

# Assembly of Delegates Briefing



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# Planning for healthy resilient Cape Cod communities anticipating and guiding housing needs





**215,000**  
PEOPLE



**162,000**  
HOUSING UNITS



**96,000**  
EMPLOYER JOBS



**85%**  
LAND PROTECTED  
OR DEVELOPED

REGIONAL HOUSING MARKET ANALYSIS  
AND 10-YEAR FORECAST OF HOUSING  
SUPPLY AND DEMAND

BARNSTABLE COUNTY, MASSACHUSETTS

JUNE 30<sup>TH</sup> 2017



Submitted to  
Barnstable County  
and the  
Cape Cod Commission



Prepared by



Burlington Vermont  
www.craneassociates.us

*Housing Market Analysis  
released earlier this year by  
the Cape Cod Commission  
highlights a **number of  
challenges as it relates to  
housing supply and demand  
in the next 10 years (and  
beyond).***

Barnstable County-Estimated Affordable Gap for Owner Units, 2015					
% of Median Household Income	50%	80%	100%	120%	>120%
Income (County Average)	\$36,125	\$57,799	\$72,249	\$86,699	
Affordable Price (County Average)	\$125,043	\$212,438	\$271,473	\$330,618	
Estimated Unit Demand	17,379	12,908	8,477	7,858	32,753
Estimated Unit Supply	3,041	5,322	10,557	12,521	47,934
Affordability Gap in Units (demand minus supply)	14,338	7,586	-2,080	-4,663	
<b>Cumulative Demand</b>	<b>17,379</b>	<b>30,287</b>	<b>38,764</b>	<b>46,622</b>	<b>79,375</b>
<b>Cumulative Supply</b>	<b>3,041</b>	<b>8,363</b>	<b>18,920</b>	<b>31,441</b>	<b>79,375</b>
<b>Cumulative Gap</b>	<b>14,338</b>	<b>21,924</b>	<b>19,844</b>	<b>15,181</b>	
Barnstable County-Estimated Affordable Gap for Renter Units, 2015					
% of Median Household Income	50%	80%	100%	120%	>120%
Income (County Average)	\$16,530	\$26,447	\$33,059	\$39,671	
Affordable Rent (County Average)	\$413	\$661	\$826	\$992	
Estimated Unit Demand	5,232	3,540	1,978	1,646	9,009
Estimated Unit Supply	2,363	1,969	1,807	2,407	12,858
Affordability Gap in Units (demand minus supply)	2,869	1,572	171	-761	
<b>Cumulative Demand</b>	<b>5,232</b>	<b>8,772</b>	<b>10,750</b>	<b>12,396</b>	<b>21,405</b>
<b>Cumulative Supply</b>	<b>2,363</b>	<b>4,332</b>	<b>6,139</b>	<b>8,546</b>	<b>21,405</b>
<b>Cumulative Gap</b>	<b>2,869</b>	<b>4,441</b>	<b>4,611</b>	<b>3,850</b>	

Source: U.S. Census Bureau, American Community Survey; EPR



# Demographic and Economic Forecast

## 3.3% population growth

Population is projected to grow to a total of 221,000 over the forecast period.

## 5.5% increase in employment

National, regional and local economic factors combine with projected population increases for this forecasted growth to a total of 155,700.

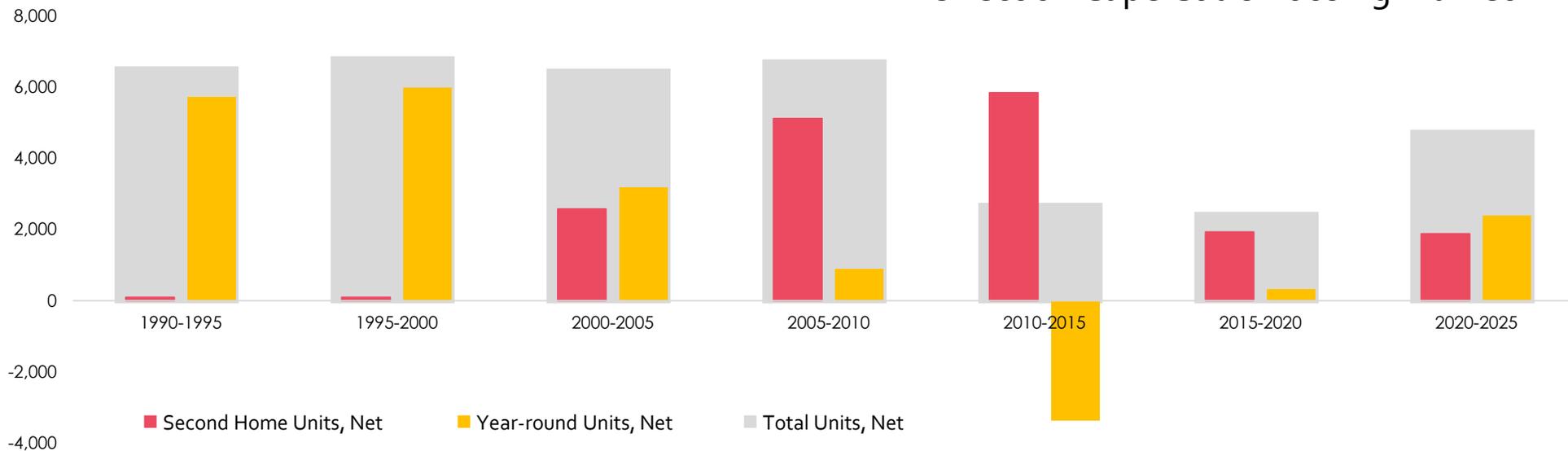
## 3.4% increase in households

Growth is slightly faster than population since household size is projected to decrease.

