

TOWN OF LAKEVILLE MEETING POSTING & AGENDA

Town Clerk's Time Stamp
received & posted:

K. DeCypre

LAKEVILLE TOWN CLERK
RCUD 2023 JAN 6 AM 11:54

48-hr notice effective
when time stamped

Notice of every meeting of a local public body must be filed and time-stamped with the Town Clerk's Office at least 48 hours prior to such meeting (excluding Saturdays, Sundays and legal holidays) and posted thereafter in accordance with the provisions of the Open Meeting Law, MGL 30A §18-22 (Ch. 28-2009). Such notice shall contain a listing of topics the Chair reasonably anticipates will be discussed at the meeting.

Name of Board or Committee:	Planning Board
Date & Time of Meeting:	Thursday, January 12, 2023 at 7:00 p.m.
Location of Meeting:	Lakeville Police Station 323 Bedford Street, Lakeville, MA 02347
Clerk/Board Member posting notice:	Cathy Murray

Cancelled/Postponed to: _____ (circle one)

Clerk/Board Member Cancelling/Postponing: _____

A G E N D A

1. Housing Production Plan – Progress review -Taylor Perez of SRPEDD
2. MBTA Communities Program Discussion - Taylor Perez of SRPEDD
3. Approve the November 10, 2022, Meeting Minutes
4. Review correspondence
5. Next meeting. . . January 26, 2022 at the Lakeville Police Station
6. Any other business that may properly come before the Planning Board.
7. Adjourn

Please be aware that this agenda is subject to change. If other issues requiring immediate attention of the **Planning Board** arise after the posting of this agenda, they may be addressed at this meeting

Subject: FW: Housing Production Plan Questions

From: Barbara Mancovsky

Date: January 6, 2023 at 2:33:17 PM EST

To: Marc Resnick <mresnick@lakevillema.org>, Michele MacEachern

Cc: "Nathan Darling, Building Commissioner & Zoning Enforcement Officer" <ndarling@lakevillema.org>

Subject: Housing Production Plan Questions

Hi Michelle, Marc and Nate -

Happy New Year!!! I hope this email finds you all well :) I was cleaning out some files last week and found some notes on the last HPP. I know that we had budgeted for an update to the Housing Production Plan with SRPEDD for this year, so I thought it might be a good time for me to get these notes I had been saving over to you for consideration. Hopefully these requests can be accommodated fairly easily as I feel that they will provide additional insight for the community, and help us guide the important decisions being made. I am happy to discuss anytime 508-989-4289

1. On page 16, 2, School Enrollment, I think this would be a great deal more meaningful for our community to see a longer timeline. Ideally, a 20 or 25 year graph. It would also be interesting to see this figure with a projected future count, based on current demographics.
2. On page 18, I have the same feedback - that the timeline reflected should be more like 25 years. For people to get a sense of what is changing, they need to be able to compare to when they were in that situation.
3. On page 22, Table 4-9, I would love to see a column added to include % of the total, so that you can see where the mean is at a glance.
4. Lastly, if possible to get a snapshot of the mortgage side of things, I think that would be interesting.
5. Understanding how, compared with the past, our households now have two full time working professionals.
6. What loan type, last origination date, number of borrowers and what average loan amount by income. I actually think this is something all communities should be monitoring and I would interested to compare this information with surrounding communities.
7. On page 30 of the last HPP, under 2. Affordability Gap Analysis, Table 4-21, I would love to see the chart updated to have two additional columns - one that shows the number of units in each band, and the % of total housing stock for the other.
8. Same page, Table 4-22, I would like to see it broken down showing the % of total of these figures under household type. For example, I expect we will see that the majority of affordable units are condos.

#16

TOWN OF LAKEVILLE

HOUSING PRODUCTION PLAN

December, 2017

Prepared for:
Town of Lakeville
346 Bedford Street
Lakeville, MA 02347

Lakeville Master Plan Implementation Committee
Rodney Dixon, Chairman
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Rita Garbitt, Town Administrator

Prepared by:
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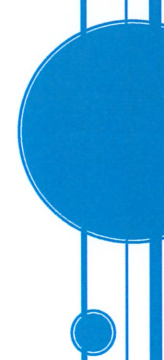


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ACKNOWLEDGEMENTS

This report was made possible with participation and technical assistance from the following:

Lakeville Board of Selectmen
Lakeville Planning Board
Lakeville Master Plan Implementation Committee
Rita Garbitt, Town Administrator
Lorraine Carboni, Town Coordinator

Sandy Conaty, SRPEDD Comprehensive Planning Manager
Eric Arbeene, AICP, SRPEDD Principal Comprehensive Planner

Project Funding: This Town of Lakeville Housing Production Plan was completed with funds provided by the District Local Technical Assistance (DLTA) Program.

Jay Ash, Secretary, Executive Office of Housing and Economic Development (EOHED)
Chrystal Kornegay, Undersecretary, Massachusetts Department of Housing and Community Development (DHCD)

Town of Lakeville Housing Production Plan

1. EXECUTIVE SUMMARY

The Town of Lakeville was first settled in 1717 as part of the Town of Middleborough, but later split from Middleborough and was incorporated as a separate town in 1853. Lakeville is located on the southwestern edge of Plymouth County in southeastern Massachusetts and is bordered by Middleborough on the north and east, Rochester and Freetown on the south, and Berkley and Taunton on the west. Lakeville is approximately thirty-eight (38) miles south of Boston and two hundred and six (206) miles from New York City.

The town's 36.1 square miles contain many lakes (or ponds), as its namesake suggests, as well as wetlands, habitat areas, aquifers and a mix of rural and suburban neighborhoods. The many ponds, rivers and streams in Lakeville also serve as a source of drinking water. Lakeville is connected to the larger southeastern Massachusetts region via its many state routes including north-south Routes 18, 105 and 140, and the east-west Route 79. U.S. Route 44 passes through the northern end of town and Interstate 495 runs along its northern edge with an interchange located just over the town line in Middleborough. Lakeville also has transit options, as it is home to the Middleborough/Lakeville MBTA Commuter Rail Station and has limited fixed route bus service to the Commuter Rail station provided by the Greater Attleboro Taunton Regional Transit Authority (GATRA).

PLANNING FOR AFFORDABLE HOUSING

As of September 2017, the Town of Lakeville has 274 housing units, which does not meet the affordability requirements set forth in M.G.L. Chapter 40B §§ 20 thru 23 and 760 CMR 56.00. This represents 7.1% of their 3,852 year round housing units. Lakeville needs to produce at least 111 more affordable units to meet the *Housing Unit Minimum* of the Statutory *Minima* (as defined in 760 CMR 56.03(3)(a)). Achieving the Housing Unit Minimum threshold would mean that the Town of Lakeville Zoning Board of Appeals would have the ability to deny a Comprehensive Permit or approve it with conditions and that the aforementioned decision would be upheld, if appealed by the applicant pursuant to 760 CMR 56.03.

HOUSING NEEDS ASSESSMENT

A Housing Production Plan's Housing Needs Assessment answers two (2) main questions: "Who is here?" and "How is the housing market serving that population?" The data survey for the Housing Needs Assessment portion of Lakeville's Housing Production Plan, conducted in 2017 using U.S. Census Bureau data, real estate market data, and local information, revealed the following main *findings*:

Lakeville has experienced a moderate increase in population since 2000 and its population is growing older.

From 2000 to 2015, Lakeville's population grew at a rate of 13%, from approximately 9,800 residents to approximately 11,100 residents. Lakeville's 13% growth rate was more than two times higher than both Plymouth County and the Commonwealth's during the same time period. In addition, Lakeville's median age rose by six (6) years from 37.8 to 43.8. During this same time period, the retirement-age population (greater than 64 years old) grew faster than both the working-age population (20-64 years old) and the school-age population (less than 20 years old).

Lakeville's household types are changing and becoming more affluent.

Between 2000 and 2015, household types became more diverse in terms of its members. Specifically, households containing only one person grew at a rate of 64% and the number of households with a person 65 years and over grew at a rate of nearly 61%. Between 1999 and 2015, the percentage of households in Lakeville's earning \$100,000 or more increased from 27.6% to 43%.

Lakeville's housing stock consists primarily of single-family units, almost half of which are over 35 years old.

Approximately 89% of housing units in Lakeville are single-family, detached homes (1-unit per lot), while the remaining 11% of housing units are in structures containing more than one unit. Of the 837 units permitted between 2002 and 2016, 348 or 41.6% were for multi-family units, which helped to address the need for rental units in town. Almost half (47%) of residential properties are more than 35 years old (built before 1980) indicating a potential need for rehabilitation programs to enable people to stay in stable housing stock.

Lakeville has a stable, moderate housing market, with a modest number of homes affordable to low-income households.

From 2002 to 2016, Lakeville's median sales price for a single family home was the second highest when compared to its neighboring communities. Lakeville's home sales during this same time period also compared fairly against its neighboring towns and continue to rebound in the aftermath of the economic downturn of the mid-to late-2000s. According to an analysis of single-family ownership costs, approximately 15.3% of houses in Lakeville are affordable to households earning less than the HUD Area Median Family Income (AMFI) of \$81,000, while 6.9% are affordable to low-income households earning 80% or less of the AMFI. While it may appear that there are a moderate number of homes affordable to people making less than the AMFI, it is important to keep in mind that many of these moderately-priced homes are within the Clark Shores neighborhood around Long Pond and are not currently classified as cottages, but likely were at one time.

BARRIERS TO AFFORDABLE HOUSING PRODUCTION

Zoning Constraints

Lakeville's large-lot, low-density Residential zoning district has led to the construction of high-priced single-family residences. While the Residential zoning districts 70,000 square foot minimum lot size is intended to maintain the rural quality of the town and water quality standards, it has promoted very low housing density that severely constrains the construction of affordable housing.

Infrastructure Constraints

Lakeville's limited municipal water and sewer service requires most residential properties to rely on Title V-compliant septic systems and on private wells. While new development could integrate alternative wastewater treatment facilities, this may not be financially feasible in smaller developments (due to the high land costs imposed by large-lot zoning). There are also concerns about the impact of septic systems on water quality in surface water and groundwater bodies.

Limited Transportation Access

Lakeville is an auto-dependent suburban community with limited public transit options. While the town does host an MBTA commuter rail station, it lacks regular fixed-route bus service. The lack of regular fixed-route bus service limits the ability of low- and moderate-income households to locate in town without also spending a large portion of their incomes on transportation.

Limited Organizational Capacity and Funding

The Town of Lakeville has both limited organizational capacity and limited funding to create additional affordable housing in town. The town has no professional planning or housing staff, no housing authority or affordable housing partnership, but does have an Affordable Housing Trust Fund. The funding of the Trust Fund is problematic; however, due to a lack of capital. The appointment of a Trust Fund Board of Directors and the establishment of an Affordable Housing Partnership, in addition to the momentum gained from developing and adopting this Plan, may increase the towns capacity to accomplish their affordable housing initiatives.

Negative Community Perceptions

While many Lakeville residents recognize the need for affordable market-rate and subsidized housing opportunities, there continues to be misconceptions about affordable housing in terms of increased density, perceived negative effects on property values, and concerns about increased municipal costs. This must be balanced; however, with the towns need to provide affordable housing for its young professionals, college-aged children and elderly residents.

AFFORDABLE HOUSING GOALS & IMPLEMENTATION STRATEGIES

The Town of Lakeville seeks to increase its inventory of affordable housing units at a pace generally consistent with the rate of development of market-rate units. Since the town has not met its Chapter 40B goal, the achievement of the goals and strategies outlined in this Housing Production Plan is critical in achieving its Chapter 40B goal.

The following major **goals** are set forth to create a mix of housing types sufficient to meet projected demands and preferences in Lakeville in the coming years. They respond to the needs identified in the Housing Needs Assessment as well as to current constraints.

Goal #1: Produce 19 Subsidized Housing Inventory (SHI) eligible housing units per calendar year; this figure equals 0.50% of the Town's year-round housing.

Goal #2: Target Modest Mixed-Use and Multi-Family Housing Developments to "Village Areas."

Goal #3: Allow for a diversity of housing options that will allow young adults and seniors to remain in the community.

Goal #4: Work with developers to encourage "Friendly 40B" developments.

In order to meet the aforementioned goals, the Town of Lakeville plans to implement the following **strategies**:

Strategy #1: Adopt an Inclusionary Zoning Bylaw

Strategy #2: Adopt an Open Space Residential Design (OSRD) Bylaw

Strategy #3: Appoint an Affordable Housing Trust Fund Board of Directors

Strategy #4: Establish an Affordable Housing Partnership

Strategy #5: Expand the current Chapter 40R Smart Growth Overlay District

Strategy #6: Continue to guide and approve appropriate Comprehensive Permits

Strategy #7: Conduct affordable housing outreach and education

Strategy #8: Promote Leadership Training for Board and Committee members

Table 1-1: Lakeville HPP Strategy and Action Plan

Strategy No.	Strategy	Who?	When?	How?	Which Goals?	Quantity of Affordable Units
1	Adopt an Inclusionary Zoning Bylaw	PB, BOS	2018-2023	Outreach, Planning, Town Meeting Vote	1,2,3	10
2	Adopt an Open Space Residential Design Bylaw	PB, BOS	2018-2023	Outreach, Planning, Town Meeting Vote	1,2,3	10
3	Appoint an Affordable Housing Trust Board of Directors	BOS	2018-2023	Outreach to citizens	1,3,4	-
4	Establish an Affordable Housing Partnership	BOS	2018-2023	Outreach, Collaboration, BOS action	1,3,4	-
5	Expand the Current Chapter 40R Smart Growth District	PB, BOS	2018-2023	Outreach, Planning, Town Meeting Vote	1,2,3	20
6	Continue to Guide and Approve Appropriate Comprehensive Permits	ZBA, PB, BOS	2018-2023	Outreach to and collaboration with developers, ZBA action	1,3,4	55
7	Conduct Affordable Housing Outreach and Education	ZBA, PB, BOS, AHP, HT	2018-2023	Outreach and Collaboration	3	-
8	Promote Leadership Training for Board and Committee Members	ZBA, PB, BOS, AHP, HT	2018-2023	Outreach and Collaboration	3	-
Total Units by 2023						95

2. INTRODUCTION

The Town of Lakeville was first settled in 1717 as part of the Town of Middleborough, but later split from Middleborough and was incorporated as a separate town in 1853. Lakeville is located on the southwestern edge of Plymouth County in southeastern Massachusetts and is bordered by Middleborough on the north and east, Rochester and Freetown on the south, and Berkley and Taunton on the west. Lakeville is approximately thirty-eight (38) miles south of Boston and two hundred and six (206) miles from New York City.

The town's 36.1 square miles contain many lakes (or ponds), as its namesake suggests, as well as wetlands, habitat areas, aquifers and a mix of rural and suburban neighborhoods. The many ponds, rivers and streams in Lakeville also serve as a source of drinking water. The City of Taunton's Water Department operates a pumping station on Assawompsett Pond and a filtration plant on Elders Pond. The City of New Bedford's Water Department operates a pumping station on Great Quittacas Pond and a filtration plant on Little Quittacas Pond. Since these ponds serve as a source of drinking water, recreation and access is very limited. Of course all of the ponds and streams are eventually interconnected, as they are parts of a surficial aquifer that also supplies wells in Middleborough, Lakeville, Rochester and Freetown.

Lakeville is connected to the larger southeastern Massachusetts region via its many state routes, including north-south Routes 18, 105 and 140, and the east-west Route 79. U.S. Route 44 passes through the northern end of town and Interstate 495 runs along its northern edge with an interchange located just over the town line in Middleborough. Lakeville also has transit options, as it is home to the Middleborough/Lakeville MBTA Commuter Rail Station and has limited fixed route bus service to the Commuter Rail station provided by the Greater Attleboro Taunton Regional Transit Authority (GATRA).

AFFORDABLE HOUSING PRODUCTION IN LAKEVILLE

Since the completion of Lakeville's last Housing Production Plan in 2012, the number of units included on the town's Subsidized Housing Inventory (SHI) has increased by 124 units from 150 to 274. New units on the SHI include three (3) ownership units at 6 Bridge Street, 14 rental units at Water Street Crossing and 100 rental units at Kensington Court. The production of these affordable units demonstrate the town's commitment to making progress in the creation of affordable units and its regional need for affordable housing.

In addition to the units mentioned above, the town has recently petitioned the Massachusetts Department of Housing and Community Development (DHCD) to include 104 units at Sterling Place at Lakeville Station on its SHI. This stems from a dispute about the how the Kensington Court and Sterling Place developments were approved. It is the town's position that 104 units at Sterling Place should be included in its SHI. If the petition is approved, the addition of Sterling Place's 104 units to Lakeville's SHI would increase its number of SHI units to 378 or 9.8%, leaving the town less than a dozen shy of meeting its 10% requirement as mandated by Chapter 40B.

3. PLANNING FOR AFFORDABLE HOUSING IN LAKEVILLE

WHY DOES LAKEVILLE HAVE A HOUSING PRODUCTION PLAN?

