



STONEHAM PUBLIC SCHOOLS
149 FRANKLIN STREET
STONEHAM, MASSACHUSETTS 02180
781.279.3802

TO STONEHAM BOARD OF SELECTMEN
FROM LES OLSON, SUPERINTENDENT
SUBJECT STATEMENT OF INTEREST TO MASSACHUSETTS SCHOOL BUILDING
AUTHORITY FOR HIGH SCHOOL PROJECT
DATE FEBRUARY 24, 2015

Attached for your consideration is a resolution authorizing the filing of a Statement of Interest to the Massachusetts School Building Authority for a High School renovation project.

As with the Statement filed in 2008 for the Middle School project, there are no projected budget costs or timeframe identified for the proposed work. The focus is on the status and deficiencies of the current facility and what we would like to see accomplished in a project. Potential costs, schedule and possible reimbursement rates will be established if the study moves forward. Any future commitment of funding would need Town Meeting approval.

The same resolution needs to be approved by the Selectmen and School Committee.

Please let me know if you have any questions. Thank you.

RESOLUTION TO BE VOTED BY BOARD OF SELECTMEN

Resolved: Having convened in an open meeting on March 3, 2015, prior to the closing date, the Board of Selectmen of the Town of Stoneham, in accordance with its charter, by-laws, and ordinances, has voted to authorize the Superintendent to submit to the Massachusetts School Building Authority the Statement of Interest dated April 2015 for the Stoneham High School, located at 149 Franklin Street, Stoneham, Massachusetts which describes and explains the following deficiencies and the priority categories for which an application may be submitted to the Massachusetts School Building Authority in the future:

Priority 5 – including but not limited to the need to renovate and/or replace the following building systems to improve energy efficiency and ensure the continued long-term use of the building: exterior window walls; boilers and related pumps and motors; unit ventilators and other air handling units; and all associated energy controls and management systems; and

Priority 7 – to renovate or replace all of the science laboratories to incorporate more flexible learning designs, safety precautions and systems, storage and preparation areas, and to convert the current laboratories into additional classroom spaces;

and hereby further specifically acknowledge that by submitting this Statement of Interest Form, the Massachusetts School Building Authority in no way guarantees the acceptance or approval of an application, the awarding of a grant or any other funding commitment from the Massachusetts School Building Authority, or commits the City/Town/Regional School District to filing an application for funding with the Massachusetts School Building Authority.

BOARD OF SELECTMEN'S MEETING TUESDAY MARCH 3RD

Thank you for coming. The purpose of this session is to give you an update on the status of what I have been able to do concerning the idea of adding an additional plaque honoring the Vietnam era Veterans who were residents of Stoneham, but are NOT listed on the current monument. The following issues need to be addressed.

The official Mass website states that there were 902 Veterans who were Stoneham residents that served during the Vietnam era. The monument outside town hall has 273 names listed on it. That leaves us with 629 potential names that could be qualified for this plaque. Names alone do not qualify a Veteran to be added. He/she must have been a resident of Stoneham at the time of entry into the service, must be Honorably Discharged, and must have served minimum time to qualify as a Veteran under Mass. Law. I currently have around 30 DD214s that qualify those Veterans as Vietnam era which would make them eligible for the plaque. In order to do any further research I would need the names of any candidates along with their DOB or Social Security numbers to verify their eligibility. I cannot do this without the help of the Veterans themselves, their families, or their friends. Once again, names alone do not work.

WHERE DO WE GO FROM HERE?

These are the town's decisions since they are funding the project upon approval. Here are some possibilities. We must make a deadline for the submission of names and publicize it. We must also consider the following options.

I have two quotes for a plaques which would have the names of all Veterans that are on the current monument, we would then add the additional 30 qualified Vets to that plaque. This option also gives the capability of 50 additional names in the future. That price is \$6975.00 shipped as long as we write a check. It includes all hardware, Stoneham is responsible for mounting.

That plaque would include all names on the current monument plus the additional names I have verified.

Another option is to have a plaque made with the names of those who are Vietnam era Vets, but are NOT on the current monument

Where will the funds come from? Where will we mount it? When will we dedicate it? Veterans Day 2015 would be my suggestion.

Thank you, Jim Devlin VSO Stoneham

BRONZE MEMORIALS Inc. 1775 S. W. GATLIN BLVD –SUITE 203 Port St. Lucie, Fl. 34953 Office 772-924-0083 Fax 954-862-3090 100% WOMAN OWNED SMALL BUSINESS SAM REGISTERED – ORCA -- CAGE CODE 4QC97 --GSA SCHEDULE PENDING EDWOSB WOSB—NAICS CODES PLAQUES 453998—LETTERS 339950 – SIC CODE 3993 NIGP CODE—550 -- 550-080 550-28 FEDERAL TAX ID # 010831977 -- DUNNS #363221586		<h1 style="text-align: center;">INVOICE</h1> <p style="text-align: center;">Email info@bronzememorials.net www.bronzememorials.net Date / Invoice # 2/27/2015 SALES ASSOCIATE: BRIE WILLIAMS</p>	
SHIP TO:		SOLD TO:	
Stoneham town Hall c/o Jim Devlin 35 Central Street Stoneham, Mass 02180		Jim Devlin 781-279-2664 cell 781-363-9970 DATE NEEDED: __ May STANDARD 15 WORKING DAYS	
jdevlin@stoneham-ma.gov		Proud Member of The Better Business Bureau Southeast Florida www.bbbsoutheastflorida.org A+ RATING	
1	CAST BRONZE PLAQUE 20"W x 30"H CONCEALED STUDS (SOLID WALLS ONLY) INCLUDED IN PRICING UNLESS OTHERWISE REQUESTED: All BRONZE Plaques Include A Single or Double Line Line Border, BROWN Leatherette Background, Satin GOLD Letters And Border, All Plaques Include Hardware For Mounting INSTALLATION INFO BELOW—ALL PLAQUES HAVE A LIFETIME GUARANTEE FOR OUTSIDE USE	\$1,594.00	\$1,594.00
1	Drill and Tap spaces for 20 names @ \$10.00 ea Name plates \$185.00 as needed. Priced separately	\$10.00	\$200.00
	POST WITH 45 DEGREE ANGLE STRAIGHT POST WOOD SCREWS W/ROSETTES (Add \$60.00) EXPANSION BOLTS W/ROSETTES(Add \$60.00) TOGGLE BOLTS W/ROSETTES(Add \$60.00)(SHEETROCK / HOLLOW WALLS)	NO	NO
		SUB-TOTAL	\$1,794.00
	FREE SHIPPING ON ORDERS OVER \$500.00 After FINAL Art Approval Your Plaque Will Ship In 15-20 Business Days Allow 2-4 Business Days For Shipping By UPS Ground. Depending On Your Location, Mid West about 1-3 Days, East Coast, and South About 3 Days, West Coast About 4-5 Business Days to all U.S. Addresses including Alaska and Hawaii and all military addresses around the world. We do not charge extra to our military.	S/H -- FREE SHIPPING ON ORDERS OVER \$500.00	FREE
	The prices on this invoice are subject to the additions of all taxes levied or assessed by the state, county, city, or other taxing authority of the state of delivery CA 10%, CT 6.5%, FL 6.5%, IA 7%, MA 6.5%. MD 6% ME 5.%, MN 6.875%, MS.7.0%, NJ 7%, NV 8.1,%, RI 7.0%, TN 7.25%, TX 9.75%, UT 6.5%, VA 6.5, WI 7.0.%, CANADA	TAX	EXEMPT MUST HAVE EXEMPT CERTIFICATE OR \$454.67 WILL APPLY
		3.75% PROCESS & HANDLING FEE	\$67.44
	<u>PAYMENT OPTIONS, SECURE ONLINE CREDIT CARD FAX</u> <u>COMPANY CHECK, FAX PERSONAL CHECK, SECURE ONLINE</u> <u>CHECK</u> Bronze Memorials Inc. qualifies as a Women-Owned Small Businesses under federal guidelines	TOTAL	\$1,861.44
ADDITIONAL INFORMATION: copy below			

After FINAL Art Approval Your Plaque Will Ship In 15-20 Business Days Allow 2-4 Business Days For Shipping By UPS Ground. Depending On Your Location, Mid West about 1-3 Days, East Coast, and South About 3 Days, West Coast About 4-5 Business Days. Our cast bronze alloy is 88% copper, 6% tin, 4% zinc & 2% lead

We Strongly Urge You NOT To Schedule Any Ceremony Involving Your Plaque Until You Actually Have The Plaque In Your Hand. Production Varies At Different Times Of The Year. Delays Can Occur, Although Very Rare, That Are Out Of Our Control Including (Art Corrections, Castings That Must Be Redone, Shipping Damage, Lost Or Delayed Shipments, Etc).

Installation Drill holes in the mounting surface slightly larger than the diameter of the studs. Fill mounting holes with silicone, epoxy or quickset cement. Set into the holes, and allow the adhesive to cure. **Bosses and Studs** Bosses (extra pads) are cast onto the back of the plaque. These are drilled and tapped to accept a threaded stud. Flat-backed plates (generally, smaller sizes) are drilled & tapped for studs *without* bosses on the back. **Recommended Uses** For concealed, permanent mounting to: Brick walls, Stone walls, Masonry surfaces

Nothing Will Be Poured Until You Approve The Art. You Can Make As Many Changes As You Need At No Additional Costs. THE PROCESS HAPPENS VERY FAST AND IS AUTOMATIC, WE PROCESS SEVERAL THOUSANDS PLAQUES PER YEAR AND WE HAVE FOUND THAT EMAIL IS THE FASTEST WAY TO KEEP AT 15-20 BUSINESS DAYS.

Orders may be subject to a cancellation charge to compensate for any cost incurred prior to cancellation, Including, but not limited to, artwork charges, plate charges special order items, shipping fees, administrative fees.

Special non inventory item orders cannot be canceled after order has been processed. No returns on custom printed products accepted unless resulting from a manufacturing error. Product samples to verify your claim must be submitted within 30 days of receipt of your order. We will issue a credit for the replacement merchandise. No refunds will be issued in lieu of merchandise credit. Non custom items can be returned within 30 days for refund subject to a 25% restocking fee.

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We Have 5 Ways to Place Your Order

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Call 772- 924-0083 TO PRICES <https://bronzememorials.net/aacc.html>

2. You Can Go Online To <https://www.bronzememorials.net/aacheck.htm>
fill Out the Form, And Submit and We Will Recreate the Check Electronically.

3. You Can Fax A Personal or Company Check Made Payable To Bronze Memorials, Inc, Just Make It Out Normally And Instead Of Mailing It, You Fax It to 954-862-3090 And We Will Recreate It Electronically, No Need To Mail The Check.

4. Call Us And We Will Fill Out The Form With You.

**5. Mail You Order To: (this will add 20 days to the order) 1775 S.W. GATLIN BLVD,
SUITE 203 PORT ST. LUCIE, FL. 34953**

We Will Process You Order upon Receipt of Payment

Thank you, Bronze memorials Inc. Processing Department

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1	Price Match International Bronze less 10% 7750.00 IB – 10% (775) = \$6975.00	(-\$775.00)	(-\$775.00)
	POST WITH 45 DEGREE ANGLE STRAIGHT POST WOOD SCREWS W/ROSETTES (Add \$60.00) EXPANSION BOLTS W/ROSETTES(Add \$60.00) TOGGLE BOLTS W/ROSETTES(Add \$60.00)(SHEETROCK / HOLLOW WALLS)	NO	NO
		SUB-TOTAL	\$6,975.00
	FREE SHIPPING ON ORDERS OVER \$500.00 After FINAL Art Approval Your Plaque Will Ship In 15-20 Business Days Allow 2-4 Business Days For Shipping By UPS Ground. Depending On Your Location, Mid West about 1-3 Days, East Coast, and South About 3 Days, West Coast About 4-5 Business Days to all U.S. Addresses including Alaska and Hawaii and all military addresses around the world. We do not charge extra to our military.	S/H -- FREE SHIPPING ON ORDERS OVER \$500.00	FREE
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		3.75% PROCESS & HANDLING FEE	\$261.56
	PAYMENT OPTIONS, SECURE ONLINE CREDIT CARD FAX COMPANY CHECK, FAX PERSONAL CHECK, SECURE ONLINE CHECK Bronze Memorials Inc. qualifies as a Women-Owned Small Businesses under federal guidelines	TOTAL	\$7,236.56
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FEDERAL TAX ID # 010831977 -- DUNNS #363221586-- NAICS CODES PLAQUES 453998—LETTERS 339950

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Thank you, Bronze memorials Inc. Processing Department

Charles F. Houghton

Attorney - At - Law

*271 Main Street - Suite 202, Stoneham, Massachusetts 02180
Telephone: (781) 438-7444 Fax: (781) 438-2078*

*Christopher J. Gordon
Attorney*

*Mark E. Mulligan
Attorney*

*Janet E. Stwell
Attorney*

*Maria D'Alasio
Paralegal*

February 27, 2015

Mr. Thomas Boussy, Chairman
Board of Selectmen
Town of Stoneham
Town Hall
35 Central Street
Stoneham, MA 02180

Dear Mr. Chairman and Members

As you are aware, I have been asked by the Town Administrator to be a member of the committee to study the feasibility of the Town building a second rink. As I was on the original rink committee I am more than happy to serve on the new committee. However, in order for me to do so, the members of the committee will need to be designated as special municipal employees.

The conflict of interest law, M.G.L. c. 268A, covers all municipal officials and employees, whether elected or appointed, paid or unpaid, full-time or part-time. However, two sections of the conflict law apply less restrictively to those part-time or unpaid municipal officials who have been designated as "special municipal employees."

"Special municipal employee" status can be assigned to certain municipal positions by a vote of the board of selectmen provided that the position is not paid. It is the municipal position that is designated to have "special" status, not the individual. Therefore, all employees holding the same office or position must have the same classification as "special municipal employees." For instance, one member of a school committee cannot be classified as a "special" unless all members are similarly classified.

The designation may be made by a formal vote of the board of selectmen, at any time. Votes should be taken individually for each board being designated, expressly naming the positions being designated. Once a position is designated as having "Special" status, it remains a "special municipal employee" position unless and until the classification is rescinded.

Only two sections of the conflict of interest law apply less restrictively to "specials" ss 17 and 20. All other sections of the conflict law that govern regular municipal employees apply to "special municipal employees" in exactly the same way. Everyone who serves on this rink committee even though it will be unpaid will be considered a regular municipal employee, unless the position has been expressly designated to have "special municipal employee" status.

Section 17 generally prohibits municipal employees from representing a private party before municipal boards or departments. It also prohibits municipal employees from acting as agent (or attorney) for a private party in connection with any matter of direct and substantial interest to their city or town. Finally it prohibits municipal employees from accepting pay or other compensation in connection with any matter of direct and substantial interest to their municipality.

However, if you are a "Special municipal employee" you may represent private parties before municipal boards other than your own, provided that you have not officially participated in the matter and the matter is not now (and was not within the past year) within your official responsibility.

It has been the policy of the Board of Selectmen that there are occasional circumstances that can arise where a position, board or committee may benefit from a person's expertise or knowledge in a particular field or profession. In those limited circumstances Special Municipal Employee status has been granted.

If the Board of Selectmen grants "special" status to the rink committee, then the Board of Selectmen should file same with the Town Clerk's office.

Please add this request to the agenda for the meeting of March 3, 2015. Thank you.

Sincerely,



Charles F. Houghton

CFH:meh



Appendix B:
Stoneham Town Center
Strategic Action Plan
Public Open House Findings
October 2014



Prepared for:
 Town of Stoneham
 35 Central Street
 Stoneham, MA 02180

Prepared by:
 Metropolitan Area Planning Council
 60 Temple Place
 Boston, Massachusetts 02111
 Tel (617) 933-0700
 www.mapc.org



Acknowledgements

This Public Meeting Open House summary was produced as part of the Stoneham Town Center Strategic Action Plan project. Thank you to all who participated throughout the process, in particular, the nearly 85 Stoneham residents who expressed their hopes for the future, and ideas for Town Center, at the event.

This project was undertaken with funds from the State's District Local Technical Assistance program. The Metropolitan Area Planning Council wishes to express our thanks to the Governor and the members of the Legislature for their continued support and funding of this program.

This Open House was staffed by the project Advisory Committee, and MAPC staff, Matthew Smith, Senior Regional Planner; Steve Winter, Economic Development Manager; and Christine Madore, Associate Planner.

Metropolitan Area Planning Council

Officers

President Lynn Duncan, City of Salem

Vice President Keith Bergman, Town of Littleton

Secretary Shirronda Almeida, Massachusetts Association of Community Development Corporations

Treasurer Taber Keally, Town of Milton

Thank you for the assistance and leadership of the following individuals:

Town of Stoneham

David Ragucci, Town Administrator

Stoneham Town Center Advisory Committee



Overview

The Town of Stoneham, Stoneham Town Center Advisory Committee and the Metropolitan Area Planning Council (MAPC) held an Open House public meeting on Wednesday, October 1, 2014 to engage the larger Stoneham community and receive input for the Stoneham Town Center Vision & Action Plan. The over 85 people in attendance provided many thoughts, opinions and guidance about the future of the Town Center area. During the meeting, attendees accomplished the following:

- viewed a narrated presentation highlighting findings from the existing conditions and market study work done to date;
- provided input about Stoneham Town Center’s strengths, weaknesses and opportunities;
- identified potential strategic priorities to energize and improve the center; and
- created visual preference collages to highlight future development and activities most desired in Stoneham Town Center.

Participants at the event were actively engaged in the process. After providing feedback at the programmed stations, many participants remained – for an hour or more - to discuss the ongoing planning process with Advisory Committee members, Town officials, and other local residents. And although MAPC were on hand to answer questions, the Advisory Committee volunteers were front and center, taking the lead in discussing key findings, describing the plan process, leading participants through the Open House stations, and discussing next steps.

A complete summary of the open house is provided below. The greatest takeaways from the evening were that Stoneham has a very engaged citizenry committed to improving the Town Center area. Specifically, there was widespread support for numerous improvements and amenities within the Town Center including a greater variety of shops, restaurants and activities; the desire for more attractive signage and streetscapes; the need for a comprehensive marketing strategy or “brand” to create “buzz” and draw more people to the area (both locally and from surrounding towns), more public transportation options to make the area more accessible and convenient, and more activities for both adults and children. The desire for a realistic, achievable set of strategies to improve and energize the area was also emphasized.

Open House Summary

Meeting attendees provided feedback to the planning team through a series of topical “stations” where specific input was sought through participatory exercises. A summary of each station and findings obtained is provided below.

Station 1: Where do you live and work?

At Station 1, participants were asked to locate where they lived and worked, and the mode or modes of transportation used to get to work. As shown in the following figures and charts, the meeting attracted people from all areas of Stoneham, and a few from surrounding communities.

Over 40 percent of attendees worked in Stoneham, with 20% commuting to Boston, 5% to Medford, and over a third to other areas of the region. As expected in a community with limited public transit options, the majority of attendees drove to work. However, 14 percent took public transit (bus or commuter rail), and 5% walked or rode a bike. The mode of commuting was not relevant to nearly 20% of attendees, who were either retired or were not currently working.

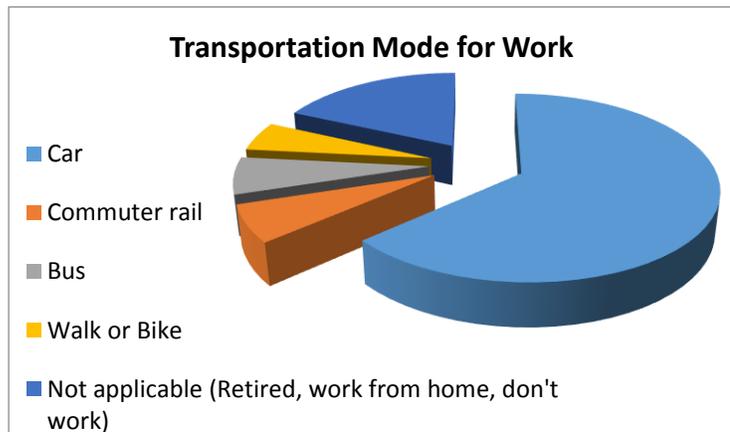
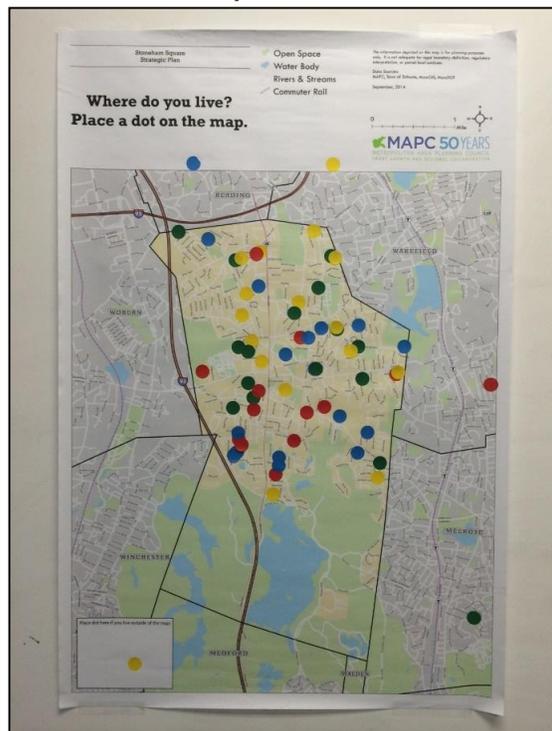
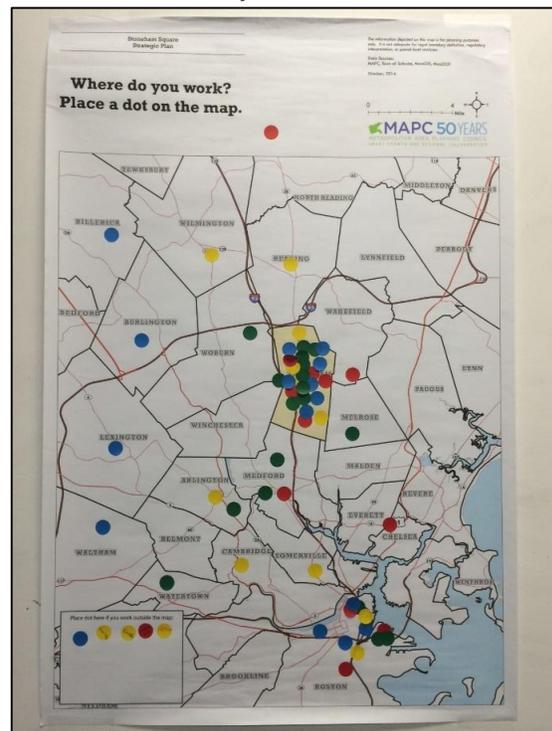


Figure: Home and Work Locations of Participants

Question: Where do you live?



Question: Where do you work?



Station 2: Overview Presentation

After identifying where each meeting participant lived and worked, the next station allowed attendees to view a pre-recorded presentation that highlighted the many findings from the residential and retail market analysis work and additional existing conditions research. The presentation provided current and valuable information about Town Center (and town wide) demographics and economic trends, existing retail and future potential, and residential demand and market segments for new housing units by 2030.

MAPC staff was present to answer questions before, during or following the presentation.



Station 3: Strengths, Weaknesses and Opportunities

Following the presentation, the next engagement station asked participants to state what they liked most about Stoneham Town Center (“Strengths”), what they liked least (“Weaknesses”) and what they felt would improve the area most (“Opportunities”). Each participant received three forms (one for strengths, one for weaknesses, and one for opportunities), which they filled out and placed on a board. Answers posted to the wall spurred many discussions about the area and its future. A summary of their thoughts is provided below:

Strengths

Open House attendees felt the Town Center area has numerous strengths already in place. The most common strengths were the presence of the Stoneham Theater, the Town Common and the overall character of the area with its many institutions (Town Hall, Library, Post Office, etc.) – it feels like a Town Center. Many also mentioned particular businesses they liked, the walkable feel of the area, and its access to major highways and Boston.