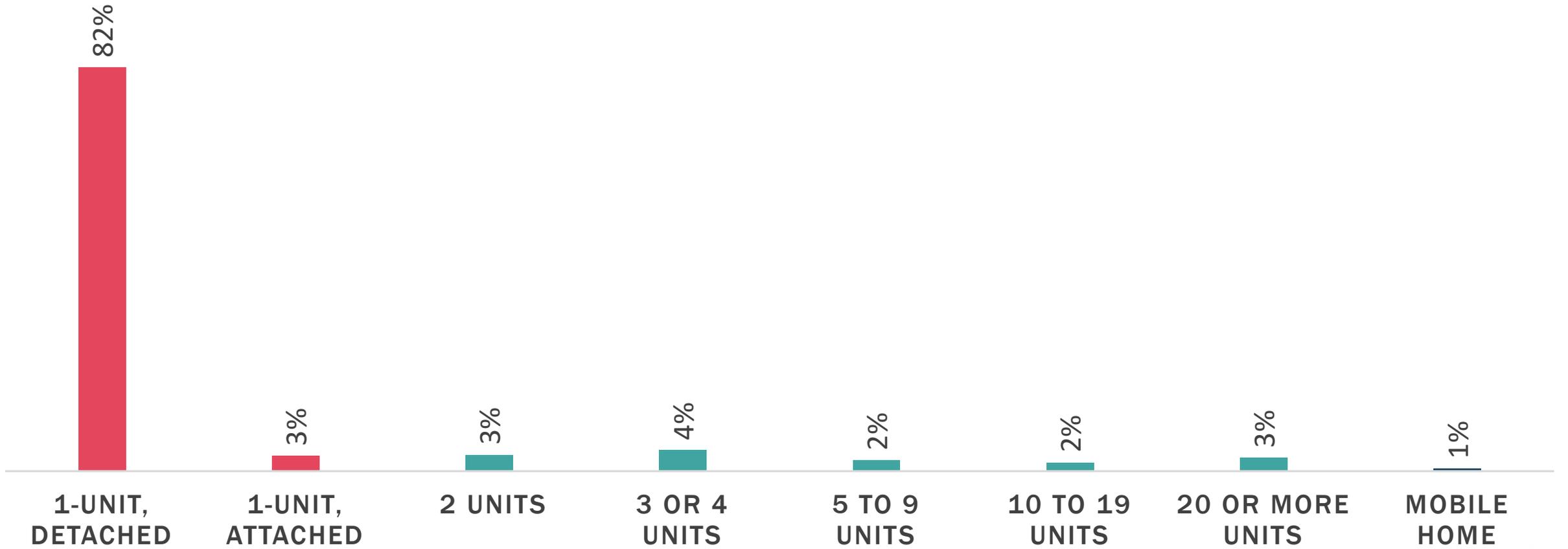
# Shifting Demand

**Demand for seasonal homes will persist as a major driver of housing unit demand.**

The impacts of the Great Recession caused a surge in second home demand. This will have a long lasting effect on Cape Cod's housing market.

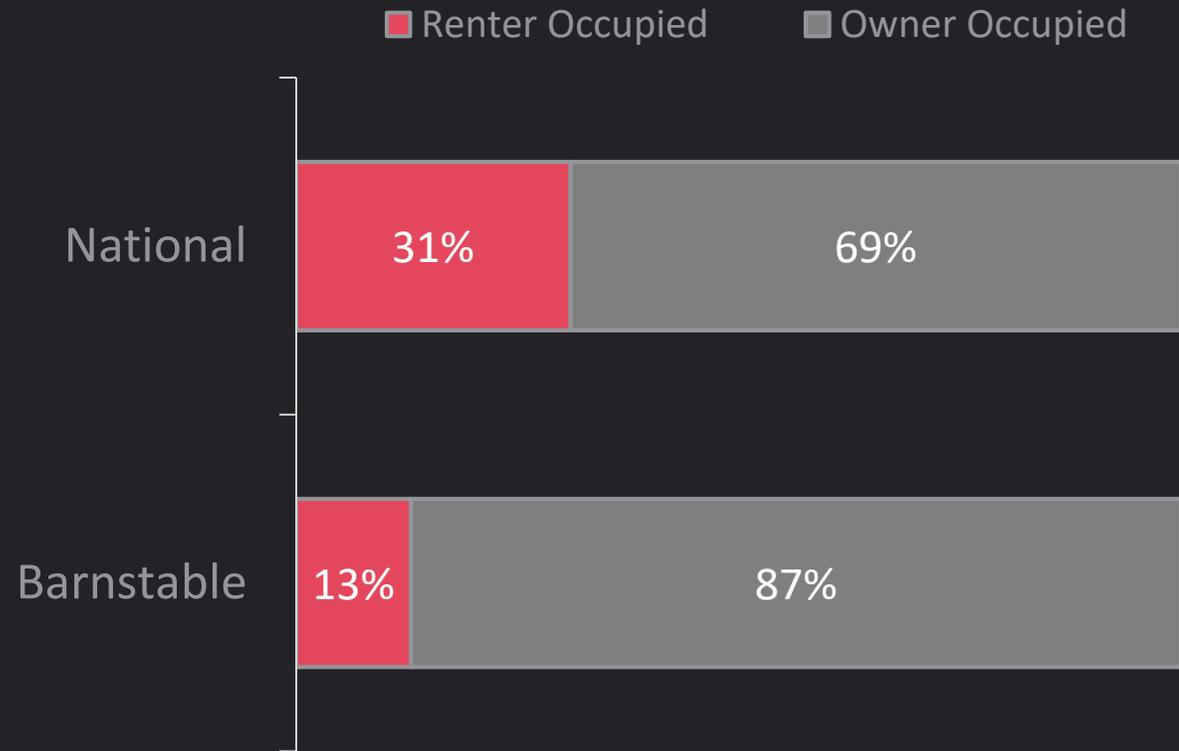


# We lack diversity in the types of homes available to the market



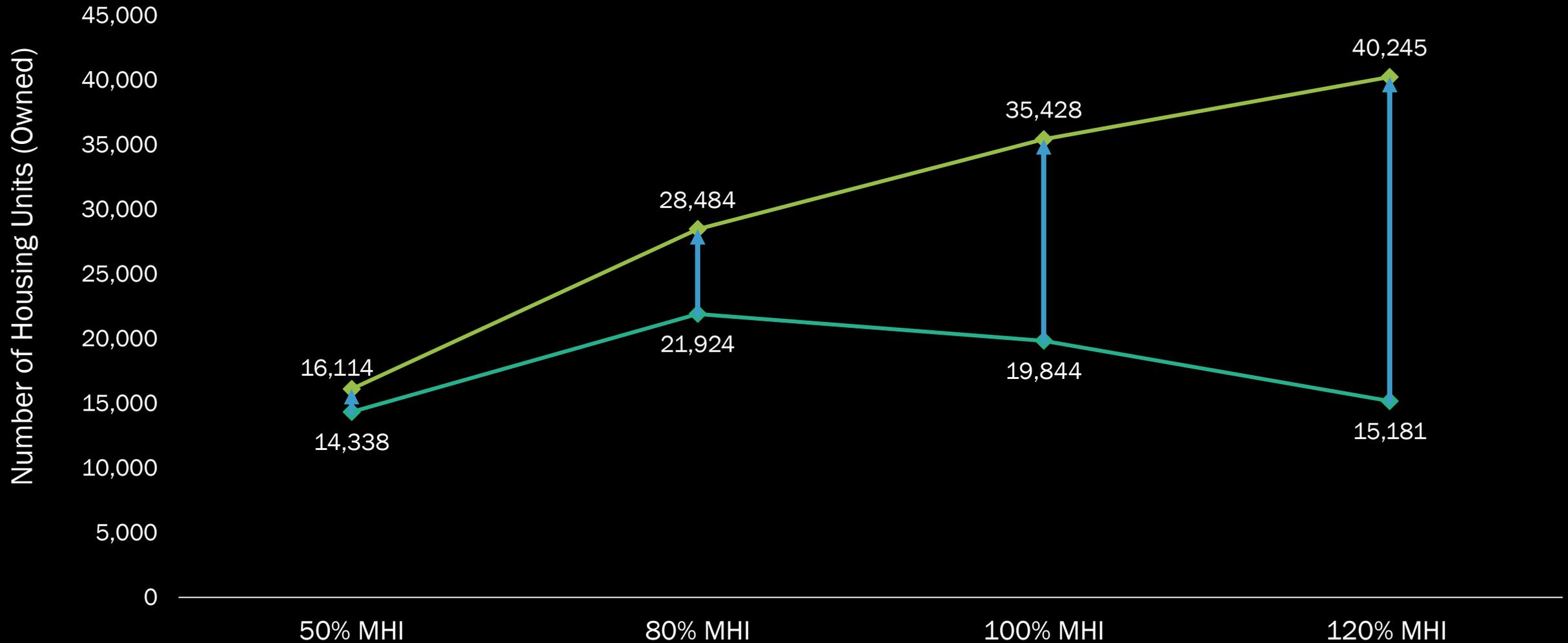
We have lower share of year-round rental properties

