



# Wellesley Strategic Housing Plan

## EXECUTIVE SUMMARY

### Introduction

The Town Staff, the Wellesley Housing Task Force, and consultants from the Barrett Planning Group began working with the community in May 2024 to develop a Strategic Housing Plan (SHP) for the Town of Wellesley. The Housing Task Force was originally organized as a communications channel and advisory group with Town staff and members from the Select Board, Planning Board, Community Preservation Committee, Wellesley Housing Authority, and Wellesley Housing Development Corporation. Over time, the group has expanded for specific purposes (including the development of the Strategic Housing Plan) at the request of community groups such as Building a Better Wellesley, Neighbors for Better Planning, and Friends of Brookside. In 2023, the Housing Task Force issued a Request for Proposals (RFP) to develop the Strategic Housing Plan following Town Meeting approval for Community Preservation Act funding to support this effort.<sup>1</sup> As described in the RFP and to Town Meeting voters, the primary purpose of the Strategic Housing Plan is to develop a strategy for creating more diverse housing options and improving the Town's Fair Housing Policies.

### Defining Housing Needs

This Strategic Housing Plan (SHP) began with a determination from the Housing Task Force that the Town of Wellesley continued to need more diverse housing options despite meeting many of the recommendations from the 2018 Housing Production Plan (HPP) and the 10 percent threshold for affordable housing on the state's Subsidized Housing Inventory (SHI). This target stems from G.L. c. 40B, §§ 20-23, ("**Chapter 40B**") which established the **comprehensive permit** process to facilitate the development of low- or moderate-income housing.

G.L. c. 40B – Chapter 40B proper – is actually the Commonwealth's regional planning law and the parent legislation for regional planning commissions such as the Metropolitan Area Planning Council (MAPC). The four short sections that make up the affordable housing provision were added in 1969, and they are called "Chapter 40B" in this plan to be consistent with affordable housing nomenclature in Massachusetts. Nevertheless, remembering the regional planning umbrella for affordable housing can help local officials and residents understand the premise of the law, which is to provide for

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<sup>1</sup> Town of Wellesley, "What is the Wellesley Housing Task Force?" accessed June 2025, <https://wellesleyma.gov/Faq.aspx?QID=257>

a regionally equitable distribution of housing for people with low incomes.

#### COMMUNITY PERSPECTIVES

The community engagement process of this plan revealed a lack of consensus about the Town's responsibility for addressing housing needs beyond its fulfillment of state mandates such as Chapter 40B or MBTA zoning (G.L. c. 40A, § 3A).

Chapter 40B establishes the “fair share” 10 percent threshold to determine whether a local Zoning Board of Appeals’ denial of a comprehensive permit project is “consistent with local needs.”<sup>2</sup> **The 10 percent standard is not based on the quantified housing need of every municipality;** rather, by requiring the same proportion of affordable housing supply across the state, regional needs for housing are at least partially met through efforts from every community within a region. Wellesley has *surpassed* this minimum based on a state policy that counts *all* units in rental projects as long as 25 percent are affordable to low- or moderate-income households.<sup>3</sup> While stated in the Chapter 40B Guidelines, this policy is not codified in the Chapter 40B statute or regulations and is therefore subject to change. That said, 10.68 percent of Wellesley’s year-round housing stock (981 units) is currently included on the SHI. While this achievement is commendable, it simply means that the Town has met the statutory minimum based on existing policy; it does not mean the Town has addressed local or

regional housing needs — hence the Town’s pursuit of this Strategic Housing Plan.

### Strategic Housing Plan Scope

The Town has consistently acknowledged the importance of housing access and choice to the socioeconomic health, diversity, and vitality of the community, as evidenced by the Town’s 2019 Unified Plan and 2018 HPP. As such, the scope for this project spoke to the need for a range of housing types including single-family homes, multi-family units, rental apartments, and supportive housing to accommodate a variety of lifestyles, needs, income levels, and stages of life. Specifically, the scope referenced the inadequate supply of affordable housing for low-income households, senior housing, “middle-income” housing affordable to the local workforce and younger families, accessible housing for persons with disabilities, and even market-rate housing for those with higher incomes. Thus, the Town recognizes that its housing needs extend beyond the regulatory requirements tied to affordable housing under Chapter 40B.