This Housing Production Plan consists of two parts. The first, a Housing Needs Assessment, identifies the community's profile, conducts an inventory of its housing characteristics, and evaluates the housing needs of the town's residents, while recognizing potential barriers to housing production. The second part of this report includes goals for housing based on identified needs as well as strategies by which the town can meet those goals in a manner consistent with M.G.L. Chapter 40B and 760 CMR 56.00 regulations. By taking a proactive approach to housing production, Lakeville will be much more likely to achieve both its housing and community planning goals.

As of September 2017, the Town of Lakeville has 274 housing units which does not meet the affordability requirements set forth in M.G.L. Chapter 40B §§ 20 thru 23 and 760 CMR 56.00. This represents 7.1% of their 3,852 year round housing units. Lakeville needs to produce at least 111 more affordable units to meet the *Housing Unit Minimum* of the Statutory *Minima* (as defined in 760 CMR 56.03(3)(a)). Achieving the Housing Unit Minimum threshold would mean that the Town of Lakeville Zoning Board of Appeals would have the ability to deny a Comprehensive Permit or approve it with conditions and that the aforementioned decision would be upheld if appealed by the applicant pursuant to 760 CMR 56.03.

Assuming future housing growth, this 10% figure is a moving target and ultimately the required minimum number of year-round units will increase over time as new year-round housing units are built. The number of year-round housing units in a community from which the required number of affordable units is calculated by DHCD (10% of year-round housing units) is based on the number of year-round housing units reported in the decennial census, the latest being 2010. Therefore, as additional year-round housing units are constructed through a decade, the subsequent number of year-round housing units reported in the next decennial census increases, as does the corresponding required number of affordable housing units. In addition, loss of current affordable properties from the Subsidized Housing Inventory through expiration of their deed restrictions can accelerate this situation.

For example, affordability restrictions on two smaller rental properties in Lakeville are set to expire in 9 to 10 years. The ARC of Greater Fall River (DHCD ID #1507) and Long Point Road (DHCD ID #1508) together have 8 rental housing units with affordability restrictions set to expire in 2026 and 2027, respectively. These two properties changing to market-rate units coupled with typical housing growth and a slow growth in the production of affordable housing units would be detrimental to Lakeville meeting the required 10% affordable housing threshold.

As such, Lakeville needs to continue to produce affordable housing units to meet the needs of its residents and to achieve the required 10% affordable housing threshold. This HPP outlines how Lakeville can do so while meeting other important affordable housing production goals, by way of an assortment of strategies and actions to be undertaken in the next five (5) years.

A. HOUSING UNIT AFFORDABILITY QUALIFICATIONS

Subsidized Housing Inventory (SHI)

The regulations for Chapter 40B, found in 760 CMR 56.00, offer affordability standards to classify housing units according to how expensive they are to occupy. They also classify households according to their ability to pay for housing.

In assessing a community's progress toward the 10% of affordable housing threshold, the State counts a housing unit as affordable if it meets the following criteria:

- It must be part of a "subsidized" development built by a public agency, non-profit, or limited dividend corporation.
- At least 25% of the units in the development must be income-restricted to households with incomes at or below the 80% of area median income and have rents or sale prices restricted to affordable levels.
 - Restrictions must run at least 15 years for rehabilitation, 30 years for new rental construction, and in perpetuity for new homeownership construction.
- Development must be subjected to a regulatory agreement and monitored by a public agency or non-profit organization.
- Project sponsors must meet affirmative marketing requirements.

Table 3-1 displays the Chapter 40B Subsidized Housing Inventory (SHI) maintained by the Massachusetts Department of Housing and Community Development (DHCD) for the Town of Lakeville and its neighboring communities.

Table 3-1: DHCD Chapter 40B Subsidized Housing Inventory (SHI), September 2017

Community	2010 Census Year Round Housing Units	Total Development Units	SHI Units	Percent
Berkley	2,169	103	24	1.1%
Freetown	3,263	104	86	2.6%
Lakeville	3,852	590	274	7.1%
Middleborough	8,921	979	589	6.6%
Rochester	1,865	8	8	0.4%
Taunton	23,844	1,720	1,529	6.4%

Source: Massachusetts Department of Housing & Community Development (DHCD)

Certified Housing Production Plans

DHCD has also created a method for measuring a community's progress toward reaching its 10% Chapter 40B goal. If, during a 12-month period, a community produces SHI eligible affordable housing equal to 0.5% or 1% of its year round housing stock, its HPP may be "certified." Certification means that the town's Housing Production Plan has met its regional need for affordable housing for one year (by meeting the 0.5% threshold) or two years (by meeting the 1% threshold).

If a community has a certified HPP within 15 days of the opening of the local hearing for a 40B Comprehensive Permit, a denial of the permit by the Zoning Board of Appeals (ZBA) may be upheld by the state Housing Appeals Committee. The procedure is as follows: The ZBA shall provide written notice to the Applicant, with a copy to DHCD, that it considers that a denial of the permit or the imposition of conditions or requirements would be "Consistent with Local Needs," the grounds that it believes have been met, and the factual basis for that position, including any necessary supportive documentation. If the Applicant wishes to challenge the ZBA's assertion, it must do so by providing written notice to DHCD, with a copy to the ZBA, within 15 days of its receipt of the ZBA's notice, including any documentation to support its position. DHCD shall review the materials provided by both parties and issue a decision within 30 days of its receipt of all materials. The ZBA shall have the burden of proving satisfaction of the grounds for asserting that a denial or approval with conditions would be consistent with local needs, provided, however, that any failure of DHCD to issue a timely decision shall be deemed a determination in favor of the municipality.

Table 3-2: DHCD SHI Yearly Goals for Lakeville

Community	2010 Census Year Round Housing Units	0.5% Yearly Goal	1.0% Yearly Goal
Lakeville	3,852	19	39

Source: Massachusetts Department of Housing & Community Development (DHCD)

Local Preference Units

It should also be noted that up to 70% of units in an affordable housing development can be set aside as "local or community preference units" in its Affirmative Fair Housing Marketing Plan (AFHMP). Under fair housing laws, an AFHMP is required when marketing and selecting residents for affordable units. The AFHMP must be approved by DHCD and not have the effect of excluding, denying, or delaying participation of groups of persons protected under the fair housing laws. Allowable preference categories can include Lakeville residents; employees of the town, such as teachers, janitors, firefighters, police officers, librarians, town hall employees; employees of businesses located in town; or households with children attending Lakeville schools. Therefore, in lotteries for affordable units, those who meet these local preference criteria will be placed in a separate pool, and the purchasers or tenants of 70% of the affordable units can come from this local preference pool. Those in the local preference pool who are not selected, as well as all other applicants, are placed in an open pool from which the tenants of the remaining units will be drawn.

B. HOUSEHOLD AFFORDABILITY QUALIFICATIONS

The state's affordable housing program also specifies criteria for families to meet in order to qualify for the rental or ownership of a SHI unit. Most housing subsidy programs are targeted to particular income ranges which may vary based on program goals. The income ranges are percentages of the Area Median Family Income (AMFI) adjusted for family size. In 2017, Lakeville's AMFI was \$81,000 for a family of four (Lakeville is within the Brockton, MA HUD Metro FMR Area; its AMFI determines all income calculations for Lakeville).

Extremely low-income housing is directed to those earning at or below 30% of area median income (AMI) as defined by HUD (\$24,850 for a family of four for the Brockton, MA HUD Metro FMR Area), very low-income generally refers to those earning at or below 50% of AMI (\$41,400 for a family of four) and low-income refers to those earning at or below 80% of AMI (\$66,250 for a family of four). These income levels are summarized in Table 3-3.

Table 3-3: HUD 2017 Income Limits for Brockton, MA Metro FMR Area¹

Persons in Family	Extremely Low (30%) Income Limits	Very Low (50%) Income Limits	Low (80%) Income Limits
1	\$17,400	\$29,000	\$46,400
2	\$19,900	\$33,150	\$53,000
3	\$22,400	\$37,300	\$59,650
4	\$24,850	\$41,400	\$66,250
5	\$28,780	\$44,750	\$71,550
6	\$32,960	\$48,050	\$76,850
7	\$37,140	\$51,350	\$82,150
8	\$41,320	\$54,650	\$87,450

Area Median Family Income: \$81,000

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

¹ The Brockton, MA HUD Metro FMR Area consists of the following 15 communities in southeastern Massachusetts: Abington, Avon, Bridgewater, Brockton, East Bridgewater, Halifax, Hanson, Lakeville, Marion, Mattapoisett, Middleborough, Plympton, Rochester, West Bridgewater and Whitman.

4. HOUSING NEEDS ASSESSMENT

This section examines Lakeville’s demographic profile, conducts an inventory of the housing characteristics, and evaluates the housing needs of the town’s residents while recognizing potential barriers to housing production. In addition, this section analyzes the current housing market in order to identify who currently lives in town and the housing market activity.

Importantly, this portion of the plan makes an inventory of factors that may be preventing the production of affordable market-rate housing (housing that can be rented or owned for less than or equal to 30% of a household’s income) and subsidized housing (rental or ownership housing that is available to eligible low-income households through the use of public or private funding sources). This process is necessary as it remains increasingly difficult for individuals and families to find affordable housing in the private market. Without subsidies and supportive zoning, the private market is less capable of producing housing that is affordable to low- and moderate-income households. As a consequence, it becomes necessary to rely more often on regulatory relief and housing subsidies to attain affordable housing and produce enough units to address existing affordable housing needs and demands.

The Housing Needs Assessment draws from a wide variety of data sources including, but is not limited to, the list below. It is important to remember that since multiple data sources were used in the development of this Plan, there may be some minor discrepancies in the data.

- U.S. Census Bureau decennial census data (2000 and 2010);
- American Community Survey 5-Year Estimates (2011-2015);
- UMass Donahue Institute Population Estimates Program;
- U.S. Department of Housing and Urban Development (HUD) data;
- HUD Comprehensive Housing Affordability Strategy (CHAS) data (2010-2014);
- Massachusetts Department of Housing and Community Development (DHCD) data;
- Massachusetts Department of Transportation (MassDOT) projection data;
- Warren Group/Banker and Tradesman data;
- Town of Lakeville Annual Census, Assessors Department and Building Department data;
- Old Colony Regional Vocational Technical High School data; and,
- Bristol County Agricultural High School data.

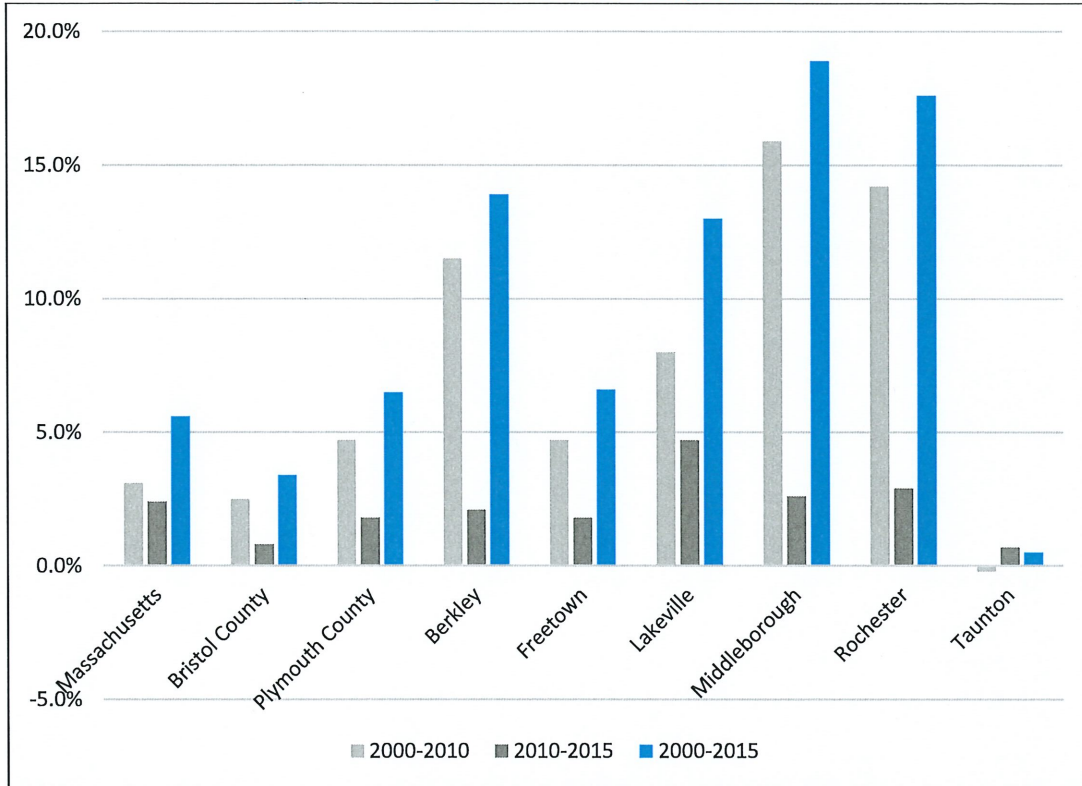
Two sets of findings within this HPP – the needs assessment and housing barriers – are the context within which a responsive set of strategies can be developed to address housing needs and meet Lakeville’s housing production goals.

A. POPULATION PROFILE

1. Total Population

From 2000 to 2015, Lakeville’s population increased 13%, from approximately 9,821 residents to 11,098 residents. This growth rate was more than two (2) times higher than that of Plymouth County and the Commonwealth during the same time period. Lakeville’s population grew at a faster rate than that of neighboring Freetown and Taunton, but was slightly behind neighboring Middleborough, Rochester, and Berkley.

Figure 4-1: Population Growth Rate, 2000-2015



Source: U.S. Census Bureau: 2000 & 2010 Census; ACS 5-Year Estimates 2011-2015

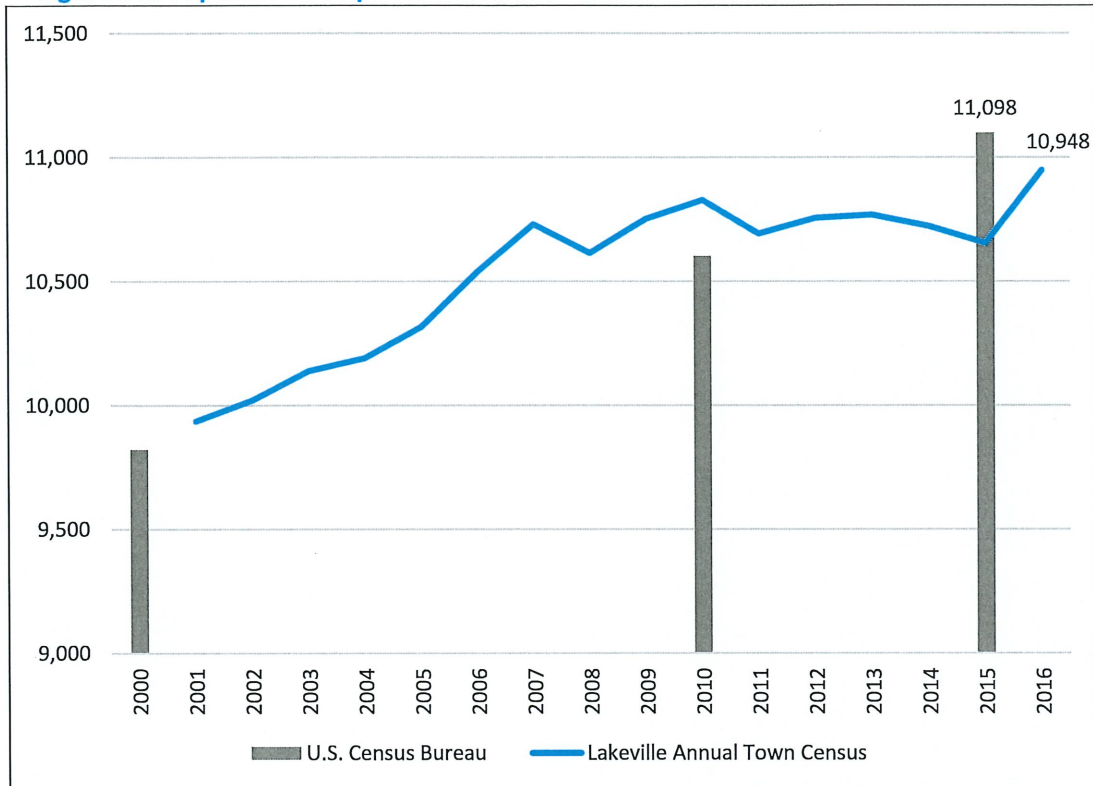
Table 4-1: Total Population Change, 2000-2015

Jurisdiction	2000	2010	2015	Change 2000-2010	Change 2010-2015	Change 2000-2015
Massachusetts	6,349,097	6,547,629	6,705,586	3.1%	2.4%	5.6%
Bristol County	534,678	548,285	552,763	2.5%	0.8%	3.4%
Plymouth County	472,822	494,919	503,681	4.7%	1.8%	6.5%
Berkley	5,749	6,411	6,547	11.5%	2.1%	13.9%
Freetown	8,472	8,870	9,031	4.7%	1.8%	6.6%
Lakeville	9,821	10,602	11,098	8.0%	4.7%	13.0%
Middleborough	19,941	23,116	23,708	15.9%	2.6%	18.9%
Rochester	4,581	5,232	5,385	14.2%	2.9%	17.6%
Taunton	55,976	55,874	56,276	-0.2%	0.7%	0.5%

Source: U.S. Census Bureau: 2000 & 2010 Census; ACS 5-Year Estimates 2011-2015

When comparing Lakeville’s population numbers from the U.S. Census Bureau with the Town of Lakeville’s annual Town Census, one can see that they are very close. According to the most population recent numbers from the U.S. Census Bureau American Community Survey, 2015 (11,098) and Lakeville’s Annual Town Census, 2016 (10,948) show a difference of just 150 people or 1.4%.