A sample of comments as they were given is provided below in a list:

- Restaurant and Theater
- Great neighborhoods and people, location, zoo, access to Boston. Theater!
- This meeting! Having a group or a team that is invested in improving its area is a major plus. Stoneham has the basic footprint. All it needs, is some thoughtful consideration to create something unique and special.
- Beautiful green space at Town Common. Centrally located town hall, library, police, fire dept., post office, easy access to major highways, theater.

- Live theater, good restaurants, town common.
- Compact & full of good restaurants.
- Location! Book Oasis, great institutions (town soccer, town day).
- It is attractive and has a lot of potential.
- Look and feel of downtown - historic, character.
- Architecture of some of the buildings.
- Theater, library.
- Charming, walkable, historic, family friendly.
- Town common, theater, accessibility to highways.
- Proximity to Boston, charm.
- People - the people of this community care. Proximity to Boston and 128/93 interchange.
- Theater is a great attraction.
- Theater, Evergreen Florist, J&B Butcher
- Walkability (actually the whole town not just center), including town green.
- Location, multiple uses, business residential + entertainment (restaurants, theatre).
- Different restaurants, flower barrels, new median strip bushes, theater, wine & cheese shop.



Weaknesses

Many of the weaknesses identified were closely aligned to the strengths. Beyond those businesses identified (theater, butcher, book store, etc.), most felt the area lacked sufficient shopping or restaurant options (too many nail salons and pizza shops), few nightlife and entertainment options to draw people to the Town Center, and traffic was a major concern. Many also noted that the area is unattractive or looks dated – particularly the entry corridors, that it lacks public transportation options, and that there is a lack of communication about Town Center and resources available to make it better.

A sample of the many comments is provided below:

- No other reason to go to downtown other than theater, Library and Common.
- Building facades look dated and tired; get rid of flower barrels and outdated lightning
- Not enough diverse restaurants; NE walk through/ bike through traffic; NE retail.
- Need to attract more people to come and stop there. Utilize the common more. More public transportation.

- The sense things are fine in the way they are; access to public transit; provincialism and complacency in vision; no good coffee!
- Lack of a variety of businesses too many of same thing – pizza, nails, hair or attorneys. Weeds growing through sidewalks and flower beds makes us look neglected. It is embarrassing!
- Parking
- Traffic speeds thru too fast; not sufficient public transportation. Bus but no commuter or T; too many run down properties within steps of the square.
- No diversity of shopping opportunities/ establishments.
- Restrictive zoning makes it almost impossible to change anything.
- Need more public transportation. A bus route to the red line would be great.
- Lack of community involvement, parking, locations to build new retail; reputation.
- Lack of places to come and hang out. Not a lot of communication from the town to let people know what is going on. Email blast, websites, "wiki". Events page online. Tourist guide. What is here?
- Hard to walk, traffic problems, "drive through", hard to park, lack of nightlife, quality businesses (restaurants, coffee shops) not quaint (atmosphere lack)
- Apart from restaurants, there is very little to attract people looking to shop, gather, or socialize. The "Common" is a parking lot covered with grass.
- Lacking activities in the evening, unsightly and empty buildings, no signage uniformity downtown.
- Lack of continuity among buildings. Color, style etc.; lack of parking.
- We need more stores, cafés, shops, etc. there are too many empty buildings /stores.
- Absence of higher end retail + restaurants; Run down high school facility.
- Not enough restaurants/night life. Area could use some updating; more kid friendly areas.
- no night life & entertaining possibilities; not very vibrant; better public transit;

Opportunities

In summary, the most common opportunities identified were more restaurants and retail establishments, including casual cafés and coffee shops; more activities including day and evening options, and improved public realm with more attractive, decorative elements and signage to draw more business to the area.

A sample of participants' comments is provided below:

- Bring in people with more events. Parades, etc.
- Diverse restaurants, walkability, coffee shops / cafes. Attractions that will draw people in. Late-night restaurant/bar that would capture the theater crowd.
- Updating, restaurants, more retail shops. More like surrounding town centers such as Melrose, Winchester.
- A fountain in the Common (for kids to run through) with night lighting.
- Adding more variety of shopping choices. Better public transportation access.
- More types of businesses. Starbucks, a nice pub, a place to hear music, shops. Melrose, Reading and Winchester have great town centers and Stoneham has a much better location to highways.
- Town center, more shops, restaurants, businesses that attract younger people (Starbucks, unique shops - clothing, bread-bakery. Small business. Live music/ cafes. Apartment buildings.
- Better, high end, diverse family friendly restaurants + businesses.
- Beautiful meditation garden in the front lawn of First Congregational Church (by Common).

- More traditional downtown. Get rid of double lines and create more of Main Street.
- Better dining options, possibilities to capture "pass - thru" traffic, location is great for that. A good location have diverse population (age, ethnicity), can be good for a mix of shopping / dining/entertainment.
- We have an open space that could be used for more recreation and beautification. What shall we do with and in front of the New Central Middle School?
- Develop Redstone shopping center. Give people a reason to go to Stoneham Center as a destination - eclectic retail, ice cream store.
- Emphasize the town "square," Main & Franklin area. Maybe even no traffic, but understand it's a state highway. More open areas for sitting outside. Better shops/restaurants?
- Take from Hersam to Maple & Main to wright by eminent domain - lease back to private dev., angled parking on street, add parking garage with ground floor retail, office or residential above.
- Better retail and restaurants.

Station 4: Priorities

The next engagement exercise allowed participants to select up to four priorities for the plan to address to improve Stoneham's Town Center. At this station, several boards were displayed with draft priorities developed by MAPC (see images below) based on findings from the market analysis and existing conditions work done to date.

At the station, each participant was given four sticker dots by Advisory Committee members. They were then instructed to review all of the priorities, and then to place their dots on their top four. The number of dots for each was then tabulated by the MAPC planning team. The results are included below. Based on the results, participants felt that improvements to streetscapes and the public realm, more restaurants and cafes, a greater variety of retail options, and public transportation options should be prioritized to improve the Town Center. (The top 4 strategies from the meeting are highlighted with green boxes.)



Other important priorities included the need for a comprehensive marketing strategy to attract more customers to the Town Center, as well as more events, programming, and recreational options. Low on the list was the need for additional housing, pedestrian improvements, and bike amenities and connections from other areas of town.

Table 1. Station 4: Priorities Results

#of dots	%	DRAFT PRIORITIES
29	11%	Greater variety of retail options.
33	12%	More restaurants and cafes.
4	2%	More housing options to attract additional residents to the area.
28	10%	More events and programming in the Town Center Area.
33	12%	More public transportations options.
41	15%	Improved streetscape and public realm to make Stoneham Center more attractive and inviting.
11	4%	Safer and improved pedestrian environment.
9	3%	More bike amenities and better connections to and within town center.
24	9%	Additional recreational options to attract residents and visitors to the Town Center.
12	4%	More attractive and effective signage through updated and improved sign regulations.
27	10%	A comprehensive marketing strategy - Stoneham Center "brand" - to attract more customers to area businesses.
20	7%	Make the Town more business friendly.

Station 5: Visual Preference Exercise

At the fifth and final station, participants were asked to create visual preference collages representing potential development, amenities and activities they would like to see in Stoneham Town Center. The images selected will help the planning team to develop a set of goals, recommendations and strategies to achieve the desired environment depicted in the selected images.

Participants perused hundreds of images depicting different building styles and types (e.g. multi-story mixed-use buildings, single family homes, commercial strip malls), as well as recreational and programming activities including restaurants, active streetscapes, art and music festivals and more. After review, participants selected two images for each collage – two building types and two amenities/activities - they wished to see in Town Center. On each image, participants were encouraged to specifically note what appealed to them within the image.



Building Design and Scale

Many participants indicated the need for a more cohesive built environment within the Town Center area. While many selected images depicting multi-story structures (3-4 stories), they more specifically noted they wanted to see a “nice downtown look” where the “scale is human” including “mixed use with retail at street level” in buildings with “quaint New England style exteriors” including “traditional brick.” Many images were selected more than once. Among the greatest priorities was outdoor seating in front of cafes

Retail, Amenities and Activities

Images selected for the second collage, “Retail, Amenities and Activities” heavily focused on the need for more programming and activity in the town center, including more “hip nightlife” options for adults to “draw more people”, and more recreational or event programming for families, particularly on the Common (e.g. ice skating, movies, etc.). Many wished to see a greater diversity of retail, particularly specialty or “unique shops” as well as a greater variety of restaurants including “unique dining destinations”, and many again calling for outdoor dining options. More public art and creative activities were also highlighted, as were connections to recreational amenities.

Figure B: Building Design and Scale: Sample Images with Attendee's Quotes



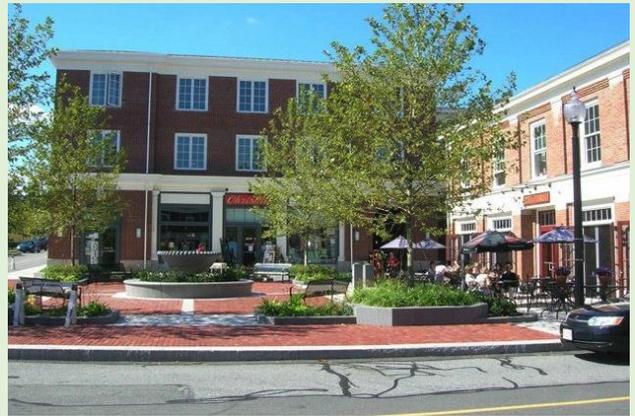
“Scale is human”
“Mixed streetscape – not just a place to drive through.
Mixed building appearance.”



“Clean, colonial.”
“Nice looking area to shops and live above.”



“Friendly, lively.”
“Outdoor seating. Walkable square with something
worth walking to.”



“Place for people to congregate and meet.”
“Attractive city scape.”



“Modern, clean, feels younger. Mix of retail.”
“Attractive storefronts. Trees enhance the beauty.”



“Colonial structures befitting the town.”
“Looks doable and realistic reach for Stoneham.”

Figure C: Retail, Amenities and Activities – Sample Images with Attendees' Quotes



“Draw diverse shopping experience.”
“Unique shops.”



“Draw – nightlife.”
“Good nightlife activity. Robust exciting upscale food and drink. Good socializing environment.”



“This looks superfun. I want a beer and a brush!”
“Personal growth, education, fun adult activities – always have to go to another town.”



“Farmers market.”
“Farmer’s market, CSA pick up brings community together.”



“Health. Outdoor rink on the Common.”
“Recreation on the Square – family oriented.”



“Attractive outdoor dining.”
“Café and casual restaurant outdoor seating.”



Appendix A:
Stoneham Town Center
Market Study
November 2014



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This Market Analysis was produced by the Metropolitan Area Planning Council, professional technical assistance was provided by Matthew Smith, Senior Regional Planner; Steve Winter, Economic Development Manager; and Christine Madore, Associate Planner.

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Thank you for the assistance and leadership of the following individuals:

Town of Stoneham

David Ragucci, Town Administrator

Stoneham Town Center Advisory Committee



Table of Contents

Acknowledgements	ii
I. Market Study Context.....	1
Recent and Planned Investment	1
Interviews	2
Opportunities and Challenges.....	2
II. Demographics	4
Population	4
Age Profile.....	4
Households	5
Family and Non-family Households	6
Income.....	7
Educational Attainment	7
III. Residential Market Analysis	8
Housing Sales and Pricing	10
Rental Market Characteristics.....	12
Rental Units	13
Recent Development and Pipeline Projects	14
Housing Affordability and Cost Burden.....	14
Housing Demand, 2014 to 2020	15
IV. Retail Market Analysis	16
A. Existing Retail Inventory	16
B. Trade Area	16
C. Retail Opportunity Gap Analysis	18
Gap Analysis	18
D. Worker Retail Potential	21
Summary.....	22

I. Market Study Context

This market study was undertaken as a component of the **Stoneham Town Center Vision & Action Plan** study. The purpose of the market study is to identify the potential for supportable residential and retail development within Stoneham’s Town Square, and to identify potential commercial and housing investments within the neighborhood.

Location and Study Area

The Town of Stoneham, a mature inner-core suburb, is uniquely located north of Boston at the junction of Interstates 93 and 95, which provides residents with convenient access to Boston and regional job centers, and companies a strategic location with strong auto-oriented transportation links.

Stoneham’s Town Center area is the focus of this analysis. As shown in Figure 1, Stoneham’s Town Center is located along State Route 28 (Main Street). The study area includes Stoneham Square, the Town Common, primary entry corridors, and surrounding blocks. The primary study area (solid black line) includes all parcels along Main Street between Montvale Avenue to the north, Hancock Street to the South, Spencer and Fuller Streets to the east, and Warren Street/Hill Court to the West. A larger secondary study area (dotted black line) includes all parcels bounded by the proposed Tri-Community Bikeway right-of-way to the north, Wright Street to the west, Pine Street to the east, and Marble Street to the South. Essentially, these areas serve as the gateway corridors into the town center.

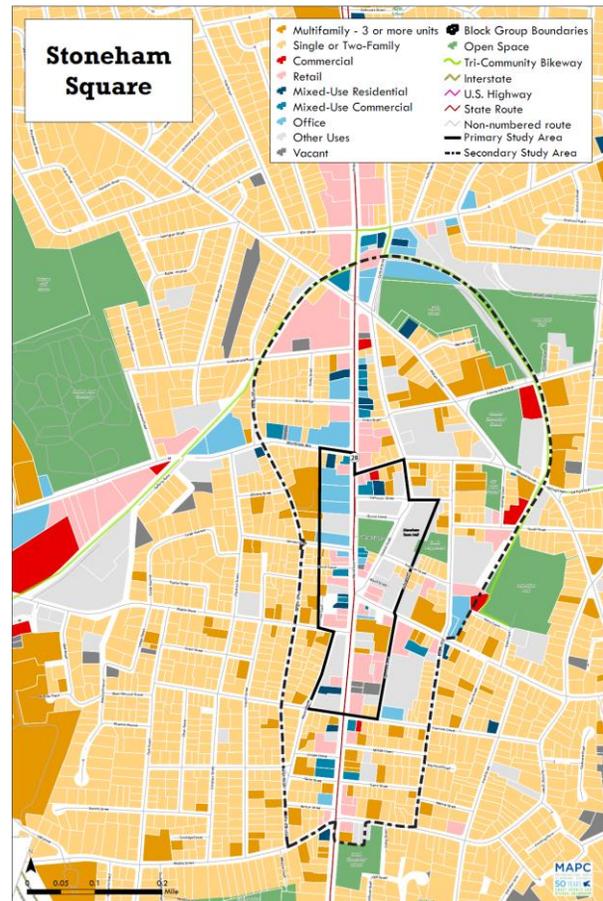
Transportation

Stoneham Square is primarily accessible by automobile along State Route 28, Main Street, which serves as a regional north/south route and is notably used as a cut-through when Interstates 93 and 95 are heavily congested. Montvale Avenue connects Main Street and the town center to Interstate 93. This intersection is often congested, particularly during peak hours. The Stoneham Square intersection can also back up, particularly with cars that cut through to neighboring communities such as Melrose and Malden.

There are few public transit options. One MBTA local bus serves Town Square and connects area residents to the Orange Line terminus in Malden. There is no Express Bus service to Boston. MBTA commuter rail stations are located approximately one mile from Town Square in Melrose.

Recent and Planned Investment

Stoneham has made several investments in the Town Center study area over the last decade, most notably, the redevelopment of the Stoneham Town Common, and the new Stoneham Middle School located at the northernmost boundary of the study area.



Private investment within the study area has included “The Residences at Stoneham Square” a 47-unit condominium development at the former Love’s Furniture building in 2007; under construction 411 Main Street, a mixed use project with retail and 25 1- and 2-bedroom rental units; and the recent redevelopment of the Heritage Building (across from Town Common) with retail and office space, and new home to the Stoneham Chamber of Commerce. New restaurants and improvements to existing restaurants have also occurred.

No additional mixed-use or commercial development is currently planned within the study area; however, plans are in the works to begin construction of the Tri-County Greenway, a bike path that would link Stoneham’s Town Center to Woburn and Winchester.

Interviews

Understanding the market from a local perspective is crucial to estimating future potential demand for new residential and retail space. As part of the market analysis, MAPC conducted numerous interviews with Town Center property owners, local merchants, developers, and other local businesses and organizations. In addition, discussions were held with Town Staff and Advisory Committee members composed of public and private sector workers, and Stoneham residents.

Opportunities and Challenges

The majority of those interviewed spoke with optimism of the potential to improve and enliven Town Center with optimism, and felt there is potential for further investment. However, all stressed that there are many challenges as well, starting with the overall negative reputation, or lack thereof, of the area. Many see it as a place to drive through that has been long neglected, and has limited offerings. At the same time, many stated that the area has “great bones” with potential to be a great place if improvements to streetscapes and other public realm changes were made.

The opportunity for a more varied retail environment in the Town Center was mentioned by nearly all interviewed and seen as a priority. Many mentioned that in its current form, Town Center is not a place where you can accomplish many shopping needs. Many felt the area had more hair and nail salons than other downtowns, a lack of dining diversity (“too many pizza and sandwich type places...”), and that it lacked common stores found in most downtowns like drugstores, card shops, or coffee shops/cafés where residents and shoppers can relax.

Recruitment of new businesses has been a challenge, and efforts need to be made to provide retailers with data-based information that shows there is a market for more business in the Town Center. For example, according to interviews, efforts to locate a coffee shop or café in the area have not proved successful. Others interviewed said shops Stoneham would like to attract have chosen other areas, in particular nearby Reading (e.g. Orange Leaf Yogurt, Dimici’s Bakery of Melrose, etc.). Other discussions highlighted that many stores/layouts are dated, and that Stoneham Center lacks a destination where professional workers – those who reside in Stoneham, but also who work in nearby office locations along Montvale and/or commute through town – to congregate during or after work. Specifically, it was mentioned that there was no contemporary American bar/restaurant in Stoneham Square, even though it’s well suited for this type of environment given its downtown feel. Further, many said that clothing and more unique boutiques would be welcomed, particularly if they could capture customers who pass through on their way to and from work and other activities. Nearly all suggested that a greater variety of restaurants and bars in addition to current offerings were also needed to create a restaurant destination and draw people to the Town Center.

Marketing Town Center was identified as a major opportunity and challenge. Marketing is a challenge because the area lacks an identity due in large part to the lack of retail options and appearance.

(However, many said the reputation of Town Center has slowly changed for the positive as more investment has been made. Further, with a larger auto-oriented retail environment to the north, efforts need to be made to ensure both areas are marketed properly, so as not to directly compete with one another. Thus, the need for targeted marketing would be needed.

More events and programming to attract additional customers and enliven the Town Center was also highlighted. Nearly all interviewed said there isn't anything to do in the Town Center beyond special events (Town Day, summer concerts, holiday strolls), and the theater. In fact, the Stoneham Theater was specifically mentioned by all interviewed as the major cultural asset drawing people to the Town Center, and that when shows were playing, business picks up. However, on off nights, it is quiet and many would like to see additional programming at the theater, particularly live music or even special movie screenings (e.g. cult films and classics) not shown in mainstream venues. Adding live music, trivia nights and other activities at bars/restaurants, as well as creating more family-friendly options in the Common and in stores (e.g. Family Paint Night at a restaurant), were also mentioned.

The public realm in its current form was seen as a challenge. Many said signage is old and unattractive, and that improvements could draw more people to Town Center. Most felt the area looked dated, that signage was not appealing, and that more could be done to make the area more inviting. Suggestions included outdoor dining options, replacements for the flower barrels, lamp post signage, more uniform retail signage and wayfinding (to plentiful parking options) and A-frames calling attention to stores. More generally, the need for more marketing of Town Center and the establishment of a "brand" is needed.

Another challenge to redevelopment is that the Town is not perceived to be business friendly. Many perceive there to be a lack of transparency in decision making, although suggest it has improved. There is also little guidance about the direction, and lack of strategic planning, not only in Town Center but for the larger community as well. It's a reactive community, not a proactive one. (Many noted, however, this planning process was a step in the right direction, and were happy to see it taking place.)

When discussing residential opportunities, one broker suggested that the residential market in town is improving, and some spillover buyers from the robust residential markets in Melrose, Malden and Medford are finding Stoneham. However, one impediment is the lack of available inventory – for single family and condos - currently on the market. Many homeowners are still underwater, and with current prices just below peak, are not likely to sell just yet. However, as the market continues to improve, more houses are expected to come onto the market. This could lead to more seniors seeking smaller unit alternatives within town. However, as highlighted, there aren't many newer alternatives to single family ownership in town. Discussions with property owners and brokers indicated the need for additional rental units. In particular, modern rental units that have amenities (e.g. fitness rooms, elevator access, etc.) are lacking. Even current rental units, which are older and lack amenities, rent quickly, and there are few vacancies. Further, with rental prices soaring in Boston and suburbs closest to the city, Stoneham holds potential as a moderately priced alternative. Many see the new 25-unit rental in Stoneham Square as the market test. If successful, more will likely follow.

Finally, although office property owners were interviewed, the key finding was that beyond smaller professional offices (lawyers, accountants, etc.) there is limited potential for additional office space in the Town Center. While Stoneham is considered to be a good location, new office development would be located closest to Route 93 or 95, where access is more convenient, parking is available, and parcels are larger. Additionally, neighboring Woburn and close-by Burlington submarkets are considered to be stronger given their location on the west side of the 93/95 interchange.

II. Demographics

Understanding the current and projected demographic and socioeconomic characteristics of a community and its region is essential to any market analysis. An area's households – composition, income, preferences – are key drivers that determine the market potential for housing and retail, and the community's economic position within its larger region.

Population

Unlike the majority of surrounding communities, population in Stoneham declined over the last decade by over 3 percent. All other communities, except Melrose, saw an increase in population, most notable Malden and Reading, which each increased by over 4 percent.

Table 1: Population Change 2000-2012, Stoneham and Surrounding Communities

	2000	2012	Pop Change	% Change
Stoneham	22,219	21,414	-805	-3.6%
Malden	56,340	59,388	3048	5.4%
Medford	55,765	56,255	490	0.9%
Melrose	27,134	27,043	-91	-0.3%
Reading	23,708	24,753	1045	4.4%
Wakefield	24,804	25,118	314	1.3%
Winchester	20,810	21,437	627	3.0%
Woburn	37,258	38,231	973	2.6%

Source: US Census 2000 and ACS 2012

Age Profile

Stoneham's population is aging. Since 2000, the population over 55 has increased by over 50 percent, while the younger population have decreased by over 10 percent. According to MAPC projections, this trend is expected to continue through 2030, thus attracting younger people to the area is important to better support an active Town Center.

Table 2: Population by Age Over Time: Stoneham 2000-2012

	2000	2012	Change	% Change
Under 19	4,986	4,490	-496	-9.9%
20 to 34	4,038	3,667	-371	-9.2%
35 to 54	6,930	6,114	-816	-11.8%
55 to 64	2,157	3,398	1241	57.5%
65+	4,108	3,745	-363	-8.8%

Source: US Census 2000 and ACS 2012

Stoneham has an older population compared to its surrounding communities and is aging at a higher rate than those communities. The median age in 2012 was 44.1, slightly older than in neighboring Wakefield and Winchester, but nearly 10 years older than Malden and Medford to the south. Additionally, although most communities saw their median age's increase between 2000 and 2012, Stoneham's increased at a higher rate.

Table 3: Median Age Over Time: Stoneham and Surrounding Communities 2000-2-12

	2000	2012	Change
Stoneham	40.6	44.1	8.6%
Malden	35.7	35.5	-0.6%
Medford	37.5	36.8	-1.9%
Melrose	39.4	41.1	4.3%
Reading	39.1	40.9	4.6%
Wakefield	38.9	41.8	7.5%
Winchester	41.1	43.1	4.9%
Woburn	37.7	40.2	6.6%

Source: US Census 2000 and ACS 2012

Households

For the housing market analysis, understanding the household composition and trends is more important than overall population figures. Every household resides in one housing unit, no matter the number of people in that household. Thus, to better understand future housing needs within a community, the number of households provides insight into the amount and type of housing that may be needed currently or in the future.