The strategies included in this SHP suggest possible paths for diversifying the Town’s housing stock in a manner consistent with the land use principles of the Unified Plan while making good use of the resources most able to accomplish this — **land use regulations** and **Town-owned land**. Other tools are necessary to support the successful use of these resources, including policy development, strong leadership, professional capacity, adequate infrastructure, and

<sup>2</sup> In addition to the 10 percent minimum, Chapter 40B provides for alternative thresholds based on the total amount of land used for affordable housing within a municipality, as well as the amount of land used in a given calendar year for this purpose. Together these metrics are referred to as the *statutory minima* under Chapter 40B.

<sup>3</sup> This threshold lowers to 20 percent when applied to lower income thresholds than upper low- or moderate-income threshold of 80 percent of the area median income, or AMI.

community support. However, due to the extremely high land costs in Wellesley, without strong zoning incentives and smart use of Town-owned land, the Town cannot efficiently support the creation, redevelopment, or preservation of housing necessary to respond to identified needs.

## Quantitative Housing Goals

### ■ PREVIOUS LOCAL TARGETS

**The Town's 2018 Housing Production Plan (HPP) included a production goal of 45 SHI-eligible units per year.**<sup>4</sup> This formula-based numerical target is not based on a specific local need; rather, Chapter 40B regulations require that HPPs include an annual production goal for SHI-eligible units equal to 0.5 percent of the municipality's housing stock. At the time of the 2018 HPP, this calculation resulted in a 45-unit target.

**The 2019 Unified Plan also established a numerical goal, aiming to add 400 permanently affordable housing units to the Town's SHI by 2028.**<sup>5</sup> This target was based on the estimated number of units needed to achieve 10 percent under 40B based on the unit shortfall at the time of the plan. (The goal included a buffer to account for the impending change in the year-round housing count based on the 2020 Census.) Both plans also included numerous *qualitative* strategies and policy recommendations developed in response to identified housing needs and

related barriers. The Town has achieved or continues to work toward many strategies in these plans. This Strategic Housing Plan similarly includes qualitative strategies, including several recommendations from the HPP or Unified Plan that were not implemented.

### ■ OTHER APPROACHES

The Chapter 40B statutory minimum is an **easily quantifiable, fixed target** where the denominator is the most recent decennial census count of year-round housing, and the numerator is the total number of units eligible for the SHI at any given time. By contrast, there is no single, definitive method for quantifying housing need, as evidenced by recent estimates of national housing demand ranging widely from *zero* to *7.3 million* units depending on the philosophy and approach applied to the analysis.<sup>6</sup> Methods typically aim to calculate gaps between the available supply of housing and demand from specific market segments based on past trends, existing conditions, and future projections. Various metrics used include vacancy rates, level of cost burden, affordability gaps (including for those working in the community), "mismatch" between existing housing stock and household needs (household size, disability status, etc.), homelessness, pent-up households living together due to high housing costs, and more.<sup>7</sup> The nuanced relationships between these indicators do not necessarily translate into fixed targets for unit creation —

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<sup>4</sup> Town of Wellesley, *Wellesley Housing Production Plan* (September 18, 2018), 42. Prepared for the Town by Barrett Planning Group, in association with JM Goldson.

<sup>5</sup> Town of Wellesley, *Unified Plan* (March 2019), 7-4. Prepared for the Town by Stantec.

<sup>6</sup> Moody's Analytics, "Bringing the Housing Shortage into Sharper Focus" (July 2025), 2.

<sup>7</sup> Recent examples of statewide and national studies using these and other metrics include: Moody's Analytics, *Bringing the Housing Shortage into Sharper Focus* (July 2025); Freddie Mac, *U.S. Economic, Housing and Mortgage Market Outlook* (November 2024); Massachusetts Executive Office of Housing and Livable Communities, *A Home for Everyone: A Statewide Housing Needs Assessment* (February 2025); Metropolitan Area Planning Council & Housing Navigator MA, *Data Opens Doors: Measuring the Affordable Housing Gap in Massachusetts* (April 2025).

particularly at the local level — but **findings can provide important context to inform policies, practices, and resource allocation, which is the approach taken for this Strategic Housing Plan.**

## Looking Ahead

Like the HPP and Unified Plan, this Strategic Housing Plan provides strategies and policy guidance based on an analysis of housing local and regional needs across income levels, household types, and other market segments *within the context of Wellesley's housing market, regulatory and policy framework, and findings from other community planning efforts.* However, *unlike* the HPP and Unified Plan, this plan does not include specific numerical targets.