## Year-round Rental Availability



# Change in Cumulative Affordability Gap by Income Level for Owners in Barnstable County, 2015-2025

◆ 2015 ◆ 2025



# Affordable Home Price vs. Median Home Value, by Town and Income Level (2015)

Choose Year

● 2015

○ 2025

Select Your Town (s)

All

Select Your Subregion(s)

Lower Cape

Mid Cape

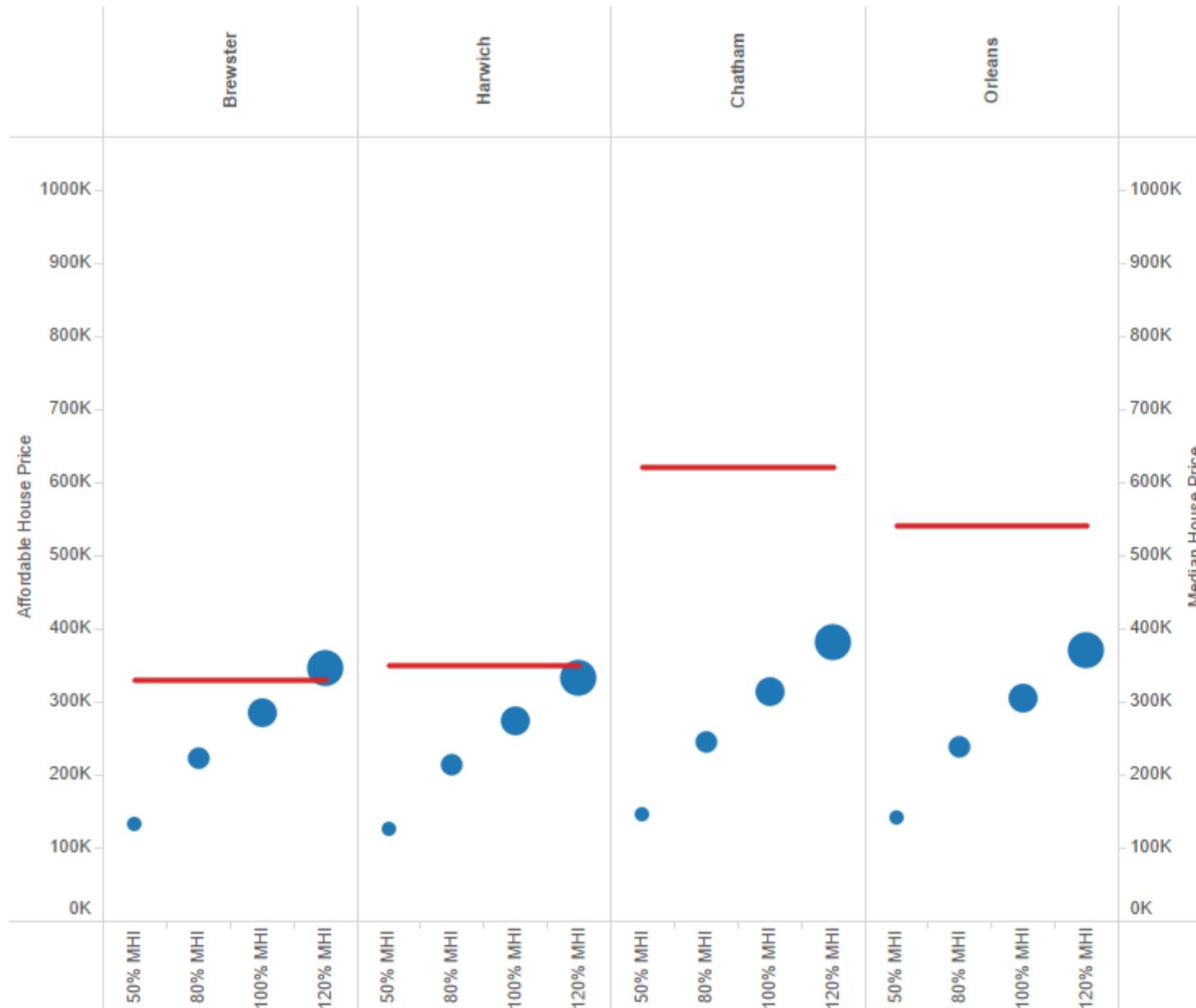
Outer Cape

Upper Cape

Legend

■ Affordable House Price

■ Median House Price



Click the 3rd Arrow Below to Reset.

Source: EPR 2017



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# Affordable Home Price vs. Median Home Value, by Town and Income Level (2025)

Choose Year

○ 2015

● 2025

Select Your Town (s)

All

Select Your Subregion(s)