Figure 4-2: Population Comparison: Lakeville Annual Town Census & U.S. Census Bureau

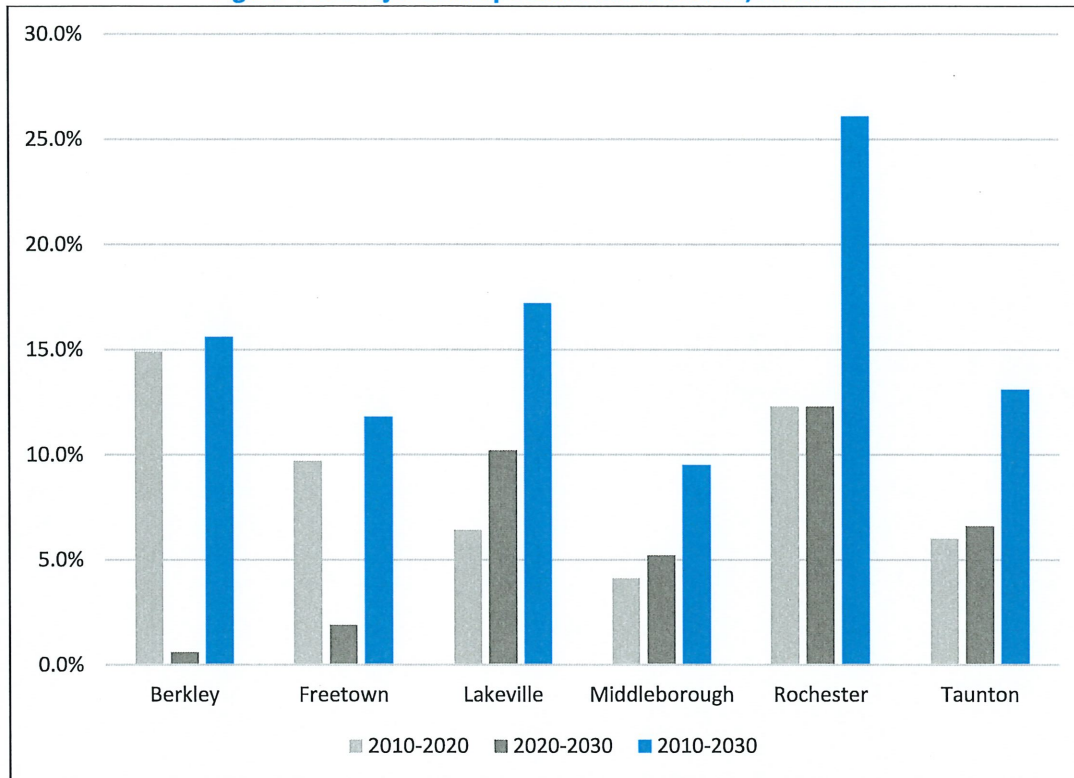


Source: U.S. Census Bureau: 2000 & 2010 Census; ACS 5-Year Estimates 2011-2015 & Lakeville Town Clerk’s Office

2. Projected Population

Population projections from the UMass Donahue Institute and MassDOT indicate that Lakeville will grow at the second fastest rate among its neighboring communities until 2030, trailing only Rochester. The projections indicate that Lakeville’s population will increase 17.2% from 2010 to 2030, from 10,602 to 12,428.

Figure 4-3: Projected Population Growth Rate, 2010-2030



Source: U.S. Census Bureau, UMass Donahue Institute, MassDOT

Table 4-2: Population Projections, 2010-2030

Community	2010 Count	2020 Projection	2030 Projection	Change 2010-2020	Change 2020-2030	Change 2010-2030
Berkley	6,411	7,366	7,411	14.9%	0.6%	15.6%
Freetown	8,870	9,729	9,913	9.7%	1.9%	11.8%
Lakeville	10,602	11,277	12,428	6.4%	10.2%	17.2%
Middleborough	23,116	24,063	25,303	4.1%	5.2%	9.5%
Rochester	5,232	5,877	6,600	12.3%	12.3%	26.1%
Taunton	55,874	59,253	63,169	6.0%	6.6%	13.1%

Source: U.S. Census Bureau, UMass Donahue Institute, MassDOT

3. Population by Age

Between 2000 and 2015, Lakeville’s median age rose by six (6) years from 37.8 to 43.8. During this same time period, the retirement-age population (greater than 64 years old) grew at a rate of nearly 37%, more than twice the rate of the working-age population (20-64 years old). The school-age population (less than 20 years old) was the only population group to see a reduction (nearly 6%) between 2000 and 2015. In light of these aging trends, there is likely to be demand for development of housing units that complement the lifestyles and incomes of retirees and “empty-nesters.”

Between 2000 and 2015, the age cohorts that experienced the largest decrease were the under 5 years’ age cohort (-30.8%) and the 35-44 years’ age cohort (-27.9%). The age cohorts that experienced the largest increases during this same time period were the 60-64 years’ age cohort (155.4%) and the 55-59 years’ age cohort (101%).

Table 4-3A: Lakeville Population Change by Age Group, 2000-2015

Age Group	2000	2010	2015	Change 2000-2010	Change 2010-2015	Change 2000-2015
School-Age (Under 20)	2,913	2,920	2,746	0.2%	-6.0%	-5.7%
Working-Age (20-64)	5,798	6,361	6,835	9.7%	7.5%	17.9%
Retiree (65 and Over)	1,110	1,321	1,517	19.0%	14.8%	36.7%
Total	9,821	10,602	11,098	8.0%	4.7%	13.0%

Source: U.S. Census Bureau: 2000 & 2010 Census; ACS 5-Year Estimates 2011-2015

Table 4-3B: Lakeville Population Change by Age Group, 2000-2015

Age Group	2000	2010	2015	Change 2000-2010	Change 2010-2015	Change 2000-2015
Under 5	751	544	520	-27.6%	-4.4%	-30.8%
5 to 9	768	739	637	-3.8%	-13.8%	-17.1%
10 to 14	749	900	970	20.2%	7.8%	29.5%
15 to 19	645	737	619	14.3%	-16.0%	-4.0%
20 to 24	346	501	643	44.8%	28.3%	85.8%
25 to 34	1,105	809	924	-26.8%	14.2%	-16.4%
35 to 44	1,946	1,539	1,403	-20.9%	-8.8%	-27.9%
45 to 54	1,538	2,042	1,929	32.8%	-5.5%	25.4%
55 to 59	493	800	991	62.3%	23.9%	101.0%
60 to 64	370	670	945	81.1%	41.0%	155.4%
65 to 74	541	763	949	41.0%	24.4%	75.4%
75 to 84	376	390	384	3.7%	-1.5%	2.1%
85 and Over	193	168	184	-13.0%	9.5%	-4.7%
Total	9,821	10,602	11,098	8.0%	4.7%	13.0%
Median Age	37.8	42.4	43.8	12.2%	3.3%	15.9%

Source: U.S. Census Bureau: 2000 & 2010 Census; ACS 5-Year Estimates 2011-2015

4. Projected Population by Age, 2010-2030

The UMass Donahue Institute’s Population Estimates Program was utilized to obtain population projections by age from 2010 to 2030. The estimates indicate that Lakeville will experience a 10.8% decrease in the school-age population (under 20 years) from 2010 to 2030, but will experience a dramatic 124.8% increase in the retirement-age population (65 years and over). The working-age population (20-64 years old) is expected to remain static.

Between 2010 and 2030, the age cohorts expected to experience the largest decreases are the 45-54 years’ age cohort (-35.6%) and the 15-19 years’ age cohort (-18.7%). The age cohorts expected to experience the largest increases during this same time period are the 75-84 years’ age cohort (142.8%) and the 65-74 years’ age cohort (135.1%).

Table 4-4A: Lakeville Population Projections by Age Group, 2010-2030

Age Group	2010	2020	2030	Change 2010-2020	Change 2020-2030	Change 2010-2030
School-Age (Under 20)	2,920	2,580	2,606	-11.6%	1.0%	-10.8%
Working-Age (20-64)	6,361	6,607	6,361	3.9%	-3.7%	0.0%
Retiree (65 and Over)	1,321	2,059	2,970	55.9%	44.2%	124.8%
Total	10,602	11,246	11,937	6.1%	6.1%	12.6%

Source: UMass Donahue Institute Population Estimates Program

Table 4-4B: Lakeville Population Projections by Age Group, 2010-2030

Age Group	2010	2020	2030	Change 2010-2020	Change 2020-2030	Change 2010-2030
Under 5	544	557	599	2.4%	7.5%	10.1%
5 to 9	739	556	664	-24.8%	19.4%	-10.1%
10 to 14	900	704	744	-21.8%	5.7%	-17.3%
15 to 19	737	763	599	3.5%	-21.5%	-18.7%
20 to 24	501	582	464	16.2%	-20.3%	-7.4%
25 to 34	809	1,153	1,306	42.5%	13.3%	61.4%
35 to 44	1,539	1,168	1,599	-24.1%	36.9%	3.9%
45 to 54	2,042	1,668	1,316	-18.3%	-21.1%	-35.6%
55 to 59	800	1,035	729	29.4%	-29.6%	-8.9%
60 to 64	670	1,001	947	49.4%	-5.4%	41.3%
65 to 74	763	1,314	1,794	72.2%	36.5%	135.1%
75 to 84	390	570	947	46.2%	66.1%	142.8%
85 and Over	168	175	229	4.2%	30.9%	36.3%
Total	10,602	11,246	11,937	6.1%	6.1%	12.6%

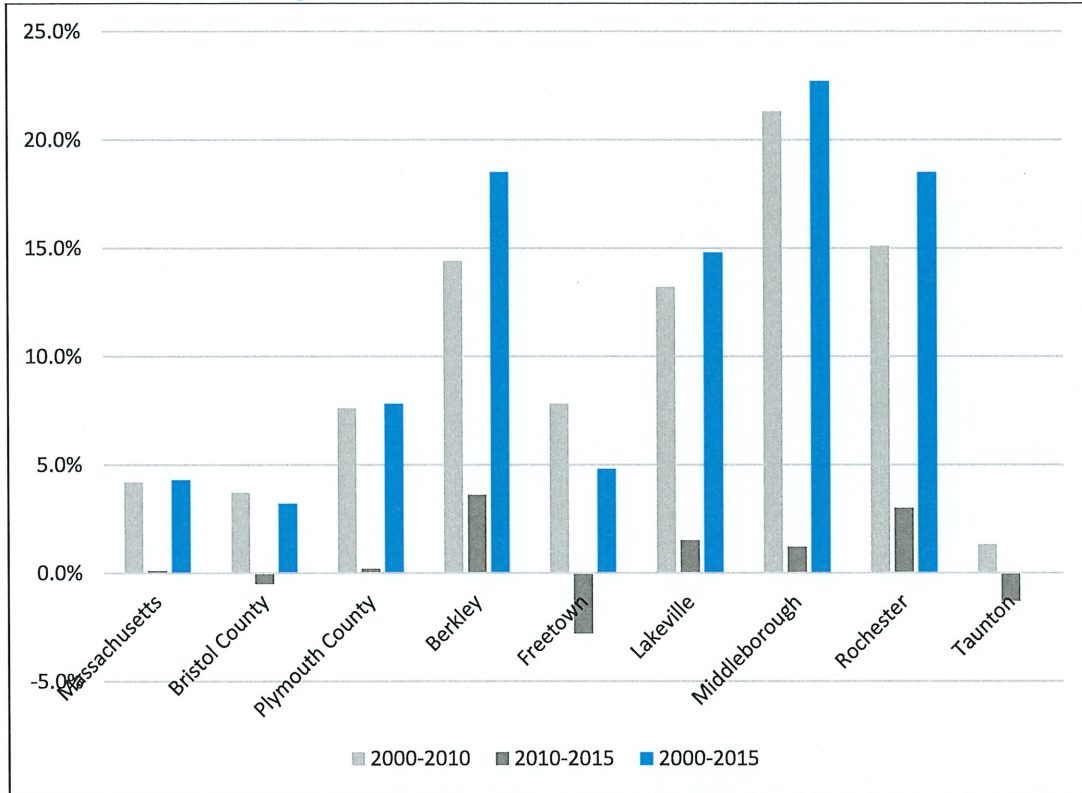
Source: UMass Donahue Institute Population Estimates Program

B. HOUSEHOLD PROFILE

1. Total Households

From 2000 to 2015, the total number of households in Lakeville increased 14.8%, from approximately 3,292 households to 3,780 households. This growth rate was more than almost two (2) times higher than that of Plymouth County and three (3) times higher than that of the Commonwealth during the same time period. The number of households in Lakeville grew at a faster rate than that of neighboring Freetown and Taunton, but was slightly behind neighboring Middleborough, Rochester, and Berkley.

Figure 4-4: Household Growth Rate, 2000-2015



Source: U.S. Census Bureau: 2000 & 2010 Census; ACS 5-Year Estimates 2011-2015

Table 4-5: Household Growth Rate, 2000-2015

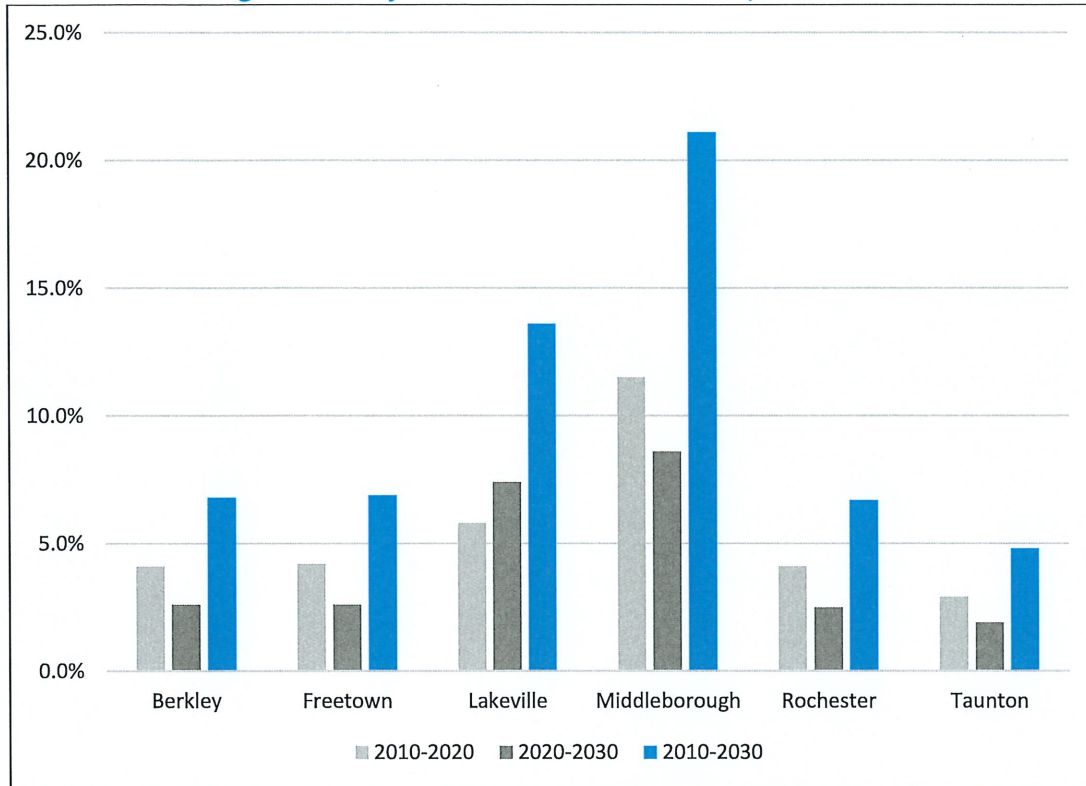
Jurisdiction	2000	2010	2015	Change 2000-2010	Change 2010-2015	Change 2000-2015
Massachusetts	2,443,580	2,547,075	2,549,721	4.2%	0.1%	4.3%
Bristol County	205,411	213,010	212,029	3.7%	-0.5%	3.2%
Plymouth County	168,361	181,126	181,425	7.6%	0.2%	7.8%
Berkley	1,843	2,109	2,184	14.4%	3.6%	18.5%
Freetown	2,932	3,162	3,072	7.8%	-2.8%	4.8%
Lakeville	3,292	3,725	3,780	13.2%	1.5%	14.8%
Middleborough	6,981	8,468	8,566	21.3%	1.2%	22.7%
Rochester	1,575	1,813	1,867	15.1%	3.0%	18.5%
Taunton	22,045	22,332	22,035	1.3%	-1.3%	0.0%

Source: U.S. Census Bureau: 2000 & 2010 Census; ACS 5-Year Estimates 2011-2015

2. Projected Households

Household projections from the UMass Donahue Institute and MassDOT indicate that Lakeville will grow at the second fastest rate among its neighboring communities until 2030, trailing only Middleborough. The projections indicate that the number of households in Lakeville will increase 13.6% from 2010 to 2030, from 3,725 to 4,231.