The Strategic Housing Plan itself is not tied to an existing housing program or initiative (although many recommendations reinforce the takeaways of the HPP and Unified Plan, both of which were developed in accordance with specific state frameworks.)<sup>8</sup> Absent any regulatory mandate, future numerical goals should be developed alongside the specific strategies the community **chooses** to pursue and develop; otherwise, such targets are somewhat meaningless because the parameters defining the strategy (e.g. program budget, extent of zoning relief, selection of Town-owned properties, etc.) have not been defined yet. Identifying relevant metrics can help decision makers establish *program-specific* targets for select recommendations or simply track progress of a strategy over time. To aid in this exercise,

this Executive Summary includes an overview of possible metrics to consider.

## Key Findings

The Housing Needs Assessment and Development Constraints sections of the SHP analyzed existing conditions and past trends relating to the Town's demographics, socioeconomics, housing stock, market conditions (including development trends), environmental constraints, infrastructure capacity, zoning barriers, and more. The relevant sections of the SHP include citations for these specific findings summarized below.

### Demographic Profile

**SHIFTING POPULATION TRENDS.** From 1990 to 2020, Wellesley experienced a significant loss of its 25 to 44 population and an increase in residents age 45 to 64; the 65+ population has remained relatively stable.

**RACIAL AND ETHNIC DIVERSITY.** Wellesley is more racially and ethnically diverse than most surrounding communities. However, **Wellesley's minority populations are more well-represented among college students living on campus**, which skews the overall minority statistics for the community.

**OLDER, PREDOMINANTLY HOMEOWNER HOUSEHOLDS.** Half of Wellesley householders are between ages 45 and 64, an age group often in the prime of their earning potential and therefore better

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<sup>8</sup> Housing Production Plans are described in 760 CMR 56.03(4) and EOHLC's Chapter 40B Comprehensive Permit Guidelines (Section II.B). While intended to expand upon the typical comprehensive master plan framework and jointly serving as a broader Townwide strategic plan, the Town's 2019 Unified Plan was designed to include the required components of a Master Plan under G.L. c. 41, § 81D.

equipped to “buy up” into significantly higher-cost housing markets.

#### **YOUNGER (AND OLDER) RENTER**

**HOUSEHOLDS.** Wellesley renters are more likely to be younger, although renting begins to increase among householders age 75+. This shift may be attributed to seniors looking to downsize into smaller rental units, as well as the Wellesley Housing Authority’s 130+ senior/disabled rental units.

**DISABLED POPULATIONS.** An estimated 3.8 percent of Wellesley’s 18+ population have an independent living difficulty, and 1.2 percent have a self-care difficulty. (These populations may overlap, and this count does *not* include those already living in existing institutionalized group quarters settings such as nursing homes.)

### **Economic Profile**

**HIGH INCOMES.** The 2023 average household income for Wellesley households was \$368,179 compared to \$177,133 for Norfolk County and \$140,991 for Massachusetts. Due to Wellesley’s higher incomes, an estimated 73 percent of Wellesley households have incomes above the *regional* median, adjusted for household size.

**PRESENCE OF LOW-INCOME HOUSEHOLDS & POVERTY.** An estimated 22 percent of Wellesley households meet basic income requirements for affordable housing under Chapter 40B. For renter households, this figure jumps to 52 percent. **Nonfamily senior households (i.e. often seniors living alone) represent the largest share of Wellesley households living in poverty**, although the Townwide share of residents below the poverty line is significantly lower than the region.

#### **HIGH ACHIEVING RESIDENT LABOR FORCE.**

Nearly three-quarters of Wellesley’s employed residents have occupations related to “Management, Business, Science, and Arts,” which typically yield significantly higher median earnings than other occupation types. Over half of residents age 25+ have a Master’s degree or higher.

**EMPLOYMENT BASE IMBALANCE.** Wellesley has a relatively high estimated jobs-to-housing unit ratio, with over two local jobs for every one housing unit. In addition, median earnings for those *working* in Wellesley (\$65,723) are much lower than those *living* Wellesley (\$111,595 for all employed residents; \$188,925 for full-time only), further making it difficult for local workers to enter the housing market. As a result, **many workers commute long distances to their jobs in Wellesley, with over 20 percent traveling 25+ miles to work.**

### **Housing Market**

**PREDOMINANTLY SINGLE FAMILY.** An estimated 82 percent of Wellesley’s dwelling units are single-family detached homes, the vast majority (94 percent) of which are owner-occupied.

#### **COMMUNITY PERSPECTIVES**

The appreciation for Wellesley’s single-family neighborhoods was a common theme across all community engagement efforts. Concerns that multi-family developments might alter this legacy reflects broader community apprehension that new housing types could affect the built fabric of Wellesley and its neighborhoods.