Unlike the majority of surrounding communities, the number of households in Stoneham decreased over the last decade. Not only did the number of households decrease, so did the average household size. This is likely the result of the aging population in Stoneham, and lack of younger residents moving in – particularly those singles, couples and households with children that have moved into nearby communities.

Table 4: Household Change: Stoneham and Surrounding Communities: 2000-2012

	2000	2012	Change	%	2000 Avg HH Size	2012 Avg HH Size
Stoneham	9,050	8,951	-99	-1.1%	2.42	2.37
Malden	23,009	22,836	-173	-0.8%	2.42	2.59
Medford	22,067	22,751	684	3.1%	2.43	2.36
Melrose	10,982	11,221	239	2.2%	2.44	2.38
Reading	8,688	9,110	422	4.9%	2.71	2.7
Wakefield	9,747	9,867	120	1.2%	2.52	2.51
Winchester	7,715	7,569	-146	-1.9%	2.65	2.8
Woburn	14,997	15,264	267	1.8%	2.47	2.49

Source: US Census 2000 and ACS 2012

Despite the decline in households over the last decade, MAPC projections anticipate an increase in households by 2030. As highlighted in Table 6 on page 6, all household growth in Stoneham is anticipated to be in those headed by persons over 65 years of age, while younger households, including those aged 35-54 (those most likely to have kids residing at home) are projected to decrease.

Significantly, household growth in Stoneham is projected to be lower than all surrounding communities. This is in part due to current preferences among younger households and seniors who are more likely to reside in walkable neighborhoods with public transportation – which Stoneham lacks, except for a local bus with limited hours of access. In fact, all communities surrounding Stoneham have access to either MBTA Commuter Rail or Orange Line trains.

Table 5: Household Change: Projected 2010 - 2030, Stoneham and Surrounding Communities

	2010	2020	2030	Change	%
STONEHAM	8,994	9,239	9,507	513	5.7%
Malden	23,673	26,333	29,390	5,717	24.2%
Medford	22,810	24,278	25,991	3,181	13.9%
Melrose	11,213	11,777	12,377	1,164	10.4%
Reading	9,305	10,253	11,221	1,916	20.6%
Wakefield	9,994	10,712	11,394	1,400	14.0%
Winchester	7,645	7,970	8,375	730	9.5%
Woburn	15,524	16,759	17,988	2,464	15.9%

Source: US Census and MAPC (Stronger Region Projections)

Table 6: Households by Age: Projected Change 2010 to 2030, Stoneham

	2010	2020	2030	Change	Percent
Under 20	47	34	24	(23)	-49%
20 to 34	1,053	1,106	1,045	(8)	-1%
35 to 54	3,521	2,994	2,940	(581)	-17%
55 to 65	1,840	2,080	1,738	(102)	-6%
65+	2,533	3,025	3,760	1,227	48%

Source: US Census and MAPC (Stronger Region Projections)

Family and Non-family Households

Approximately 65% of households in Stoneham are family households and 27% of all households have children under 18 residing at home, slightly lower than the State average. However, over 35% of households are non-family households, the overwhelming majority of which are persons living alone, of which nearly half are over the age of 65. In fact, Stoneham has a higher percentage of households with individuals over 65 years of age than the state. This population, along with younger singles and married couples without children, are more likely to prefer a smaller housing units.

Table 7: Households by Type, Stoneham 2012

	Stoneham		State
	Number	%	%
Family households (families)	5,871	65%	64%
<i>Families with Children</i>	2,417	27%	29%
<i>Married Couple/No Kids</i>	2,793	31%	27%
<i>Single Parent</i>	402	4%	9%
Nonfamily households	3,179	35%	37%
<i>Householder living alone</i>	2,721	30%	29%
<i>Householder 65 years and over</i>	1,204	13%	11%
Households with individuals 65 and older	2,841	31%	26%
Average household size	2.42	n/a	2.50
Average family size	3.07	n/a	3.12

Source: ACS 2012

Income

Stoneham's median household income is just under \$73,000. This is higher than that of the State, but lower than that in nearly all surrounding communities, the exception being Malden. Further, Stoneham's households' incomes increased by a lower percentage compared to surrounding communities between 2000 and 2012.

Table 8: Household Income

	2000	2012	Percent Change
STONEHAM	57,240	\$72,938	27%
Malden	45,255	\$54,229	20%
Medford	52,510	\$72,773	39%
Melrose	62,985	\$86,264	37%
Reading	76,453	\$102,614	34%
Wakefield	64,811	\$85,810	32%
Winchester	93,585	\$128,199	37%
Woburn	55,094	\$72,434	31%

Source: US Census 2000 and ACS 2012

Communities with higher household incomes are often attractive to retailers, due to the higher buying power of nearby residents. Although Stoneham incomes are lower than in most nearby communities, many residents/commuters from more affluent communities (e.g. Melrose, Reading and Wakefield) likely travel through Stoneham and offer an opportunity to capture spending.

In addition, Stoneham's lower income is likely due in part to the large number of seniors, many of whom are likely living on a fixed income. When looking at household incomes by age of the householder, those over 65 years of age earn under \$37,000 annually. Median incomes for households between 25 and 64 years of age exceed \$85,000.

Table 9: Household Income by Age

Age	Median Income
15 to 24 years	\$54,583
25 to 44 years	\$85,293
45 to 64 years	\$88,530
65 years and over	\$36,827

Source: ACS 2012

Educational Attainment

Lower income levels compared to surrounding communities may be a result of a slightly lower level of education in Stoneham. Although a higher percentage of Stoneham residents 25 years or older hold at least a high school diploma or equivalent (93%) compared to Middlesex County and the State, a significantly lower percentage of residents hold at a bachelor's degree or higher (38%) compared to all of Middlesex County (50%). The most significant difference is the percentage of residents holding a graduate of professional degree, which often lead to higher incomes.

Table 10: Educational Attainment (age 25+)

Subject	Stoneham		Middlesex County		State	
	Estimate	Percent	Estimate	Percent	Estimate	Percent
Population 25 years and over	15,829	100%	1,043,896	100%	4,465,898	100%
No High School Diploma	1,126	7%	84,086	8%	484,887	11%
High school graduate	4,541	29%	228,467	22%	1,156,650	26%
Some college, no degree	2,767	18%	143,456	14%	739,171	17%
Associate's degree	1,370	9%	63,971	6%	344,724	8%
Bachelor's degree	3,801	24%	268,306	26%	989,299	22%
Graduate or professional degree	2,224	14%	255,610	25%	751,167	17%
Percent high school or higher	n/a	93%	n/a	92%	n/a	89%
Percent bachelor's or higher	n/a	38%	n/a	50%	n/a	39%

Source: ACS 2012

III. Residential Market Analysis

Existing Housing Stock

Housing Units by Type

The study area is comprised primarily of single and two-family units representing nearly 70% of total housing stock. Given its place as the Town Center, there is a higher concentration of multi-family units, particularly smaller apartment and condominiums. Just Over 15% of units are found in structures with 3-9 units, more than double that found in the remainder of town, but similar to the county rate. Surprisingly, only 16 percent of Town Center units are in structures with 20 or more units. This is low for a town center setting, where multifamily densities often are supported and contribute to an amenity rich, pedestrian-friendly street life. Specifically, the percentage of multifamily units in the Town Center area is significantly lower than all of Stoneham (25%), and lower than the Middlesex County percentage. Essentially, many of Stoneham's multifamily complexes are located outside of downtown in areas with limited walkability to services and amenities.

Table 11: Number of Units in Structure (Study Area, Stoneham, Middlesex, State)

	Town Center	Stoneham	Middlesex County
Single Family	53%	61%	55%
Two Family	14%	7%	13%
3-4 Units	9%	4%	9%
5-9 Units	7%	3%	5%
10-19 Units	9%	7%	5%
20 or more	7%	18%	12%
Other	0%	0%	0.4%

Source: ESRI BAO

The housing stock in Town Center is older than in the rest of Stoneham. As shown in Table 12. Only 3% of units within Town Center have been built since 2000 (excluding the soon-to-open 24-unit Petrillo Building), and only 10% since 1990. While this is similar to all of Stoneham, more than half of units in the study area were built prior to 1940, which is significantly higher than the rest of town and all of Middlesex County.

This can be viewed both as a positive and a negative. Some households may find the older, historic housing stock in the surrounding areas of Town Center appealing. Other households looking for modern units with amenities including elevator access would likely look elsewhere. These types of units are often appealing to smaller households, including seniors and others with accessibility needs.

Table 12: Age of Housing Stock (Study Areas, Stoneham, Middlesex)

	Town Center	Stoneham	Middlesex County
Built 2010 or later	0%	0%	0%
Built 2000 to 2009	3%	4%	7%
Built 1990 to 1999	7%	6%	7%
Built 1980 to 1989	7%	14%	10%
Built 1970 to 1979	9%	11%	10%
Built 1960 to 1969	7%	15%	11%
Built 1950 to 1959	11%	19%	13%
Built 1940 to 1949	3%	5%	6%
Built 1939 or earlier	52%	27%	37%

Source: ESRI BAO

The lack of multi-family or townhouse units attractive to smaller households (e.g. multi-family) may act as a significant impediment to the overall vibrancy the Stoneham Town Center study area. There simply aren't many modern units available.

Occupancy Characteristics: Tenure and Length of Time

Just over half of units in the Town Square study area are owner-occupied, significantly lower than the town (70%). Significantly, a larger percent of rental households in the Town Center area have lived in Stoneham for a shorter time than renters elsewhere in town. Over 10% moved in since 2010 compared to 6% Town-wide and 8% County-wide. Nearly 40% moved in since 2000, significantly more than the Town or County averages. There could be many reasons for this, including age of housing stock, availability of parking, and/or transportation access, as well as housing impacts related to the Great Recession. The growing popularity of downtown or town center living may also be a driver.

Table 13: Tenure and Length of Stay

	Town Center	Stoneham	Middlesex County
Owner occupied	56%	69%	63%
Moved in 2010 or later	3%	2%	2%
Moved in 2000 to 2009	17%	23%	24%
Moved in 1990 to 1999	15%	18%	16%
Moved in 1980 to 1989	6%	9%	8%
Moved in 1970 to 1979	9%	9%	6%
Moved in 1969 or earlier	6%	9%	7%
Renter occupied	44%	31%	37%
Moved in 2010 or later	11%	6%	8%
Moved in 2000 to 2009	28%	20%	24%
Moved in 1990 to 1999	3%	4%	3%
Moved in 1980 to 1989	2%	1%	1%
Moved in 1970 to 1979	0%	0%	0%
Moved in 1969 or earlier	1%	0%	1%

Source: ACS 2012

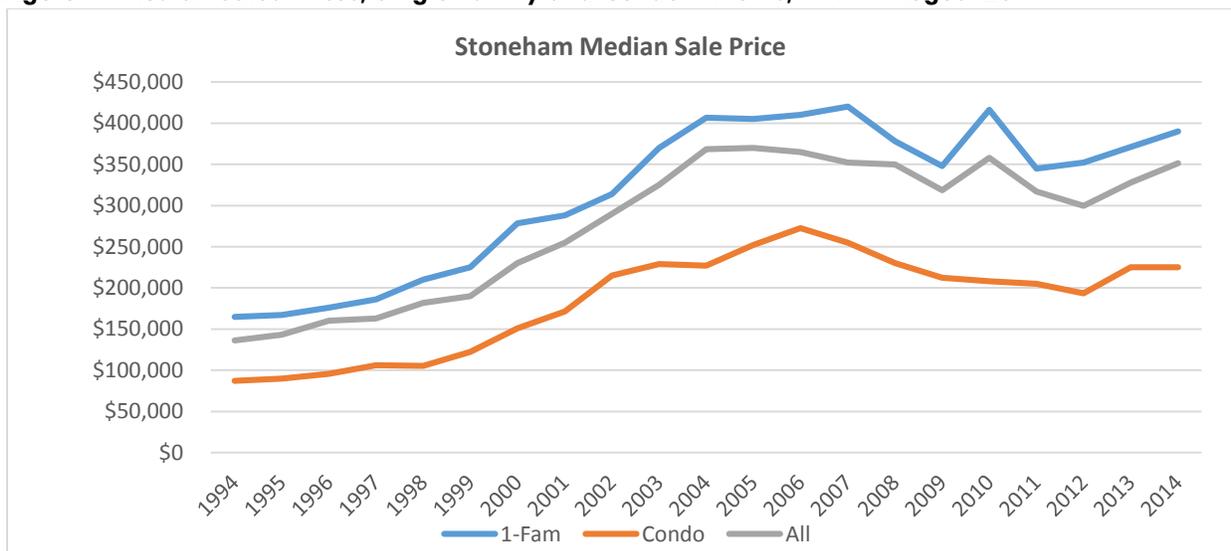
Housing Sales and Pricing

Although residential real estate brokers said that a significant issue for Stoneham housing sales is the lack of inventory on the market, transaction information from the Warren Group shows a slightly different story with housing sales and prices on the rise. Although home sales dipped during the recession, numbers have picked up considerably in the last few years, having reached or exceeded the number of sales during the peak years. Median prices, however, have not yet reached the peaks of 2006. Further, 2014 will have the highest sales volume in at least 10 years, led by an increase in condominium sales. Through August, nearly 230 total sales have closed, including 73 condominiums (the highest number since 2005) and 126 single family homes (4 shy of the 2013 total). However, prices have not reached the same peak.

Table 14: Single Family and Condo Sales

Year	1-Fam	Condo	All
1994	108	102	244
1995	110	68	208
1996	137	58	234
1997	172	83	299
1998	150	82	258
1999	128	81	237
2000	97	79	208
2001	135	77	238
2002	122	64	208
2003	129	91	244
2004	112	58	202
2005	129	77	231
2006	104	61	190
2007	122	68	204
2008	94	39	144
2009	112	42	165
2010	94	35	152
2011	90	39	148
2012	120	60	201
2013	132	62	231
2014	126	73	229

Figure A: Median Sales Prices, Single Family and Condominiums, 1994 - August 2014



Source: Warren Group, 2014

The higher number of sales has been met with increasing median sales prices, particularly for single family homes, which are near peak (-5% from 2006). Brokers have said that well priced starter homes (Under \$500K) are at a premium throughout town, and sell quickly.

Condominiums sales prices have leveled off, but are significantly lower than pre-peak prices (-15%). However, when looking at recent sales, this is likely related to age and quality of the stock. As shown in Table 15, newer condominiums, particularly those with amenities (e.g. in unit laundry, elevators) are selling for more than \$325,000, and as high as \$420,000. These prices are significantly more than the median condo price (\$225,000 in 2014) town wide, and higher than median condo prices at the peak (\$272,500). For example, 2-BR units at 426 Main Street in Stoneham Square, which was built in 2007, are selling for around \$350,000, whereas 2-BR condominiums in older structures are selling in the mid \$200,000 range. Townhouses on Pomeworth have recently sold for above \$400,000. Thus, location in or near Town Center appears to have a premium, as these are the highest condo sales in Town.

Table 15: Recent Sales by Unit Type

Address	Use	Beds	Baths	Sq Ft	Sale Date	Sale Price	Avg cost per sf	Yr Built
426 Main Street	Condo	2	2	1296	6/26/14	\$352,500	\$272	2007
426 Main Street	Condo	2	2	1160	6/10/14	\$342,500	\$295	2007
426 Main Street	Condo	1	1	691	5/15/14	\$235,000	\$340	2007
426 Main Street	Condo	2	2	1209	12/20/13	\$329,500	\$272	2007
61 Wright Street	Condo	2	2	796	8/19/14	\$210,000	\$264	1930
12 Benton Street, Apt 8	Condo	2	2	1477	5/23/14	\$267,350	\$181	1940
8 Gilmore St, Apt D.	Condo	2	2	1280	2/7/14	\$257,000	\$200	1999
10 Pomeworth St	Condo	2	3	1892	4/30/13	\$415,000	\$219	2007
10 Pomeworth St, Unit J	Condo	2	2.5	2034	2/23/14	\$420,000	\$206	2007
2 Gould St, Apt 4	Condo	2	1	1900	1/19/14	\$200,000	\$210	1900
15 Pomeworth, Unit A	Condo	1	1	1880	12/9/13	\$200,000	\$200	1900
4 Gerry Ct	1-F	3	1	1370	6/25/14	\$355,500	\$259	1831
15 Grant Street	1-F	3	1	984	7/15/14	\$340,000	\$345	1964
12 Raymond Rd	1-F	2	1	1008	6/6/14	\$325,000	\$322	1950
7 Warren St	1-F	3	2	1255	5/1/14	\$375,000	\$298	1900
1 Poplar Street	1-F	5	3	2458	12/19/13	\$255,500	\$185	1840
6 Hersam St	1-F	2	1	1008	5/28/14	\$257,200	\$255	1935
22 Cedar Ave	1-F	4	3	2833	5/22/14	\$605,000	\$213	2003
37 Chestnut St	1-F	3	2	1813	12/2/13	\$442,000	\$243	1890

Source: Zillow

Further, brokers and property owners suggest that there is a market for new housing in Stoneham Square. While single-family units most attractive to young families are found within walking distance to Stoneham Square, most have not entered the market, but likely will in the coming years as seniors decide to downsize. Given the lack of available condominiums for sale in the study area (6 total as of September 2014), and the lack of new or recently-constructed condominium units, brokers and developers believe there is a market for new construction, particularly units that appeal to seniors looking to downsize and young professionals who work along the Route 95 corridor or in Boston. And recent sales suggest new construction is feasible, particularly for condominiums which are in short supply in walkable environments not only in Stoneham but regionally.

The lack of new product is evident in building permit data. Beyond projects like the former Love's Furniture Building, there has been almost no new multifamily construction in recent years. Over the last decade, only 83 residential building permits have been issued in town, the overwhelming number of which have been for

single family homes. In fact, only 3 permits have been issued for multifamily construction. One 3-unit building, one 14-unit building and 1 5-unit building.

Table 16: Building Permit Data

	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Single Family	10	13	6	3	2	0	0	14	19	11
Two Family	0	0	0	1	0	0	0	0	1	0
Three and Four	1	0	0	0	0	0	0	0	0	0
Multifamily	0	1	1	0	0	0	0	0	0	0
Total Permits	11	14	7	4	2	0	0	14	20	11
Total Units	13	27	11	5	2	0	0	14	21	11

Note: These permits are for new construction and do not reflect permits for upgrades and condominium conversions.

Rental Market Characteristics

Compared to Middlesex County, renters in Stoneham and in Stoneham Town Center tend to be older, and they are growing older. In 2012, less than a quarter of renters in Stoneham Center were under 35 years of age, compared to nearly 40% in 2000. While this is similar to the Town percentage, it is significantly higher than in Middlesex County, where close to 40% of renters are under 35 years of age.

In fact, where the number of renters over 35 held relatively steady in Middlesex County, the percentage of renters in Stoneham increased significantly. The increase was in households 45-54 and especially 55 to 64 years of age (+255 households).

Table 17: Age of Renters: Town Center, Stoneham and Middlesex County

	Census Tract		Stoneham		Middlesex County	
	2000	2012	2000	2012	2000	2012
Under 35 years	38%	24%	26%	24%	40%	37%
35 to 44 years	26%	14%	19%	16%	23%	20%
45 to 54 years	15%	22%	14%	15%	14%	17%
55 to 64 years	9%	26%	10%	21%	8%	11%
65 and over	13%	15%	31%	26%	16%	15%

Source: US Census 2000, ACS 2012

Looking more specifically at numbers, there were 67 more total renter households in Stoneham Center in 2012 compared to 2000. However, there were over 200 more households over 55 years of age, and 116 fewer under 35.

Table 18: Renters by Age 2000-2012, Stoneham Center

CENSUS TRACT	2000	2012	CHANGE		% OF TOTAL	
			#	%	2000	2012
Total Households	2212.00	2212.00	0.00	0%	100%	100%
Renter Households	943.00	1010.00	67.00	7.1%	42.6%	45.7%
Under 35 years	353	237	-116.00	-32.9%	37.5%	23.5%
35 to 44 years	240	139	-101.00	-42.1%	25.5%	13.8%
45 to 54 years	141	217	76.00	53.9%	15.0%	21.5%
55 to 64 years	83	262	179.00	215.7%	8.8%	25.9%
65 and over	126	156	30.00	23.8%	13.4%	15.4%

Source: US Census 2000, ACS 2012

Beyond the increase in senior households over the last decade in Stoneham, these numbers show that in general, younger renters are looking outside of Stoneham. Based on regional and national trends, younger people are more likely to seek out environments that are walkable with many amenities, and that are close to work. However, Stoneham Center lacks many of the amenities younger people seek out – cafes, casual/affordable restaurants and local shops. The lack of diversity, both in unit types, and in the retail environment, were identified as impediments to attracting a younger demographic to the area.

Table 19: Renters by Length of Residency

	Town Center	Stoneham	Middlesex County
Renter occupied	44%	31%	37%
<i>Moved in 2010 or later</i>	11%	6%	8%
<i>Moved in 2000 to 2009</i>	28%	20%	24%
<i>Moved in 1990 to 1999</i>	3%	4%	3%
<i>Moved in 1980 to 1989</i>	2%	1%	1%
<i>Moved in 1970 to 1979</i>	0%	0%	0%
<i>Moved in 1969 or earlier</i>	1%	0%	1%

Source: ACS 2012

Rental Units

Brokers and property owners noted that multi-family and upper floor rentals in the Town Center go quickly. However, the existing inventory is not modern and units lease for relatively low market rents (\$1,000 – 1BR). New units coming online at 411 Main Street will rent for between \$1,800 for a 1BR unit and \$2,300 for a 2BR unit. These units feature hardwood floors, granite countertops and stainless steel appliances, and have elevator access and underground parking. While not affordable to lower income households, the developer has received interest from potential tenants. (Units will not begin renting until October/November 2014.) Brokers see potential for the project, as rents are considerably lower than for similar new units in Boston, Cambridge and Somerville, and lower than newer projects in Melrose near the Orange Line.

Table 20: Rental Rates at Nearby Residential Complexes

Property	Location	Units	1 BR Rent	2BR Rent	Amenities	Completed
Stoneham						
Cliffside	Stoneham		\$1,625	\$1,845	Fitness Center, Laundry	?
114 Main St.	Stoneham	24	\$1,800	\$2,350	Elevator, Granite	2014
The Gates	Stoneham		n/a	\$1,700	Elevator, Pool, but dated	Older
Melrose						
Windsor at Oak Grove	Melrose	550	\$1,870+	\$2,100-\$2,600	Transit, Pool Washer/Dryer	2009
Alta Stone Place	Melrose	67	\$2,312	\$2,649	Transit, Fitness Center, Pool, Elevator	2013
Burlington						
Heritage at Stone Ridge	Burlington	180	\$1,850	\$2,340	Washer/Dryer, Pool	
Avalon Burlington	Burlington	312	n/a	\$1,800	Fitness Center, Pool	

Source: Zillow, and Property Websites

Recent Development and Pipeline Projects

Beyond the 24-unit 411 Main Street development, there is little new residential proposed for Stoneham. A 298-unit Comprehensive Permit project is proposed on Franklin Street near the Melrose line (and commuter rail stop), as is a 264-unit complex on Fallon Road off of I-93. Neither of these developments offer residents a walkable, mixed-use environment. Beyond these developments, some two-family units are currently proposed or under construction throughout town.

Housing Affordability and Cost Burden

It is important to understand not only the cost of housing and incomes, but the percentage of income households are currently spending on housing. Only 495 housing units (5.3% of all units) in Stoneham are deed-restricted affordable units, eligible to low-income households earning below 80% AMI (Area Median Income). However, over 31% of households in Stoneham would qualify for low-income housing. Thus there is likely a need for more affordable units, particularly those near amenities and transportation connections.