Figure 4-5: Projected Household Growth Rate, 2010-2030



Source: U.S. Census Bureau, UMass Donahue Institute, MassDOT

Table 4-6: Total Household Change, 2010-2030

Community	2010 Count	2020 Projection	2030 Projection	Change 2010-2020	Change 2020-2030	Change 2010-2030
Berkley	2,109	2,195	2,252	4.1%	2.6%	6.8%
Freetown	3,162	3,294	3,380	4.2%	2.6%	6.9%
Lakeville	3,725	3,941	4,231	5.8%	7.4%	13.6%
Middleborough	8,468	9,446	10,256	11.5%	8.6%	21.1%
Rochester	1,813	1,888	1,935	4.1%	2.5%	6.7%
Taunton	22,332	22,970	23,408	2.9%	1.9%	4.8%

Source: U.S. Census Bureau, UMass Donahue Institute, MassDOT

3. Household Types

Between 2000 and 2015, household types became more diverse in terms of its members. Specifically, households containing only one person grew at a rate of approximately 64% and households headed by a female with no husband present grew at a rate of approximately 12%. Additionally, the overall aging trend, previously revealed in the population figures, is mirrored in the significant rise in households with individuals 65 years and older (60.5%). Lakeville's predominant household type is a married-couple family (64% of all households) with an average family size of 3.41 members.

Table 4-7: Lakeville Household Types, 2000-2015

Household Types	2000	2010	2015	Change 2000-2010	Change 2010-2015	Change 2000-2015
Family households	2,659	2,912	2,823	9.5%	-3.1%	6.2%
With own children under 18	1,318	1,321	1,211	0.2%	-8.3%	-8.1%
Married-couple family	2,296	2,440	2,431	6.3%	-0.4%	5.9%
With own children under 18	1,138	1,080	1,061	-5.1%	-1.8%	-6.8%
Female householder, no husband	264	335	296	26.9%	-11.6%	12.1%
With own children under 18	137	171	101	24.8%	-40.9%	-26.3%
Nonfamily households	633	813	957	28.4%	17.7%	51.2%
Householder living alone	483	627	794	29.8%	26.6%	64.4%
Householder 65 and over	205	275	309	34.1%	12.4%	50.7%
Households w/persons under 18	1,412	1,447	1,333	2.5%	-7.9%	-5.6%
Households w/persons 65 and over	666	921	1,069	38.3%	16.1%	60.5%
Average household size	2.91	2.82	2.91	-3.1%	3.2%	0.0%
Average family Size	3.24	3.19	3.41	-1.5%	6.9%	5.2%
Total Households	3,292	3,725	3,780	13.2%	1.5%	14.8%

Source: U.S. Census Bureau: 2000 & 2010 Census; ACS 5-Year Estimates 2011-2015

C. ECONOMIC PROFILE

1. Household Income

From 1999 to 2015, Lakeville's median household income increased almost 29%, from \$70,495 to \$90,876. While the rate of growth was the second lowest to that of the State, Plymouth and Bristol Counties and its surrounding communities, Lakeville is still a relatively affluent community. Lakeville's median household income in 2015 was 20% higher than Plymouth County's and 32.5% higher than the State's. Among its surrounding communities, only Rochester had a higher median household income.

Table 4-8: Median Household Income, 1999-2015

Jurisdiction	1999	2015	Change 1999-2015
Massachusetts	\$50,502	\$68,563	35.8%
Bristol County	\$43,496	\$56,842	30.7%
Plymouth County	\$55,615	\$75,459	35.7%
Berkley	\$66,295	\$86,288	30.2%
Freetown	\$64,576	\$87,921	36.2%
Lakeville	\$70,495	\$90,876	28.9%
Middleborough	\$52,755	\$76,500	45.0%
Rochester	\$63,289	\$98,958	56.4%
Taunton	\$42,932	\$53,058	23.6%

Source: U.S. Census Bureau: 2000 Census & ACS 5-Year Estimates 2011-2015

From 1999 to 2015, Lakeville experienced a large increase in the number of high-income households, with households earning \$150,000 to \$199,999 increasing 214.7% and households earning \$200,000 or more increasing 322.8%. In total, 43% of households in Lakeville earned more than \$100,000 in 2015. Conversely, 11.1% of the households in Lakeville earned less than \$25,000 in 2015, highlighting the fact that there are still a number of low-income households in Lakeville.

Table 4-9: Lakeville Household Income Distribution, 1999-2015

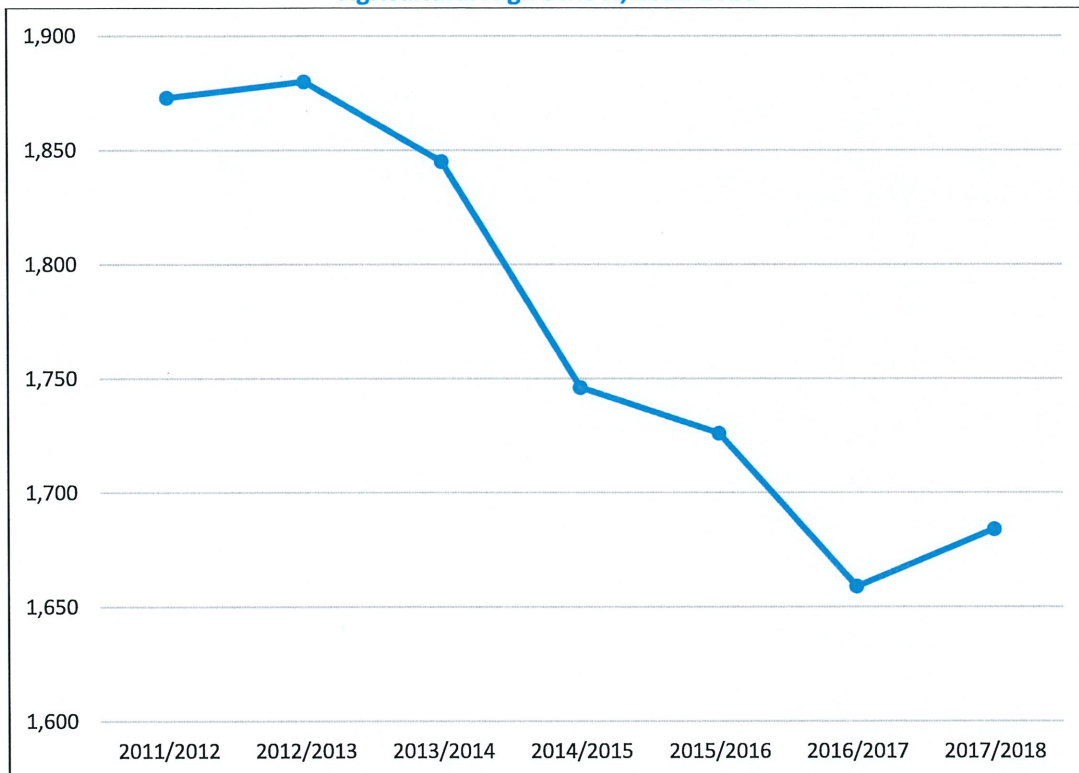
Income Range	1999	2015	Change 1999-2015
Less than \$10,000	109	157	44.0%
\$10,000 to \$14,999	130	53	-59.2%
\$15,000 to \$24,999	154	210	36.4%
\$25,000 to \$34,999	166	216	30.1%
\$35,000 to \$49,999	448	303	-32.4%
\$50,000 to \$74,999	777	680	-12.5%
\$75,000 to \$99,999	604	536	-11.3%
\$100,000 to \$149,999	702	885	26.1%
\$150,000 to \$199,999	129	406	214.7%
\$200,000 or more	79	334	322.8%
Total	3,298	3,780	14.6%

Source: U.S. Census Bureau: 2000 & 2010 Census; ACS 5-Year Estimates 2011-2015

2. School Enrollment & Educational Attainment

The Town of Lakeville is in a regional school district with the neighboring town of Freetown. There are a total of five (5) schools in the district, one (1) elementary school in each Freetown and Lakeville and joint intermediate, middle school and high school in Lakeville. Students who reside in Lakeville also have the opportunity to attend two regional high schools - the Old Colony Regional Vocational Technical High School in Rochester and Bristol County Agricultural High School in Dighton. Figure 4-6 and Table 4-10 show the total number of Lakeville students enrolled in the Freetown Lakeville Regional School District, the Old Colony Regional Vocational Technical High School, and the Bristol County Agricultural High School has declined over the past seven years.

Figure 4-6: Enrollment of Lakeville Students in the Freetown Lakeville Regional School District, Old Colony Regional Vocational Technical High School & Bristol County Agricultural High School, 2011-2018



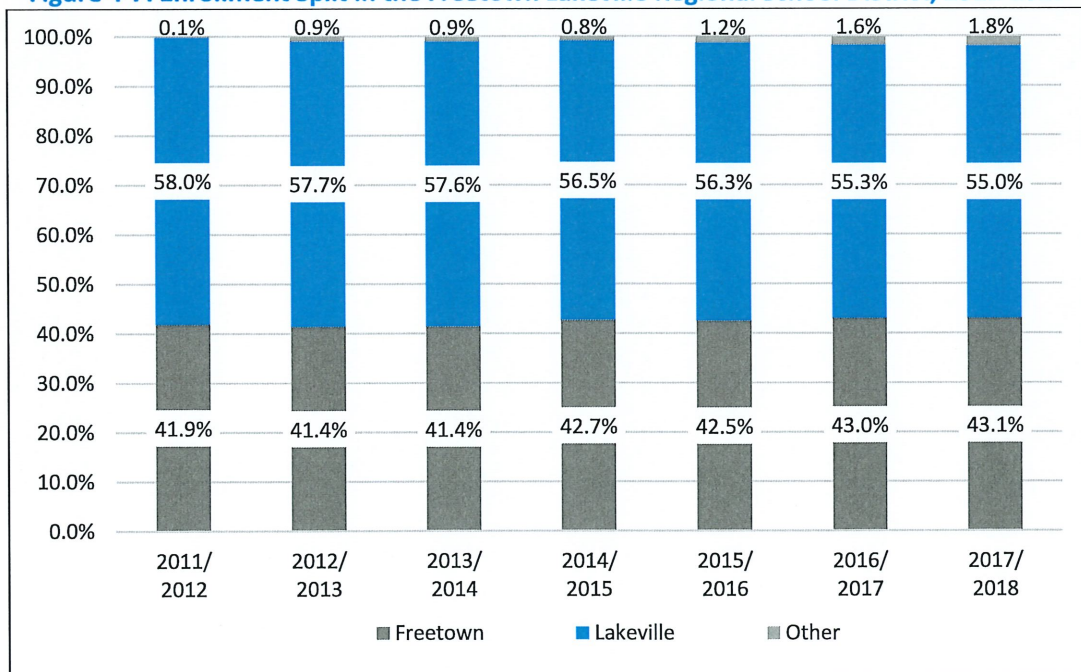
Source: Freetown Lakeville Regional School District, Old Colony Regional Vocational Technical High School and Bristol County Agricultural High School.

Table 4-10: Enrollment of Lakeville Students in the Freetown Lakeville Regional School District, Old Colony Regional Vocational Technical High School & Bristol County Agricultural High School, 2011-2018

School	Grade Level	2011/ 2012*	2012/ 2013	2013/ 2014	2014/ 2015	2015/ 2016	2016/ 2017	2017/ 2018
Freetown Elementary School	PreK to 3	47	29	40	21	20	21	26
Assawompsett Elementary School	K to 3	630	492	476	449	421	411	435
George R. Austin Intermediate School	4 & 5	144	289	262	249	281	281	235
Freetown Lakeville Middle School	6 to 8	481	453	452	445	437	400	421
Apponequet Regional High School	9 to 12	469	501	483	440	438	412	433
Total Freetown Lakeville Regional School District	PreK to 12	1,771	1,764	1,713	1,604	1,597	1,525	1,550
Bristol County Agricultural High School	9 to 12	14	12	8	11	7	9	12
Old Colony Regional Vocational Technical High School	9 to 12	88	104	124	131	122	125	122
Totals		1,873	1,880	1,845	1,746	1,726	1,659	1,684

Source: Freetown Lakeville Regional School District, Old Colony Regional Vocational Technical High School and Bristol County Agricultural High School. *For the 2011/2012 School Year, Assawompsett Elementary School housed Grades K thru 4, Freetown Elementary School housed Grades PreK thru 4, and the George R. Austin Intermediate School housed Grade 5 only.

Figure 4-7: Enrollment Split in the Freetown Lakeville Regional School District, 2011-2018



Source: Freetown Lakeville Regional School District

From 2000 to 2015, the level of educational attainment among Lakeville’s residents has increased noticeably, with increases occurring in the number of high school and college graduates (at all levels) and decreases occurring in the number of people who have not graduated high school.

Table 4-11: Lakeville Educational Attainment (Adults 25 Years +), 2000-2015

Level of Education	2000	2015	Change 2000-2015
Less than 9th grade	194	166	-14.4%
9th to 12 grade, no diploma	652	372	-42.9%
High school graduate	1,786	2,375	33.0%
Some college, no degree	1,305	1,353	3.7%
Associate's degree	513	852	66.1%
Bachelor's degree	1,438	1,608	11.8%
Graduate or professional degree	726	983	35.4%
Total	6,614	7,709	16.6%

Source: U.S. Census Bureau: 2000 Census & ACS 5-Year Estimates 2011-2015

3. Occupation & Labor Force Trends

In 2015, approximately 36.5% of Lakeville’s employed population had an occupation in the “management, and professional” sector and another 25.3% of the population had an occupation in the “sales and office” sector. Only three (3) industries saw a decrease in employment from 2000 to 2015, including two (2) “traditional” industries - agriculture and manufacturing, which saw an 82% and 22% decrease respectively.

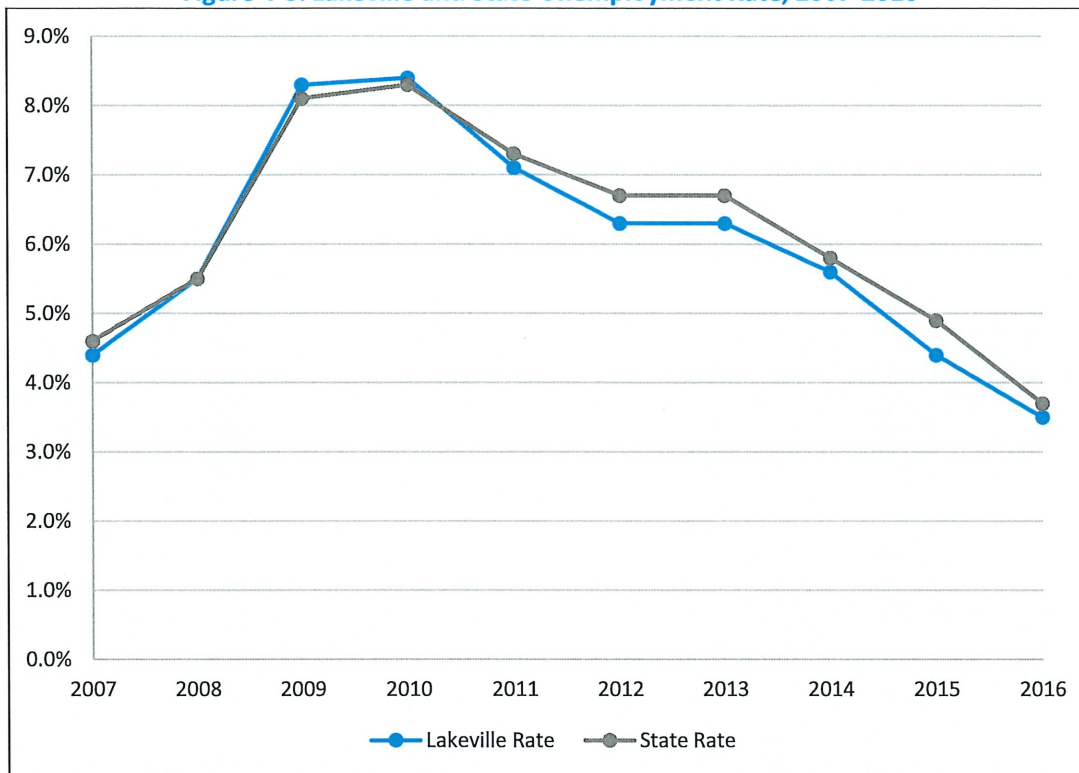
Table 4-12: Occupation & Industry Trends for Lakeville’s Employed Civilian Population, 2000-2015

Occupation & Industry	2000	2015	Change 2000-2015
Occupation			
Management, professional, and related occupations	2,061	2,235	8.4%
Service occupations	619	834	34.7%
Sales and office occupations	1,434	1,552	8.2%
Natural resources, construction and maintenance occupations	398	627	57.5%
Production, transportation, and material moving occupations	611	881	44.2%
Employed civilian population 16 years and over	5,168	6,129	18.6%
Industry			
Agriculture, forestry, fishing and hunting, and mining	61	11	-82.0%
Construction	310	546	76.1%
Manufacturing	645	502	-22.2%
Wholesale trade	225	258	14.7%
Retail trade	734	888	21.0%
Transportation and warehousing, and utilities	263	489	85.9%
Information	186	78	-58.1%
Finance, insurance, real estate, and rental and leasing	404	394	-2.5%
Professional, scientific, management, administrative, and waste management services	322	721	123.9%
Educational, health and social services	1,236	1,274	3.1%
Arts, entertainment, recreation, accommodation and food services	342	522	52.6%
Other services (except public administration)	207	208	0.5%
Public administration	233	238	2.1%
Employed civilian population 16 years and over	5,168	6,129	18.6%

Source: U.S. Census Bureau: 2000 Census & ACS 5-Year Estimates 2011-2015

In terms of employment, Lakeville’s annual average unemployment rate has closely mirrored the Commonwealth’s. The rate peaked in 2010 at 8.3% as a result of the economic downturn of the mid-2000s, but has steadily declined to 3.7% in 2016.