**HIGH PROPERTY VALUES.** Wellesley's single-family homes have an average assessed value of \$1.93M while condominiums have an average assessed value of \$1.1M (FY2025). Wellesley's more attainably priced single-family homes (i.e. those in the bottom quartile value) tend to be older, comparatively smaller, situated on smaller lot sizes, and are much more likely to have had the same homeowner for the past 25+ years. However, even these homes have a median value of nearly \$1.3M. Very high property values result in limited feasibility for buy-down programs, property acquisition, or other methods to create affordability with Town funds.

**HIGH SALES PRICES – TRENDING UP FOR CONDOMINIUMS.** In 2024, the median price of a single-family home in Wellesley reached \$2.1M, while the median sale price for a condominium jumped dramatically from \$975,000 in 2023 to \$1.8M in 2024 due to recent sales from new high-cost condominium projects.

**LITTLE OPPORTUNITY FOR MIDDLE/UPPER-MIDDLE-INCOME HOUSING.** In a competitive, high-cost housing market such as Wellesley's, housing affordable to middle-income households simply will not be produced unless required or strongly incentivized. As a result, there has been significantly less representation of younger households in Wellesley over time, and it is challenging for those who work in the community to live in or near Wellesley.

**LARGER HOMES.** Nearly half of Wellesley's owner households are either 1- or 2-person households, yet the strong majority of owner-occupied units contain four or five bedrooms. **Newer homes (often resulting from demolition and rebuild) tend to be much larger;** while the median residential building area for all of Wellesley's single-family homes

is 2,806 square feet, the median jumps to 4,141 square feet for homes built since 2000.

**TEARDOWNS.** An estimated 12 percent of Wellesley's current stock has been built in since 2010; however, this new development has not led to an increase in total housing units available because many new units are based on existing unit teardowns. **Between 2003 and 2025, Wellesley's single family housing stock rose by just 95 homes, although over 1,200 single family homes were built during this time.** Also from 2003-2025, condominiums jumped by 320 units while two- and three-family homes fell by 65 properties (a loss of approximately 122 units). These shifts reflect the **loss of smaller multifamily properties, either due to conversion to condominiums or teardowns.**

#### COMMUNITY PERSPECTIVES

The lack of smaller units and middle-income housing was frequently referenced in the community engagement process, either as a need to address or as an unavoidable truth resulting from market forces. These gaps in the local housing supply present a challenge for longtime senior residents who cannot afford to downsize and remain in the community, as well as for younger families and local workers who are priced out of the housing market.

#### Affordability & Stability

**RETHINKING 10%. Of the 981 units currently included on the SHI, only an estimated 589 (or 6.4 percent) are actually affordable** due to state policy that counts all units in rental projects as long as 25 percent are affordable to low- or moderate-income income

households.<sup>9</sup> For a true 10 percent based on the 2020 Census, the Town would need to add 329 units, all affordable.

**COST BURDEN.** In 2023, an estimated 9.9 percent of Wellesley homeowners (759) and 17.4 percent of renter households (254) were severely cost burdened, meaning they were spending 50 percent or more of their income on housing costs. **Nonfamily senior households are disproportionately cost burdened, as they only make up 15 percent of Wellesley's households, yet account for 35 percent of severely cost-burdened households.**

**HOUSING INSTABILITY.** **Eviction filings for Wellesley renters more than doubled between 2023 and 2024** (up from 22 to 49 filings). For regional context, the ratio of eviction filings to rental units in Wellesley was far smaller than Norfolk County for 2021 and 2022; however, by 2024, the frequency of filings in Wellesley was on par with the county.

**HOUSING AUTHORITY PROPERTIES.** Both the 2019 Unified Plan and 2018 Housing Production Plan identified Barton Road (88-unit state family two- and three-bedroom units) and Morton Circle (36 state elderly-disabled one-bedroom units) as potential redevelopment projects. Although the Town has used CPA funds twice to study opportunities for the improvement, redevelopment, or expansion of one or both of these sites, no redevelopment project has commenced.

## Regulatory Barriers

### LIMITED EXISTING MULTIFAMILY ZONING.

While various forms of “multifamily” housing are allowed by right in multiple zoning districts, these areas are limited in size and scattered throughout town. In addition, multifamily projects are likely to trigger other local review processes that are permitted separately.

