

Memorandum

November 15, 2012

To: Westwood Planning Board
Fr: John Connery
Re: Additional School Enrollment Data

This memorandum is provided as a supplement to the educational impacts analysis set forth in the Fiscal Impact Analysis dated November 8, 2012. (Capitalized terms not otherwise defined in this memo shall be as defined in the fiscal report.)

Consistent with established standards of fiscal analysis, the fiscal report estimated the number of school-aged children for the Proposal based upon a thorough review and analysis of student generation data for similar mixed-used projects in towns that, like Westwood, have excellent school systems (such as Newton, Needham, Andover and Hingham).

In the course of discussions with the Town on these issues, we were asked to review additional student generation data for Concord, Lexington, and Sharon – communities that similarly have very highly-rated school systems. Unfortunately, these communities do not have any mixed use residential developments that can provide an equivalent “apples to apples” comparison for the purposes of estimating the educational impacts of the Proposal. However, in the interest of being responsive to the Town’s request, we have prepared this supplemental memorandum to summarize the applicable data for the requested communities.

The following projects are included in this supplemental analysis:

- 1. Avalon Lexington Hills.** This project is a 395 unit 40B rental development comprised of apartment and rental town houses, located on the 100-plus acre campus of the former Metropolitan State Hospital in Lexington. The rural hospital campus setting is surrounded by significant open space used for bicycling, walking and picnicking. The site abuts the Belmont Country Club and, in general, is surrounded, beyond the open space buffer, by established single family developments. The site provides extensive on-site outdoor recreation facilities for children and other residents. The site is not associated with any commercial development and there is no walkable access to public transportation.

Unit Mix	85 one bedroom units (21.6%)*
	279 two bedroom units (71.1%)
	18 three bedroom units (4.6%)

*Note: 60 of the one bedroom units are age restricted. Accordingly, the student population is derived from 322 units.

Total number of students: 142

Gross student average per unit: 0.441 (Not including age restricted).

- 2. Concord Mews.** This project is a 350 unit 40B rental multi-family development located on Nathan Pratt Drive. It is a mix of two and three story garden style apartments and townhouses surrounded by open space that is primarily used to visually buffer the site from surrounding uses and to provide walking and bicycle trails. It abuts the Thoreau Hills Reservation and is within walking distance of the Maynard Country Club. It is designed as a low density residential development with groupings of smaller residential buildings with private garages. To the south and east it abuts established low density single family neighborhoods. To the west, separated by local roadways, it abuts a one and two story office development in both Maynard and Concord. The site provides extensive on-site outdoor recreation facilities for children and other residents, but does not offer walkable access to public transportation and is not adjacent to any regional highways.

Unit Mix	70 one bedroom units (20%)
	245 two bedroom units (70%)
	35 three bedroom units (10%)

Note: as of the date of this memorandum, the site is 80% occupied with 60 students. Accordingly, to generate a more accurate estimate assuming 95% occupancy, the reported enrollment number was expanded to 75.

Total number of students: 75

Gross student average per unit: 0.214

- 3. Avalon at Sharon.** Avalon at Sharon is a 156-unit 40B rental development located at Avalon Drive off Norwood Street near the Rt. 95 interchange. The two and three story garden style apartments are located in smaller buildings, each having between 16 and 24 units, and separate garages. The development is surrounded by open space and/or low density single family development. It offers access to on-site and abutting bicycle and walking trails, and directly abuts the Spring Valley Country Club. The site provides extensive on-site outdoor recreation facilities for children and other residents, but does not offer walkable access to public transportation.

Unit Mix	64 one bedroom (41%)
	92 two bedroom (59%)

Total number of students: 63

Gross student average per unit: 0.404

As noted above, each of the above projects is fundamentally different from the Proposal. None of the above projects includes an integrated commercial component, and all are comprised of townhouse or garden-style buildings situated in “ideal” family-friendly settings with extensive on-site and off-site open space and outdoor recreation. Because of these characteristics, it is

expected that these developments would generate substantially more school children than the Proposal.

In addition, as with any suggested comparable, the unit mix and affordability components of these developments do not necessarily match what is being proposed in Westwood. Therefore, consistent with the methodology used in the fiscal report, the information in Table 1, below, uses an equivalency calculation to take into consideration differences in unit mix and affordable percentages. More specifically, Table 1 factors out one bedroom and three bedroom units and adjusts the affordable rate to 15% (consistent with the Proposal) to generate an equivalency between the mixed use and non mixed use developments.

Table 1. Student Equivalency

Mixed Use Comparables	2 Bedroom Market rate(students per unit)	2 bedroom Affordable (students per unit)	University Station Student Equivalency
Powder Mill Sq. 40B Andover	0.068	0.40	42
Charles River Landing 40B Needham	0.082	0.40	42
Avalon Ship Yard 40B Hingham	0.115	0.40	51
Avalon Newton Highlands 40B Newton	0.148	0.40	60
Woodland Station 40B Newton	0.150	0.40	61
Average	0.11	0.40	50
10% range			55
Non –Mixed Use Sites	2 Bedroom Market rate(students per unit)	2 bedroom Affordable (students per unit)	University Station Student Equivalency
Lexington Hills	0.46	0.40	159
Concord Mews	0.15	0.40	63
Avalon Sharon	0.77	0.40	225
Average	0.46	0.40	136
10% range			150

As seen Table 1, not surprisingly, there are substantially more students generated in the Lexington, Concord, and Sharon projects, which are located in much more “traditional” residential environments, are not integrated with commercial development, and include extensive on-site and off-site open space and outdoor recreation for families with children. In fact, our data shows that even traditional residential projects that are located in communities with lower-ranked school systems generate a substantial number of children. This is because the most important factor driving the number of students that will be generated by a proposal is fundamentally the nature and character of the residential development itself (i.e., townhouse or garden style vs. large buildings; extensive open space vs. more limited outdoor play and recreation areas; pastoral setting vs. commercial development; etc.).

Given the characteristics of the Proposal and the factors mentioned above, it is expected that the Proposal’s residential components will cater less to families with children and more to “professional” residents who will live, work, and shop within the immediate area. Consistent with this expectation, Table 1 shows that the student generation rates for mixed-use projects that are comparable to the Proposal, although also located in highly ranked school districts, are considerably lower than the “traditional” residential projects.

Combining the two sets of student per unit data is to compare “apples and oranges,” but for the purpose of discussion, the combined market rate student ratio would be 0.285. Using this value and the regional average for affordable two bedroom units of 0.40, the Proposal’s two bedroom unit mix of 276 market rate units and 49 affordable units would generate approximately 99 students.

Even with an assumed 99 students, there is a continuing substantial net fiscal benefit to the Town which would be available to address the educational impacts of the Proposal.