Lower Cape

Mid Cape

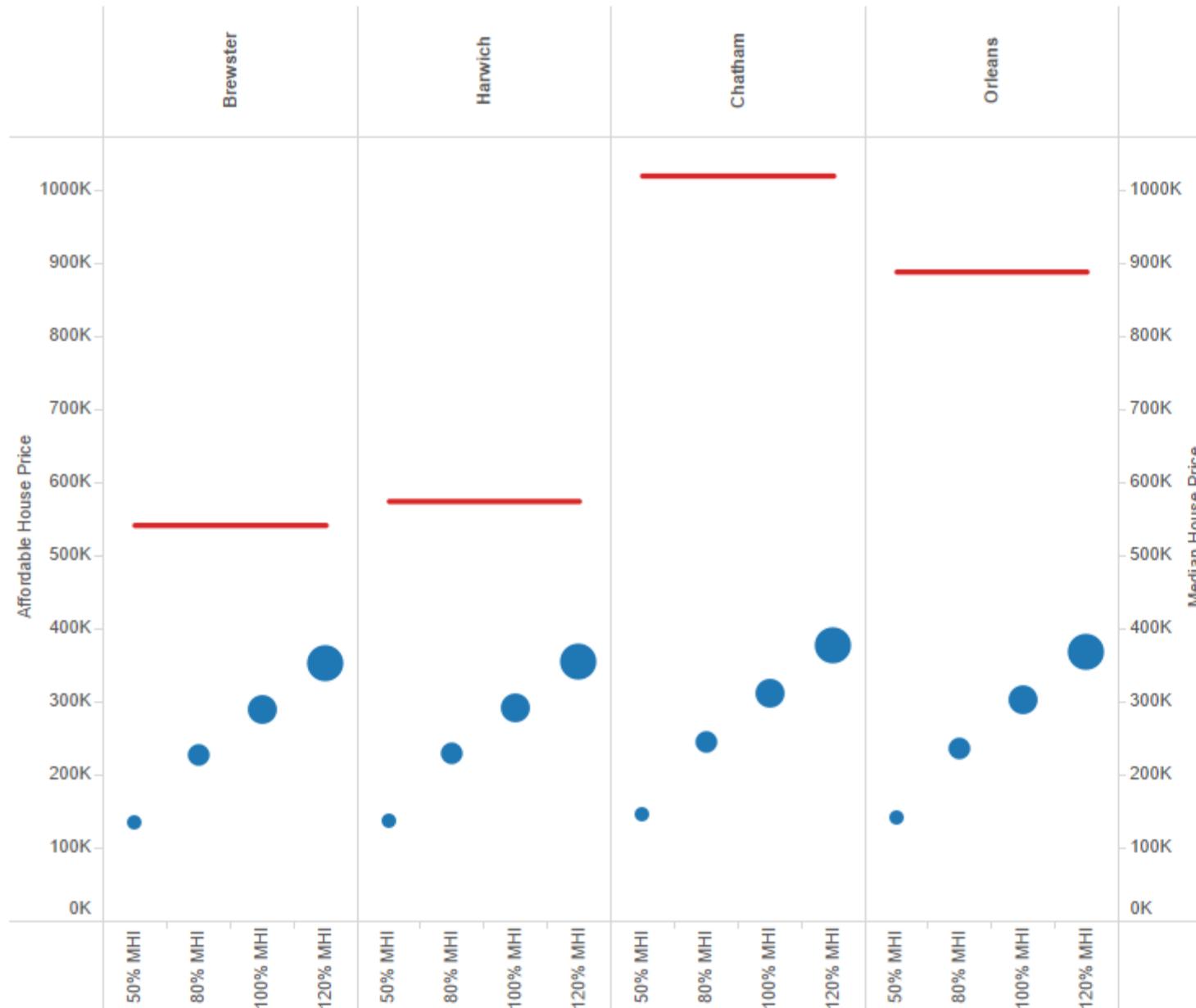
Outer Cape

Upper Cape

Legend

■ Affordable House Price

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Click the 3rd Arrow Below to Reset.

Source: EPR 2017



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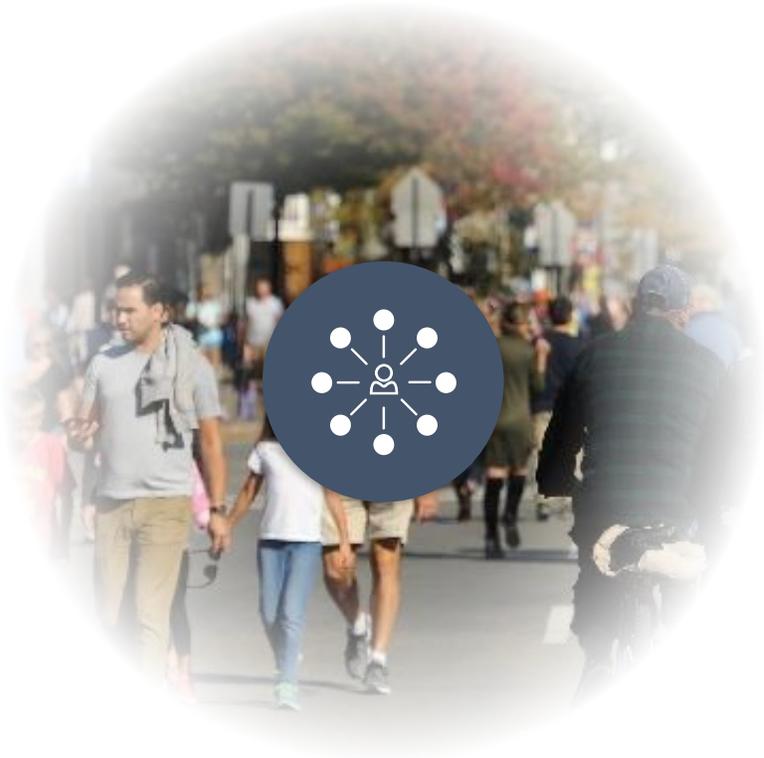
[www.capecodcommission.org/housingstudy](http://www.capecodcommission.org/housingstudy)





# CEDS

## TYPES OF RESILIENCY



COMMUNITY

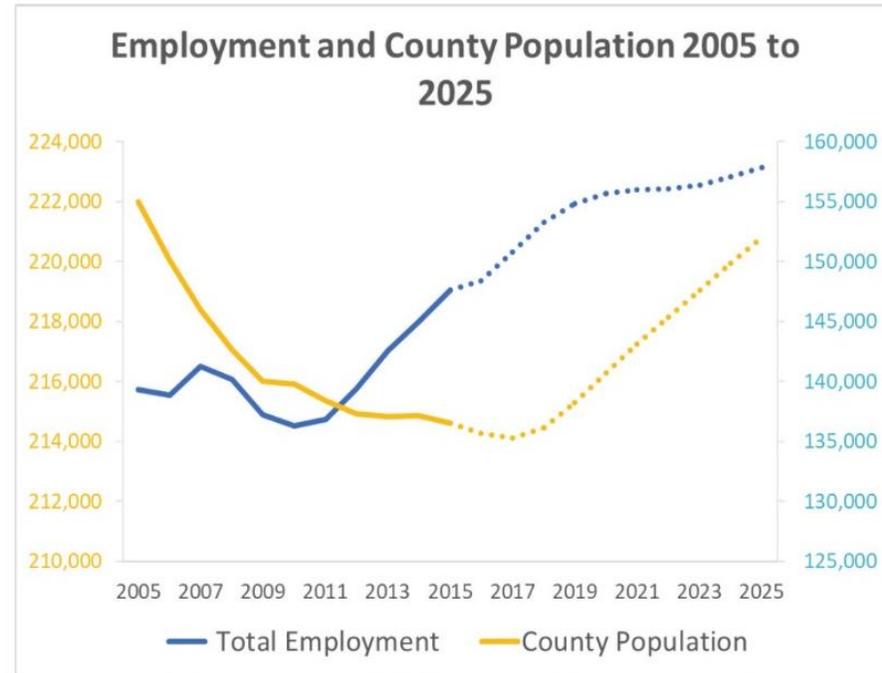


ECONOMIC



ENVIRONMENTAL

Employment growth is expected to add roughly *6,200 additional residents by 2025.*



Year	Upper Cape	Mid Cape	Lower Cape	Outer Cape
2016	85,703	81,904	34,023	12,646
2020	86,176	83,094	34,217	12,807
2025	87,517	85,325	34,841	13,137

NET POPULATION GROWTH				
Year	Upper Cape	Mid Cape	Lower Cape	Outer Cape
2020	256	1,181	84	151
2025	1,598	3,412	708	481