#### COMMUNITY PERSPECTIVES

The practice of adopting Residential Incentive Overlays (RIOs) to rezone specific sites has been criticized as an unsystematic or hasty way to introduce higher-density housing. In response to strong opposition to two RIOs at the November 2024 Special Town Meeting, the Planning Board has established an RIO task force to review the bylaw. By contrast, greater support exists for reusing existing structures for multifamily housing in suitable areas, as this practice better protects the current built and natural landscape. However, current regulations do not facilitate redevelopment, which is the primary path forward for integrating housing into the existing fabric of the community.

### COMPLEX ZONING BYLAW & PERMITTING PROCEDURES.

Wellesley's zoning bylaw is largely organized by district-specific regulations, which has gradually led to **overlapping land uses and provisions**, making it difficult to assess the impact of broader zoning amendments. Additionally, the layered permitting process ensures careful board review of larger projects, but also can trigger multiple review and approval

<sup>9</sup> This threshold lowers to 20 percent when applied to lower income thresholds than upper low- or moderate-income threshold of 80 percent of the area median income, or AMI.

phases, delaying projects and adding to development costs.

**LIMITED INCENTIVES.** Outside of the Residential Incentive Overlay (RIO), the **zoning bylaw does not appear to offer strong incentives to support the types of development the Town wishes to encourage.** The Inclusionary Zoning bylaw, for example, does not include bonus incentives, nor does the Natural Resource Protection bylaw, which is required for subdivisions creating five or more lots.

## Priorities & Concerns

**NEEDS OF CURRENT WELLESLEY RESIDENTS.** Throughout the engagement process, there tended to be **more consistent support for prioritizing housing challenges faced by current community members.** Examples included the redevelopment, modernization, and possible expansion of existing affordable housing; and addressing the needs of current residents being priced out of the community or unable to downsize within Wellesley.

**IMPACTS OF DEVELOPMENT.** Community concerns relating to housing development have focused on **changes to neighborhood character, traffic, infrastructure capacity, degradation of the environment, and the cumulative effect of these impacts** on the overall quality of life for existing households.

**COMMUNICATION AND TRANSPARENCY.** Wellesley residents are highly engaged and civically involved. Participants expressed a **strong desire for transparency, two-way communication, and opportunities for meaningful input.** However, there is limited capacity in Town government, particularly the Planning Department, to oversee existing housing policy while incorporating more

community-informed planning efforts and additional strategies.

**BROADER LAND USE PLANNING.** The Town's Unified Plan encourages more diverse housing types within walkable village centers, transit-accessible areas, and industrial parks while promoting the preservation of single-family neighborhoods. In addition, the land use policies of the Plan encourage protection of open space resources, while leaving room for exploration of some housing on the North 40 property.

**TOWN-OWNED PROPERTY.** Because land values are so high, one of the most efficient ways for the Town to meaningfully produce units aimed to address specific needs is through **selective disposition of municipal land, as suggested in the HPP and Unified Plan.** For scattered smaller tax title properties, this strategy can support the creation of affordable single-family homes throughout town. For larger sites, this strategy can facilitate housing projects aimed to address specific needs, such as supportive residential housing to serve adults with disabilities, a "starter home" development, or a retirement community for low-, moderate-, and middle-income seniors.

**OPEN SPACE GOALS.** The Town's Open Space and Recreation Plan aims to expand permanently protected open spaces. While this may seem at odds with housing goals, it provides an **opportunity for collaboration on joint housing and open space preservation projects** that could access more potential funding streams and meet two important objectives.



## Opportunities

The value of real estate in Wellesley objectively limits socioeconomic diversity, which is an unavoidable truth for highly sought-after communities with competitive housing markets. As such, the Town's best opportunities for encouraging the types of housing that can address market gaps is through proactively planning for redevelopment in suitable areas, amending zoning to facilitate the desired types of development and serve a broader range of incomes, and making good use of publicly owned land— all of which require strong leadership and clear policy defining the Town's housing goals.

## Summary of Goals and Strategies

This Strategic Housing Plan includes **6 goals** supported by **48 strategies** summarized below. These recommendations are detailed and further organized into an "Approach to Implementation" that assigns suggested time frames and responsible parties.

### ■ GOAL 1

**Empower the Wellesley Affordable Housing Trust (WAHT) to create, support, preserve, and improve affordable housing for the benefit of the community.**

- 1A** Continue to launch and support the Wellesley Affordable Housing Trust.
- 1B** Pursue training and technical assistance for the WAHT members and supporting staff with MHP, CHAPA, or another entity, or solicit proposals for preliminary technical assistance as the WAHT launches.