Figure 4-8: Lakeville and State Unemployment Rate, 2007-2016



Source: Massachusetts Executive Office of Labor & Workforce Development

4. Poverty Status

While Lakeville is a relatively affluent community, approximately 4.4% of the population is living in poverty. According to the U.S. Census Bureau in 2016, a single person living in poverty has an annual income of \$12,228 or less and a family of four living in poverty has an annual income of \$24,563 or less.

Table 4-13: Lakeville Poverty Rates, 2015

Age Group	Age Group Population	Below Poverty	
		Number	Percent
Under 18 years	2,498	109	4.4%
18 to 64 years	7,041	280	4.0%
65 years and over	1,440	93	6.5%
Total*	10,979	482	4.4%

*Total population for whom poverty is determined.

Source: U.S. Census Bureau: ACS 5-Year Estimates 2011-2015

D. HOUSING/MARKET PROFILE

1. Housing Types

Approximately 88.5% of the housing units in Lakeville are single-family, detached (1-unit per lot) homes, while the remaining 11.5% are in structures containing more than one unit. From 2000 to 2015, Lakeville's housing stock grew 14.9%, with detached single-family units comprising the largest number of new housing units, which account for 54.8% of the new housing units (300 of the 547 new units). During this same time period, other housing types grew at a faster pace, but resulted in a smaller number of units.

Table 4-14: Lakeville Housing Types, 2000-2015

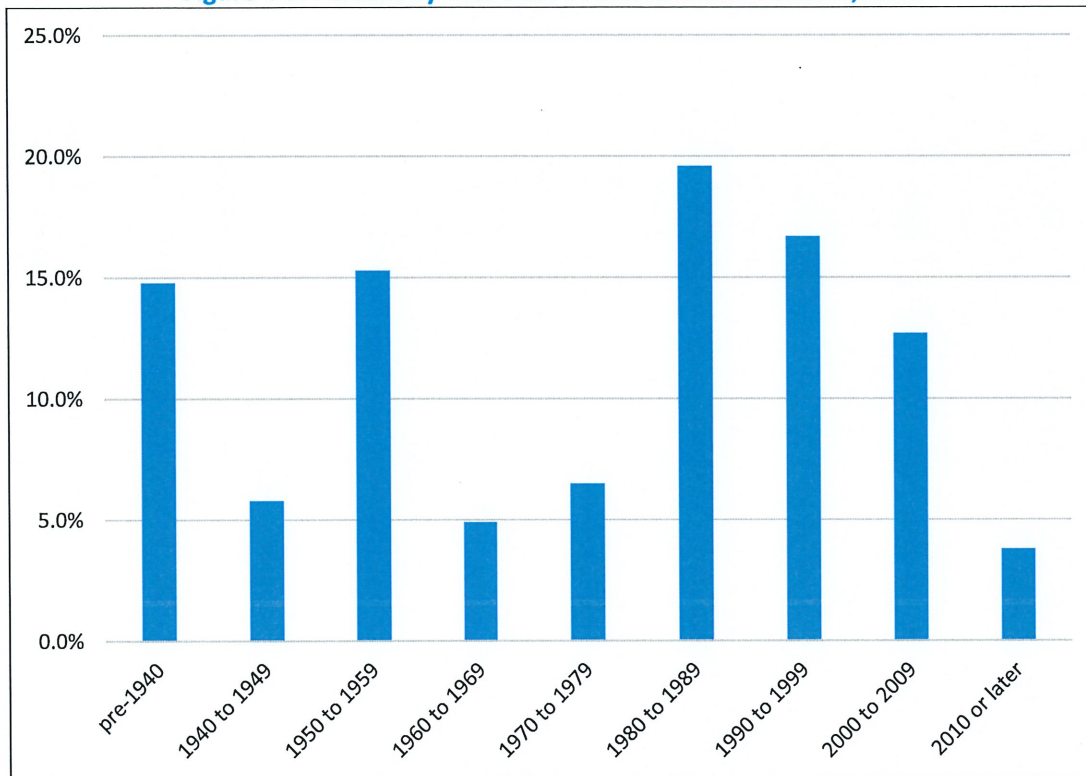
Housing Types	2000		2015		Change 2000-2015
	Number	Percent	Number	Percent	
1-unit, detached	3,425	93.5%	3,725	88.5%	8.8%
1-unit, attached	20	0.5%	110	2.6%	450.0%
2 units	30	0.8%	46	1.1%	53.3%
3 or 4 units	71	1.9%	60	1.4%	-15.5%
5 to 9 units	50	1.4%	49	1.2%	-2.0%
10 to 19 units	0	0.0%	15	0.4%	-
20 or more units	0	0.0%	133	3.2%	-
Mobile Home	66	1.8%	71	1.7%	7.6%
Boat, RV, van, etc.	0	0.0%	0	0.0%	N/A
Total	3,662	100%	4,209	100%	14.9%

Source: U.S. Census Bureau: 2000 Census & ACS 5-Year Estimates 2011-2015

2. Age of Housing

Almost half (47.3%) of residential properties in Lakeville are more than 35 years old (built before 1980). In the absence of consistent maintenance, the relative age of this housing stock can indicate reduced quality and value. If older housing units have reduced values and are thereby more “affordable” to low and moderate income households, rehabilitation programs may be appropriate to enable people to stay in stable housing stock. The age of housing also has impacts on energy use and home financing. In addition to the existing Homeowner Septic Repair Program, additional programs to support home improvements may be needed, including energy efficiency and deleading programs for units occupied by low-and moderate-income households, particularly older residents on fixed incomes.

Figure 4-9: Percent by Year Built of Residential Structures, 2015



Source: U.S. Census Bureau: ACS 5-Year Estimates 2011-2015

Table 4-15: Year Built of Residential Structure, Lakeville, 2015

Time Period	Number	Percent
pre-1940	623	14.8%
1940 to 1949	243	5.8%
1950 to 1959	644	15.3%
1960 to 1969	207	4.9%
1970 to 1979	273	6.5%
1980 to 1989	824	19.6%
1990 to 1999	702	16.7%
2000 to 2009	535	12.7%
2010 or later	158	3.8%
TOTAL	4,209	100.0%

Source: U.S. Census Bureau: ACS 5-Year Estimates 2011-2015

3. Housing Tenure and Occupancy

Approximately 86.1% of Lakeville's 3,780 occupied housing units were owner-occupied and 13.9% were renter-occupied. The town's percentage of renter-occupied units increased from 9.5% in 2000 to 13.9% in 2015. The percentage of vacant housing units in town has held steady at approximately 10% from 2000 to 2015.

Table 4-16: Housing Tenure and Occupancy in Lakeville, 2000-2015

Housing Tenure & Occupancy	2000		2010		2015	
	Number	Percent	Number	Percent	Number	Percent
Housing Tenure						
Occupied Housing Units	3,292	100.0%	3,725	100.0%	3,780	100.0%
Owner-Occupied Housing Units	2,978	90.5%	3,295	88.5%	3,254	86.1%
Average size of owner-occupied unit	2.98	N/A	2.89	N/A	3.05	N/A
Renter-Occupied Housing Units	314	9.5%	430	11.5%	526	13.9%
Average size of renter-occupied unit	2.23	N/A	2.25	N/A	2.01	N/A
Housing Occupancy						
Total Housing Units	3,662	100.0%	4,177	100.0%	4,209	100.0%
Occupied Housing Units	3,292	89.9%	3,725	89.2%	3,780	89.8%
Vacant Housing Units	370	10.1%	452	10.8%	429	10.2%
For seasonal or recreational use	277	74.9%	325	71.9%	N/A	N/A
Homeowner vacancy rate (percent)	0.8	N/A	1.3	N/A	0.4	N/A
Rental vacancy rate (percent)	1.6	N/A	2.9	N/A	0.0	N/A

Source: U.S. Census Bureau: 2000 & 2010 Census; ACS 5-Year Estimates 2011-2015

When analyzing housing unit tenure by age in Lakeville, approximately 75% of both owner-occupied units and renter-occupied units are inhabited by someone who is 45 years-old or older, another indicator of the town's aging population.

Table 4-17: Housing Unit Tenure by Age in Lakeville, 2015

Age Range	Owner-occupied housing units		Renter-occupied housing units	
	Number	Percent	Number	Percent
15 to 24 years	2	0.1%	0	0.0%
25 to 34 years	154	4.7%	106	20.2%
35 to 44 years	631	19.4%	40	7.6%
45 to 54 years	803	24.7%	189	35.9%
55 to 64 years	983	30.2%	68	12.9%
65 years and over	681	20.9%	123	23.4%
Total	3,254	100.0%	526	100.0%

Source: U.S. Census Bureau: ACS 5-Year Estimates 2011-2015

When analyzing housing tenure by household size, the percentage of one and two person households constituted the majority of both owner-occupied and renter-occupied housing units in 2015. Between 2000 and 2015, the percentage of one and two-person owner-occupied housing units increased 5% and the percentage of one and two-person renter-occupied housing units increased almost 12%. These statistics, combined with the population trends, indicate the likely need for smaller housing units.

Table 4-18: Housing Tenure by Household Size, 2000-2015

Household Size	2000		2010		2015	
	Number	Percent	Number	Percent	Number	Percent
Owner-occupied housing units	2,978	100.0%	3,295	100.0%	3,254	100.0%
1-person household	371	12.5%	474	14.4%	510	15.7%
2-person household	977	32.8%	1,103	33.5%	1,135	34.9%
3-person household	565	19.0%	622	18.9%	500	15.4%
4-person household	666	22.4%	669	20.3%	661	20.3%
5-person household	278	9.3%	299	9.1%	215	6.6%
6-person household	79	2.7%	92	2.8%	136	4.2%
7-or-more-person household	42	1.4%	36	1.1%	97	3.0%
Renter-occupied housing units	314	100.0%	430	100.0%	526	100.0%
1-person household	112	35.7%	153	35.6%	284	54.0%
2-person household	97	30.9%	124	28.8%	129	24.5%
3-person household	51	16.2%	78	18.1%	47	8.9%
4-person household	38	12.1%	52	12.1%	17	3.2%
5-person household	9	2.9%	15	3.5%	30	5.7%
6-person household	6	1.9%	6	1.4%	19	3.6%
7-or-more-person household	1	0.3%	2	0.5%	0	0.0%

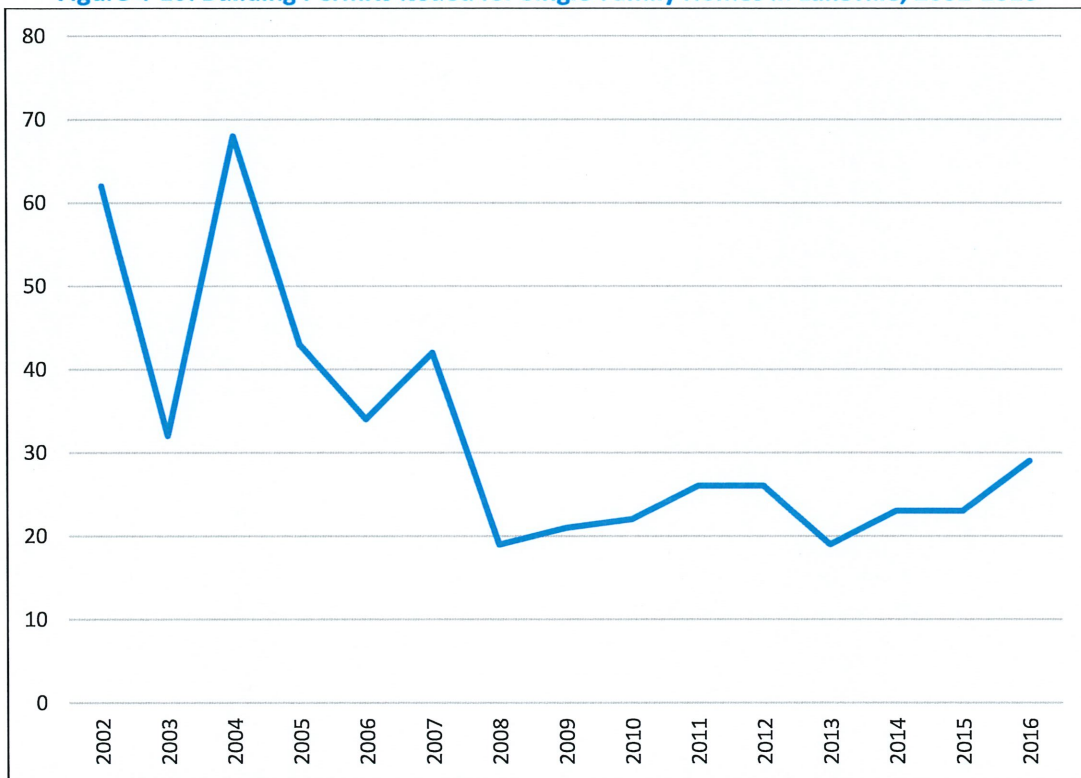
Source: U.S. Census Bureau: 2000 & 2010 Census; ACS 5-Year Estimates 2011-2015

4. Housing Permits

According to the Town of Lakeville’s Building Department, a total of 489 building permits for single-family houses were issued between 2002 and 2016. The number of single-family permits issued peaked in 2004 at the height of the housing boom, with 68 permits issued. The number of permits issued in the years after, however, declined as a result of the economic downturn of the mid- to late-2000s. In recent years, however, the number of single-family permits issued has been steadily increasing.

In terms of multi-family housing, there have been a total of 348 multi-family permits issued between 2005 and 2016. Most (322 of the 348 permits) of these permits can be attributed to three large developments that have occurred over the past decade – LeBaron Hills, Kensington Court, and Sterling Place. The breakdown of multi-family developments is as follows: LeBaron Hills-118 permits, Kensington Court-100 permits, Sterling Place-104 permits, 6 Bridge Street-12 permits, and Water Street Crossing-14 permits.