**26,000 households on Cape Cod are 'cost burdened' spending more than 30% of income on housing.**

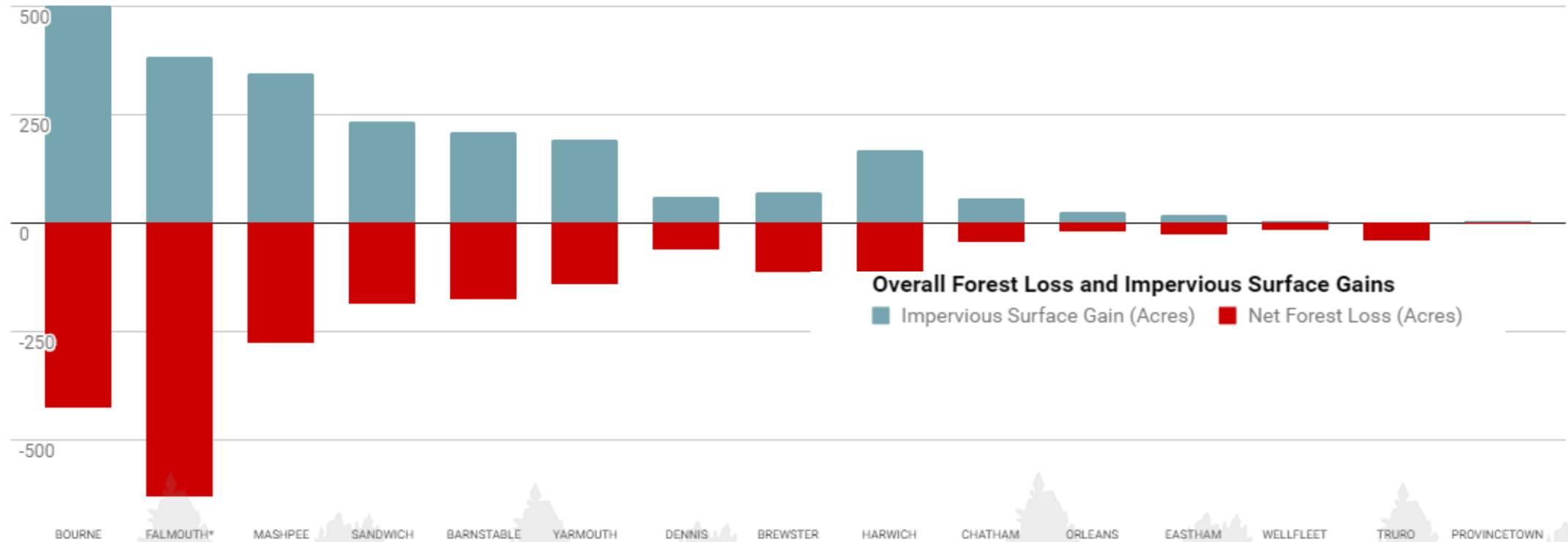
Source: CRANE/EPR, Barnstable County Housing Market Analysis



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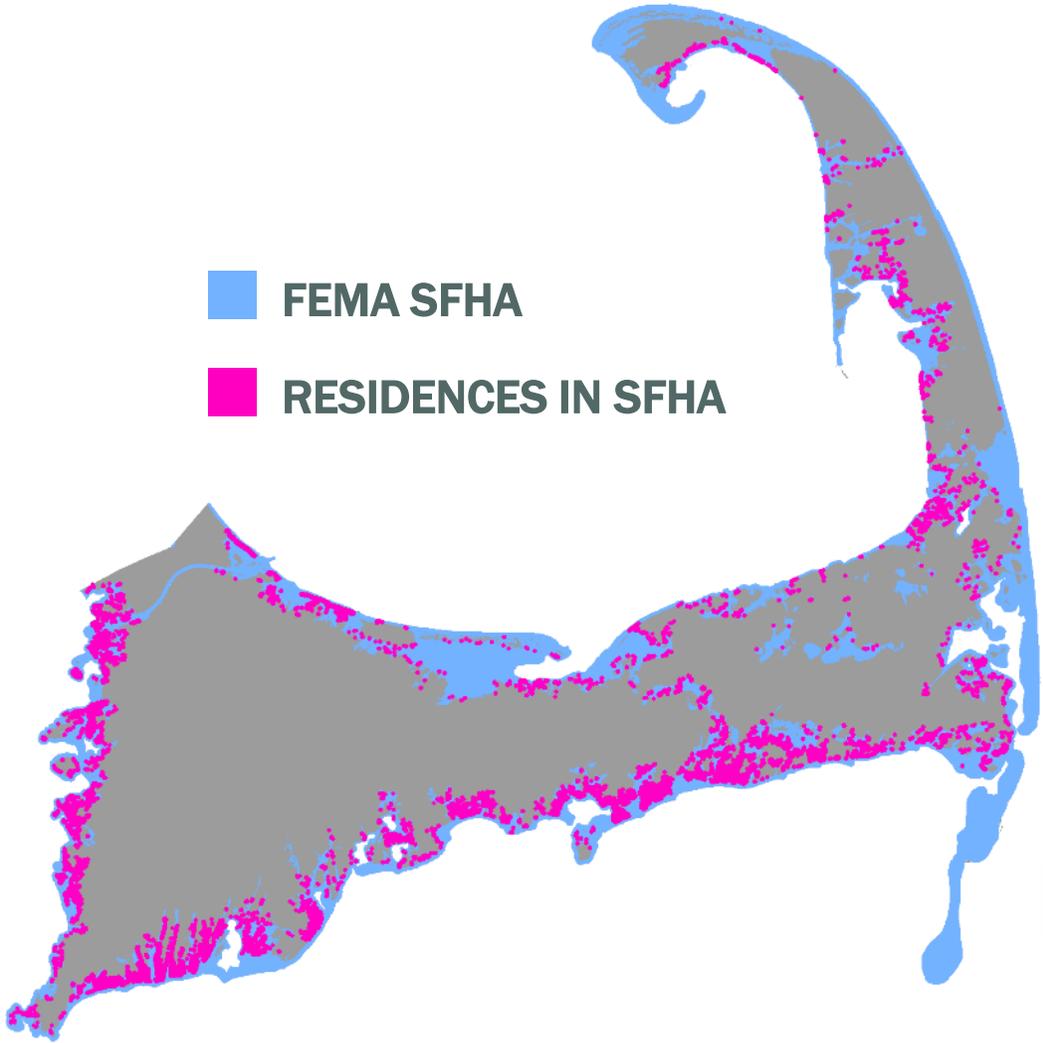


# Consequence of Sprawl



2,300 ACRES OF TREE COVER LOST

# COASTAL HOMES AT RISK ESTIMATED ECONOMIC LOSS



**■ FEMA SFHA**  
**■ RESIDENCES IN SFHA**

**13,000 SINGLE FAMILY HOMES  
IN SPECIAL FLOOD HAZARD  
AREAS (SFHA)**



**PROPERTY VALUE:  
\$9,000,000,000**

# 7,258

Acres Potentially  
Developable in  
Special Flood  
Hazard Areas  
on Cape Cod

Percentage  
of Each  
Town's  
Potentially  
Developable  
Land in  
Special Flood  
Hazard Areas

38%	Orleans*
29%	Sandwich *
22%	Chatham
21%	Wellfleet
15%	Brewster
14%	Bourne
20%	Eastham
11%	Dennis
11%	Falmouth
9%	Harwich
8%	Truro
7%	Barnstable
4%	Mashpee
3%	Yarmouth
1%	Provincetown



# Vision for the Future

*Protect the region's  
natural resources to  
provide vital  
ecosystems services*