- 1C** Develop a WAHT Strategic Plan that defines the Trust's mission, goals, policies, and potential initiatives for its first 3-5 years, beginning with the existing framework established by the WHDC.
- 1D** Revisit and (if warranted) revise the Town's Affordable Housing and Fair Housing Policies.
- 1E** Within or as an appendix to the WAHT Strategic Plan, consider developing a Public Engagement Plan.
- 1F** Research potential funding streams and resources to capitalize the WAHT.
- 1G** Ensure an active WAHT presence in other municipal planning initiatives to enhance awareness of the links and compatibility between housing and other public interest topics.
- 1H** Identify programs and initiatives for the WAHT to pursue in the future based on their alignment with the AHT's mission, goals, and policies.

### ■ GOAL 2

**Prioritize public outreach and engagement for housing and planning initiatives; foster continued, responsive community-wide dialogue about housing in Wellesley.**

- 2A** Invite representatives from all Town Boards, Committees, and Commissions to a listening session to share questions, concerns, or ideas about housing as it relates to their work.
- 2B** Provide an annual Housing Report to Town Meeting.
- 2C** Build up the "Housing in Wellesley" page on the Select Board Office website to include links or subpages for specific audience.
- 2D** As applicable, support rezoning initiatives with participatory visioning activities such as design charettes, guided tours of the

areas under discussion, and listening sessions.

- 2E** Work with the Wellesley Civil Discourse Initiative (WCDI) to plan a structured, connected series of housing-focused conversations.
- 2F** As part of the AHT's Public Education & Engagement Plan, organize a series of expert panel-led discussions on housing-related topics.

### ■ GOAL 3

**Align housing and land use planning with the principles of the Unified Plan and other relevant local or regional planning efforts as appropriate.**

- 3A** Launch a tiered zoning audit to (1) identify conflicting, redundant, or unclear provisions and (2) assess the bylaw's ability to encourage development types that meet Town needs and align with the Unified Plan.
- 3B** With input from all departments, document the implementation status of existing plans or initiatives.
- 3C** Continue to confer with the state's Division of Capital Asset Management and Maintenance (DCAMM) regarding opportunities for the redevelopment of state-owned land at Mass Bay Community College.
- 3D** Engage with Wellesley's educational institutions to discuss their housing needs and partnership opportunities.
- 3E** Hold a series of interdepartmental staff workshops to identify areas appropriate for development and redevelopment, focusing on locations identified in other planning efforts.
- 3F** Identify and pursue strategies for addressing transportation and mobility gaps to meet existing needs and facilitate

residential or mixed-use redevelopment within industrial or administrative/professional districts.

- 3G** Plan for necessary traffic improvements at key problematic locations to accommodate future growth in areas anticipating or targeted for redevelopment.
- 3H** Commence an ongoing interdepartmental effort to develop criteria for determining the best use(s) of properties under municipal consideration (either for acquisition or disposition).
- 3I** Using the criteria established under 3H, assess vacant or underutilized Town-owned properties and use findings to make formal recommendations to the Select Board and Town Meeting for action.

### ■ GOAL 4

**Pursue strategies to create, support, and sustain a diverse housing stock that addresses identified needs and supports other community-wide priorities.**

- 4A** In partnership with the Wellesley Housing Authority (WHA), plan for redevelopment of Barton Road and Morton Circle to improve quality of life for existing tenants and provide additional mixed income units; evaluate other existing SHI projects for similar redevelopment opportunity.
- 4B** Track projects permitted under the Town's Inclusionary Zoning (IZ) Bylaw to assess its effectiveness; explore amendments to broaden its applicability and serve additional income levels.
- 4C** Formalize and communicate a long-term, planned approach for land use planning that encourages housing diversity, protects environmental resources, and is otherwise consistent with the Unified Plan.

- 4D** Review the Residential Incentive Overlay (RIO) Bylaw to determine its efficacy in addressing Wellesley's housing needs.
- 4E** Launch a “zoomed out” visioning process for Lower Falls and surrounding commercial areas to explore redevelopment scenarios that integrate housing within the existing built environment.
- 4F** To support and encourage smaller projects that would trigger IZ, prepare guidance materials and resources for local developers.
- 4G** Conduct an inventory of existing nonconforming vacant lots in residential districts and consider strategies to encourage manageable infill of allowed uses that create affordable units (including affordable single-family homes).
- 4H** Encourage conversion of underutilized non-residential buildings to multifamily housing (or mixed use if within commercial areas) by special permit.
- 4I** Explore potential impacts of allowing conversion of large older single-family homes into neighborhood-scale multifamily (up to four units) by special permit, provided the building's exterior is preserved; investigate market feasibility of requiring or incentivizing inclusion of an affordable or workforce housing component.
- 4J** Explore regulatory strategies that can incentivize “starter homes” (i.e. smaller single-family homes on reduced lot sizes) and open space protection on remaining vacant developable land within single family districts.