To help identify the need for affordable units (subsidized for low income, or market rate), looking at cost burdened households helps to determine need. Cost burdened households are those who spend more than 30% of their income on housing costs. Those who spend more than 50% are considered to be severely cost burdened.

As shown in Table 21, over 40% of Stoneham households are housing cost burdened, and 15% are severely cost burdened. (A higher percentage of renter households are cost burdened (55%) compared to owners. More specifically, Stoneham's low income households are disproportionately housing cost burdened. Nearly 75% of households earning below 80% Area Median Income are burdened (see Table 22), compared to less than 20% of high income households. This is significant because housing cost burden is particularly difficult for lower income households who have less disposable income. Therefore when housing costs consume the majority of their income, they have little to spend on other necessities like food and clothing. It would be recommended that a minimum of 20% of new units constructed in the future be deed-restricted as affordable units.

Table 21: Cost Burdened Households

	Number of HHs	Percent HHs
Total HHs	8,789	100%
Cost Burdened HHs	3,598	41%
Severely Cost Burdened HHs	133	15%

Source: ACS 2011

Table 22: Cost Burdened Households by Income

	Total Households	Number of Cost Burdened Households	Percent of Cost Burdened Households
Low Income HHs (below 80% AMI)	2,775	2050	74%
Moderate Income HHs (80%-100%)	1,040	480	46%
Higher Income HHs (100%+)	5,070	945	19%

Source: ACS 2011

Table 23: Cost Burdened Households by Type

	Total Households	Number of Cost Burdened Households	Percent of Cost Burdened Households
Elderly Family	1,135	470	41%
Small Family	3,685	1,275	35%
Large Family	625	185	30%
Elderly Non Family	1,370	860	63%
Other	2,070	685	33%

Source: ACS 2011

Given the limited number of affordable units in town, and the high level of housing cost-burden, there is a housing mismatch in town, and more affordable housing options are needed. This is common throughout many communities in the region, and points to the growing need for units affordable to lower-, moderate- and middle-income households.

Housing Demand, 2014 to 2020

To estimate future demand, MAPC used its Stronger Region Forecasts to estimate the number of housing units needed over the next 5-7 years. Stoneham's population is projected to age significantly over the next 15 years. This will lead to a decrease in household size, but an increase in the number of total households.

Table 24: Projected Household Change, 2012 - 2030

	2012 Total	2020 SR	Change	2030 SR	Change
Households	9,050	9,239	189	9,507	457
<i>Town Center Capture (33%)</i>	<i>n/a</i>	<i>n/a</i>	<i>63</i>	<i>n/a</i>	<i>152</i>
<i>Remainder of Stoneham (66%)</i>	<i>n/a</i>	<i>n/a</i>	<i>126</i>		<i>304</i>

Based on MAPC's household projections, at least 189 new households are expected in Stoneham by 2020, and over 450 by 2030. Given the aging of Stoneham's households, the increase of older renters coupled with a decrease in younger renters, new unit demand is for multifamily development in locations accessible to retail and services as well as transit. Thus, given changing preferences, approximately one-third of total demand could likely be supported in the Town Center area. The remainder would be built in other areas in town, particularly areas closest to highway infrastructure, and commuter options (e.g. near Melrose or Wakefield town lines.) Additionally, given the growing percentage of renters over the last decade, approximately half of all unit demand will be for rental apartments – predominantly 2BR units.

Amenities including elevator access, fitness rooms and other common space will make new units more competitive with other amenity rich areas that offer transit. Further should the Town Center offer a greater range of activities and amenities – particularly an improved retail landscape and especially public transit options (express bus, or commuter rail feeder service) the same multifamily units that are typically attractive to older residents could attract younger households, particularly those who work along 95 and 93, and who wish to be closer to work. Further, based on current sales prices for newer condominiums, new construction could likely be supported in Stoneham Center, particularly given the lack of condominiums available for sale within the region. Again, including affordable units in the mix should be a priority.

IV. Retail Market Analysis

A. Existing Retail Inventory

The first step in conducting the retail market analysis involved researching and analyzing the current retail inventory within the study area. MAPC staff surveyed the existing retail environment by walking the entire study area and documenting each store by type. In total, approximately 130 retail and professional office establishments were identified. This included a range of retail, professional office, and institutional uses (e.g. Town Hall, Library, etc.). The main finding – which echoes sentiments from those interviewed – is that the retail composition of the area is unbalanced (see Table 25), with an unusually high concentration of personal and professional services/offices, and a low supply of retail establishments like shoppers and convenience goods.

Table 25: Existing Retail Inventory by Type

Type	# of Stores	% Town Center	% Typical Neighborhood/Community Center Mix
Shoppers Goods	13	11%	30-40%
Convenience Goods	9	7%	20-30%
Food Service	19	16%	10-20%
Personal Services	46	42%	10-20%
Professional Services	25	20%	10%
Vacant	5	4%	5%

Source: MAPC

In particular, there is a very high concentration of Personal Services businesses – 46 stores, or 42% of the total inventory including numerous hair, nail, and other service establishments like dry cleaning. This is significantly higher than the 10-20% found in a typical neighborhood center. Professional Services/Offices (lawyers, accountants, etc.) made up 20% of the total, which is far higher than the typical 5% found in balanced centers. On the flip side, the number of shopping goods stores – places like clothing stores, gift shops, shoe stores, books, etc. – is very low at 11% (30-40% would be typical), as are the number of convenience goods stores (food, health/pharmacies, health, beauty, etc.) 30-40% would be typical. Food service is currently within the typical range round in town centers, however, the inventory is heavy on limited service and take out options that offer similar choices – pizza, sandwiches, etc. And although vacancy is slightly lower, this may reflect the ability of businesses to continue operating due to lower rents for older spaces, and the overall non-competitive environment.

In summary, the area lacks the variety of retail options typically associated with destination shopping and dining environments.

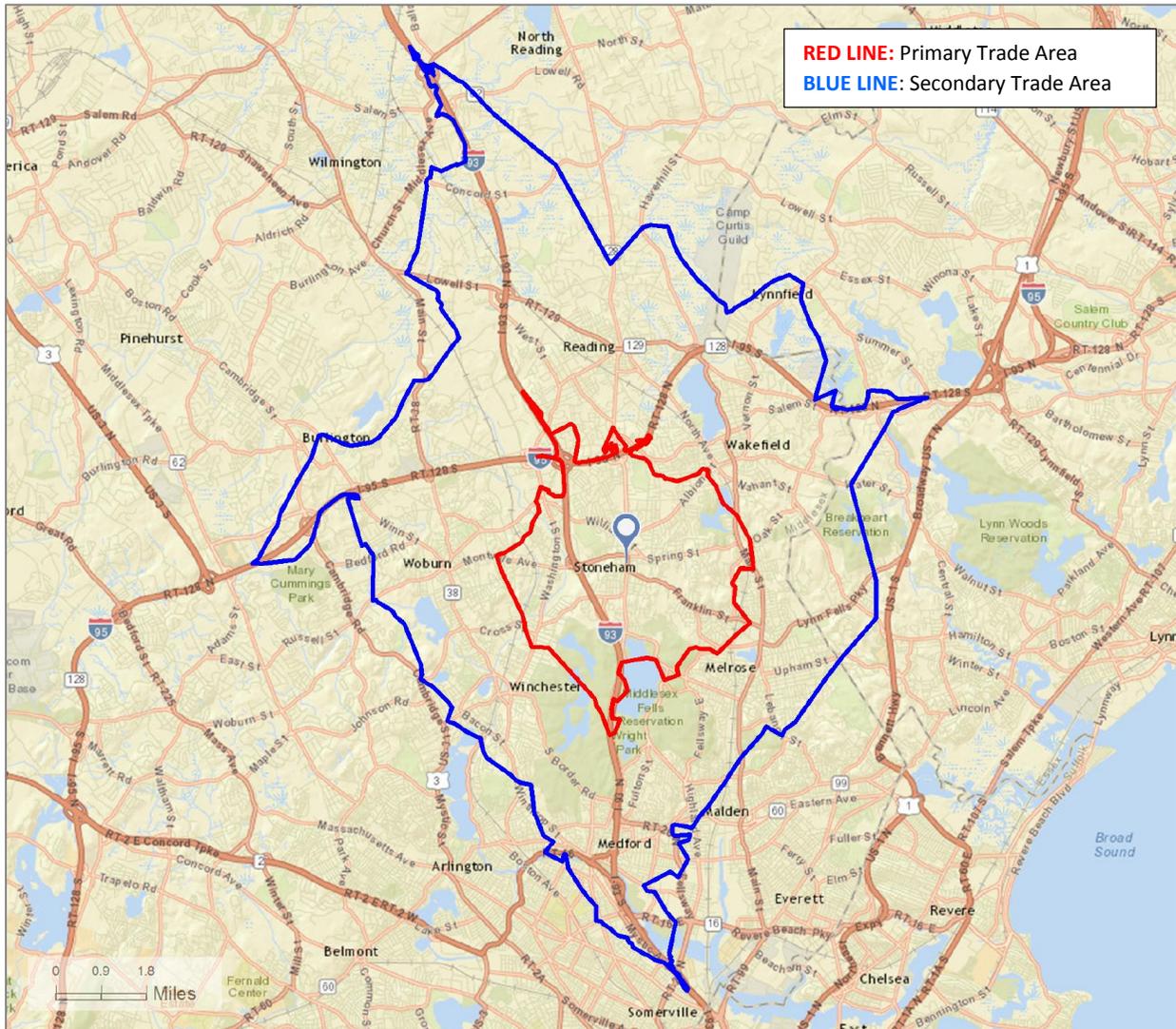
B. Trade Area

Before future potential can be identified, a trade area – the area in which businesses will draw the majority of their business – needs to be determined. Defining a trade area, or areas, is a key task as it defines the boundaries for which data is gathered and analyzed to identify potential retail opportunities.

Given that Stoneham Square is located along a heavily traveled State highway (Route 28, Main Street), and has limited public transit service, MAPC identified and analyzed three trade areas for different purposes.

- **Town Center (hyper local market):** The town center trade area encompasses areas within 1/2-mile radius of the Town Common. The area was specifically analyzed to identify if additional retail could potentially be supported from existing households living within walking distance to Town Center.
- **Primary Trade Area (local market):** The primary trade area includes all areas within a 5-minute drive of the Town Common. This includes all areas of Stoneham, as well as portions of Melrose, Wakefield, Reading, Woburn and Winchester. The 5-minute drive study area was selected, as consumers typically prefer to purchase goods and services at locations that are nearby and convenient. The area also does not overlap with competing town centers (Melrose, Wakefield, Woburn and Reading).
- **Secondary Trade Area (regional market):** The secondary trade area encompasses areas within a 10-minute drive of Town Common. This includes all of Stoneham and areas as far as North Reading to the north, Somerville and Malden to the South, Lynnfield and Peabody to the east, and Woburn and Burlington to the west. Households within this trade area may shop in Stoneham occasionally, but the majority of their spending will occur outside of Stoneham Square.

Figure B: Primary and Secondary Trade Areas



C. Retail Opportunity Gap Analysis

A retail opportunity or gap analysis looks at the overall demand for retail goods and services within a designated trade area based on the spending potential of households (demand), and the actual sales for those goods and services within the market area (supply). The difference between the demand and supply is the retail “gap”. When the demand exceeds the supply, there is “leakage,” meaning residents must travel outside the area to purchase those goods. In such cases, there is an opportunity to capture some of this spending within the market area to support new retail investment. When there is greater supply than demand, there is a “surplus”, meaning consumers from outside the market area are coming in to purchase these goods and services. In such cases, there is limited or no opportunity for additional retail development. Thus, the retail gap analysis provides a snapshot of potential opportunities for retailers to locate within an area.

To best identify retail opportunities within Stoneham’s town center area, a gap analysis was performed at the three market levels: the local market (1/2-mile radius/walk), the primary market (5-minute drive), and the secondary market (10-minute drive).

For purposes of this retail analysis, as stated earlier, the 5-minute drive time was deemed the most appropriate for analysis, as it captures nearby residents most likely to walk or take a short drive for convenience

Gap Analysis

Table 2 provides a summary of the retail opportunity gap analysis. Those figures in red (and with negative signs) indicate sectors for which there is a surplus of retail sales within the given trade area (i.e. little to no opportunity). Those that are positive and in black, represent sectors where there is leakage (i.e. opportunity for more retail).

Table 26: Summary Retail Opportunity Gap: 3-digit NAICS, All Trade Areas

	NAICS	LOCAL TRADE AREA	PRIMARY TRADE AREA	SECONDARY TRADE AREA
		Town Center	5-minute Drive	10-minute Drive
Total Retail Trade and Food & Drink		-\$22,540,841	\$224,261,637	\$847,489,626
Total Retail		-\$15,851,815	\$202,588,614	\$760,047,793
Total Food & Drink		-\$6,689,024	\$21,673,022	\$87,441,833
Motor Vehicle & Parts Dealers	441	\$5,244,382	\$54,867,466	\$140,251,286
Furniture & Home Furnishings Stores	442	-\$1,306,064	\$7,061,224	\$13,951,911
Electronics & Appliance Stores	443	\$787,950	\$10,487,018	\$35,186,904
Building Materials, Garden Equip. & Supply	444	-\$1,966,679	\$5,034,690	\$7,343,193
Food & Beverage Stores	445	-\$30,080,898	\$5,586,472	\$157,806,277
Health and Personal Care	446	\$4,665,107	\$35,659,498	\$94,090,502
Gasoline Stations	447	\$437,563	\$32,931,126	\$174,319,470
Clothing & Clothing Accessories	448	\$1,965,834	\$24,452,024	\$31,148,586
Sporting Goods, Hobby, Book and Music Stores	451	-\$1,154,296	\$6,919,303	\$18,425,734
General Merchandise Stores	452	\$5,482,738	\$1,954,236	\$136,459,891
Miscellaneous Store Retailers	453	\$535,471	\$4,449,121	\$10,035,897
Nonstore Retailers	454	-\$453,186	\$13,186,439	-\$58,971,859
Food Services & Drinking Places	722	-\$6,689,024	\$21,673,022	\$87,441,833

Source: Dun & Bradstreet via ESRI BAO, and MAPC

As demonstrated in Table 26, there is limited opportunity for new retail that can be supported solely by residents currently residing within the local trade area – households within ½-mile of the Town Common. However, there is significant opportunity across all retail sectors within both the primary and secondary trade areas. Several of these retail types typically do not locate in a walkable downtown or town center environment. For example, motor vehicle & parts dealers often locate along auto-oriented commercial corridors where there are large parcels for parking/storage, as do large General Merchandise stores (e.g. Target, Macy’s, etc.), which typically locate in malls or strip mall environments. These would be more appropriate uses for areas further north on Main Street (e.g. Redstone Plaza), or elsewhere within the Secondary Trade Area. Thus, these and other retail sectors that typically locate in suburban, auto-oriented commercial areas were removed from the analysis for Town Center.

Table 27 provides a summary of opportunities (shaded areas with an X), or lack thereof, for Town Center-inclined retail sectors. Sectors that show opportunity across all three trade areas typically hold the greatest opportunity for more retail. Thus, opportunities can be categorized as Strong, Limited, or Minimal, as follows:

Table 27: Retail Opportunities: Urban Inclined Sectors

	NAICS	LOCAL TRADE AREA	PRIMARY TRADE AREA	SECONDARY TRADE AREA
		Town Center	5-minute Drive	10-minute Drive
<i>Furniture & Home Furnishings Stores</i>	442		X	X
<i>Electronics & Appliance Stores</i>	443	X	X	X
<i>Food & Beverage Stores</i>	445		X	X
<i>Health & Personal Care Stores</i>	446	X	X	X
<i>Clothing & Clothing Accessories</i>	448	X	X	X
<i>Sporting Goods, Hobby, Book, Music Stores</i>	451		X	X
<i>Miscellaneous Store Retailers</i>	453	X	X	X
<i>Food Services & Drinking Places</i>	722		X	X

Source: ESRI BAO and MAPC

Strong Opportunity

- Electronics
- Health & Personal Care Stores (does not include hair and nail salons)
- Clothing and Shoe Stores
- Miscellaneous Store Retailers (Used Merchandise, Gift Shops)
- Full and Limited-service Restaurants

Some Opportunity

- Hobby, Book and Music Stores
- Furniture and Home Furnishings (Home Goods more than Furniture)

Minimal or No Opportunity

- Food & Beverage Stores

Important to note, restaurants were included as a strong opportunity because there is a significant gap in both the Primary and Secondary Trade Areas of over \$21million and \$87 million, respectively. However, this data likely does not take into account the recent openings of several full- and limited-service restaurants in the Market Street at Lynnfield lifestyle center (e.g. Davio’s, FuGaKyu, Legal C Bar, Wagamama, Yard House, Panera Bread, Temazcal, etc.), which is located at the periphery of the Secondary Trade Area. These recent openings likely diminish some of the opportunity.

Potential Supportable Retail Square Footage

Next, the potential for new supportable square footage of retail space was estimated for Stoneham Town Center. It is important to note that the below analysis is not a prediction for what will occur in Stoneham Town Center, rather it is an estimate of retail space that could be supported based on the gap analysis figures, average sales per square foot of different store types, average store sizes in downtown areas, and an estimated spending capture within the Primary and Secondary Trade Areas.¹

Assumptions based on the different trade areas are below:

- **Primary Trade Area:** 10 percent of opportunity gap would be captured/spent in Town Center businesses. 90 percent would occur in other shopping areas – Redstone Plaza, nearby Downtowns (Melrose, Reading, etc.), and malls like Market Street at Lynnfield.
- **Secondary Trade Area:** 5% of opportunity gap would be captured/spent in Stoneham Town Center; 95% outside in other downtowns, and at other large retail centers (Market Street Lynnfield, Burlington Mall, and Square One Mall) as well as other commercial areas.

Table 28 provides a summary of the potential for new retail space for each of the two trade areas studied. Included for each is the potential supportable square feet, the number of potential establishments, and the types of retail most likely given the gaps identified. (For a more detailed look at the analysis, see Table A.X. in the Appendix.)

Table 28: Summary of Potential Supportable Retail by Square Feet and Number of Establishments

Trade Area	Supportable Square Footage	Total Establishments	Types
Primary Trade Area (5-minute drive)	45,600	10-12	5 small clothing/shoe stores (or 2-3 larger ones), full service restaurant, 2 limited service restaurants (cafes), home goods and gift shop, 1 hobby shop (music/books/electronics).
Secondary Trade Area (5-mile Radius)	15,750	4-5	2-3 full-service restaurants, 1 limited service restaurant (café), 1 furniture/home furnishings, 1 hobby (music/books)
ESTIMATED POTENTIAL	50,000 (total supportable sf – existing vacant sf, then rounded)	15 establishments (10 new storefronts)	Clothing/shoes, restaurants (limited and full svc), gift/hobby, home furnishings.

Source: ESRI BAO and MAPC

As highlighted in the above table, the potential exists to support up to 50,000 square feet of additional retail space in Stoneham Square based on spending and estimated capture rates within the trade areas. (This figure represents the total supportable square footage from the Primary and Secondary Trade Areas, minus the existing vacant square feet².)

Roughly 15 small establishments (1,000-3,000 sf) could potentially be supporter in approximately 10 new storefronts (5 new establishments could fill existing vacant spaces). In particular, there is an opportunity to

¹ The local ½-mile square footage was not selected for analysis of potential square footage, as the area is included within the Primary Trade Area.

² Five retail vacancies were identified including in new construction/redevelopment projects. At an average of 2,000sf, an estimated 10,000sf of ground floor retail space is currently available within Town Square.

add anywhere from 2-5 clothing/shoe stores (depending on the size and products offerings), 2-3 home furnishings and goods stores, 1-2 miscellaneous retailers such as gift shops and or consignment/used merchandise. Residents from the 5-minute drive, Primary Trade Area would be the main customers for these establishments. In addition, given the significant leakage in restaurant spending within the Primary and Secondary Trade Area, 4-5 full service restaurants could be supported (particularly casual, affordable bistros and gastro pubs, which are lacking) as could 2-3 café style outposts.

Again, it is important to note, that the above retail square footage and number of stores, is not a prediction of what will happen, it is what can potentially be supported by residents in the area. There are many additional factors that impact the decision to locate a new retail establishment in an area:

- availability and quality of the retail space
- size of the spaces depending on retail type
- store location – is it highly visible? (Retail needs high visibility)
- Foot traffic – the more the better
- Rents and terms
- Parking – Is it available nearby or within a short walk?
- Product or service price points
- Marketing
- Business plan and acumen
- Zoning and other regulatory obstacles
- Permitting and inspection processes
- Etc.

Thus, although the potential exists for more retail, based on the numbers, the amount captured may be less, particularly if spaces and locations are not conducive to a strong retail environment. However, given the high visibility along much of Main Street, visibility is not likely the main impediment to a stronger retail base. Thus, strategies to make the environment more appealing to customers will likely be needed. This will include marketing (to residents, but also to area businesses and their employees), wayfinding and store signage improvements, business attraction initiatives, more programming, and other public realm improvements.

D. Worker Retail Potential

Also key to the success of many retail districts is local workers, as their spending supports retail establishments. According to the International Council of Shopping Centers (ICSC)³, local office workers spend approximately \$100 dollars a week on food and convenience goods during the work week (during commutes to and from the office, or during the day - i.e. lunch).

There are over 4,000 workers employed within a 5-minute drive of Town Center. As shown in Table 29, if Stoneham Town Center businesses could capture a portion of weekly spending by half of the local workforce, and a tenth of those within a 5-minute drive – through marketing and/or new offerings – an estimated 5 establishments could be supported – mostly casual sit down restaurants or take-out or convenience retail. However, given the impression that many establishments are “getting by”, additional marketing to capture worker spending would not support 4 additional establishments, it would likely support and further strengthen business at existing or replacement establishments should current offerings close, as well as other opportunities identified in the gap analysis.

³ Goover, Joel, “New Retail Frontier: Lunchtime Shoppers,” International Council of Shopping Centers, June 2012.

Table 29: Worker Supported Retail

	Local Worker Spending		Potential Supportable Retail	
	# of workers (rounded)	Annual Spending (estimated)	Square footage retail	Number of supportable stores
Workers within 1/2-mile (50%)	2,000	\$1,900,000	6,475	3.5
Workers w/in Primary trade area workers (10%)	1,450	\$700,000	2,375	1.5
TOTALS	6,250	\$2.6 M	8,850	5

Assumptions:

- 50% Town Center (1/2-mile radius) worker capture. \$20/week spending per Town Center employee (1/2-mile), primarily on food and convenience.
- 5% Primary Trade Area workers (within 5-minute drive) spend 20% weekly spending in Town Center. \$10/week spending per Primary Trade Area employee (5-minute drive), primarily on food and convenience.

Summary

Based on the analysis of the various market conditions highlighted throughout this document, Stoneham's Town Center hold the potential to support additional residential and retail development. The residential could support up to 150 additional units of housing. Given changing housing preferences of the market segments most likely to reside in a walkable Town Center, multi-family and townhouse style units would be in greatest demand, with approximately 50% rental and 50% owner. To attract more residential, additional transportation options are likely needed to attract residents and support new investment. A more active, amenity rich area with a greater variety of retail and programming would also help to attract more residents to the area. Based on the analysis the potential exists for up to 50,000 sf of additional retail (12-15 new establishments) in the Town Center study area should it capture 10% of the retail gap for town-center inclined retail. The greatest opportunities would be for eating and drinking establishments, clothing stores, and specialty retailers (e.g. card/gift and home goods). Worker spending would also be needed to support existing and future retail potential. Thus, a more robust marketing strategy, combined with improvements to the public realm are needed to draw more residents and consumers to the area.