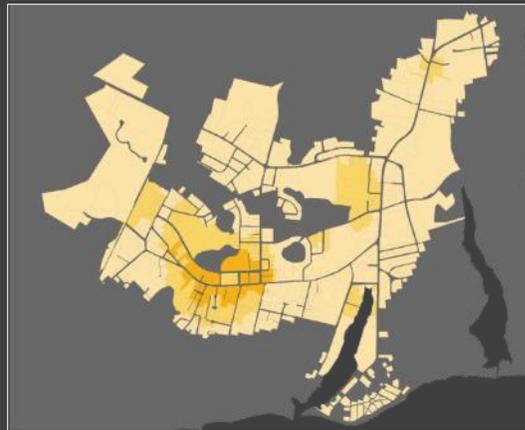
*Focus economic  
revitalization in  
existing centers of  
activity*



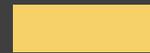
# REGIONAL ACTIVITY CENTERS

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## DOWNTOWN FALMOUTH



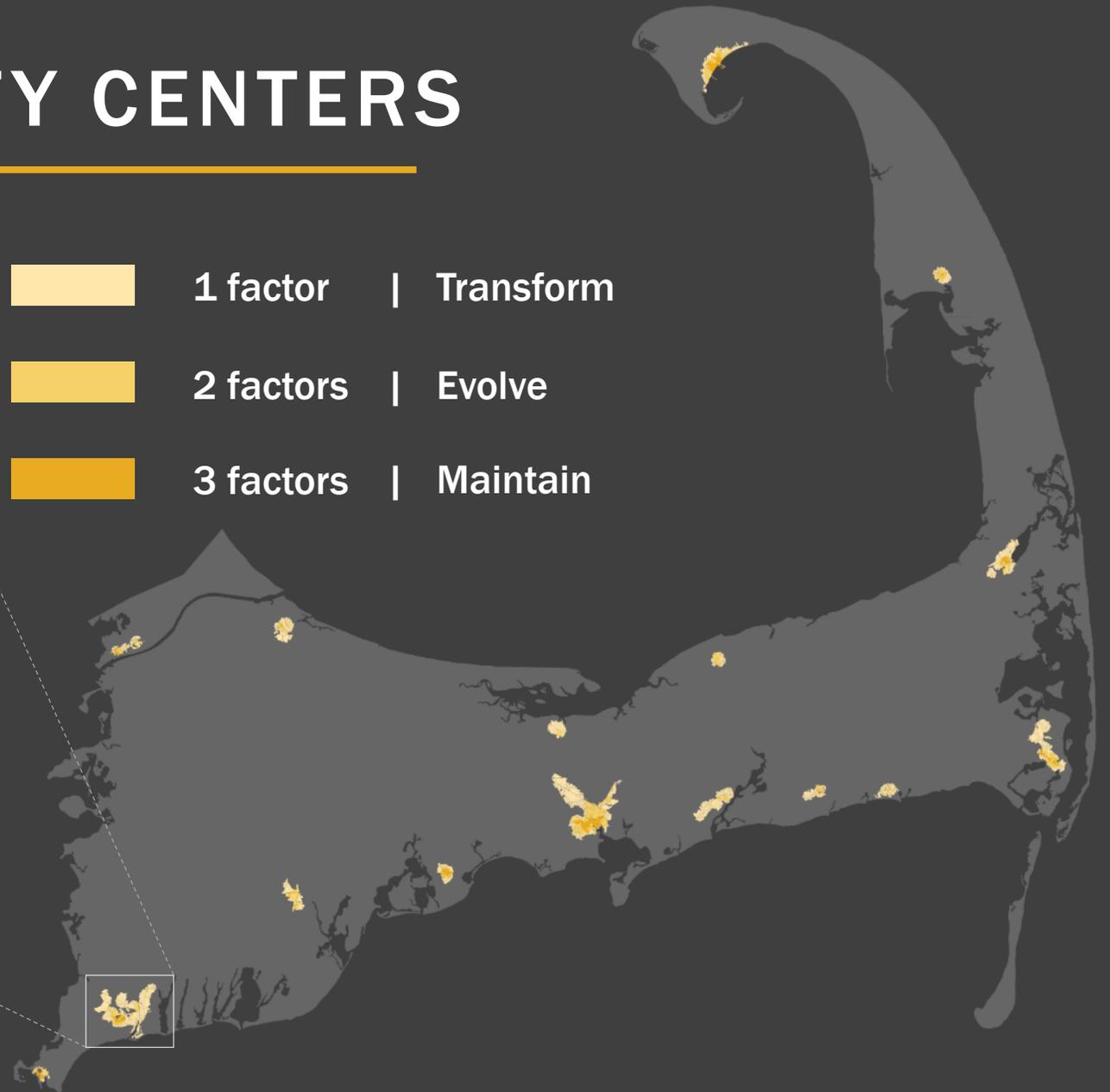
1 factor | Transform



2 factors | Evolve



3 factors | Maintain



# Place Based Planning

- Activity Centers focus of infrastructure planning/funding
- Commission support for planning/design
- Adoption of Zoning/Regulation to support mixed-use/housing
- Reimagined commercial & industrial areas





# Community Resiliency by Design Workshops

Eastham, Orleans, Falmouth, Barnstable

• June 19<sup>th</sup> and 20<sup>th</sup>

OneCape - August 17, 2018

Housing Preference Survey

Fall Workshops

Builders Roundtable

Form Based Code Framework



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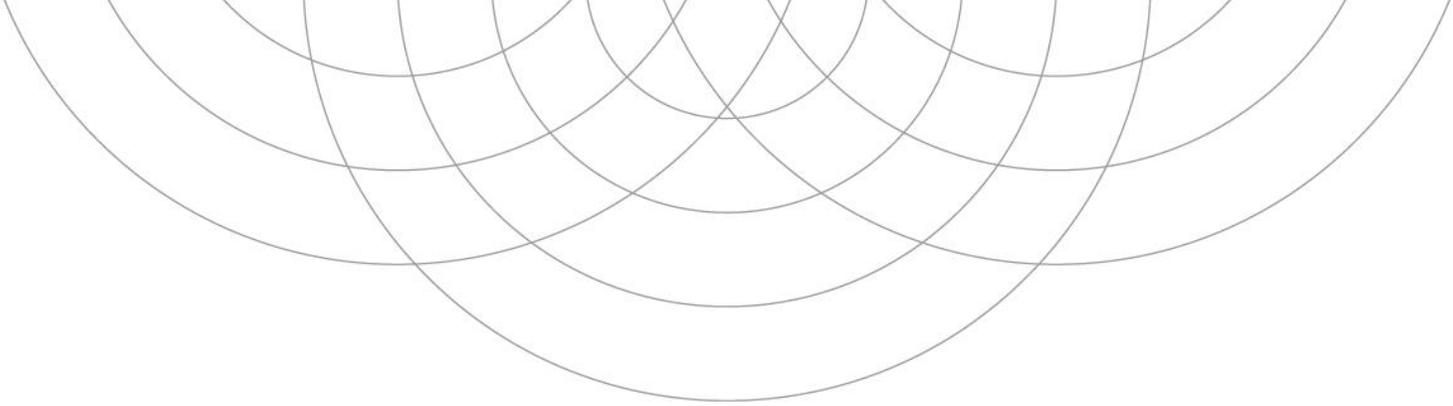
*Funded by the  
Executive Office of Energy and the Environment*