Figure 4-10: Building Permits Issued for Single-Family Homes in Lakeville, 2002-2016

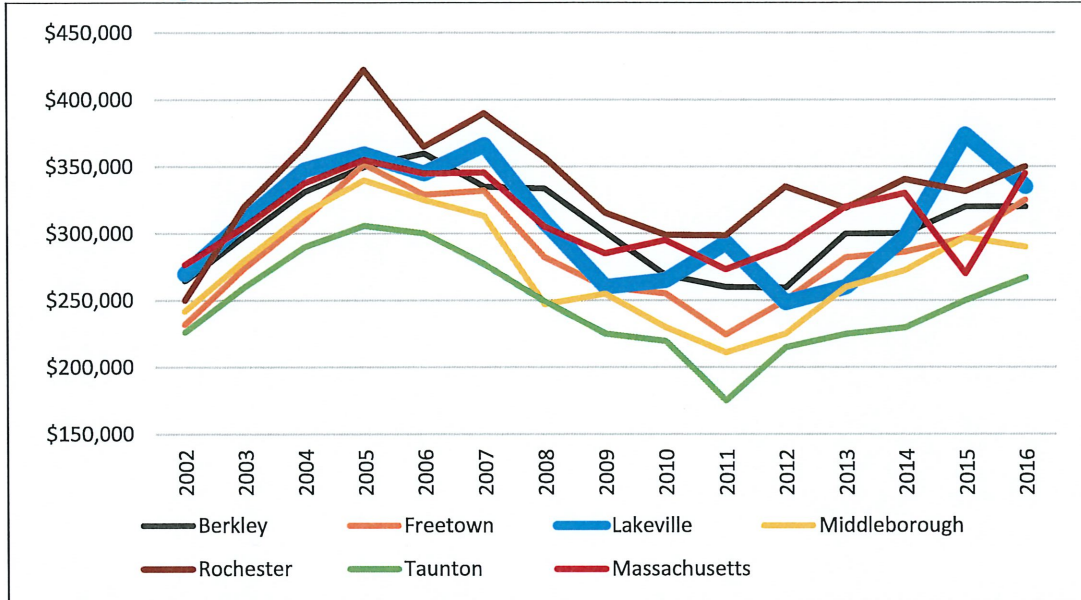


Source: Town of Lakeville Building Department

5. Ownership Market

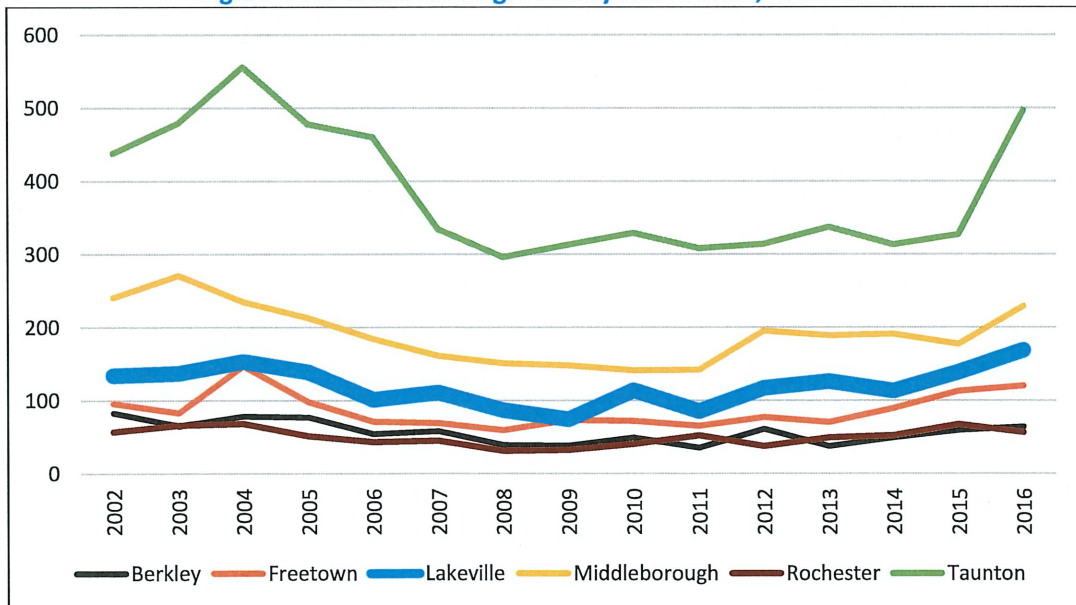
From 2002 to 2016, Lakeville’s median sales price for a single family home was the second highest when compared to its neighboring communities. Only Rochester had a median sales price that was higher than Lakeville’s during that period. Lakeville’s homes sales during this same period also compared fairly against its neighboring communities and only trailed Taunton and Middleborough. Median sales prices and sales volumes in Lakeville, as well as, in most other communities continue to rebound in the aftermath of the economic downturn of the mid- to late-2000s, and have either surpassed or are rapidly approaching levels of the early-2000s.

Figure 4-11: Median Sales Price of Single-Family Homes, 2002-2016



Source: Warren Group/Banker and Tradesman

Figure 4-12: Trends in Single-Family Home Sales, 2002-2016

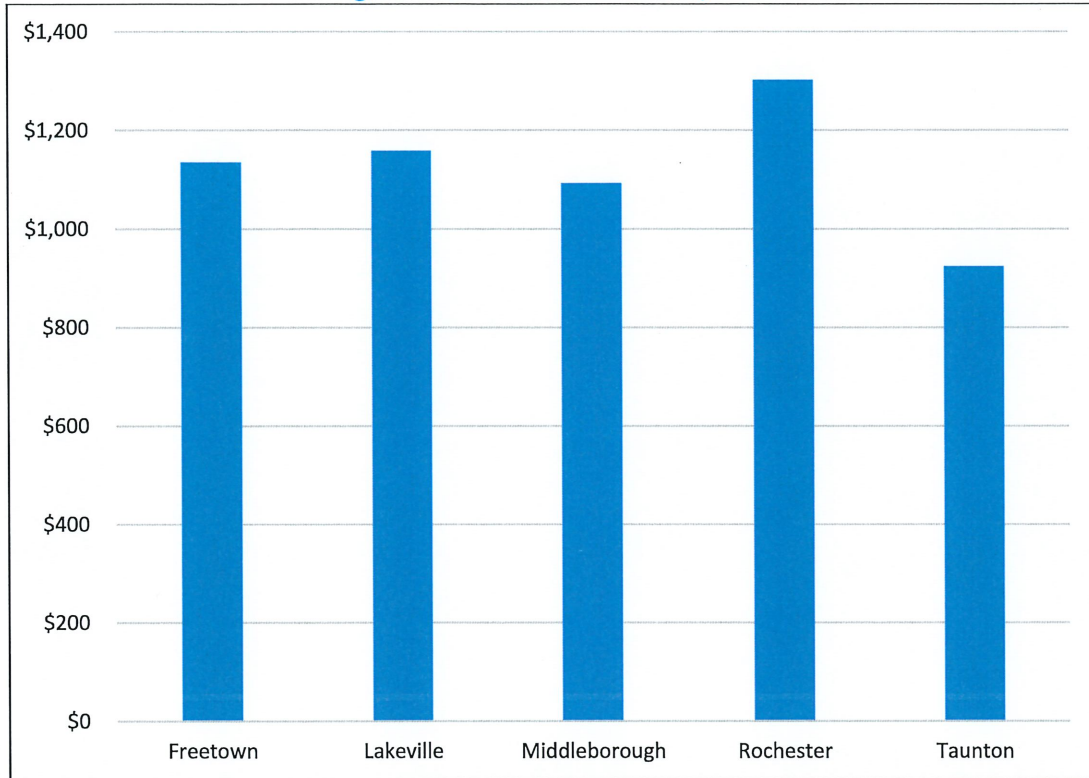


Source: Warren Group/Banker and Tradesman

6. Rental Market

Lakeville has a low proportion of rental housing, accounting for only 13.9% of the town's housing stock. While this number is low, it has increased dramatically in recent years due to the construction of two large apartment complexes; Kensington Court (100 units) and Sterling Place (104 units). In terms of rent, Lakeville had the second highest median gross rent amongst its neighboring communities in 2015 at \$1,159, only trailing Rochester's median gross rent of \$1,302.

Figure 4-13: Median Gross Rent, 2015



Source: U.S. Census Bureau: ACS 5-Year Estimates 2011-2015

E. AFFORDABILITY ANALYSIS

1. Housing Cost Burdens

The U.S. Department of Housing and Urban Development (HUD) Comprehensive Housing Affordability Strategy (CHAS) data was utilized to analyze the housing cost burdens of Lakeville's residents. CHAS data demonstrates the extent of housing problems and housing needs, particularly for low income households. Cost burdened is generally defined as a household that spends more than 30% of their gross income on housing-related expenses. According to the most recent CHAS data, approximately 31.9% of the households in Lakeville were determined to be cost burdened. Renter households were almost two and half times more likely to be cost burdened as compared to owner households.

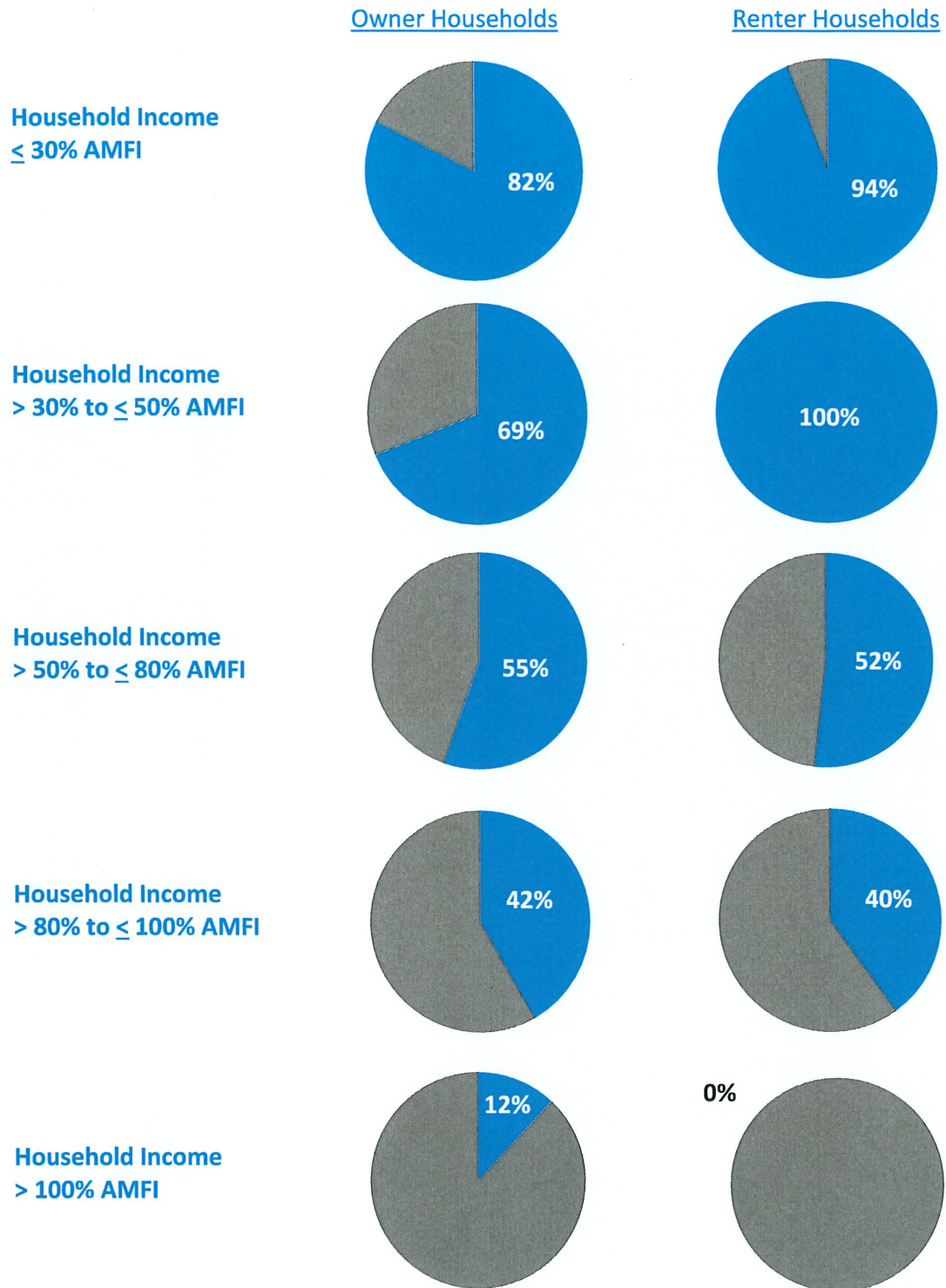
Table 4-19: Housing Cost Burdened Households

Cost Burden Range	Owner	Renter	Total
Cost Burden <=30% (Not Cost Burdened)	2,349	169	2,518
Cost Burden >30% to <=50% (Cost Burdened)	490	134	624
Cost Burden >50% (Severely Cost Burdened)	380	190	570
Cost Burden not available	30	0	30
Total	3,250	495	3,745

Source: HUD Comprehensive Housing Affordability Strategy (CHAS), 2014

As the following charts express, lower income households are more likely to be cost burdened. Low- and middle-income homeowners are more likely to be in need of support to perform necessary home repairs and upkeep, particularly older residents living on fixed incomes.

Figure 4-14: Percent Experiencing Housing Cost Burden by Income



2. Housing Affordability

According to an analysis of single-family ownership costs, approximately 15.3% of the single-family houses in Lakeville are affordable to households making less than the HUD Area Median Family Income (AMFI) of \$81,000, and approximately 6.9% of houses are affordable to low-income households making 80% or less of the AMFI. According to this analysis it appears that there are a moderate number of homes that are affordable to people making less than the AMFI; however, it is important to keep in mind that the values used were assessed values and not market values. It is also important to note that many of these moderately-priced homes are within the Clark Shores neighborhood around Long Pond and are not classified as cottages, but may have been at one time. Lastly, the analysis did exclude the 170 single family homes in Lakeville that are classified as cottages and are not year-round housing units.

Table 4-20: Lakeville Housing Affordability Gap, 2002-2016

Year	A	B	C	D
	HUD MFI	Affordable Price (A x 3)	Median Sales Price	Affordability Gap (C - B)
2002	\$63,500	\$190,500	\$269,750	\$79,250
2003	\$70,300	\$210,900	\$309,900	\$99,000
2004	\$72,900	\$218,700	\$347,500	\$128,800
2005	\$73,650	\$220,950	\$359,500	\$138,550
2006	\$73,600	\$220,800	\$345,000	\$124,200
2007	\$71,700	\$215,100	\$366,500	\$151,400
2008	\$76,000	\$228,000	\$308,500	\$80,500
2009	\$79,500	\$238,500	\$260,000	\$21,500
2010	\$79,800	\$239,400	\$265,000	\$25,600
2011	\$82,600	\$247,800	\$293,000	\$45,200
2012	\$83,700	\$251,100	\$248,250	-\$2,850
2013	\$78,300	\$234,900	\$260,000	\$25,100
2014	\$80,700	\$242,100	\$297,500	\$55,400
2015	\$81,200	\$243,600	\$374,000	\$130,400
2016	\$87,100	\$261,300	\$335,000	\$73,700

Source: Warren Group/Banker and Tradesman, HUD

Table 4-21: Approximate Cost of Single Family (SF) Ownership Units in Lakeville, 2017

A	B	C	D	E
Income Range Relative to Area MFI (\$81,000)	Family Income Range (A X \$81,000)	Family Income Range x3 (method for determining appropriate maximum value of "affordable" housing) (B x 3)	Number of SF Units "affordable" to families in this income range (# of SFHs valued in Range C)	Percent of SF Units "affordable" to families in this income range (D ÷ 3,690)
Less than 50% MFI	< \$40,500	< \$121,500	20	0.5%
50% - 80% MFI	\$40,500 to \$64,799	\$121,500 to \$194,399	235	6.4%
80% - 100% MFI	\$64,800 to \$80,999	\$194,400 to \$242,999	310	8.4%
100% - 120% MFI	\$81,000 to \$97,199	\$243,000 to \$291,599	648	17.6%
More than 120% MFI	≥ \$97,200	≥ \$291,600	2,479	67.2%

Source: Analysis based on Lakeville Preliminary FY18 Assessors Data and HUD Data

5. BARRIERS TO AFFORDABLE HOUSING PRODUCTION

While there are needs for more affordable housing in Lakeville, there are also a number of formidable barriers to producing such housing in town including the following:

Zoning Constraints

Lakeville's large-lot, low-density Residential zoning district has led to the construction of high-priced single-family residences. This district has a minimum lot size of 70,000 square feet (or 1.61 acres) with a minimum required frontage of 175 feet. While this large lot size is intended to maintain the rural quality of the town and water quality standards, it has promoted very low housing density that severely constrains the construction of housing that is affordable. While very large-lot zoning (upwards of 200,000 square feet per acre) can sometimes be used as a land conservation technique, this mid-sized lot zoning often leads to suburban sprawl. It also contributes to the construction of large single-family units that, due in part to their property's embedded land costs, are unaffordable to low- to moderate-income families. Also constraining the development of affordable housing in town, is the fact that multi-family structures are not permitted, with the exception of projects located within the Residences at Lakeville Station Smart Growth Overlay District (SGOD).

There are; however, some provisions in Lakeville's Zoning By-law that hold the potential for promoting more affordable units including:

- *Mixed-Use Development District*: One purpose of this district is to promote the mixed use development of large land areas; however, "age qualified housing" is the only type of housing permitted within the district and does not allow for the creation of diverse housing types affordable to young adults or families.
- *The Residences at Lakeville Station Smart Growth Overlay District (SGOD)*: This district was created to promote smart growth, increase the production of a range of housing units, and provide for not less than 20% of housing units being affordable. Two-, three-, and multi-family units are permitted in this district along with other non-residential neighborhood business uses.
- *Accessory Apartments*: This bylaw provides family members the opportunity to live in close proximity to one another, maintain an independent living space, and provide for the health and security concerns of elderly or disabled homeowners who wish to remain in their homes, all the while maintaining the single-family character of neighborhoods.

Infrastructure Constraints

Lakeville has limited municipal water and sewer service, therefore, requiring most residential properties to rely on Title V-compliant septic systems and on private wells. New development could integrate alternative wastewater treatment facilities; however, this may not be financially feasible in smaller developments (due to the high land costs imposed by large-lot zoning). There are also often concerns about the impact of septic systems on water quality in surface water and groundwater bodies. While close attention to water quality issues is essential, it also contributes to higher development costs and serves as a constraint to development of a diversity of housing types and smaller lot housing.

Limited Transportation Access

Lakeville is an auto-dependent suburban community with limited public transit options. The primary public transit facility in Lakeville is the Middleborough/Lakeville MBTA commuter rail station at the terminus of the Middleborough/Lakeville line. The Greater Attleboro Taunton Regional Transit Authority (GATRA) provides bus service between the commuter rail station and Wareham. In addition, GATRA provides demand response bus service to Lakeville residents who are 60 years or older and for people with disabilities. The lack of regular fixed-route bus service; however, limits the ability of low- and moderate-income households to locate in town without also spending a large portion of their incomes on transportation.