Stoneham Town Center Strategic Action Plan December 2014



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Thank you for the assistance and leadership of the following individuals:

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David Ragucci, Town Administrator

Stoneham Town Center Advisory Committee



Table of Contents

Acknowledgements	ii	Recent and Planned Investment	12
I. Planning Context	1	<i>Future Investments</i>	12
Historical Perspective	2	VI. Market Study Findings.....	13
Stoneham Center Today.....	2	Retail Market Potential	13
II. Current Conditions	2	Residential Market Potential	14
Population and Households.....	2	VII. Stakeholder Input	15
<i>Population: Existing and Projected</i>	2	A. Advisory Committee	15
<i>Household Characteristics</i>	3	B. Interviews.....	15
<i>Race and Ethnicity</i>	3	Strengths	15
<i>Income and Poverty</i>	4	Weaknesses	15
Industry and Employment.....	5	Opportunities.....	15
Stoneham Town Center Jobs	5	C. Transportation Workshop	15
III. Land Use & Zoning.....	6	(For a complete overview including results from the meeting, see	
Residential Uses.....	6	Appendix B.)D. Public Open House.....	16
Retail and Office Uses	7	VIII. Recommendations.....	20
Zoning	8	IX: Implementation Matrix	29
Central Business District (CBD)	8		
Business District.....	8	<i>Appendix A: Stoneham Market Analysis (separate document)</i>	
Residence B.....	8	<i>Appendix B: Public Open House Summary (separate document)</i>	
Parking Requirements	8		
Sign Requirements.....	8		
IV. Historic and Cultural Assets.....	9		
Historic Assets.....	9		
Cultural Assets	9		
V. Transportation	10		
Automobile Access.....	10		
Bus Service.....	10		
Pedestrian Environment	11		
Parking.....	11		
Bike facilities.....	11		

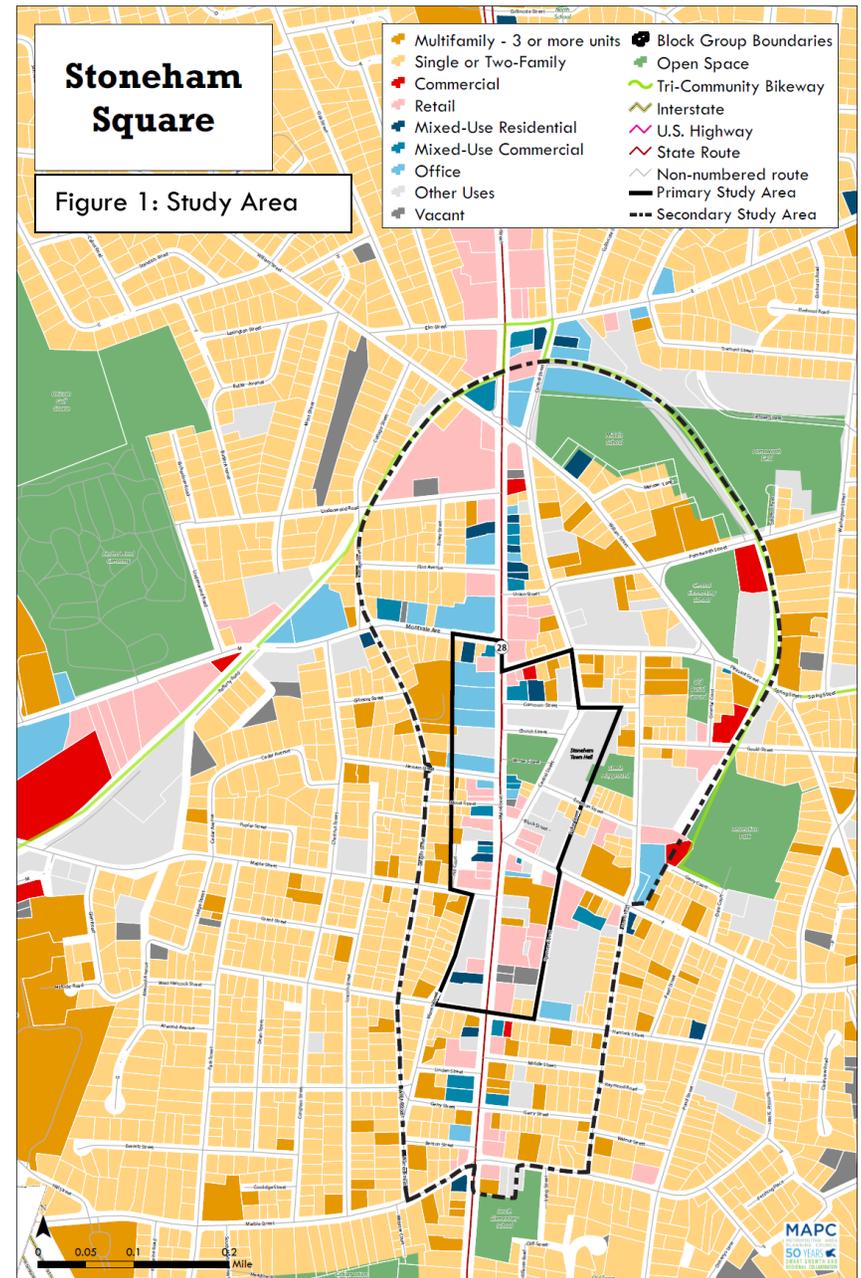
I. Planning Context

The purpose of the *Stoneham Town Center Strategic Action Plan* study is to identify a set of goals, strategies and actions to reinvigorate Stoneham Center and its surroundings and regain its place as the focal point of community life. The project included several phases. The first Phase involved an analysis of existing conditions including a review of demographic and socioeconomic conditions, existing land use and zoning and other criteria detailed in this report. A broad market study was then undertaken to identify the potential for supportable residential and retail development within the Town Center area. This analysis, combined with significant input received from the public at an Open House event on October 1, 2014 informed a series of recommendations highlighted in Section VIII of this document.

Location and Study Area

The Town of Stoneham, a mature inner-core suburb, is uniquely located north of Boston at the junction of Interstates 93 and 95, which provides residents with strong access to Boston and regional job centers, and companies a strategic location with strong auto-oriented transportation links.

Stoneham's Town Center area is the focus of this analysis. As shown in Figure 1, Stoneham Center is located along State Route 28 (Main Street). The study area includes Stoneham Square, the Town Common, primary entry corridors, and surrounding blocks. The primary study area (solid black line) includes all parcels along Main Street between Montvale Avenue to the north, Hancock Street to the South, Spencer and Fuller Streets to the east, and Warren Street/Hill Court to the West. A larger secondary study area (dotted black line) includes all parcels bounded by the proposed Tri-Community Bikeway right-of-way to the north, Wright Street to the west, Pine Street to the east, and Marble Street to the South. Essentially, these areas serve as the gateway corridors into the town center.



Historical Perspective

Stoneham residents take pride in their industrial history as the former “Shoe Town” during the 19th century. At its peak, local footwear manufacturers produced up to 380,000 pairs of shoes, one of the largest outputs in the county.

At the turn of the century, Stoneham saw a population boom as shoe manufacturing gave way to the pharmaceutical and automobile industries, both major employers in the town during the 1900s. However, with the construction of I-93 in the 1960s, Stoneham’s transformation into a residential suburb for many that work in Boston was complete. Since then, Town Center has seen its place as the center of community life fade, as the largest employers and retail located along highways and other auto corridors and residential development went to more auto-oriented suburban developments.

Stoneham Center Today

Stoneham Center remains the active civic center of the town, with Town Offices, the Post Office and the Library all located within a ¼-mile of each other; however, post-WWII suburbanization has drawn much of the area’s vibrancy away, with large auto-oriented shopping centers located just outside of the study area drawing businesses and consumers away from the center. Fortunately, recent investments have kick-started Stoneham Center’s transformation, including development of a new, picturesque Town Common, the adaptive reuse of older buildings into mixed use housing and retail, and construction of a new middle school nearby, as well as brand new mixed-use construction. Despite these investments, and although Stoneham Center retains numerous businesses, including restaurants, professional services, and notably, a professional theatre, foot traffic tends to be light except during special events and before and after theatre performances. So, although the area aspires to have the pulse of a downtown, it is not yet the destination it could be. Instead, and as indicated during interviews for this project, Stoneham Center for many is a place they pass through in their cars. Thus, the Town

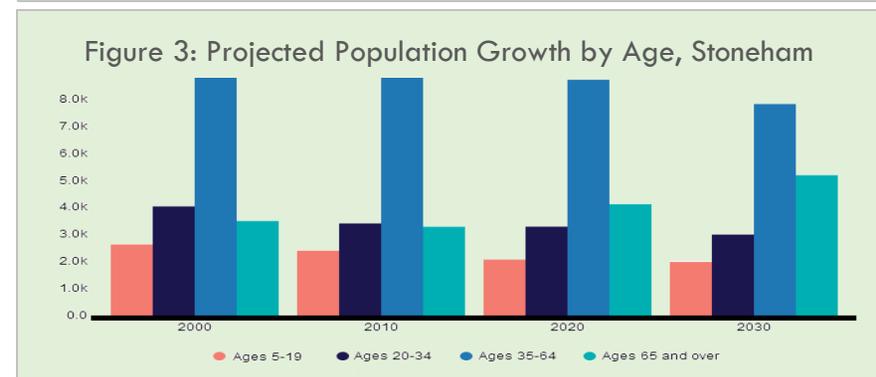
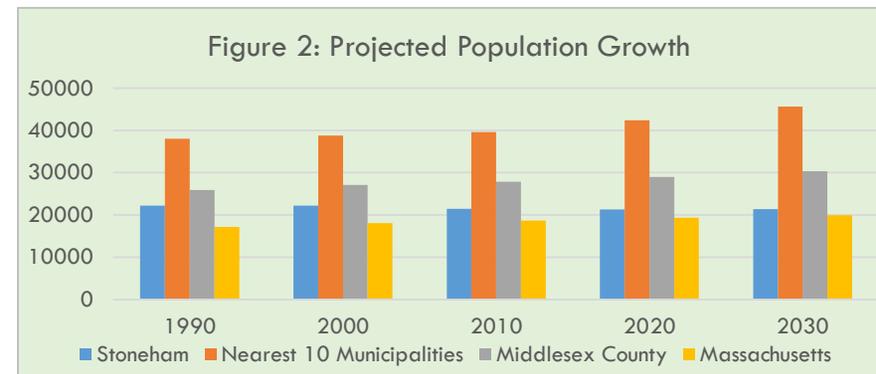
must increase efforts to undergo the greater transformation desired by many to fully recapture its place as the center of the community.

II. Current Conditions

Population and Households

Population: Existing and Projected

Stoneham Center¹ has just over 3,400 residents, accounting for approximately 16% of Stoneham’s 21,437 total residents as of the 2010 Census. Over the past twenty years, Stoneham’s population has grown slowly and has not experienced the robust growth seen in neighboring towns that have access to public transit or are close to major highways. MAPC’s *MetroFuture*² projections show that Stoneham’s overall population will remain stable over the next 15 years (Figure 2); however, the age



¹ Four Census block groups in the Stoneham Square area

² *MetroFuture* is MAPC’s 30-year long-range regional plan.

composition will change significantly. Seniors aged 65 or above will see the greatest increase - 60% by 2030, whereas younger residents will decrease (Figure 3). This change in age distribution will impact Stoneham's housing demand, amenities desired, and service costs. Attracting a younger workforce to live and work in the community will be critical to maintaining a balanced tax base in the town.

Household Characteristics

Stoneham Center is home to approximately 1,300 households, roughly 15% of Stoneham's total of close to 9,000. Although there has been a slight decrease in the number of households over the last decade, the number of households is projected to increase over the next 20 years according to MAPC's projections. (Table 1).

Like surrounding residential suburban communities, Stoneham has a high proportion of family households (65%); however, only 27% are families with children.. Additionally, and similar to regional and national trends, Stoneham's households are getting older and smaller: median age has increased and household size has decreased over the past 20 years. Stoneham and Stoneham Center are projected to see a significant increase in number of households headed by persons 65 and older over the next 20 years (Table 1).

The aging of the population will have a large impact on the housing stock in Stoneham Center. Many older households, including "empty nesters", are more likely to downsize to both reduce cost of living and eliminate the need to upkeep larger homes. They often prefer smaller units in walkable, amenity-rich environments typically found in mixed-use and/or multi-family buildings and environments like Stoneham Center. However, given the aging of the population, it is important for Stoneham Center to attract younger households, both singles and couples without children, as well as households with children. More residents with spending power are needed to support an active retail environment. Fortunately, housing preferences of younger people and seniors are very much aligned in today's market – both are more "urban-inclined" – with many preferring to live in multi-family structures. Therefore, creating an accessible, amenity rich, active environment will be attractive to both.

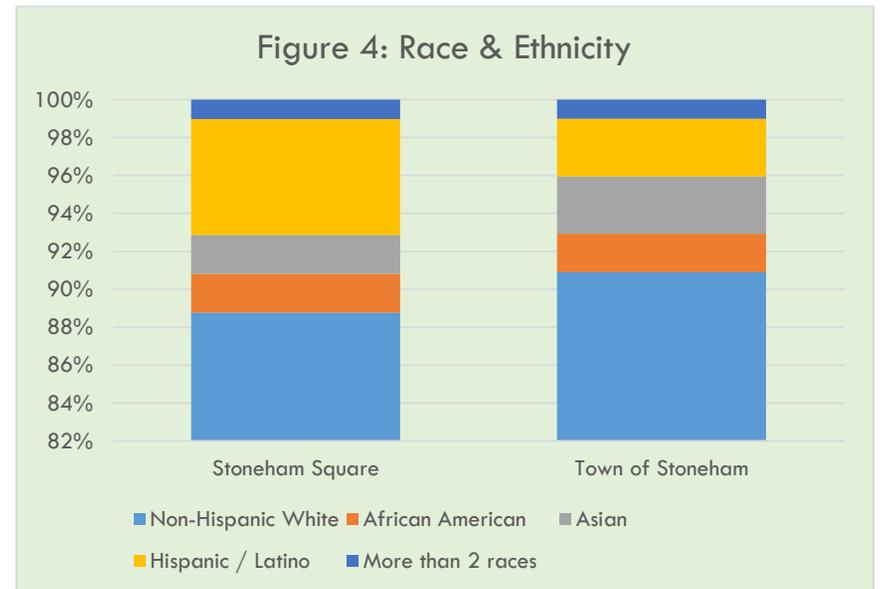
Table 1: Household Change by Age: 2010 - 2030

	2010	2020	2030	Change	%
Households	8,994	9,239	9,507	513	5.7%
Under 20	47	34	24	(23)	-49%
20 to 34	1,053	1,106	1,045	(8)	-1%
35 to 54	3,521	2,994	2,940	(581)	-17%
55 to 65	1,840	2,080	1,738	(102)	-6%
65+	2,533	3,025	3,760	1,227	48%

Source: US Census and MAPC (Stronger Region Projections)

Race and Ethnicity

The Town of Stoneham is a predominantly white community (90% in 2010). The Stoneham Center area has a slightly more diverse population, with more African-American than the Town and twice (6%) as many Latino/Hispanic population (Figure 4).



Income and Poverty

The median household income (MHI) in Stoneham Center (\$62,466) is approximately 15% lower than Stoneham overall (\$72,938). While income levels are comparable to surrounding towns like Medford and Woburn, they are significantly lower than its more affluent neighbors such as Winchester and Reading and increasingly, Melrose. And although MHI in Stoneham has increased over the past decade, incomes increased by a lower percentage compared to all but one of its surrounding communities between 2000 and 2012.

Table 2: Household Income, Stoneham and Surrounding Communities

	2000	2012	Percent Change
STONEHAM	57,240	\$72,938	27%
Malden	45,255	\$54,229	20%
Medford	52,510	\$72,773	39%
Melrose	62,985	\$86,264	37%
Reading	76,453	\$102,614	34%
Wakefield	64,811	\$85,810	32%
Winchester	93,585	\$128,199	37%
Woburn	55,094	\$72,434	31%

Source: US Census 2000 and ACS 2012

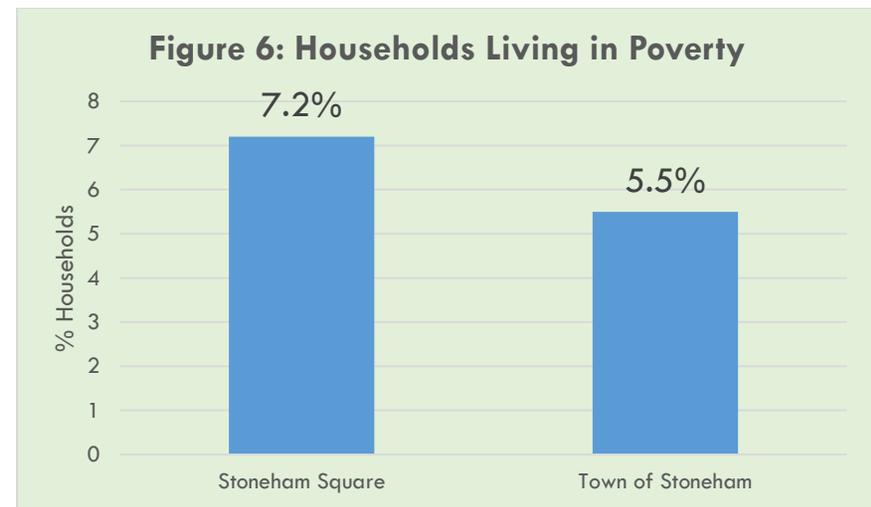
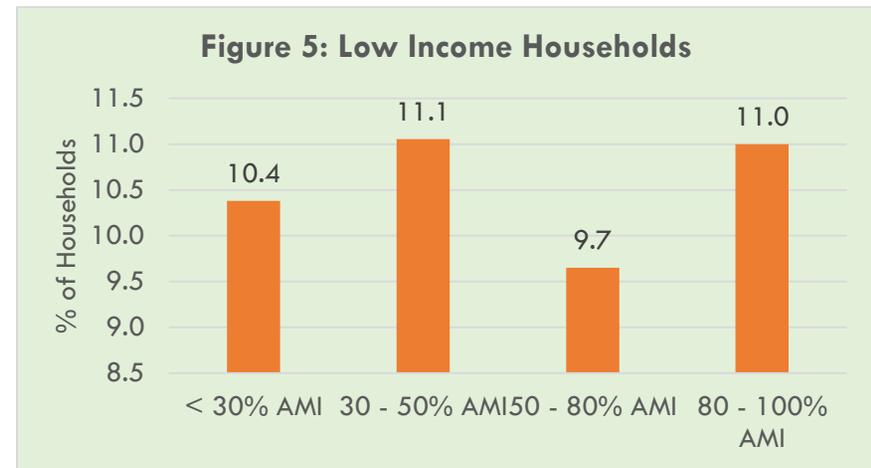
Stoneham's lower income is due in part to the large number of seniors, many of whom are likely living on a fixed income. When looking at household incomes by age of the householder, those over 65 years of age earn under \$37,000 annually. Median incomes for households between 25 and 64 years of age exceed \$85,000.

Table 3: Household Income by Age

Age	Median Income
15 to 24 years	\$54,583
25 to 44 years	\$85,293
45 to 64 years	\$88,530
65 years and over	\$36,827

Source: ACS 2012

Over a third of Stoneham's households are either low, very low, or extremely low income (Figure 5); more than half of this population is burdened by housing costs (spending 30% or more of their income on housing). Additionally, Stoneham Center has a higher number of households living in poverty than all of Stoneham - 7.2% vs. 5.5%, respectively. (Figure 6).



Industry and Employment

Businesses not only bring tax revenue to a community, they bring jobs for local residents, and they bring consumers (employees who reside out of the area, but commute in) to support local retail and services.

Stoneham Town Center Jobs

Stoneham Town Center is the historic center of business within the community. Although the area no longer is the primary location for business growth and employment within town, nearly 740 businesses within a half-mile of the Town Common still employ approximately 4,000 workers. When looking at workers within a 5-minute drive, the number increases to over 16,000. This represents a large pool of potential consumers.

Professional and Scientific Services, Retail Trade, and Health Care & Social Assistance establishments are the largest employers within the half-mile. Among the many retail jobs, clothing and accessories stores, and food and beverage stores have the highest number of employees; however, most are located outside of the Study Area at and around Redstone Plaza and along Montvale Avenue. The large number of professional and health care workers is attributed to the presence of office buildings and health care providers (e.g. Massachusetts Eye & Ear Infirmary), along Montvale Avenue from Main Street to I-93.

Table 4: Employment within ½-mile of Town Common

Industry	Businesses		Employees	
	#	%	#	%
Agriculture, Forestry, Fishing etc.	1	0.1%	3	0.1%
Mining	0	0.0%	0	0.0%
Utilities	0	0.0%	1	0.0%
Construction	68	9.2%	289	7.2%
Manufacturing	25	3.4%	221	5.5%
Wholesale Trade	22	3.0%	89	2.2%
Retail Trade	66	8.9%	465	11.6%
Transportation & Warehousing	13	1.8%	118	3.0%
Information	10	1.4%	187	4.7%
Finance & Insurance	38	5.1%	228	5.7%
Real Estate, Rental & Leasing	23	3.1%	72	1.8%
Professional, Scientific & Tech Svcs	101	13.7%	545	13.6%
Management of Companies & Enterprises	2	0.3%	3	0.1%
Administrative & Support & Waste Management & Remediation Services	76	10.3%	344	8.6%
Educational Services	16	2.2%	202	5.1%
Health Care & Social Assistance	62	8.4%	471	11.8%
Arts, Entertainment & Recreation	21	2.8%	94	2.4%
Accommodation & Food Services	31	4.2%	135	3.4%
Other Services (except Public Administration)	78	10.6%	335	8.4%
Public Administration	11	1.5%	194	4.9%
Unclassified Establishments	75	10.1%	0	0.0%
TOTAL	739	100.0%	3,997	100.0%

III. Land Use & Zoning

Land use in the Primary Study Area (Figure 7, solid black line) is supportive of a walkable Town Center Environment and includes retail establishments, professional and town offices, institutional uses, open space and mixed use multifamily residential.

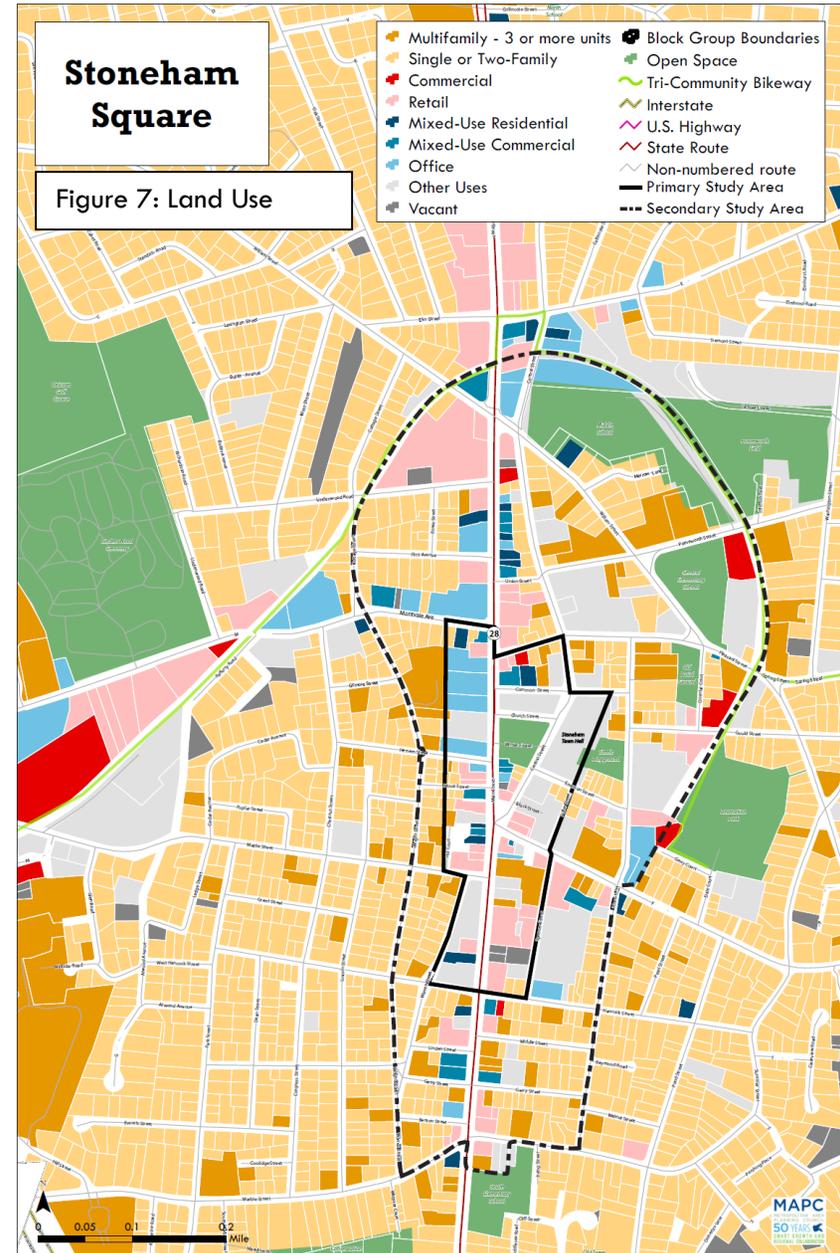
The Secondary Study Area (dotted line) includes auto oriented retail and office uses including Stop and Shop and Mass Eye and Ear, the newly renovated and expanded Stoneham Middle School, and single-, two- and multifamily (including townhouses) residential. Numerous underutilized parcels holding retail and light industrial uses are found south of Stoneham Square on parcels facing Main Street.