## ■ GOAL 5

### Prevent displacement of Wellesley residents.

- 5A** Explore the adoption of a Means-Tested Residential Exemption (MTRE) for homeowners meeting age, asset, income, residency, and other requirements.
- 5B** Consider adopting G.L. c. 59 § 50, which grants a tax exemption to property owners renting an affordable unit up to 200% AMI (among other criteria).
- 5C** Explore additional regulatory or programmatic strategies to encourage the preservation of older properties and reduce teardown activity.
- 5D** Investigate methods for encouraging the inclusion of more adaptable or accessible homes (beyond ADA requirements) within larger projects.
- 5E** Consider launching programs (or partnering with existing programs) to help income-eligible households with housing needs — e.g. rental assistance or rehabilitation/repair loans.
- 5F** Partner with developers to “buy down” market rents to affordable levels for some units within new rental projects — *on top of* their obligation under the Town's Inclusionary Zoning.
- 5G** Assess the feasibility of acquiring or deed-restricting the limited supply of older, smaller multifamily properties upon resale.

## ■ GOAL 6

### Strengthen the Town's capacity for advancing its housing and land use goals, policies, and planning.

- 6A** Conduct an internal assessment of current staff capacity to implement the Strategic Housing Plan, monitor the Town's deed-restricted affordable

housing, and support the efforts of the newly launched WAHT.

- 6B** Consider joining the Regional Housing Services Office to expand the Town's capacity for supporting housing initiatives.
  - 6C** Based on findings from above actions (6A-6B), consider adding a housing staff position to oversee housing-related initiatives, administer affordable housing programming, assist residents with housing needs, and facilitate other actions suggested in this Strategic Housing Plan.
  - 6D** Conduct a review of the Town's existing deed-restricted units and establish a tracking method to review their long-term compliance.
  - 6E** Implement a standard policy of charging monitoring fees or requiring a Monitoring Services Agreement for any units created through the Town's Inclusionary Zoning or under the Chapter 40B Local Initiative Program
  - 6F** Using the criteria for assessing properties under 3H, develop standard RFPs to enable the Town or WAHT to acquire property for affordable housing purposes.
  - 6G** Remain current on technical assistance opportunities and planning grants relating to housing, including the Town's continued designation under the Housing Choice Initiative.
  - 6H** Re-engage with the WestMetro HOME Consortium to determine future pathways for membership when the program has capacity.
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## Guidance for Metrics

The suggestions below offer ideas for measurable indicators that could be incorporated into program-specific goals or allow the Town to measure progress and effectiveness of adopted strategies over time.

**DEED-RESTRICTED UNITS ON SHI.** As described above, for a “true” 10 percent on the SHI based on the 2020 Census, the Town would need to add **329 units**, all affordable, and keep pace with affordable units and market units created in the future to ensure this target is maintained.

### LOCAL FUNDS & SUPPORTED PROJECTS.

While the newly established Wellesley Affordable Housing Trust (WAHT) will already be required to keep detailed financial records, the Town and Trust can take additional steps to document particulars of all supported projects. Metrics can include the **number of project units, number of accessible units, units by bedroom count, cost per unit, project type** (ownership or rental), **income levels served, location** (neighborhood or zoning district), **other contributing subsidy sources** (if any), and **permitting mechanism**.

### NUMBER AND TYPES OF HOUSEHOLDS

**SERVED.** While there will be overlap with reporting on development projects as described above, the WAHT or other housing partners may also support non-development housing programs suggested in the SHP's strategies such as rental assistance, “buying down” additional rents to a range of income levels, rehabilitation loans, and more. Tracking or establishing a goal for the **number of Wellesley households served** can help the Town assess and refine such programs.

**UNITS CREATED UNDER IZ.** While the detailed SHI documentation suggested above would overlap with this effort, specifically tracking details for units produced under Inclusionary Zoning will allow the Town to determine if adjustments to the bylaw are necessary, particularly in light of the **substantial need for housing above 80% AMI and under market prices.**

**NUMBER OF TEARDOWNS.** While the Planning Department already tracks demolition delay bylaw applications and permits, tracking and reporting additional data comparing the original home to the replacement home (**year built, neighborhood, building square footage, number of bedrooms, style, assessed value**, etc.) can support decision-making and goal setting relating to policies and programs to incentivize preservation of older housing stock.