Limited Organizational Capacity and Funding

The Town of Lakeville has both limited organizational capacity and limited funding to create additional affordable housing in town. The town has no professional planning or housing staff, no housing authority or affordable housing partnership, but it does have an Affordable Housing Trust Fund. The funding of the Trust Fund is problematic; however, due to a lack of capital. Like many other small communities in the Commonwealth, Lakeville struggles with finding funding sources to create affordable housing, as it does not receive an annual Community Development Block Grant (CDBG) nor does it have access to Community Preservation Act (CPA) funding, a program that many communities in the state rely on to fund local housing initiatives.

Negative Community Perceptions

Lakeville residents recognize the need for affordable market-rate and subsidized housing opportunities. However, misconceptions of increased density, perceived negative effects on property values, and concerns about increased municipal costs often prevent residents from pursuing needed housing development. This must be balanced; however, with the Town's need to provide affordable housing for its young professionals, college-aged children and elderly residents who may not be in the position to afford steep homeownership costs, but prefer to live or remain in Lakeville.

6. AFFORDABLE HOUSING GOALS AND STRATEGIES

When reviewing the data from the housing needs assessment and the barriers to affordable housing production, it points to the need for housing types in Lakeville that meet the needs of smaller households, households with retirement-age residents, and low- to moderate-income households. In Lakeville's high-value housing market changing some of the current public policy initiatives will likely be necessary in order to overcome barriers and thereby produce housing types that are affordable to low- and moderate-income families, while still being profitable to the development community.

A. AFFORDABLE HOUSING GOALS

GOAL #1: Produce 19 Subsidized Housing Inventory (SHI) eligible housing units per calendar year; this figure equals 0.50% of the Town's year-round housing.

This numerical goal for annual housing production, pursuant to which there is an increase in the municipality's number of Subsidized Housing Inventory (SHI) Eligible Housing units by at least 0.50% of its total units, is in accordance with 760 CMR 56.03(3)(a). It should be pursued during every calendar year included in the HPP, until the overall percentage exceeds the Statutory Minimum set forth in these regulations. Should the town meet this 0.5% goal, this HPP document may be certified by DHCD for one year, allowing the town to deny or place conditions on any non- "Friendly 40B" comprehensive permit applications. In accordance with the January 2014 Interagency Agreement Regarding Housing Opportunities for Families with Children, at least 10% of units in each development containing SHI eligible units will have three or more bedrooms, with certain exceptions such as small projects, assisted living, single room occupancy, lack of demand, infeasibility, and others.

GOAL #2: Target Modest Mixed-Use and Multi-Family Housing Development to "Village Areas".

Clustering housing development in the traditional village format will provide much-needed housing options, as well as, create an outlet for growth away from Lakeville's rural land and groundwater recharge areas. Modest mixed-use and multi-family units will match demand created by the major emerging demographics of smaller households and elderly households for smaller units with lower maintenance demands than large single family homes. More modest units will also help create local options for young Lakeville residents forming their own households and for local employees such as teachers and firefighters. Small retail and civic uses will serve as amenities in these areas. The utilization of Chapter 40B as a permitting tool to develop affordable housing in these "Village Areas" is a real possibility.

GOAL #3: Allow for a diversity of housing options that will allow young adults and seniors to remain in the community.

The Town should allow for a diversity of housing options that will accommodate both Lakeville's younger adults, as well as, Lakeville's seniors to meet desires expressed by the town and many of the demographic and socioeconomic trends. Placing emphasis on these particular demographics can create momentum for affordable housing and can begin to overcome misconceptions about the character and impact of these developments.

GOAL #4: Work with developers to encourage "Friendly 40B" developments.

The Town should work collaboratively with respected private and non-profit affordable housing developers to increase the amount of affordable housing in Lakeville. By working collaboratively with developers, the Town can help influence the location and character of these developments to produce positive outcomes. This can be done by providing descriptions or visual design guidelines that direct development to preferred site designs and building construction outcomes that complement the community. While the Town does not currently have any reasonable municipal sites on which to construct affordable housing, the Town would consider utilizing surplus municipal property or property taken by tax-title to build affordable housing in the future.

B. AFFORDABLE HOUSING IMPLEMENTATION STRATEGIES

STRATEGY #1: Adopt an Inclusionary Zoning Bylaw

Inclusionary zoning is a zoning provision that requires a developer to include affordable housing as part of a development or potentially contribute to a fund for such housing. This mechanism insures that any new development project over a certain size includes a set-aside in numbers of affordable units or funding from the developer to support the creation of affordable housing. Most communities inclusionary zoning bylaws include mandated percentages of units that must be affordable, typically 10% to 20% and density bonuses. Some also allow the development of affordable units off-site and/or cash in lieu of actual units.

STRATEGY #2: Adopt an Open Space Residential Design (OSRD) Bylaw

An Open Space Residential Development (OSRD) bylaw, also referred to as cluster development or flexible zoning, promotes a “smarter” and more compact type of development pattern. Under OSRD units are built in a cluster instead of the conventional grid pattern that has been identified as promoting suburban “sprawl.” OSRD zoning provides a more flexible layout that promotes the efficient use of land, lowers the costs of development in terms of roads and infrastructure, decreases municipal maintenance and service costs, all while preserving open space, community character and natural resources. The bylaw should promote the development of affordable housing to low- and moderate-income households by incorporating specific provisions such as density bonuses and other incentives that are appropriate and beneficial to the Town.

STRATEGY #3: Appoint an Affordable Housing Trust Fund Board of Directors

The appointment of a Board of Directors to the Affordable Housing Trust will enable the use of public funds that can only be spent on housing. Trust funds provide a flexible vehicle through which resources may be committed to the production and/or preservation of affordable housing. Dedicated, predictable, and ongoing sources of revenue, such as linkage payments, specific taxes (hotel tax, meal tax), fees, inclusionary housing mandates, and loan repayments are desirable; however, even one-time donations or proceeds from the sale of property, or negotiated contributions may be contributed to the fund. Once the Affordable Housing Trust Fund Board is up and running, the town will look to establish a program to accept donations from local companies in addition to the aforementioned funding mechanisms.

STRATEGY #4: Establish an Affordable Housing Partnership

An Affordable Housing Partnership would serve as a clearinghouse for all housing information, programs, and strategies. They would review proposed town policies for their effect on the housing market, and propose strategies to help address housing needs as they may arise. Further, they will serve as the lead negotiator for future Chapter 40B developments and advise the Board of Selectmen and Zoning Board of Appeals on affordable housing issues and projects. They will also work to cultivate appropriate projects and guide them through the permitting process. Additionally, they would be tasked with creating and implementing an affordable housing educational campaign to engage the community in discussions on affordable housing and to present information on the issues needed to dispel myths and help galvanize local support.

STRATEGY #5: Expand the Current Chapter 40R Smart Growth Overlay District

The town is currently looking at the possibility of expanding their current Chapter 40R Smart Growth Overlay District in the Lakeville Corporate Park to include eight lots on Commercial Drive and Riverside Drive.

STRATEGY #6: Continue to Guide and Approve Appropriate Comprehensive Permits

The town has been successful in working with Chapter 40B developers to help create housing that is affordable across a wide range of incomes, while protecting the Town’s critical resources and community character. Recent examples of this include the 100-unit Residences at Lakeville Station/Kensington Court development and the 14-unit Water Street Crossing development. Additional projects that are consistent with the Master Plan and the

goals of this Plan should be supported and cultivated as long as the community has a need for affordable housing. The Affordable Housing Partnership will serve a critical role in this process upon its establishment.

STRATEGY #7: Conduct Affordable Housing Outreach and Education

The proposed Affordable Housing Partnership should develop and implement an affordable housing education campaign. An education campaign is needed to dispel myths associated with people who need and occupy affordable housing, the impact of affordable housing on local real estate values, as well as its impact on a community's character. A successful education campaign will also help build the local support that is needed to implement the goals and strategies contained within this Plan. An education campaign may include the following initiatives:

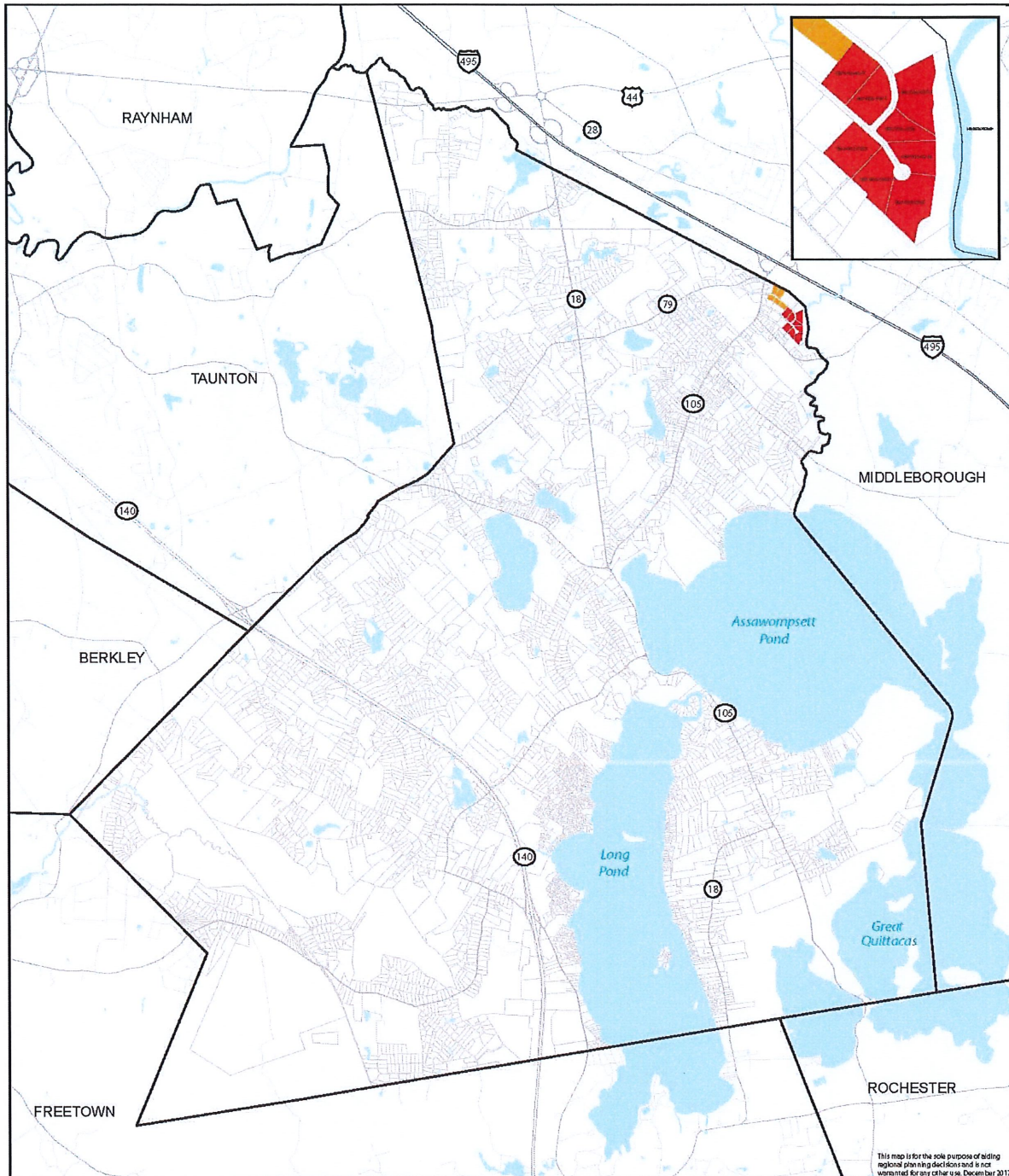
- Publication and distribution of this Plan.
- Development and distribution of an affordable housing brochure/pamphlet.
- Holding an annual housing forum to discuss progress made towards the community's affordable housing goals.

STRATEGY #8: Promote Leadership Training for Board and Committee Members

Promote training opportunities for members of the Planning Board, Zoning Board of Appeals and the soon to be established Affordable Housing Trust Fund and Affordable Housing Partnership, as well as, other relevant Town Boards and Committees to take advantage of ongoing training and educational programs related to affordable housing. Well advised and prepared Board and Committee members are likely to conduct Town business in a more effective and efficient manner. The following is a list of leadership training resources:

- The University of Massachusetts Extension's Citizen Planner Training Collaborative (CPTC) offers classes periodically throughout the year and may provide customized training sessions to individual communities.
- The Massachusetts Housing Partnership conducts the annual Massachusetts Housing Institute training program and also has many technical guides for municipalities.
- Other organizations such as DHCD, MHP, CHAPA, and the Community Preservation Coalition also provide conferences, training sessions, and publications.

Figure 4-15: Housing Action Map



Town of Lakeville - Housing Action Map

Legend

- Properties Identified for Potential Chapter 40R Expansion
- The Residences at Lakeville Station Smart Growth Overlay District, existing 40R district
- Municipal Boundaries
- Water
- Interstates
- Arterials and Collectors
- Local Roads

1 mile ①

This map is for the sole purpose of aiding regional planning decisions and is not warranted for any other use. December 2017

Table 4-22: Lakeville HPP Strategy and Action Plan

Strategy No.	Strategy	Who?	When?	How?	Which Goals?	Quantity of Affordable Units
1	Adopt an Inclusionary Zoning Bylaw	PB, BOS	2018-2023	Outreach, Planning, Town Meeting Vote	1,2,3	10
2	Adopt an Open Space Residential Design Bylaw	PB, BOS	2018-2023	Outreach, Planning, Town Meeting Vote	1,2,3	10
3	Appoint an Affordable Housing Trust Board of Directors	BOS	2018-2023	Outreach to citizens	1,3,4	-
4	Establish an Affordable Housing Partnership	BOS	2018-2023	Outreach, Collaboration, BOS action	1,3,4	-
5	Expand the Current Chapter 40R Smart Growth District	PB, BOS	2018-2023	Outreach, Planning, Town Meeting Vote	1,2,3	20
6	Continue to Guide and Approve Appropriate Comprehensive Permits	ZBA, PB, BOS	2018-2023	Outreach to and collaboration with developers, ZBA action	1,3,4	55
7	Conduct Affordable Housing Outreach and Education	ZBA, PB, BOS, AHP, HT	2018-2023	Outreach and Collaboration	3	-
8	Promote Leadership Training for Board and Committee Members	ZBA, PB, BOS, AHP, HT	2018-2023	Outreach and Collaboration	3	-
Total Units by 2023						95

APPENDIX A: SUPPLEMENTAL DATA

Table A-1: Trends in Single-Family Home Sales, 2002-2016

	Berkley	Freetown	Lakeville	Middleborough	Rochester	Taunton
2002	83	96	134	241	57	438
2003	65	83	137	271	66	479
2004	78	147	153	235	68	556
2005	77	98	139	213	51	478
2006	54	71	101	184	43	460
2007	58	69	111	161	45	334
2008	39	59	87	151	31	296
2009	38	73	74	148	32	313
2010	49	72	114	141	40	329
2011	35	65	85	142	52	308
2012	61	77	117	195	37	314
2013	37	70	126	189	49	337
2014	49	89	113	191	52	313
2015	59	113	139	177	67	327
2016	64	120	169	229	56	497

Source: Warren Group/Banker and Tradesman

Table A-2: Median Sales Price of Single-Family Homes, 2002-2016

	Berkley	Freetown	Lakeville	Middleborough	Rochester	Taunton	Massachusetts
2002	\$264,525	\$232,000	\$269,750	\$242,000	\$250,000	\$226,250	\$276,500
2003	\$298,000	\$274,000	\$309,900	\$279,900	\$320,000	\$260,000	\$305,000
2004	\$331,000	\$310,000	\$347,500	\$315,000	\$365,000	\$289,900	\$337,500
2005	\$350,000	\$351,750	\$359,500	\$339,900	\$422,500	\$305,900	\$355,000
2006	\$360,000	\$329,000	\$345,000	\$325,100	\$365,000	\$300,000	\$345,000
2007	\$334,950	\$332,000	\$366,500	\$313,000	\$390,000	\$277,000	\$345,500
2008	\$333,500	\$282,000	\$308,500	\$247,000	\$357,000	\$249,000	\$305,000
2009	\$301,000	\$260,000	\$260,000	\$254,950	\$315,500	\$225,000	\$285,000
2010	\$269,000	\$255,000	\$265,000	\$229,900	\$299,000	\$219,500	\$295,000
2011	\$260,000	\$224,500	\$293,000	\$211,000	\$298,500	\$175,000	\$273,000
2012	\$259,500	\$250,000	\$248,250	\$225,000	\$335,000	\$215,000	\$290,000
2013	\$299,900	\$282,000	\$260,000	\$259,500	\$319,000	\$224,950	\$320,000
2014	\$300,000	\$286,250	\$297,500	\$272,500	\$340,500	\$229,700	\$330,000
2015	\$320,000	\$296,700	\$374,000	\$297,000	\$331,500	\$249,950	\$270,200
2016	\$320,000	\$325,000	\$335,000	\$290,000	\$350,000	\$267,000	\$345,000