Residential Uses

Residential density is essential to a successful town center. Local residents form a crucial consumer base for local retail areas as they support establishments beyond the 9 to 5 workday, particularly on weekends. However, although residential uses are found on nearly 70% of parcels within the larger study area, most are lower density single or two-family residences along the periphery, as well as some smaller multifamily developments.

Within the Primary Study Area, there are a limited number of residential uses. Notably, there is the former Love’s building condominiums just south of Stoneham Square, and the new rental complex at 411 Main Street. Beyond these two developments, the only residential options include walk up rental units located on upper floors of older buildings. These units lack the amenities many downtown inclined populations prefer, and are not accessible to those unable to maneuver stairs easily.

Greater residential uses and densities would better support an active retail environment, while also provide housing for seniors and young professionals most likely to reside in Town Center.



Retail and Office Uses

A key component to a successful town center is a varied and balanced retail environment. A balanced environment is one that offers a mix of shopping and convenience retailers, restaurants, personal services (e.g. salons, spas) and professional services like accountants, attorneys, and doctor’s offices.

As mentioned previously, retail uses are found primarily along Main Street. To better understand the uses, MAPC staff surveyed the existing retail environment by walking the entire study area and documenting each store by type. In total, approximately 130 retail and professional office establishments were identified. This included a range of retail, service, and professional offices. Institutional uses (e.g. Town Hall, Library, etc.) were not counted.

The main finding is that the retail composition of the area is unbalanced (see Table 5), with an unusually high concentration of personal and professional services/offices, and a low supply of retail establishments like shoppers and convenience goods.

Table 5: Existing Retail Inventory by Type

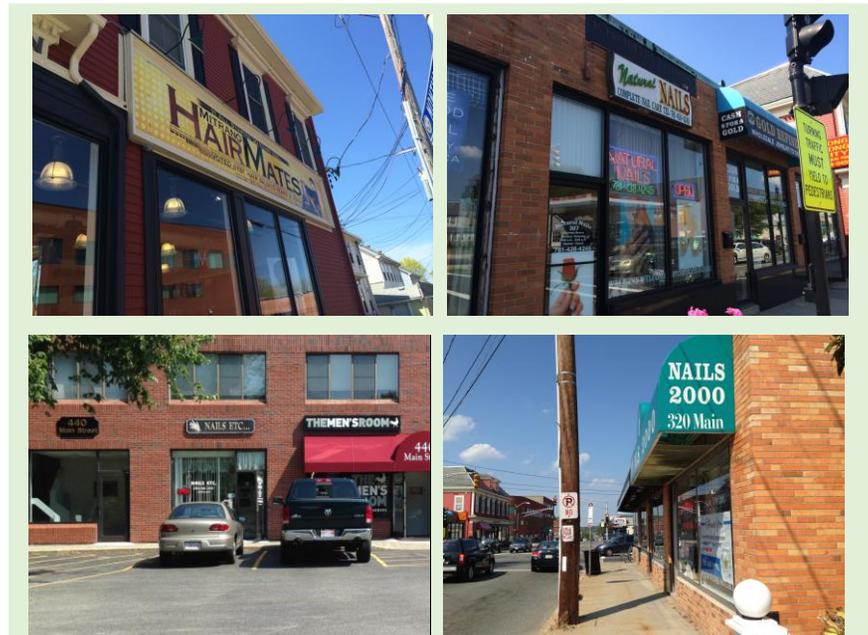
Type	# of Stores	% Town Center	Typical Neighborhood/Community Center Mix
Shoppers Goods	13	11%	30-40%
Convenience Goods	9	7%	20-30%
Food Service	19	16%	10-20%
Personal Services	46	42%	10-20%
Professional Services	25	20%	10%
Vacant	5	4%	5%

Source: MAPC

In particular, there is a very high concentration of Personal Services businesses – 46 stores, or 42% of the total inventory including numerous hair, nail, and other service establishments like dry cleaning. This is significantly higher than the 10-20% found in a typical neighborhood center. Professional Services/Offices (lawyers, accountants, etc.) made up 20% of the total, which is far higher than the typical 5% found in balanced centers. On the flip side, the number of shopping goods stores – places like

clothing stores, gift shops, shoe stores, books, etc. – is very low at 11% (30-40% would be typical), as are the number of convenience goods stores (food, health/pharmacies, health, beauty, etc.) 30-40% would be typical. Food service is currently within the typical range found in town centers; however, the inventory is heavy on limited service and take out options that offer similar choices – pizza, sandwiches, etc. And although vacancy is slightly lower, this may reflect the ability of businesses to continue operating due to lower rents for older spaces, and the overall non-competitive environment.

In summary, the area lacks the variety of retail options typically associated with destination shopping and dining environments.



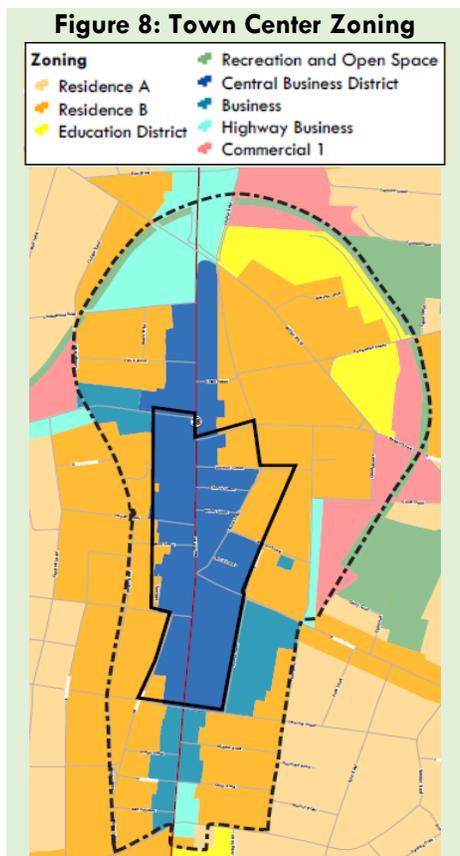
Stoneham Center retail is dominated by personal services including many hair and nail salons. More shopping and convenience retail would create a more balanced retail environment where consumers can accomplish many tasks in one central location.

Zoning

Generally speaking, current zoning allows for a mixed-use, amenity rich environment in and around Town Center.

Central Business District (CBD)

All parcels along Main Street within the Primary Study Area are included in the Central Business District, as are many north in the Secondary Study Area. The purpose of the district is to preserve and improve the character of Stoneham Square and its vicinity. The district allows for many by right uses typical in a Town Center including mixed use buildings with dwellings above the first floor, retail, restaurants and service establishments. Drive thrus are not allowed, and auto uses are only allowed by special permit.



Business District

Parcels along entry corridors (Montvale, Franklin and Main) are zoned primarily as Business. The purpose of the district is “to provide an area for retail sales and services and other uses associated with a Central Business District” and allows for retail, service and office uses, as well as minor automotive repair businesses. One of the most beneficial uses within proximity of a CBD is higher density residential; however, only 5-units are allowed and only in mixed-use situations. Given that these areas are easily walkable from Stoneham Square and the Common, they could be strong locations for multifamily-only or larger mixed-use residential to better

support local retail and to enliven the environment.

Residence B

Most of the Secondary Study Area is zoned “to provide residential areas of medium intensity with a variety of housing types.” This includes single- and two-family homes. However, multifamily is only allowed by Special Permit. Higher density residential surrounding downtown environments, as they provide a strong customer base for local merchants. Thus, allowing multifamily by right would be beneficial to the success of Town Center.

Parking Requirements

Parking requirements, even for a location with few public transportation alternatives, are somewhat high for a town center. For example, new medical and dental offices require 5 spaces per 1,000 sf, whereas other office uses and retail require approximately 3 spaces per 1,000 sf, which is more typical. However, given the character of Stoneham Town Center retail, the presence of several public parking lots, and several underutilized private lots (e.g. Salem 5 Bank and others), opportunities to make requirements flexible should be explored including shared parking strategies. Multifamily residential parking requirements are also high. The bylaw requires 2.1 spaces for every multifamily unit constructed. This is likely more than is needed, particularly for smaller housing units (e.g. studios and one-bedroom units).

High parking requirements may make development infeasible, particularly on smaller parcels. Tying parking requirements to number of bedrooms per unit should be explored. For example, studios would require 1 space, 1-bedroom units would require 1.5 spaces, and 2- and 3-bedroom units would require 2 spaces.

Sign Requirements

Sign requirements could be improved. Although the bylaw regulates many elements, it is also quite restrictive for a Town Center. Perpendicular “blade” signs (signs that protrude from the structure), which are common in walkable areas, and which provide points of interest to attract customers from shop to shop, are not allowed, nor are temporary A-frame signs. A review of the signage requirements should be undertaken to learn from other places what works and doesn’t work in a Town Center.

IV. Historic and Cultural Assets

Stoneham Center has a number of historic and cultural offerings. These amenities are very important to the Town Center economy as they attract (and could potentially attract more) visitors to the area, as well as residents interested in residing in a community with an established sense of place. More simply put, they enhance the overall environment.

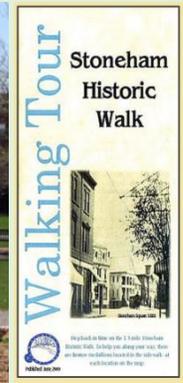
Historic Assets

Stoneham Center study is home to many of the town's greatest surviving historic resources. Stoneham's historical registry currently lists a dozen structures, including Town Hall, the Fire Station and the Library, all of which remain in use today. Stoneham Square is also home to several commercial structures built in the late 1800s during the height of the shoe industry. These structures, built during prosperous times, create a true Town Center environment, and help to create a strong sense of place. There are also numerous historical homes formerly owned by prominent businessmen and industrialists located in the surrounding residential districts. Homes include the Fuller House on Franklin Street, the Silas Dean House on Pine Street, and the Old Town House, Stoneham's first Town Hall (1826) on Central Street. John Hill's Shoe Factory (1858) on Main Street has been repurposed, first as Love's Furniture and now as "The Residences at Stoneham Square."

Cultural Assets

Cultural amenities within the Center include The Stoneham Theater, a gallery, as well as numerous events held in Stoneham Common, including summer concerts, Town Day and more. The greatest asset is the Stoneham Theatre, a professional theatre that hosts a variety of programs year round. In addition to 6 main stage shows annually, the theatre also has a concert series, a youth theatre program, the gallery curated by The Griffin Museum of Photography in Winchester, and holds special events throughout the year.

Although not in the study area, other cultural amenities nearby include the Stone Zoo, and numerous recreational facilities and walking trails in the Middlesex Fells Reservation.



Many of Stoneham Center's historic buildings remain in use including the Town Hall (1939), Fire House (1916) and Library (1904) and serve as the center of civic life. They also provide the area with a strong sense of place.

V. Transportation

A strong, efficient and reliable transportation network, including auto, bicycle, pedestrian and public transit amenities, is essential to the success of a Town Center and its economic opportunities. Transportation not only provides access to jobs, it also provides access to customers needed to support area businesses.

Automobile Access

Stoneham Square is primarily accessible by automobile along State Route 28, Main Street, which serves as a regional north/south route and is notably used as a cut-through when Interstates 93 and 95 are heavily congested. Montvale Avenue connects Main Street and the center to Interstate 93. Congestion in Town Center is a concern, particularly during peak hours. The most significant backups occur at the intersection of Montvale and Route 28, and the Stoneham Square intersection, where Main, Franklin and Central Streets converge. Congestion is in large part due to commuters cutting through from other communities such as Melrose Wakefield, Malden and Reading.

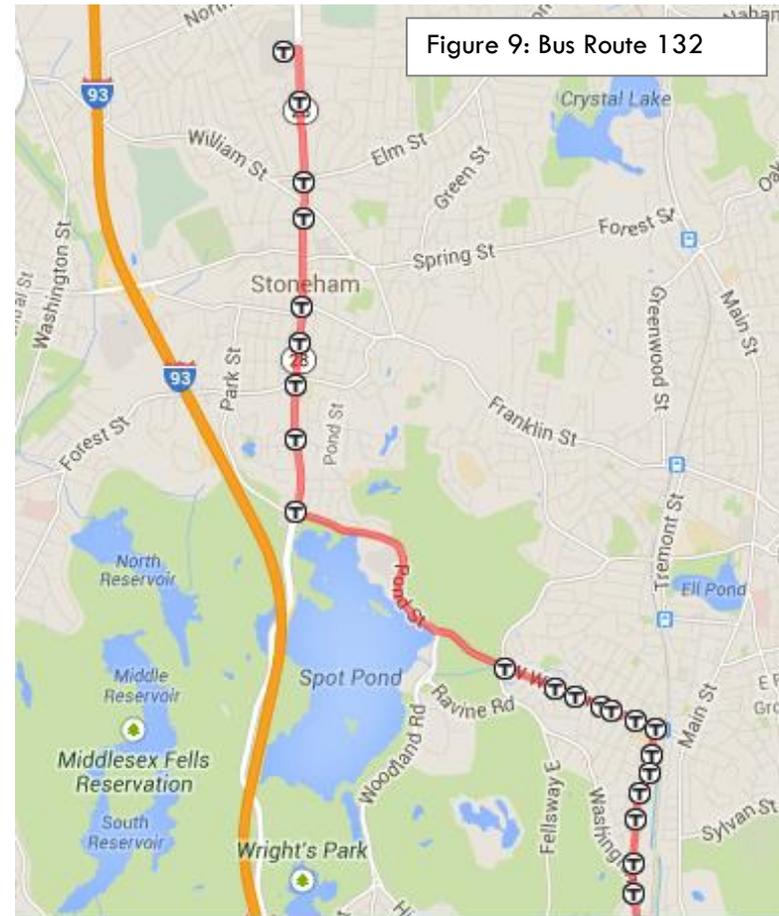
Bus Service

Stoneham Square is currently serviced by MBTA bus route 132, which runs between Redstone Shopping Center and the Malden Center, which connects to the Orange Line via Oak Grove Station. The bus makes several stops along Main Street / Route 28. Current inbound service begins at 6AM and ends at 7PM, which is a significant challenge for commuters and visitors, particularly those traveling outside of the 9 to 5 workday. Saturday inbound service is 8am to 7:30pm and there is no Sunday service.

A majority of local merchants have expressed the need to relocate existing bus stops that are obstructing storefronts and adding stops near job centers, as well as create an express bus service between Stoneham and Downtown Boston (Haymarket). More specifically, some businesses even stated that the unpredictable service and lack of a later transit option limits the potential to attract employees, in particular city dwellers who do not own a car. Further, bus service does not connect Town Center's residents or consumers to other amenities in Town, most notably there is no public transportation link to the Stone Zoo or other nearby recreational amenities.

Without a direct link, the opportunity to capture more business from these major regional attractions is lessened.

Although MBTA commuter rail stations are located approximately one mile from Town Square in Melrose with no bus service connecting these stations to Stoneham, public transit is not an option for many.



Bus Route 132 provides limited, local service to the Malden Center Orange line station, but does not stop at the Stone Zoo and other recreational amenities in the Fells.

Pedestrian Environment

The pedestrian environment varies widely within the study area. Within Stoneham Square, sidewalks are in good to excellent condition, with round curbs and brick paving along edges. Tree plantings and lamp posts are placed consistently along the sidewalk and feature barrels with potted plants maintained by the Stoneham High School Class of '82's beautification committee. Sidewalk width ranges between 8 and 16 feet, which can accommodate pedestrians, street furniture and outdoor dining (which is currently not allowed.). Cross walks in the Square are clearly striped and paved with brick, with accessible ramps at all intersections.

Interviews with local merchants revealed a unanimous consensus that additional improvements can be made to make Stoneham Square a more inviting place for pedestrians. Suggestions include adding hanging plants to lamp posts and changing the timing of crosswalk signals to coordinate with traffic signals, and more.

Outside of the Stoneham Square, pedestrian conditions are not as favorable. Large parking lots with curb cuts break up large segments of sidewalks, significant cracking and impediments were noticed, and street crossings at some intersections are confusing and dangerous (e.g. Montvale and Main Street, in front of the Post Office).

Parking

Stoneham Square has ample on and off-street parking. Many businesses along Main Street have parking lots in the front, side, or behind buildings. An additional 4 public parking lots can be found adjacent to Town Common, Town Hall, and the Fire Station, however, these lots are not well-marked by directional signage.

A large proportion of merchants interviewed stated that "the lack of parking" in Stoneham Square is perceived, not the reality, due in large part to the lack of clear signage, or unrealistic expectations to "always park in front of a particular shop." Merchants also noted that aggressive ticketing and 2-hour parking periods for designated on-street parking may be too short to encourage visitors to extend their stay downtown. The addition of short-term, 15 to 30 minute period parking spaces near take-out restaurants or businesses that command shorter visits may improve parking turnover rates downtown.

Bike facilities

No bicycle facilities current exist in the study areas. There are no bike lanes, sharrows (shared lane bicycle street markings), or dedicated bike paths. However, the proposed Tri-Community Greenway is scheduled to begin construction in spring 2015.

Recent and Planned Investment

Over the last decade, Stoneham Center has begun the process of transitioning back to the focal center of the community. This is most evident by the numerous investments that have occurred within the study area.

Public investments in the Town Center study area have brought a sense of place to the study area, particularly through the redevelopment of Stoneham's Town Common. Additional investment includes the new Stoneham Middle School located at the northernmost boundary of the study area.

Several private investments within the study area have also brought attention to the area. Most visibly, residential construction including "The Residences at Stoneham Square," a 47-unit condominium development at the former Love's Furniture building (2007); and the under construction 411 Main Street, a mixed use project with retail and 25 one- and two-bedroom rental units; are bringing more residents to the center. Additionally, new townhouse development on Pomeworth Street (2007) and duplexes on Emerson and Warren Streets (2008) have brought more people within walking distance.

Private commercial development is also bringing more retail and offices to the area. This includes the recent redevelopment of the Heritage Building (across from Town Common) into a mixed-use retail and office complex. The building is now home to the Chamber of Commerce, a yoga studio, with additional ground floor retailers are expected in the coming months. Other investment within the study area include renovation of a 2-story medical office in 2011, a new restaurant and improvements to existing establishments.

Future Investments

No additional mixed-use or commercial development is currently planned within the study area; however, plans are in the works to begin construction of the Tri-County Greenway. The bikeway, which will originate from Stoneham's Recreation Park will extend through Woburn and Winchester using existing railroad right of way is expected to obtain approximately \$5.5 million in state and federal funds and begin construction beginning in 2015.



Recent investment is helping to reestablish Town Center as the focal point for community interaction.

Recent Public Investments

- **Town Common:** The Stoneham Town common was constructed in 2007, and is home to Town Day, the holiday tree lighting, summer concerts and more.
- **Stoneham Middle School:** Town Meeting on February 7, 2012 approved \$40.5M for a new middle school. Construction began in the summer of 2012 and opened in Fall 2014. The Massachusetts School Building Authority will reimburse 57.5% of \$22M of the project cost.

Recent Private Investments:

- **The Heritage Building** (2013 -2014): This retail/office rehabilitation project by Middlesex Investment Partners included interior and façade improvements and the addition of an outdoor patio area.
- **The Petrillo Building** (2008-2014): This mixed-use project includes 25 one to two-bed apartment units and ground level retail.
- **Former Love's Building** (2007): This mixed-use residential condominium includes 47 units and ground level commercial space.

VI. Market Study Findings

To develop a realistic, achievable, and implementable plan for Stoneham Town Center, it is crucial to understand the how much development and types of commercial investment the marketplace can potentially support.

As part of this project, a general market analysis was conducted to identify the potential demand for residential, retail, and to a lesser extent, office development within Stoneham Center Study Area. It is important to note that findings from market studies offer a glimpse of what could potentially be supported within an area based on current data, trends and assumptions made as part of the analysis. Market studies do not predict what will be developed. Thus, the purpose is to help communities to better understand the level of investment that may be possible, and to develop strategies to attract development and new business activity, market available retail and office space, identify opportunity sites that hold potential for redevelopment, and inform regulatory changes that may be needed to achieve desired results.

This section will highlight the major findings from the market study, including demand estimates for residential units, as well as square footage estimates and types of supportable retail. (The full market analysis is included as Appendix A.)

Retail Market Potential

To estimate the potential for new retail space in Stoneham Town Center, MAPC performed two analyses: a retail gap analysis of trade area residents, and a retail demand analysis of local workers.

MAPC conducted the retail gap analysis first to identify the potential for additional retail within the trade area. For this project, the trade area – the area where a retail hub can expect to attract the majority of its consumers – included all households and their spending within a 5-minute or 10-minute drive of Town Center.

In summary, and as highlighted in the following table, the potential exists for significantly more retail in Stoneham Town Center - up to 50,000 sf of additional retail within 10-15 establishments. The greatest opportunity is for clothing stores, shoe stores, restaurants, and gift/hobby/home furnishings stores. These are the types of retailers identified as lacking in

the analysis of the existing retail environment, thus there is little competition in place should new establishments choose to locate in Stoneham.

Table 6: Summary of Potential Supportable Retail by Square Feet and Number of Establishments

Trade Area	Supportable Square Footage	Total Establishments	Types
Primary Trade Area (5-minute drive)	45,600	10-12	5 small clothing/shoe stores (or 2-3 larger ones), full service restaurant, 2 limited service restaurants (cafes), home goods and gift shop, 1 hobby shop (music/books/electronics)
Secondary Trade Area (5-mile Radius)	15,750	4-5	2-3 full-service restaurants, 1 limited service restaurant (café), 1 furniture/home furnishings, 1 hobby (music/books)
ESTIMATED POTENTIAL	50,000 (total supportable sf – existing vacant sf, then rounded)	15 establishments (10 new storefronts)	Clothing/shoes, restaurants (limited and full svc), gift/hobby, home furnishings.

However, despite the potential, it is important to note again that this is not a prediction of what will open in the Town Center, rather it is what may be possible. There are many factors that go into whether or not a business decides to locate in an area, including the availability and quality of the space, the size of the space, its location and visibility (which is crucial for retail), foot and auto traffic, parking availability and other considerations. Given that many existing spaces are older, it may be difficult to attract retailers to some locations. Newer spaces in strong locations with high

visibility (e.g. Stoneham Square, near Town Common and public parking) will be more likely to attract new tenants if lease terms and costs are favorable.