UNION STUDIO  
ARCHITECTURE & COMMUNITY DESIGN

[www.capecodcommission.org/CRBD](http://www.capecodcommission.org/CRBD)





*Creative Approaches to Moderate Density*  
*Filling the Missing Middle on Cape Cod*

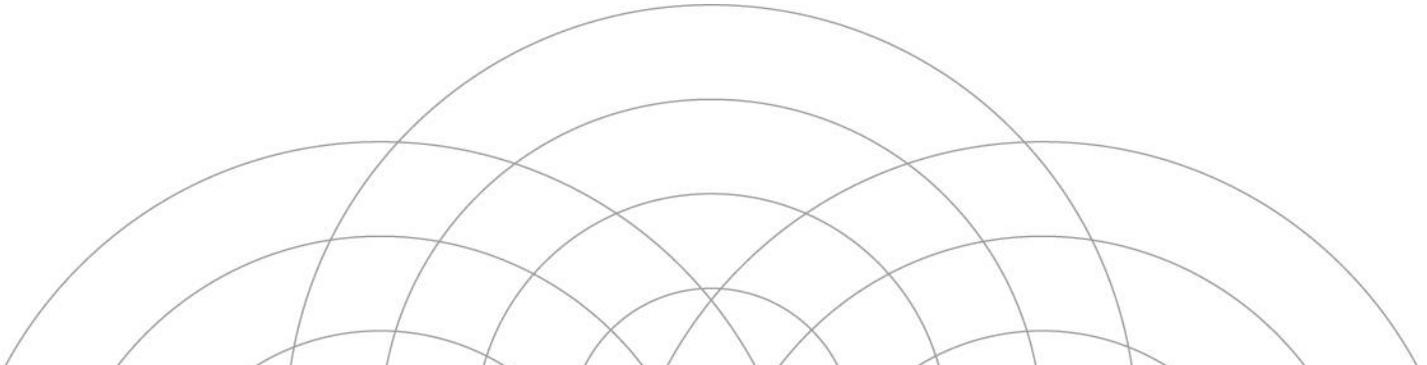
*First Public Presentation*

*Falmouth*

*June 20, 2018*



UNDA  
ARCHITECTS



## *Some principles of healthy communities*

- *Walkable and pedestrian friendly*
- *Mix of housing types that meets the broad needs of the community*
- *Public & private outdoor spaces and amenities*
- *Contextual architectural design and materials*
- *Equitable connection and access to community resources and amenities*





Our passion for community design stems from our belief that many **time-tested principles** for creating healthy places **have been largely forgotten** over the past 50 years





And that the **design** of new public places, neighborhoods and buildings must **resonate with the communities they serve** and **enhance our civic life**.





*And that through careful application of the principles of healthy neighborhood design, we can provide a **framework for revitalizing our streets and neighborhoods.***



# Why are we here?

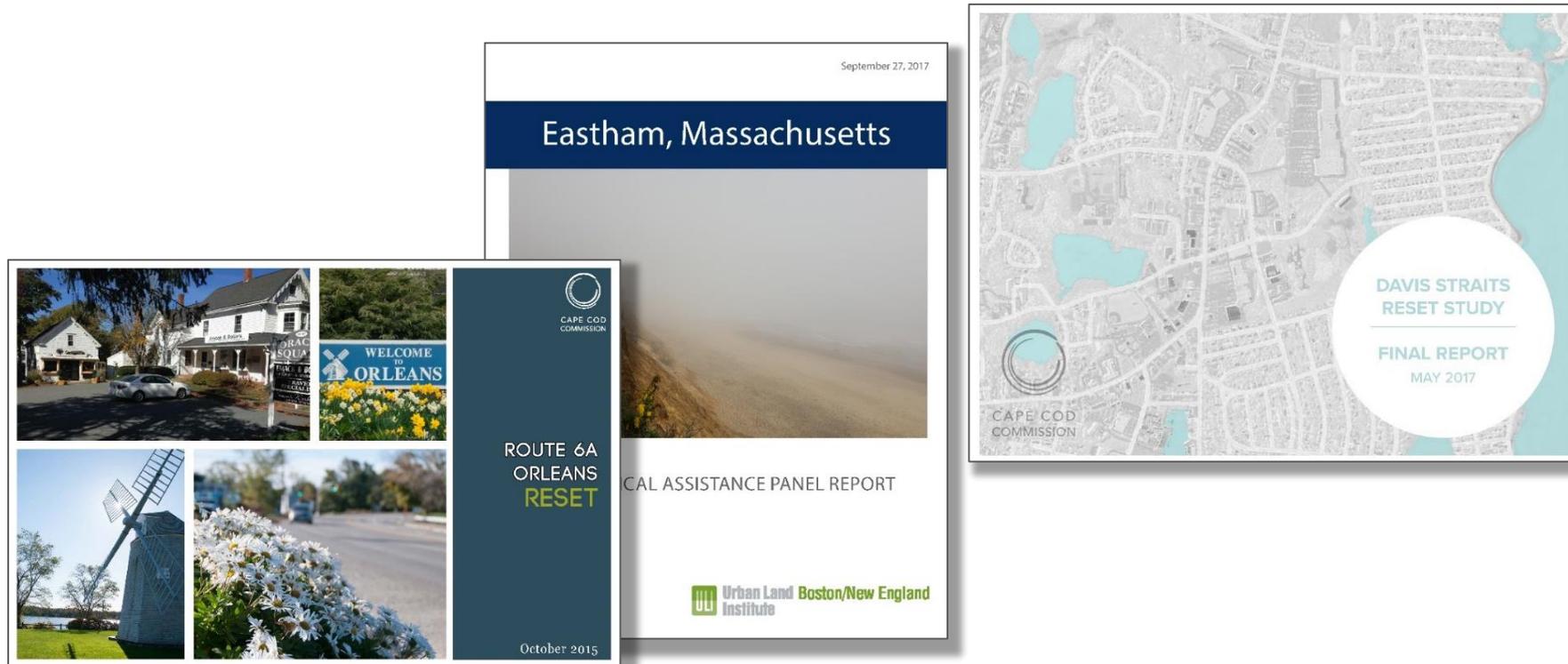


To *begin* community conversations around strategies and techniques for *meeting the increasing demand for housing* on cape cod...



