes	\$169/Vehicle
# Vehicles/ 1.2 per unit	120
Estimated Vehicle Excise	\$20,280
Total Estimated Revenue	\$1,194,030
Key Services	
School Age Child: .267 unit	27
Estimated Police Calls: .67/unit	67
Estimated Fire Calls: .20/unit	20
Estimated EMS Calls: .156/unit	16
Potential Expenses	
Schools @ \$13,962/student	\$372,785
Police @ \$150/call	\$10,050
Fire/EMS @ \$940/call	\$33,464
General Government @ \$125/unit	\$12,500
Total Estimated Expenses	\$428,799

MARK FOUGERE
PRINCIPAL OF FOUGERE PLANNING AND DEVELOPMENT

Mark Fougere is an AICP land use planner with over 34 years of public and private sector experience and holds a master's degree in planning. Mr. Fougere has an extensive background in project management dealing with a broad array of planning related issues including spearheading rezoning efforts, managing development teams, site and land use planning, impact fees, fiscal impact analysis, public presentations, expert witness testimony, land use law analysis, and consensus building challenges. Mr. Fougere has also served on a municipal planning board and as a Selectman. He has managed numerous rewrites and amendments to zoning ordinances and site plan/subdivision regulations. Mr. Fougere has worked extensively in many New England communities on fiscal impact analysis, traffic corridor studies, housing, workforce housing, and land use regulations.