Worker Retail Potential

Next, MAPC analyzed the potential of local workers to support area retail. Studies show that workers spend approximately \$100 per week on food and convenience goods near their office or place of work. Therefore, based on assumptions outlined in the more detailed market study (Appendix A), the 16,000 workers within a 5-minute drive of Town Center could support up to 5 establishments if a portion of their spending can be captured. In particular, take-out and sit down restaurants, as well as delis and convenience retail.

Residential Market Potential

For Stoneham’s Town Center to become reenergized – to grow and prosper – it is important to look for ways to offer more housing within the study area, particularly the types of units the market demands.

The purpose of the residential analysis was to identify if the potential exists for additional development within the Town Center, and if so, how many units could be supported, what type of units are in demand, and the households most likely to reside in them.

Demographic shifts highlighted earlier in this report, and changing housing preferences will likely drive demand in Stoneham Center. Specifically, with an aging of the population – locally and regionally – and with younger people staying single longer, and families having fewer children, household sizes are getting smaller. Thus, the demand for and preference for smaller housing units including multifamily and town homes with amenities in a walkable environment has increased. Stoneham Town Center provides the type of environment attractive to these demographics and residential unit types.

To estimate future demand, MAPC used its Stronger Region Forecasts to estimate the number of housing units needed over the next 5-7 years.

Table 7: Projected Household Change, 2012 - 2030

	2012 Total	2020 SR	Total Unit Demand	2030 SR	Total Unit Demand
Households	9,050	9,239	189	9,507	457
Town Center Capture (33%)	n/a	n/a	63	n/a	152
<i>Remainder of Stoneham (66%)</i>	<i>n/a</i>	<i>n/a</i>	<i>126</i>	<i>n/a</i>	<i>304</i>

Based on MAPC’s household projections, at least 189 new households are expected in Stoneham by 2020, and over 450 by 2030. Given the aging of Stoneham’s households, the increase of older renters coupled with a decrease in younger renters, new unit demand is for multifamily development in locations accessible to retail and services as well as transit. Thus, given changing preferences, approximately one-third of total demand could be supported in the Town Center area. The remainder would be built in other areas in town, particularly areas closest to highway infrastructure (e.g. the proposed Fallon Road project³), and commuter options (e.g. near Melrose or Wakefield town lines, such as the proposed 300-unit Weiss Farm 40B project). Additionally, given the growing percentage of renters over the last decade, approximately half of all unit demand will be for rental apartments – predominantly one- and two-bedroom units.

Amenities including elevator access, fitness rooms and other common space will make new units more competitive with other amenity rich areas that offer transit. Further should the Town Center offer a greater range of activities and amenities – particularly an improved retail landscape and especially public transit options (express bus, or commuter rail feeder service) the same multifamily units that are typically attractive to older residents could attract younger households, particularly those who work along Interstates 95 and 93, and who wish to be closer to work. Further, based on current sales prices for newer condominiums, new construction could likely be supported in Stoneham Center, particularly given the lack of condominiums available for sale within the region.

³ For purposes of this analysis, the Fallon Road 300-unit residential project to the west of I-93, and disconnected from much of Stoneham, was considered an outlier, and units were not included in future demand projections.

Finally, more than 40% of Stoneham households are cost burdened, meaning they spend over 30% of their income on housing costs. Therefore, deed-restricted affordable units should be required in any new development.

VII. Stakeholder Input

Throughout the Stoneham Town Center Vision & Action Plan process, input was sought from various stakeholders. This included input from the project Advisory Group, local merchants and business owners, developers, and the public.

A. Advisory Committee

A 15 member project Advisory Committee was formed at the outset of the project. The committee was organized by the Town Administrator, and included a broad range of interests from local businesses, representatives from Town departments, boards and committees, the Stoneham Theatre, Stone Zoo, residents and more. The Advisory Committee worked closely with MAPC throughout the process, provided feedback, engaged citizens, volunteered at public events, and provided feedback on the draft document.



The Stoneham Town Center Advisory Committee worked with Town Staff and MAPC throughout the process to review findings, reach out to community members, and to facilitate the Public Open House.

B. Interviews

Over a dozen interviews were conducted with stakeholders as part of the planning process.

Strengths

Among the strengths identified, many felt the area had “good bones” – it feels like a Town Center. It’s location near the interchange of Routes 93 and 95 was also seen as an advantage. Nearby amenities like the Stone Zoo as well as events like Town Day also bring or could potentially bring more people to the square. The Stoneham Theater was mentioned by all as a major asset and draw. The diversity of restaurants – including Italian, Indian, Asian and other options – were also a major plus.

Weaknesses

Several weaknesses were also identified. Many were concerned about traffic and the limited public transportation options. Many felt the area lacked a diversity of retail options and that there was little to do after 5pm beyond eating or the theater. Others felt the area looked dated and could be spruced up through façade improvement, improved signage and other improvements to the public realm. Others felt the town could be more business friendly by updating ordinances to allow for things like outdoor dining (currently not allowed), and improved signage.

Opportunities

Those interviewed also identified numerous opportunities for Town Center. This included the opportunity to attract more residents, to capture more pass through traffic to support area businesses, and better, coordinated marketing efforts to bring attention to the Center and its businesses.

C. Transportation Workshop

A workshop was held on July 30 2014 to discuss transportation challenges and potential solutions, including those specific to the Town Center. The meeting, which was jointly held as part of a parallel planning process through MAPC’s Transportation Department, attracted approximately 30 participants, including many members of the Town Center Plan Advisory Group. Additional stakeholders in attendance included downtown business owners, Hallmark Health, social service organizations, and representatives of the Stoneham Housing Authority, Greenway Committee and Open Space and Recreation Committee. After a brief overview presentation participants rotated through breakout groups focused on transit, bicycling, or walking. Traffic congestion and lack of transit alternatives – the area is underserved by transit compared to surrounding towns - were identified as key issues facing Town Center. This not only limits commuter options for

residents and their access to jobs, it limits the consumer base for local merchants, and hurts local businesses looking to attract qualified workers from areas outside of Stoneham. For example, with few transit options, the Stoneham Theater has difficulty attracting actors from Boston. Additionally, pedestrian safety and the need to reduce fatalities also surfaced as a major concern during discussions.



Image: Transportation Workshop

At the meeting, participants identified the following needs:

- Improvements to existing MBTA bus routes, including greater frequency, longer operating hours (after 7pm) and Sunday service.
- Desire for new transit service that could include:
 - A new express bus route to Boston
 - Extending Bus Route 131, which currently stops at the Melrose town line on Franklin Street, into Stoneham Town Square.
 - An east-west shuttle bus along the Montvale Ave/Main Street/Franklin Avenue corridor connecting to commuter rail and express bus services in Melrose and Woburn.
- Improved pedestrian crossings in Stoneham Center including improved light timings in Stoneham Square, safety improvements near the Post Office and at Montvale Avenue/Main Street.
- Expanded bicycle facilities including the Tri-Town bike path, and connections (bike lanes, sharrows, etc.) to recreational amenities

(For a complete overview including results from the meeting, see Appendix B.)

D. Public Open House

The Town of Stoneham, Stoneham Town Center Advisory Committee and the Metropolitan Area Planning Council (MAPC) held an Open House public meeting on October 1, 2014 to engage the larger Stoneham community and receive input for this vision and action plan. More than 80 people attended and provided many thoughts, opinions and guidance about the future of Stoneham’s Town Center.

A complete summary of the meeting is provided as Appendix B for review. However, key takeaways from the evening were that Stoneham has a very engaged citizenry committed to improving the Town Center area. Specifically, there was widespread support for numerous improvements and amenities within the Town Center including a greater variety of shops, restaurants and activities; the desire for more attractive signage and streetscapes; the need for a comprehensive marketing strategy or “brand” to create buzz and draw more people to the area to live and to shop (both locals and from surrounding towns); more public transportation options to make the area more accessible and convenient; and more activities for both adults and children. The desire for a realistic, achievable set of strategies to improve and energize the area was also expressed.

The meeting featured several “stations” where the public was able to offer input into the process. A few key findings from the input stations are below.

Stoneham Strengths, Challenges and Opportunities

Attendees at this engagements station were asked to state what they liked most about Stoneham’s Town Center (Strengths); what they liked least (Weaknesses); and what they felt would improve the area most (Opportunities). Highlights include:

Strengths

- Stoneham Theatre (most common answer)
- Location near Interstates 93 and 95, and proximity to Boston
- Good restaurants.
- People
- Town Common and events

Weaknesses

- Area lacks amenities beyond theater. Not enough to do downtown – for adults or children. No nightlife.
- Building facades/streetscapes look dated and tired.
- Traffic
- Not enough public transportation
- Not many shopping options – need more.

Opportunities

- A greater variety of shopping options.
- More public transportation options – local, express and connector buses.
- Additional restaurants – for families and for young professionals.
- Signage and streetscape improvements to make the area more visually appealing.
- Improvements to the Common – physical and programmatic. (e.g. fountains, ice skating, more events)



At the first two engagement stations of the October Public Open House, meeting participants were presented with information about the project, then stated what they felt were the area's greatest strengths, weaknesses and opportunities.

Station: Priorities

After listening to a presentation highlighting existing conditions and market opportunities within the Town Center, attendees were asked to review a dozen draft priorities for the plan to address to improve the Town Center area. Each participant picked their top four.

Based on the results, participants felt that improvements to streetscapes and the public realm, more restaurants and cafes, a greater variety of retail options, and more public transportation options should be prioritized to improve the Town Center.

Other important strategies included the need for a comprehensive marketing strategy to attract more customers to Town Center businesses, as well as more events programming, and recreational options. Low on the list was the need for additional housing, pedestrian improvements, and bike amenities and connections from other areas of town.



Top priorities identified by Open House attendees included:

- 1) Streetscape and public realm improvements.
- 2) More public transportation options.
- 3) More restaurants and cafes.
- 4) A greater variety of retail options.

Station: Visual Preference

At the Visual Preference engagement station, participants create visual preference collages representing potential development, amenities and activities they would like to see in Stoneham Town Center.

Participants perused hundreds of images depicting different building styles and typologies, from multi-story mixed-use buildings to single family homes to commercial strip mall development, as well as recreational and programming activities including restaurants, active streetscapes, art and music festivals and more.

Many participants indicated the need for a more cohesive built environment within the Town Center area. Although not stated as a priority in the previous exercise, many selected images depicting multi-story, mixed-use structures (3-4 stories) with residential above. More specifically, they wanted to see a “nice downtown look” where the “scale is human” and the “mixed use with retail at street level” have “quaint New England style exteriors” including “traditional brick.” Many images were selected more than once. In terms of amenities, the greatest priorities included the desire for more and “unique dining destinations: with outdoor seating, more “hip nightlife” options, and additional programming, including movies and ice skating in the Common.



The final engagement station allowed participants to identify building types, as well as activities and amenities they most wanted to see in Town Center.

Visual Preference Image Selections and Direct Quotes



"Scale is human"
 "Mixed streetscape – not just a place to drive through.
 Mixed building appearance."



"Clean, colonial."
 "Nice looking area to shops and live above."



"Draw diverse shopping experience."
 "Unique shops."



"Draw – nightlife."
 "Good nightlife activity. Robust exciting upscale food and drink. Good socializing environment."



"Friendly, lively."
 "Outdoor seating. Walkable square with something worth walking to."



"Place for people to congregate and meet."
 "Attractive city square."



"This looks super fun. I want a beer and a brush!"
 "Personal growth, education, fun adult activities – always have to go to another town."



"Farmers market."
 "Farmer's market, CSA pick up brings community together."



"Modern, clean, feels younger. Mix of retail."
 "Attractive storefronts. Trees enhance the beauty."



"Colonial structures befitting the town."
 "Looks doable and realistic reach for Stoneham."



"Health. Outdoor rink on the Common."
 "Recreation on the Square – family oriented."



"Attractive outdoor dining."
 "Café and casual restaurant outdoor seating."

VIII. Recommendations

The following recommendations are presented in two parts. Part A is a narrative highlighting the goals, strategies, and actions to further enhance and re-energize the larger Stoneham Town Center areas. Part B (TO BE COMPLETED AFTER PUBLIC REVIEW) is an implementation matrix that provides suggestions for who is responsible for each strategy. This could include a Town department or committee, a non-profit organization, a private entity, or others. The matrix also identifies when each should be accomplished – short, medium, long-term – and the potential resources need to achieve the strategy (e.g. General fund, grants, staff time, etc.)

Goal 1: Build organizational capacity in Stoneham's Town Center to advocate for continued revitalization and stronger growth.

STRATEGIES

1.A. Hold Town Center specific networking events to improve interaction between local businesses, residents and potential investors.

Networking events are crucial to the success of local business districts. They provide local business owners an avenue to build partnerships, discuss concerns about and opportunities for their business, build a larger clientele, and identify larger issues to be addressed to better the business environment/climate.

Actions:

- **FIRST STEP: Create a database of all existing business owners.**
- **Hold Town Center specific networking events.**

1.B. Building on momentum from this project, form an official Stoneham Town Center Neighborhood Association to implement this plan, advocate for and make improvements to the town center, and serve as a booster organization for the Town Center.

Membership for any neighborhood association should include diverse perspectives including business owners, local residents and workers. The

neighborhood association would be charged with advocating for neighborhood improvements (both in Town Center and surrounding residential areas), developing neighborhood goals and strategies to achieve desired results, organizing neighborhood activities and events specifically for area residents, and more. A neighborhood association often includes a mixture of volunteers including homeowners, renters, business owners, institutional representatives and other local organizations.

Actions:

- **FIRST STEP: Identify and recruit additional key stakeholders beyond the current plan Advisory Committee to ensure broad range of interests and perspectives.**

The Advisory Committee should meet after completion of this plan, discuss a path forward, identify priorities it wishes to tackle, and recruit additional membership to broadly reflect the larger Town Center community.

1.C. Create a Downtown subgroup of the Chamber, and eventually a Downtown Merchants Association, tasked specifically with promoting Town Center businesses, events and programming.

Many Town Center merchants are members of the Stoneham Chamber of Commerce, therefore the Chamber is familiar with merchant needs and resources available to promote these businesses. To focus specifically on the needs of downtown business interests, a Town Center subgroup of the Chamber should act as the initial organization to coordinate and promote events and activities specific to the area. Once activity and participation grows, a more formal Merchants Association should be formed to take on a larger role. Merchants Associations in other communities have successfully promoted and increased business activity. Many create downtown websites highlighting member businesses and promotions, hold regular events like First Fridays and/or Holiday Strolls, etc. Funding for these organizations is primarily derived from membership fees, which include advertising, and other benefits, but also from fundraising events and activities. Merchant Associations are typically comprised only of local business owners and their employees.

Actions:

- **FIRST STEP: Convene Town Center merchants to identify interest in forming a subgroup of the Chamber.**
- **Establish the Chamber subgroup and create a workplan.**
- **Upon establishment of a Merchants Association, create a work plan (tasks, priorities), including funding structure, for the organization.**

Goal 2: A more inviting, attractive and easily navigable public realm to increase awareness of Stoneham Town Center and its existing (and future) amenities.

STRATEGIES

2.A. Create a regulatory environment that encourages a more attractive public realm desired by the larger community.

Participants at the public open house, and many interviewed, stressed the need to improve the overall appearance of Stoneham Town Center. Many felt it was a primary reason that Stoneham Town Center lacks “a pulse.” Landscaping, signage, building façade upgrades and other improvements to improve the overall look of Town Center and its would help to attract more businesses, customers and residents.

Actions:

- **FIRST STEP: Develop and adopt revised signage standards into the zoning bylaw specific to and appropriate for a town center.**
Standards should allow for perpendicular “blade” signage (protruding from buildings) to provide greater visibility, specific design elements to create cohesion in the center, and temporary signage (through special permit) such as A-frames to better attract customers.
- **Develop a wayfinding plan to guide motorists (but also bicyclists and pedestrians) to Town Center services and amenities.**
Stoneham Town Center is not clearly identified to motorists, nor are its many amenities or parking. A wayfinding signage plan, including Gateway signage from the north, south, east and west, that clearly indicates downtown and its attractions (e.g. Town

Common, Stoneham Theatre) and amenities, in particular public parking would help to make the area more navigable to help capture pass through traffic, and point visitors to key attractions like restaurants, the Stoneham Theatre, etc. Branding should be incorporated into any wayfinding plan.

- **Identify funding (town, grant or other) to implement wayfinding plan.**
- **Consider adopting a set of design guidelines to accompany Central Business District Zoning to encourage the building design desired by participants at the public meeting.**
Many at the public meeting wanted to preserve a “New England” character, with materials such as brick or clapboard siding, an active retail ground floor with large windows, plantings, etc. A set of recommended guidelines would encourage strong design by informing developers during the earliest stages of each project.
- **Continue to fund the recently created façade improvement program to assist local businesses with the appearance of the establishment to attract more customers and enhance the larger environment.**

Goal 3: An energized Town Center with greater retail, entertainment and service options.

A key priority of area stakeholders was the desire to attract a more diversified mix of retail and entertainment amenities to the Town Center area.

STRATEGIES

3.A. Target key retail opportunities to locate in Stoneham Center.

The retail market analysis identified several retail sectors that could potentially be supported within Stoneham Town Center including clothing, shoe, home goods and gift stores.

Actions:

- **FIRST STEP: Identify and create a list/spreadsheet of establishments in other downtowns that may be interested in opening a second or third location, and recruit them to Stoneham Town Center.**
The Town Planner working with the Chamber of Commerce and other stakeholders should identify establishments in other communities and then use the market analysis, and other materials,

to recruit establishments to available spaces in Town Center. Priorities should include clothing stores, shoe stores (which also builds on Stoneham's history), specialty gifts and restaurants.

- **Develop a database of available retail spaces.** (See Goal 3 for more.)
- **Work with current owners of Town Center establishments interested in opening another shop or restaurant to identify potential spacesm connect them to resources (training, funding), etc.**
- **Look to attract additional downtown anchor establishments that will draw larger numbers of people to Town Center during the day and evening to increase foot traffic in and support smaller establishments nearby.**

Although the Stoneham Theatre is a strong evening anchor, the area lacks a “draw” during the day beyond civic uses. Anchor establishments such as high traffic retail or restaurant uses (e.g. large cafes, pharmacies), public or private facilities (e.g. private fitness facilities or YMCAs), or other institutional would help to draw more customers to Town Center.

3.B. Create a more exciting environment by developing and/or attracting additional programming and cultural activities to Stoneham Square.

Throughout the planning process, many stated that beyond the Stoneham Theatre (“a huge amenity”), and a few restaurants, there was little to do in the Town Center – for all ages.

Actions:

- **FIRST STEP: Explore potential for the Stoneham Theatre to hold more events to attract more visitors to town and support both the theater and local businesses.**

Although the Stoneham Theatre was far and away considered the greatest asset in Town Center, many expressed a desire for additional programming, including concerts, and potentially movies on nights when the theater is dark. Theater management and local stakeholders should meet to explore potential opportunities that are consistent with the mission of the theater.

- **Encourage more restaurants and bars to locate in Town Center, particularly those that would attract a young professional post-work crowd.**

A more active environment with nightlife options would potentially attract nearby workers. In fact, several people interviewed suggested Town Center was the perfect location for a “good American bar and grill.” They could also help to attract younger residents to the area.

- **Study the feasibility of an ice rink in Town Common to attract families in colder, winter months, when foot traffic decreases.**

More amenities and programming will bring more people to Town Center to support existing, and potentially attract additional retail and service establishments. For example, increased visitation could help to attract a coffee shop or café that is desired by many, but has been difficult to attract.

Goal 4: A more robust, convenient and efficient multi-modal transportation system to better connect Stoneham Square residents and businesses.

Increasingly, businesses and residents, look to locate and/or live in areas with a menu of transportation options available to them including public transit, bicycle and pedestrian networks, and the automobile. In order for Town Center to fully maximize its potential, additional transportation options are needed to better serve residents and workers.

(Many of these recommendations were developed as part of the parallel Livable Cities planning process referred to earlier in the document.)

4.A. Improve local mobility and access to transit for Town Center residents, employees and customers.

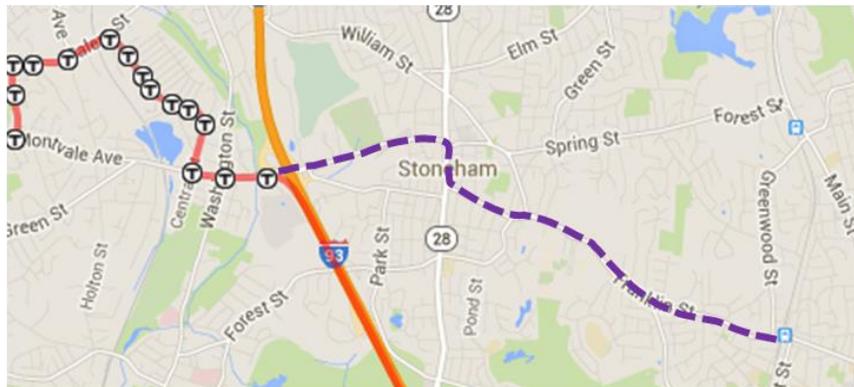
Actions:

- **FIRST STEP: Work with the MBTA to extend service on the 132 beyond 7pm, and to add a stop for the Stone Zoo and other recreational amenities in the Fells.**

Extended weekday and weekend service would make bus transit a more viable option for residents who work beyond the traditional 9 to 5 workday, while adding a stop at the Stone Zoo would better link Town Center to potentially capture more visitors (through cross-marketing with the zoo.)

- **Develop and adopt a Complete Streets policy that requires street design and construction to accommodate all users including cars, transit, bicyclists and pedestrians.**
- **Work with the MBTA to extend the 325 express bus from Malden into Stoneham Center.**
Many expressed the desire for an Express Bus connecting Stoneham Town Center to Boston. Currently, the 325 express bus connects Malden to Boston's Haymarket, but could potentially be extended.
- **Study the feasibility to develop a local shuttle serving the east-west corridor (Montvale, Main Street, Franklin) through Stoneham Center connecting it to Express Bus service in Woburn and Commuter Rail service via the Melrose Highland station.**

Figure: Potential east-west shuttle corridor.



- **Identify funding to conduct a parking study to improve convenience and accessibility of parking through parking management strategies.**
Most believe that lack of parking is more a perception than a reality in and around Town Center. Identifying strategies to best manage parking through a series of strategies could benefit all users.

4.B. Ensure a safe pedestrian environment throughout Stoneham Town Center to encourage foot traffic and to better support local businesses.

Actions:

- **Repair existing crosswalks and add additional crosswalks where needed most to ensure pedestrian safety.**
- **Ensure sidewalks are in good condition, both within the Primary Study Area (e.g. in and around Stoneham Square and Town Common), but also along entrance corridors in the Secondary Study Area that connect to residential neighborhoods. (Conditions vary along these corridors.)**
- **Improve snow removal in key areas.**
Businesses in town center environments rely on clear sidewalks and pathways to and from parking and residential structures to allow customers to reach their establishments. Stronger enforcement of existing snow removal requirements may be needed. MAPC's Snow Removal Policy Toolkit presents a menu of best practices and examples from local ordinances.
(<http://www.mapc.org/resources/snow-removal-policy>)

4.C. Promote and increase access to bicycle amenities and facilities.

Actions:

- **Ensure the Tri-Community Bikeway is fully funded and built.**
The Tri-Community Bikeway will link Stoneham Town Center to a regional bike network through Woburn and Winchester. This will provide existing Stoneham residents and workers, and potentially attract new ones, with an alternative to the car, and access to the region as bicycling continues to grow throughout the region as a viable commuting alternative.
- **Create a bike plan for the Town of Stoneham.**
A comprehensive bike plan for the entire Town with connections to Town Center would be beneficial by attracting visitors from outside the area, and providing improved connections for Town Center

BEST PRACTICES: Dedham Business Guide



The Town of Dedham's APA-award winning "Dedham Business Guide" is an excellent tool to assist the small business community with navigating the Town of Dedham process for opening a business. The guide includes the following information in an easy-to-read format:

- **Getting Started:** Info on business certificates, taxes, zoning, signage, regulations, and technical assistance.
- **Town Contacts:** Contact and information for Town Departments and Business Resources.
- **Overall Process:** From Plan through Permitting.