**AFFORDABILITY GAPS.** Using standard calculations for housing affordability, the Town could determine the **income levels required to afford Wellesley's home values and market rents** (as was undertaken in the Affordability Gaps section) and use this information to assess the feasibility of “buy-down” programs or expanded thresholds within the Town’s Inclusionary Zoning.

**COST-BURDENED HOUSEHOLDS.** The Town could aim to reduce the **number or percentage of cost burdened households** in Wellesley, either through programming or unit creation targeted to specific income levels. Detail by household type (such as that shown in Table 23 of the Needs Assessment) requires further analysis, but any consistent, standard approach for assessing cost burden can help the Town set goals to close observed gaps.

**PROJECTS ON TOWN-OWNED LAND.** Because land values are so high, one of the most efficient ways for the Town to meaningfully produce units aimed to address specific needs is through selective disposition of municipal land. Once the Town has undertaken a detailed assessment of Town-owned properties, specific goal setting can emerge. For example, the Town can set **annual goal for independent affordable ownership units** created on smaller, scattered tax title properties. For larger sites, the Town could set collaborative targets with the Natural Resources Commission for **acreage conserved** and **affordable units created.**

**LEVEL OF CIVIC ENGAGEMENT.** Several strategies in this plan focus on the importance of proactive, thorough, meaningful community engagement efforts for housing and land use planning initiatives. Reporting on the types of engagement (**method, location, outreach, results**) and level of participation (**number of participants**) can help the Town make observations about successful methods or identify underrepresented groups.

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## Approach to Engagement

Engagement across several outreach methods connected the consulting team, Town staff, Housing Task Force members, and local officials with residents and nonresidents throughout this process. These efforts are described below, with detailed summaries included in the Appendix of the full Strategic Housing Plan.

**SMALL GROUP INTERVIEWS.** During the months of June and July 2024, the consultant team conducted small group interviews with



nearly 60 individuals familiar with Wellesley's housing needs to get a sense of community perceptions surrounding the current state of housing stock in Wellesley. The Housing Task Force and Town staff distributed an interview sign-up form to those who would be interested in participating and asked them to share the opportunity with others. Participants included government officials, local residents, local employers, nonprofit organizations, and developers.

**COMMUNITY SURVEY.** A community survey was available from October 14, 2024 to November 25, 2024 through an online survey and physical copies. Designed to capture attitudes about housing in Wellesley and potential strategies to address housing diversity in Town, the survey encouraged responses from both residents and nonresidents to take. A total of 1,542 individuals completed this survey.

**COMMUNITY FORUMS.** The Consulting Team and Housing Task Force hosted three community meetings during the development of this plan – one in June 2024 and two in November 2024 (one in person and one virtual).

**WELLESLEY HOUSING TASK FORCE & WORKING GROUP MEETINGS.** From June 2024 to April 2025, a Strategic Housing Plan Task Force met virtually to discuss the plan's development, findings, and potential strategies.

**PRESENTATIONS TO THE SELECT BOARD AND PLANNING BOARD.** On June 3, 2025, the consultant team and Town staff presented a draft of the plan to both boards.

**PUBLIC COMMENT PERIOD.** Members of the public, including Town boards, committees, and commissions, had the option to provide written comments on the draft plan from June 4 to July 3. Town staff and the consultant team reviewed and discussed all comments, which were shared with the Planning Board and Select Board. Changes that resulted from these comments were presented to both boards during a final presentation of the plan.

**FINAL PRESENTATION.** On October 28, 2025, the consultant team presented the final plan to both Boards. **TO BE UPDATED.**

While the promotion of these engagement events, including the town-wide survey and community forums, attempted to include all individuals with an interest in housing, the feedback gathered from these events are from a self-selecting group of individuals. Self-selected sampling allows participants to engage on their own accord and willingness to participate is often influenced by a participants' interest in the topic, time allowance, or even having headspace to fully engage in these events.

Self-selected sampling can amplify existing disparities in engagement access and privilege within the community engagement process. Certain populations, like those with more access to free time, have the availability to engage with civic engagement opportunities more easily. This can lead to an overrepresentation of viewpoints or experiences, skewing the overall results and limiting the generalizability of findings excluding marginalized or underrepresented groups. The consulting team, Town staff, and Housing Task Force acknowledge these limitations.