# Where we are starting

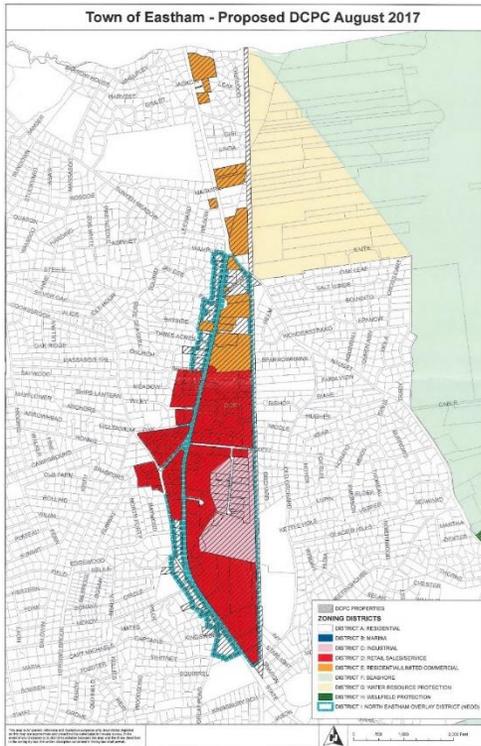
Each community has recently completed studies that identify areas where new housing types would be appropriate



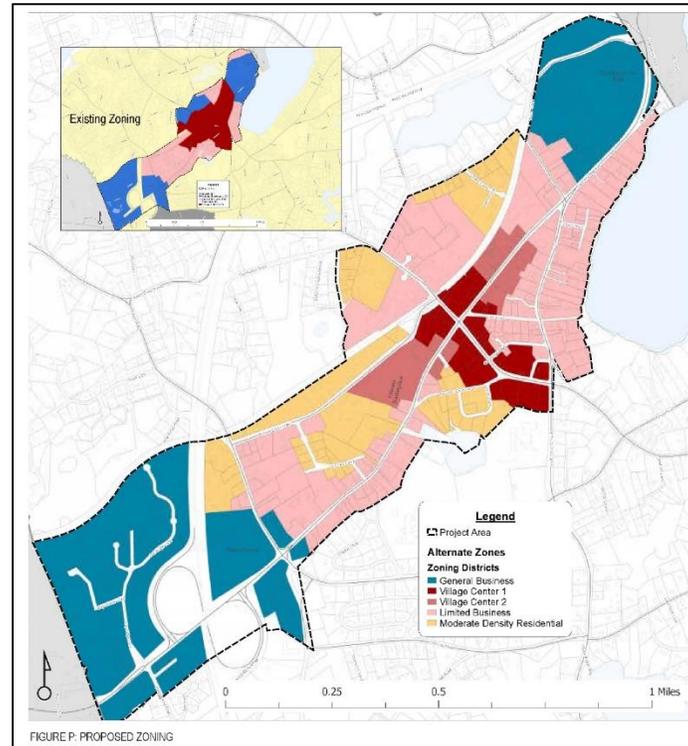
Eastham and Orleans have also adopted recent zoning changes that provide new opportunities for housing and mixed use development.



# Where we are starting



**Eastham:**  
Route 6 / Brackett Rd Area



**Orleans:**  
Village Center



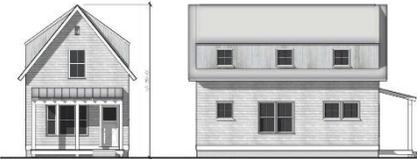
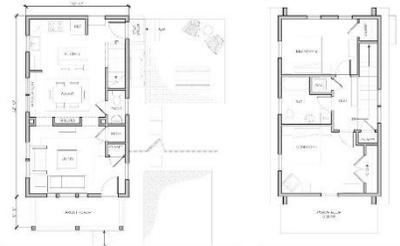
**Falmouth:**  
Davis Straits Area

The study areas focus on the “main street” areas or commercial core of each community – the “transitional” areas at the edge of the single family districts...



# *What do we hope to deliver?*

*To develop a series of moderate density prototypes – based on local precedent and community input...*



*...that could be used to address housing challenges in variety of places on the Cape and in each community.*



# What do we hope to deliver?

Develop the framework (starting point) for **form based regulations** to assist your town boards as they review new development proposals.

JAMESTOWN VISION PATTERN BOOK

### THE LOT & THE BLOCK

**SITE CONFIGURATION**

Outbuildings and parking belong in the third layer of the site. Campuses can often be placed in such a way to help frame a private outdoor space in the back of the house.

The second layer acts as a 20' buffer to keep parking on the rear of the lot.

Corner lots should be well defined on both sides with building footprints, fencing and landscaping.

The building should address the street & should respect existing and regulating front setbacks.

The building entry should be located in the first layer such that it is clearly visible from the street. Porches and stoops can help to create a transition zone between the outside and inside worlds.

Landscaping and fencing can help to define the private frontage.

3.1 The three layers suggest the proper zones for the location of the entry, the building, parking and any outbuildings.

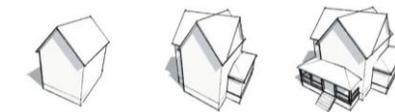
3.2 Trees create a separation between the public zone of the sidewalk and the private zone of the front porch.

3.3 A successful corner lot creates a strong frontage along both the primary and secondary streets. Landscaping elements soften the hard edges of the building along the front and side setbacks.

**AVOID**

3.4 It is important to maintain the rhythm of the street when building on new lots in traditional neighborhoods. Houses that are set too far back and do not align with the other houses on the street disrupt the continuity of the neighborhood.

RESIDENTIAL DESIGN GUIDELINES



10.1 Simple volumes such as dormers, bays and porches can be added to basic house forms to accommodate growing families and uses.

**74**

**BUILDING CONFIGURATION**

- Building height shall be measured in number of stories, excluding ABOs and ground-level basements.
- Stories may not exceed 14 feet in height from finished floor to finished ceiling, except for a first floor Commercial function which must be a minimum of 11 feet maximum.
- Height shall be measured to the eave or roof deck as specified on table 6.

**BUILDING FUNCTION** (see Table 10.1, Table 10.2)

A. Residential	limited use
B. Lodging	limited use
C. Office	limited use
D. Retail	limited use

**BUILDING CONFIGURATION** (see Table 10.1)

A. Principal Building	3 stories max. 2 min.
B. Outbuilding	2 stories max.

**LOT OCCUPATION**

A. Lot Ratio	18.8 min. 34.8 max.
B. Lot Coverage	70% max.

**BUILDING DEPOSITION** (see Table 10.1)

A. Elevation	permitted
B. Signage	permitted
C. Playyard	permitted
D. Courtyard	not permitted

**SETBACKS - PRINCIPAL BUILDING**

A. Front Setback (F)	6.0 min. 18.0 max.
B. Front Setback (O)	6.0 min. 18.0 max.
C. Side Setback	3.0 min.
D. Rear Setback	3.0 min.*
E. Frontage Setback	100% min. at setback

**SETBACKS - OUTBUILDING**

A. Front Setback	24.0 min. + 10% setback
B. Side Setback	6.0 min. or 3.0'
C. Rear Setback	3.0 min.

**PRIVATE FRONTAGES** (see Table 10.1)

A. Common Lawn	not permitted
B. Paved & Fenced	permitted
C. Terrace or P.C.	permitted
D. Etc.	permitted

**SETBACKS - PRINCIPAL BLDG.**

- The Facades and Elevations of Principal Buildings shall be distanced from the Lot lines as shown.
- Facades shall be built along the Principal Frontage to the minimum specified width in the table.

**SETBACKS - OUTBUILDING**

- The Elevations of the Outbuilding shall be distanced from the Lot lines as shown.

To help guide new development in ways that support the character of your community.



# *What do we hope to deliver?*

Share our initial findings during the *One Cape Summit* this August



As well as a *final series of public meetings* and workshops in the fall to review specific *recommendations and regulatory goals* for each community.



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