Source: Warren Group/Banker and Tradesman

APPENDIX B: SUBSIDIZED HOUSING INVENTORY

Table B-1: Subsidized Housing Inventory, Lakeville, 2017

DHCD ID #	Project Name	Address	Type	Total SHI Units	Affordability Expires	40B Comp. Permit?	Subsidizing Agency
1507	ARC of Greater Fall River	Flintlock Drive	Rental	4	2026	No	EOHHS
1508	Long Point Road	Long Point Road	Rental	4	2027	No	EOHHS
4327	DDS Group Homes	Confidential	Rental	21	N/A	No	DDS
6342	Woods Edge	Ebony Farm Road	Ownership	18	Perpetuity	Yes	MassHousing
6343	The Residences at LeBaron Hills	Rhode Island Road & Precinct Street	Mix	97	Perpetuity	Yes	MassHousing & FHLBB
6704	6 Bridge Street	6 Bridge Street	Ownership	3	Perpetuity	Yes	MassHousing & FHLBB
7596	DMH Group Homes	Confidential	Rental	9	N/A	No	DMH
7631	The Residences at Lakeville Station/ Kensington Court	2 Commercial Drive	Rental	100	2039	No	DHCD
10052	Water Street Crossing	7 Water Street	Rental	14	Perpetuity	Yes	MassHousing

Total SHI Units 274

Census 2010 Year Round Housing Units 3,852

Percent Subsidized 7.1%

Source: Massachusetts Department of Housing and Community Development (DHCD)

APPENDIX C: HOUSING ACTION SITES

Table C-1: Housing Action Sites

Parcel ID	Site Address	Owner	Total Acres	Zoning	Notes
62-3-7F	27 Commercial Drive	Commercial Drive Realty LLC	3.62	I	Potential Ch. 40R Expansion
62-3-7H	29 Riverside Drive	Canpro Investments Ltd.	2.89	I	Potential Ch. 40R Expansion
62-3-10A	31 Commercial Drive	Commercial Drive Realty LLC	1.82	I	Potential Ch. 40R Expansion
62-3-10B	35 Riverside Drive	Canpro Investments Ltd.	2.05	I	Potential Ch. 40R Expansion
62-3-10C	36 Riverside Drive	Canpro Investments Ltd.	3.65	I	Potential Ch. 40R Expansion
62-3-10D	34 Riverside Drive	Canpro Investments Ltd.	2.59	I	Potential Ch. 40R Expansion
62-3-10E	32 Riverside Drive	Canpro Investments Ltd.	2.98	I	Potential Ch. 40R Expansion
62-3-10K	33 Riverside Drive	Canpro Investments Ltd.	2.52	I	Potential Ch. 40R Expansion

Source: Town of Lakeville

**Planning Board
Lakeville, Massachusetts
Minutes of Meeting
Thursday, November 10, 2022**

On November 10, 2022, the Planning Board held a meeting at the Lakeville Police Station. The meeting was called to order by Chairman Knox at 7:00 p.m. LakeCam was making a video recording of the meeting.

Members present:

Mark Knox, Chair; Peter Conroy, Vice-Chair; Nora Cline, Jack Lynch, Michele MacEachern

Others present:

Marc Resnick, Town Planner

Discussion on 348 Bedford Street concerning proposed Site Plan

Atty. Robert Mather representative for the proponents was present. He understood that they were in front of the Board informally and would have to return. However, they welcomed this opportunity to present and receive the Board's input so when they return they will have everything prepared. Atty. Mather said also present tonight are the owners, the Donnelly family, Sean, Brian, and Karen, as well as, Scott Zion, Operations, Jim Pavlik, Outback Engineering, and Derek Savas, owner of the Plaza.

Atty. Mather advised they were here in regards to 348 Bedford Street, which they would know as the old Plymouth Savings Bank building. They need Site Plan Approval under the 6.7.3.C which provides a change in occupancy of an existing business or industrial structure, which increase the previous approved occupant load by 10%. The previous occupant load was 24 and the proposed Brew Pub will increase that to 45. He noted they do have other items that are going on simultaneously such as the liquor license hearing with the Select Board. They are also in the process of obtaining a Federal Brewing license. That submittal is being handled by Atty. Rob Pellegrino. That process takes about nine months. Atty. Mather clarified that doesn't mean the operation cannot open before then, only that they would not be able to brew until they get that.

Atty. Mather stated they have submitted a Request for Determination from the Conservation Commission and they expect to have that before they return to the Board. Regarding the timetable, they would like to see the business possibly open in April or May, but the first of June is more likely. They will be open for the coming summer season. Mr. Sean Donnelly then gave an overview of what the vision for the business is. They would like to create a great area for locals to meet, have a drink, and have good food provided by the local food truck that they are partnering with.

Mr. Pavlik then displayed the proposed Site Plan and where the Brew Pub would be located. They are proposing to put in a small addition in the back under the existing drive through windows and existing roof covering. Regarding the parking, they looked at what was required for the existing Plaza building based on the original Permit, but the requirements have changed since the 90's. Previously, it was one space per 300 square feet of office or retail. Now it is one space per 300 square feet plus one per employee. He displayed the existing they would like to keep as well as with the reuse of the building providing the new requirement. Mr. Knox asked if the line spaces behind the building have been added. Mr. Pavlik said they haven't been striped there, but that is how it is being used.

Atty. Mather added that there is a lot of parking on the site that is not utilized. The current plaza requirement is for 76 spaces. The addition of the Brew Pub brings that up to 113 spaces. There are currently 75 spaces, but they will be taking 10 of those spaces away. However, there are 48 other spaces that are available. They will stripe them if necessary, but one of the benefits of this project is that the peak hours of operation are going to be different from the current operation and will probably be from 5:00 to 10:00 or 11:00. They are comfortable they have enough spaces. They also have no problem putting in a restriction that the Town Hall spaces are not to be used. They will work with the Town as to the manner they want them to prohibit that.

Mr. Pavlik said that have met with the Board of Health for approval on the change in use. One of their requirements was to provide a wastewater holding tank for the washed water from washing kegs. The chemical concentrations have been known to cause failure in septic systems so there will be an outdoor holding tank that would be in a fenced enclosure in the back along with the dumpster. For the outdoor seasonal seating, they are proposing to have an outdoor toilet facility that would have a sink and toilet. Atty. Mather clarified this was not a port-a-potty. They will show the Board what it will look like when they return next month.

Mr. Pavlik said they are proposing to have some entertainment. There are about 20 outdoor seats. The lighting is the existing Plaza lighting, which is sufficient for what is needed for the parking lot and what is proposed. There will probably be some string lights, low voltage lighting, and some accent lighting around the seating area. Atty. Mather noted that lighting is an issue where they want sufficient lighting but they don't want too much or to light up the night sky.

Mr. Knox asked if there would be some sort of fencing around the beer garden area. Ms. Pavlik said there should be some examples of that in their packets. Mr. Donnelly said that is also required for their Federal license. Mr. Knox said in regards to having ropes, his concern would be they are getting close to the road there and for traffic not to be impeded, he would not want to see a six-foot stockade fence. He would want it to be as transparent and clear as possible. He would also like to see some something generated on the parking guaranteeing that at the peak hours, when the other businesses are operating that the parking is sufficient. He also recommended a lighting plan that would give them the lumens so there is not light pollution casting onto neighboring properties, but the area is well lit and complies with the lighting bylaw.

Mr. Knox asked if they were altering the building in any way. Mr. Donnelly replied just some paint and a sign or two, except for the underneath area they are expanding for their cooler. Mr.

Knox asked Atty. Mather to return with something that would satisfy the Selectmen regarding signage and the Town Hall parking issue. Mr. Conroy asked how the food truck would gain access to the site. Mr. Donnelly replied there is driveway in the back of the building and they will have some stanchions that they will move to get the truck in. Mr. Conroy also asked what would happen to the outdoor bathroom in November. Mr. Donnelly said when it starts to get cold, he would pull it and bring it back in the late spring.

Mr. Conroy noted that he was pretty familiar with the back way behind Winberg's. It is tight when including all the side spots that Winberg has going vertical there that they use. He said that it should be shown as one way if it is not already. Mr. Pavlik said it is currently operating as one way traffic. Ms. MacEachern thought that people would enjoy staying in Town for this type of experience. She felt they should anticipate a potential rush when it first opens, and with their parking plan think about that. Atty. Mather responded maybe having a temporary overflow. She also thought striping would be beneficial on the back-parking area.

Atty. Mather noted they had met with the Fire Chief. He didn't have any issues but suggested the opportunity be used to communicate to the applicant that they would need to do a code review. Atty. Mather said the Building Commissioner indicated that was part of the building permit process and he would handle the code review, along with the Fire Department making sure the fire system warning system is up to date. Mr. Knox said that he felt that they should striped the spaces behind the building and also make sure the fire apparatus can make that turn if a car is parked. He just wanted to make sure this change does not create an additional problem. Atty. Mather said they would address all the suggestions made when they return on December 8th.

Housing Production Plan presentation by Taylor Perez of SRPEDD

Ms. Perez distributed some information to the Board. She advised that for the scale of the Plan that Lakeville is doing the community engagement is through the survey. This drives all the suggestions they make in the Plan. She then went through the questions on the survey. After reviewing, Ms. Perez said the next step is to take all of the information and compose it into goals and strategies, which they would then review with the Board. If the Board is comfortable with those goals and strategies, they will move forward and write the Plan based on that.

Ms. Perez estimated returning in early 2023 with the goals and strategies. If they are comfortable with that, January and February will be writing and graphically designing the report. They will be getting edits from the Board and then also sending it to DHCD for their comments. The Plan then comes back to the Board for adoption. She asked if there were any questions.

The demographics of respondents was then discussed. Although, that had not been part of the survey, Ms. Perez noted it was a great point and something they can include in the future. Ms. MacEachern asked if the Plan was going to be rewritten or if it would similarly mirror their existing Plan. Ms. Perez replied it will be similar, but it will be a modernized update. Ms. Cline then began to discuss the buildable land area in the context of Safe Harbor and DHCD. Ms. MacEachern said they have been working to generate that number, which comes out to around 200+ acres. They

have a large development that is approximately 200 acres but in determining how much of that is counted towards that, she thought they needed some assistance in determining that.

Ms. Perez displayed some information for the Board. She said that these are the least common forms of Safe Harbor that are invoked because there are quite a few steps to them. Ms. Perez then went through the exclusions and said they must determine that number and then it is 1.5% of that. How that would be calculated was then discussed. Ms. Perez stated this was a little out of her area of expertise and was more familiar with the standard invoking of the 10% Subsidized Housing Inventory (SHI.) She advised if they submitted all this information to DHCD, they will make the decision whether or not it is accurate. She would recommend a consultant, but was not sure of funding.

Mr. Resnick then described the process that he went through to get a rough calculation. He found they were well below the required amount needed. Ms. Perez said that the best avenue, if they are concerned about being able to go Safe Harbor, would be at the end of the Housing Production Plan cycle in March when the Plan is completed and adopted, there is a one year and two-year Safe Harbor. This can be invoked if they are permitting a given number of units .5% of their required SHI for one year, and 1% for two years. This must be proved to DHCD. Different zoning mechanisms were also discussed.

Discussion of upcoming Town Meeting Warrant

Atty. Mather was present. He advised he had sent a letter on behalf of his client Mr. Mohammad Itani and his wife asking to withdraw Article 16, the rezoning of County Street to Industrial. However, they have not abandoned that proposal, but are looking to refine it and come back for the annual Town Meeting in the spring. He noted that they had not been present when someone had spoken about potential Indian artifacts, but they were aware of it being something you face when you develop anything. They were willing to work with it

Mr. Itani then asked members why they did not support the proposal. They were surprised it was put on the Warrant and then the Board decided not to support it. Mr. Knox said it was represented to them through the Chairman of the Select Board. They decided to put it on the Warrant and let the townspeople decide. He noted that because of the climate of what is going on right now, they didn't feel it had a good look and thought that was why they voted against the industrial change. Mr. Conroy added that what he was most concerned with was the lack of detail, as well as the current climate. For him, it was too open ended. Do you have a customer? Are you going to keep it? What would you build there? He is reiterating the questions the neighbors are going to ask.

Mr. Itani said they were approached by a local bank that wanted to build their headquarters who approached them and asked if they were open to selling them part of the property, where they can build a 30,000 square foot bank headquarters. This is not a retail bank, but for their corporate office. They felt if the rezoned a 900-foot strip that parallels Route 140 and leave the rest of the property, it splits the property in half. Half would be industrial and half would stay residential. The industrial would all front Route 140 and it is right at the exit. The residential will be accessible

from Freetown Street which eventually they will develop into a residential community. He then described LeBaron Hills, where he was also the developer, as a development that including a variety of housing styles and residents.

Mr. Itani said even in the industrial area they are proposing, probably half of it will not be developed because of wetlands, streams, and the like. It will allow them to have a higher density in the 50 acres upfront that are not wetlands, and that was the idea behind the 150 acres. However, they are more than happy to have discussions with the Board. They believe that the 325 acres is a lot of acreage to do residential only. Under normal zoning, it can support about 300 units and he could have about 200 units. With a 40B, it will be a lot denser. Splitting the zoning, is a benefit to him, but also beneficial to the Town because it creates a tax base that does not require much from the infrastructure or town services. He noted that this seems to be the parcel that should be industrial, if they are going to have any industrial zoning in Town. There will be some impact, some traffic, but it will be minimal compared to anything else that can go in there.

Mr. Lynch said that one of his concerns would be to the Native Americans. Some of that will infringe on their rights or burial grounds, and he could not be a part of that. Mr. Conroy noted that the information they were given was more than what they got the first time which had been nothing. This had been helped. Atty. Mather asked if the Board would be receptive to them returning this and giving them additional information. He agreed that the timing had not been right and he would rather this project stand on its own merits. Mr. Knox said no as a straight up zoning change, but if there is the promise of it being corporate offices to a bank and there is a development agreement to make sure that it is not anything but what they are told, that may be a consideration. He felt that industrial would not fly.

Ms. MacEachern said it appears that there is quite a significance to the Native people and she thought the best option would be to work with something that is amenable to both parties. Mr. Itani said that representative had reached out to him. He had told her that once they know what is there, he would be more than happy to sit down and discuss. They are in the process of hiring a company that would look at the property. If there is anything of significance that should be saved, they would be more than happy to work with them.

Mr. Knox said that if he wanted to withdraw now, coming back in February would make sense for the timing to have a public discussion about it. Mr. Itani said once they have the zoning, they will talk to potential suiters, but if they don't have the zoning it would be a waste of time. Atty. Mather said the Town will need to decide if they want any more industrial development in Town. If so, they feel this is the best location as there is no other site in Town that would offer immediate access onto a limited access highway. They will give this some more thought and come back. They did not want to see a negative vote which is why they requested the Board withdraw. Mr. Itani added that if they had any additional feedback or ideas to feel free to reach out to him.

Review the following Zoning Board of Appeals petitions:

- a. Chosid – 17 Dunbar Road

Mr. Knox made a motion, seconded by Mr. Lynch, to make no recommendation on the petition for Chosid at 17 Dunbar Road. The **vote** was **unanimous for**.

b. Sign Design – 10 Main Street

Mr. Knox advised this was for a request for a sign larger than allowed by the bylaw. Ms. MacEachern said the proposed sign is about 52 square feet and the maximum allowed is 32 square feet. It is internally illuminated and nothing should be granted for anything over 24 square feet. It is also over 20 feet from the ground level. She stated knowing how much work had been put into the new sign bylaw, she would like to send a recommendation to the Zoning Board to adhere to their bylaw. The height of the sign was also discussed. The Board was okay with the height as it was pre-existing. Ms. MacEachern then repeated her statement for the ZBA to adhere to the bylaw as a motion. It was seconded by Mr. Conroy. The **vote** was **unanimous for**.

SRPEDD update – Nora Cline

Ms. Cline said she would update the Board at their next meeting in December.

Discussion of upcoming Town Meeting Warrant – continued

Mr. Resnick said the Planning Board had multiple articles that are zoning articles. He asked what the procedure was in Town for making the motions, answering any questions, etc. Mr. Knox replied historically, he thought the Chairman has done it. Mr. Knox said he would do it, but if anyone would like the experience. Mr. Resnick then distributed a summary explanation for each article, which he went through briefly. He noted that Article 16 and 17 were both to be indefinitely postponed.

Approve Meeting Minutes

Ms. MacEachern made a motion, seconded by Mr. Lynch, to approve the Minutes from the September 22, 2022, meeting. The **vote** was **unanimous for**.

Correspondence

Mr. Resnick said, for their information, there were notices from some of the surrounding communities regarding fairly large warehouses. He noted that a subdivision plan for the Golf Course and a preliminary plan for the hospital property had been filed. These would be on the December 8th agenda.

Next meeting

The next meeting is scheduled for December 8, 2022, at 7:00 p.m. at the Lakeville Police Station.

Adjourn

Mr. Knox made a motion, seconded by Ms. MacEachern, to adjourn the meeting. The **vote** was **unanimous for**.

Meeting adjourned at 8:47.