There are also specific guides about:

- **Opening a restaurant:** Information about permits needed, parking requirements, obtaining common victualler License and Alcoholic Beverages License, signage, etc.
- **Opening a Small Store:** Information of getting a Business Certificate, Permits and Licenses, etc.
- **Site Plan Review**
- **Design Review**
- **Special Permit or Variance process.**

residents to recreational, retail and job destinations outside of the area.

- **Identify priority locations for the placement of bike racks in Town Center to encourage cyclists to stop at local businesses.**

Goal 5: Improve marketing of Stoneham Town Center locally and within the North of Boston region to attract more customers to area businesses, more employment to Stoneham and more residents.

STRATEGIES

5.A Develop a comprehensive, brand driven marketing strategy specifically for Town Center to attract more businesses.

Actions:

- **FIRST STEP: Form a working group/committee comprised of Town Center stakeholders including the Chamber, business and property owners, and other interested parties to strategize and conduct a marketing strategy using a consultant.**
- **Identify funding (Town funds, grant funds, other) and hire a consultant to develop a brand and strategy.**
- **Look for opportunities to cross market Town Center with other attractions, such as the Stone Zoo.**

5.B. To better attract desired investment to Stoneham Town Center, ensure the Town becomes and is perceived to be a business-friendly community.

Actions:

- **FIRST STEP: Create a Town Center page on the Town website highlighting Stoneham Center's many amenities.**
This could include a page dedicated to the Town Center, with information about and links to local business organizations (e.g. Chamber), as well as other valuable documents.
- **Create a "How to Do Business in Stoneham" guide modeled after the Massachusetts APA-award winning guide from Dedham.**

Although many suggested that the Town has become more business-friendly, developing a guide that provides a step by step

process for opening a business could help to attract potential investors, and signal to the business community that Stoneham is not only open for business, but welcoming and ready to attract more businesses.

- **Place the Market Analysis (Appendix A) on the town website to highlight investment opportunities and to potentially attract market segments with the greatest opportunity in Stoneham Center.**

The market analysis identifies several retail and residential sectors with potential for growth in Stoneham. Placing the study online could attract those looking to invest in, or further reinforce those already planning to invest, in the community.

- **Revise ordinances to allow for common amenities/activities found in successful Town Centers like outdoor dining in summer months and A-frame signs to better draw consumers into stores and restaurants.**

Visibility is crucial to retail and other smaller businesses. Ensuring these businesses are visible, through quality, well-designed signage is a must.

- **Develop a database of vacant/available retail/office spaces, and opportunity sites for development and place on Town website (preferably on newly created Town Center page.)**
- **Ensure all of downtown is connected to wireless internet service.**
Today's workers do business in many environments – offices, homes and increasingly between at parks, cafes, and other public spaces.

5.C. Promote Stoneham's historic and cultural assets to draw more visitors (and residents) to the area.

Historic structures and locations are key economic drivers, in that they attract visitors interested in learning about history, businesses interested in locating in historic, walkable shopping districts, and residents looking to reside in a community with established character.

Actions:

- **FIRST STEP: Seek funding to update the Stoneham Historic Walking Tour pamphlet to provide more information about historic amenities.**
- **Look for opportunities to cross promote Stoneham's historical amenities with cultural and retail offerings.**

For example, coordinate a "Sites and Bites Tour" where groups tour the many historic assets and then learn more about them while dining at a downtown restaurant. Another strategy would be the development of an annual holiday house tours or creating "pop up" displays in storefronts calling attention to their significance, or creating a mobile app walking tour, and others.

Goal 6: A greater diversity of housing options to meet market demand – particularly smaller senior and younger households interested in living in a walkable, amenity-rich Town Center environment.

STRATEGIES

6.A. Focus new mixed-use residential development in the Primary Study Area and mixed-use or multifamily-only development in the Secondary Study Area.

More residents living in Town Center would better support an active, amenity rich environment that includes more retail and restaurants, and expanded transit options.

Actions:

- **FIRST STEP: Identify priority sites for mixed-use and multifamily development.**
The new Town Planner should continue to work with the Town Center Plan Advisory Committee (or as recommended, the newly established Town Center Neighborhood Association). Mixed use should be prioritized within the Primary Study Area.
- **Work with property owners of identified priority sites to encourage desired redevelopment.**

6.B. Ensure the development process is predictable and transparent to encourage multifamily and mixed-use development.

Actions:

- ***FIRST STEP: Review permitting procedures and identify mechanisms to streamline the development process.***
Business owners and developers look to invest in communities that offer transparency and expedited permitting, as they offer a roadmap – or a path and timeframe – to opening a business or developing a property. Currently, the process is considered to be somewhat complicated.
- ***Revise zoning to allow mixed-use and multifamily (of over 5-units) by right in the Primary Study Area and along key access corridors.***

The new Town Planner should conduct a full review of the Central Business District zoning, and consider the potential for an overlay district over the Primary Study Area to allow for greater densities, greater sign requirements, etc.

6.C. Mitigate displacement of current residents and businesses through policies to provide affordable housing and business training and assistance.

Actions:

- ***Make information about affordable housing opportunities and business training resources accessible to residents and businesses.***
- ***Explore adopting inclusionary zoning which would require a percentage of new units to be deed-restricted affordable units in larger developments.***
Over 30% of Stoneham households would potentially qualify for affordable housing, and 40% of Stoneham households are housing cost burdened. Given the need for affordable housing, the requirement of affordable units should be encouraged.

IX: Implementation Matrix

The matrix identifies each goal, strategy and action (How?) potential responsible parties for each (Who?), timing (When?) and potential funding resources.

Short-term = Year 1-2

Mid-term = Year 3-4

Long-term – Year 5 and beyond

GOAL	STRATEGY	ACTION (HOW)	WHO	WHEN	POTENTIAL RESOURCES	
Goal 1: Build organizational capacity in Stoneham's Town Center to advocate for continued revitalization and stronger growth.	1.A. Hold Town Center specific networking events to improve interaction between local businesses, residents and potential investors.	FIRST STEP: Create a database of all existing business owners.	Chamber Town Center Subgroup	Short Term	Town staff time	
		Hold Town Center specific networking events.	Chamber Town Center Subgroup	Short Term and Ongoing	Chamber & Merchant volunteer time	
	1.B. Building on momentum from this project, form an official Stoneham Town Center Neighborhood Association to implement this plan, advocate for and make improvements to the town Center, and serve as a booster organization for the Town Center.	FIRST STEP: Identify and recruit additional key stakeholders beyond the current plan Advisory Committee to ensure broad range of interests and perspectives.	Town Center Plan Advisory Committee Town Administrator	Short Term	Volunteer time Town staff time	
		1.C. Create a Downtown subgroup of the Chamber, and eventually a Downtown Merchants Association, tasked specifically with promoting Town Center businesses, events and programming.	FIRST STEP: Convene Town Center merchants to identify interest in forming a subgroup of the Chamber.	Chamber of Commerce	Short Term	Staff and volunteer time
			Establish the Chamber subgroup and create a work plan.	Chamber Town Center Subgroup	Short Term	Volunteer time Chamber staff time
	Upon establishment of a Merchants Association, create a work plan (tasks, priorities), including funding structure, for the organization.	Town Center Merchants	Mid-Long Term	Merchants volunteer time		

GOAL	STRATEGY	ACTION (HOW)	WHO	WHEN	POTENTIAL FUNDING RESOURCES
Goal 2: A more inviting, attractive and easily navigable public realm to increase awareness of Stoneham Town Center and its existing (and future) amenities.	2.A. Create a regulatory environment that encourages a more attractive public realm desired by the larger community.	FIRST STEP: Develop and adopt revised signage standards into the zoning bylaw specific to and appropriate for a town center.	Town Planner Planning Board	Short- to mid-term	Staff time Massachusetts Downtown Initiative Grants (EOHED)
		Develop a wayfinding plan to guide motorists (but also bicyclists and pedestrians) to Town Center services and amenities.	Town Planner Consultant	Mid-term	Town Technical assistance funding (DLTA or Planning for Metro Future through MAPC) Massachusetts Downtown Initiative Grants (EOHED)
		Identify funding (town, grant or other) to implement wayfinding plan		Mid-term	Town funds
		Consider adopting a set of design guidelines to accompany Central Business District Zoning to encourage the building design desired by participants at the public meeting	Town Planner Consultant	Mid-term	Town staff time Technical assistance funding - DLTA & Planning For MetroFuture (MAPC), PATH or PDF funding (DHCD)
		Continue to fund the recently created façade improvement program to assist local businesses with the appearance of the establishment to attract more customers and enhance the larger environment.	Town Administrator Board of Selectmen	Ongoing	Town funds, grant funds
Goal 3: An energized Town Center with greater retail, entertainment and service options.	3.A. Target key retail opportunities to locate in Stoneham Center.	FIRST STEP: Identify and create a list/spreadsheet of establishments in other downtowns that may be interested in opening a second or third location, and recruit them to Stoneham Town Center.	Chamber Town Center Subgroup Town Planner	Short-term	Chamber subgroup volunteer time Town staff time

GOAL	STRATEGY	ACTION (HOW)	WHO	WHEN	POTENTIAL FUNDING RESOURCES
		Develop a database of available retail spaces. (See Goal 3 for more.)	Chamber Town Center Subgroup Town Planner	Short-term	Chamber subgroup volunteer time Town staff time
		Work with current owners of Town Center establishments interested in opening another shop or restaurant to identify potential spaces connect them to resources (training, funding), etc.	Chamber Town Center Subgroup Town Planner Town Administrator	Short-term and Ongoing	Chamber staff time Town staff time
		Look to attract additional downtown anchor establishments that will draw larger numbers of people to Town Center during the day and evening to increase foot traffic in and support smaller establishments nearby.	Chamber Town Center Subgroup Town Planner	Short-term	Chamber staff time Town staff time
	3.B. Create a more exciting environment by developing and/or attracting additional programming and cultural activities to Stoneham Square.	FIRST STEP: Explore potential for the Stoneham Theatre to hold more events to attract more visitors to town and support both the theater and local businesses.	Chamber Town Center Subgroup Town Center Advisory Committee Stoneham Theatre Cultural Council	Short-term and Ongoing	Sponsorships Grant funding Chamber staff time Town staff time Volunteer time
		Encourage more restaurants and bars to locate in Town Center, particularly those that would attract a young professional post-work crowd.	Chamber Town Center Subgroup Town Planner	Ongoing	Town staff time Chamber subgroup volunteer time
		Study the feasibility of an ice rink in Town Common to attract families in colder, winter months, when foot traffic decreases.	Town Administrator Open Space and Recreation Committee	Short- to mid-term	Town or grant funds
Goal 4: A more robust, convenient and efficient multi-modal transportation system to better connect Stoneham Square residents and businesses.	4.A. Improve local mobility and access to transit for Town Center residents, employees and customers.	FIRST STEP: Work with the MBTA to extend service on the 132 beyond 7pm, and to add a stop for the Stone Zoo and other recreational amenities in the Fells.	Town Administrator Town Planner	Short-term	Town staff time MBTA (implementation)

GOAL	STRATEGY	ACTION (HOW)	WHO	WHEN	POTENTIAL FUNDING RESOURCES
		Develop and adopt a Complete Streets policy that requires street design and construction to accommodate all users including cars, transit, bicyclists and pedestrians.	Town Planner	Short-term	Town staff time MassDOT Active Streets Certification Program
		Work with MBTA to extend the 325 express bus from Malden into Stoneham Center.	Town Administrator	Mid-term	Town staff time MBTA (implementation)
		Study the feasibility to develop a local shuttle serving the east-west corridor (Montvale, Main Street, Franklin) through Stoneham Center connecting it to Express Bus service in Woburn and Commuter Rail service via the Melrose Highland station.	Town Administrator Town Planner	Mid-term	Town, grant or State technical assistance funds
		Identify funding to conduct a parking study to improve convenience and accessibility of parking through parking management strategies.	Town Planner Planning Board	Mid-term	Town, grant or State technical assistance funds
	4.B. Ensure a safe pedestrian environment throughout Stoneham Town Center to encourage foot traffic and to better support local businesses.	Repair existing crosswalks and add additional crosswalks where needed most to ensure pedestrian safety.	DPW Capital Improvement Advisory Committee	Ongoing	Chapter 90 Street and Roadway funding
		Ensure sidewalks are in good condition, both within the Primary Study Area (e.g. in and around Stoneham Square and Town Common), but also along entrance corridors in the Secondary Study Area that connect to residential neighborhoods. (Conditions vary along these corridors.)	DPW Capital Improvement Advisory Committee	Ongoing	Town staff time Town transportation funds MassDOT Active Streets Certification Program

GOAL	STRATEGY	ACTION (HOW)	WHO	WHEN	POTENTIAL FUNDING RESOURCES
		Improve snow removal in key areas.	Merchants	Ongoing	Volunteer time Town funding
	4.C. Promote and increase access to bicycle amenities and facilities.	Ensure the Tri-Community Bikeway is fully funded and built.	Town Administrator Capital Improvement Advisory Committee Open Space and Recreation Committee	Short- to mid-term	Town staff time Volunteer time
		Create a bike plan for the Town of Stoneham.	Town Planner Open Space and Recreation Committee	Mid-term	Town, grant or State technical assistance funds
		Identify priority locations for the placement of bike racks in Town Center to encourage cyclists to stop at local businesses.	Town Planner Open Space and Recreation Committee	Short- to mid-term	Town staff time Grant funds
Goal 5: Improve marketing of Stoneham Town Center locally and within the North of Boston region to attract more customers to area businesses, more employment to Stoneham and more residents.	5.A Develop a comprehensive, brand driven marketing strategy specifically for Town Center to attract more businesses.	FIRST STEP: Form a working group/committee comprised of Town Center stakeholders including the Chamber, business and property owners, and other interested parties to strategize and conduct a marketing strategy using a consultant.	Chamber of Commerce Stoneham Town Center Advisory Committee	Short-term	Chamber staff time Volunteer time
		Identify funding (Town funds, grant funds, other) and hire a consultant to develop a brand and strategy.	Town Planner Chamber Town Center Subgroup	Short- to mid-term	Local Options Meals Tax funds Chamber funds Town and Chamber staff time
		Look for opportunities to cross market Town Center with other attractions, such as the Stone Zoo.	Chamber Town Center Subgroup Stone Zoo	Mid-term	Local Options Meals Tax funds Chamber Town Center funds Chamber Subgroup Volunteer time
	5.B. To better attract desired investment to Stoneham Town Center, ensure the Town becomes and is perceived to be a business-friendly community.	FIRST STEP: Create a Town Center page on the Town website highlighting Stoneham Center's many amenities.	Town Administrator Town Planner	Short-term	Town staff time

GOAL	STRATEGY	ACTION (HOW)	WHO	WHEN	POTENTIAL FUNDING RESOURCES
		Create a “How to Do Business in Stoneham” guide modeled after the Massachusetts APA-award winning guide from Dedham.	Town Administrator Town Planner	Short- to mid-term	Town staff time Town funds to hire consultant
		Place the Market Analysis (Appendix A) on the town website to highlight investment opportunities and to potentially attract market segments with the greatest opportunity in Stoneham Center.	Town Center Advisory Committee Town Administrator	Short-term	Town staff time Stoneham Town Center Advisory Group volunteer time
		Revise ordinances to allow for common amenities/activities found in successful Town Centers like outdoor dining in summer months and A-frame signs to better draw consumers into stores and restaurants.	Town Planner Planning Board Board of Selectmen	Short-term	Town staff time
		Develop a database of vacant/available retail/office spaces, and opportunity sites for development and place on Town website (preferably on newly created Town Center page.)	Town Planner Chamber Town Center Subgroup	Short- to Mid-term	Town staff and Chamber Subgroup volunteer time
		Ensure all of downtown is connected to wireless internet service.	Town Administrator Town Planner	Long-term	Town funds Grant funds
	5.C. Promote Stoneham’s historic and cultural assets to draw more visitors (and residents) to the area.	FIRST STEP: Seek funding to update the Stoneham Historic Walking Tour pamphlet to provide more information about historic amenities.	Stoneham Historical Society		Membership fees Future event revenues (e.g. home tours)
		Look for opportunities to cross promote Stoneham’s historical amenities with cultural and retail offerings.	Stoneham Historical Society Chamber Town Center Subgroup	Mid-term	Membership fees Event revenues

GOAL	STRATEGY	ACTION (HOW)	WHO	WHEN	POTENTIAL FUNDING RESOURCES
Goal 6: A greater diversity of housing options to meet market demand – particularly smaller senior and younger households interested in living in a walkable, amenity-rich Town Center environment.	6.A. Focus new mixed-use residential development in the Primary Study Area and mixed-use or multifamily-only development in the Secondary Study Area.	FIRST STEP: Identify priority sites for mixed-use and multifamily development	Town Planner Town Administrator	Short-term	Town staff time Technical assistance funding - DLTA & Planning For MetroFuture (MAPC)
		Work with property owners of identified priority sites to encourage desired redevelopment.	Town Planner Town Administrator	Short-term and Ongoing	Town staff time
	6.B. Ensure the development process is predictable and transparent to encourage multifamily and mixed-use development	FIRST STEP: Review permitting procedures and identify mechanisms to streamline the development process.	Town Planner Town Administrator Building Department	Short-term	Town staff time Technical assistance funding - DLTA & Planning For MetroFuture (MAPC)
		Revise zoning to allow mixed-use and multifamily (of over 5-units) by right in the Primary Study Area and along key access corridors.	Town Planner Planning Board Board of Selectmen	Mid-term	Town staff time Technical assistance funding - DLTA & Planning For MetroFuture (MAPC)
	6.C. Mitigate displacement of current residents and businesses through policies to provide affordable housing and business training and assistance.	Make information about affordable housing opportunities and business training resources accessible to residents and businesses	Town Planner	Short-term	Staff time Town funds
		Explore adopting inclusionary zoning which would require a percentage of new units to be deed-restricted affordable units in larger developments	Town Planner Planning Board Town Administrator	Mid-term	Staff time or State technical assistance funds



NORTHEAST ENERGY PARTNERS, LLC vs. MAHAR
REGIONAL SCHOOL DISTRICT; CONSTELLATION
NEWENERGY, INC., third-party defendant.

462 Mass. 687

April 3, 2012 - July 9, 2012

Suffolk County

Present: IRELAND, C.J., SPINA, CORDY, BOTSFORD,
GANTS, DUFFLY, & LENK, JJ.

Records And Briefs:

- [SJC-11024_01 Appellant Ralph Mahar Brief.pdf](#)
- [SJC-11024_02 Appellant Ralph Mahar Reply Brief.pdf](#)
- [SJC-11024_03 Appellee Northeast Energy Brief.pdf](#)
- [SJC-11024_04 Amicus Amesbury Brief.pdf](#)

Uniform Procurement Act. Electricity. Words, "Energy related," "Energy contract."

This court concluded that a contract between a regional school district and an energy broker for the procurement of contracts for electricity was an "energy contract" within the meaning of G. L. c.30B § 1 (b) (33), and was thus exempt from the competitive solicitation and bidding procedures set for in G. L. c. 30B. [692-700]

CERTIFICATION of questions of law to the Supreme Judicial Court by the United States District Court for the District of Massachusetts.

Kelly T. Gonzalez for the defendant.

Scott A. Birnbaum (Anne Marie Longobucco with him) for the plaintiff.

Gordon P. Katz & Jessica Ragosta Early, for Amesbury Housing Authority & others, amici curiae, submitted a brief.

DUFFLY, J. The Ralph Mahar Regional School District (Mahar), which serves several central Massachusetts towns, entered into a price watch agreement with Northeast Energy Partners, LLC (Northeast), a licensed broker of energy services based in Connecticut, pursuant to which Northeast would negotiate and secure contracts for the provision of Mahar's electricity from energy suppliers. Mahar did not enter into the agreement to obtain Northeast's services pursuant to the competitive bidding procedures contained in G. L. c. 30B. When Mahar questioned the validity of the agreement, Northeast filed a diversity action in the United States District Court for the District of Massachusetts seeking a declaratory judgment that its agreement

with Mahar is valid and enforceable because, under G. L. c. 30B, § 1 (b) (33), the agreement is exempt from the competitive solicitation and bidding procedures set forth in G. L. c. 30B. A judge of that court has certified to us the following questions of State law pursuant to S.J.C. Rule 1:03, as appearing in 382 Mass. 700 (1981):

"[1.] Is a contract between a school district and an energy broker for the procurement of contracts for electricity exempt from the requirements of G. L. [c.] 30B as a contract for 'energy or energy related services' pursuant to G. L. c. 30B, § 1 (b) (33)?"

"[2.] If [G. L. c.] 30B is interpreted to apply to a contract between a school district and an energy broker for the procurement of contracts for electricity, does this interpretation apply retroactively to 2004, to 2008, or only prospectively?"

"[3.] If [G. L. c.] 30B applies to the contract, does a provision providing for automatic renewal of the contract term with a public entity, without the public entity's affirmative approval, violate [G. L. c.] 30B?"

For the reasons discussed below, we answer the first certified question, "Yes"; we therefore need not reach the second or third questions. [\[Note 1\]](#)

1. Background. We assume the following facts, which we draw from the pleadings and other documents of record. Northeast is a broker of energy services that acts as an agent for clients in purchasing electricity from electricity suppliers. Northeast's clients include businesses and governmental entities, such as regional school districts. Through its "Price Watch Aggregation Program," Northeast negotiates pricing and other terms with electricity suppliers on behalf of a large group of customers; customers sign agreements authorizing Northeast to enter into multiyear, fixed-rate contracts for electricity, up to a

Page 689

specified maximum rate, on their behalf. Customers do not pay Northeast to participate in the price watch aggregation program. Northeast receives compensation for its services through commissions and other payments from electricity suppliers.

Northeast and Mahar entered into a price watch agreement in July, 2004. That agreement authorized Northeast to explore energy markets, negotiate pricing and other terms, and enter into contracts on Mahar's behalf for the supply of Mahar's electricity requirements for a period of between twelve and forty-eight months, at a price of \$0.0669 per kilowatt hour or less. The agreement specified that if Northeast were unable to obtain a contract to supply Mahar's requirements at or below that price, due to "market conditions," Northeast could propose a modification to the agreement to reflect a higher authorized purchase price. The agreement provided also that, on receipt of a proposed higher authorized purchase price or length of term modification, Mahar had fifteen days to respond in writing that it accepted or rejected the proposed modification. If Mahar failed to reject the proposed modification in writing within fifteen days, the agreement would automatically be modified to incorporate the proposed change. [\[Note](#)

The initial term of the price watch agreement was for one year, ending in July, 2005, but was subject to both extension and automatic renewal under the following circumstances. If Northeast were successful in executing an electricity supply agreement during the one-year period, the initial term would automatically extend to, and be coextensive with, the term of the electricity supply agreement. In addition, as long as Northeast obtained a new or renewal agreement with an electricity supplier,

Page 690

then Mahar's price watch agreement with Northeast would automatically be modified to incorporate the new rate and would renew for a term coextensive with that of the new electricity supply agreement, unless rejected in writing by Mahar within fifteen days. [\[Note 3\]](#)

Northeast was unable to obtain a contract for Mahar at the \$0.0669 price authorized by the terms of the initial agreement. In January, 2005, Mahar and Northeast amended the price watch agreement, increasing the authorized purchase price to \$0.0792 per kilowatt hour for a term of forty-six months, beginning in March, 2005, and ending in December, 2008. Eileen M. Perkins, who was then Mahar's superintendent, signed the amendment to the price watch agreement to reflect the increased authorized purchase price. In February, 2005, Northeast, as agent for Mahar, entered into an energy service contract with an electricity supplier, Constellation NewEnergy, Inc. (Constellation), pursuant to which Constellation would supply Mahar with electricity at the fixed rate of \$0.0792 per kilowatt hour until December, 2008.

In anticipation of the December, 2008, expiration of the electricity supply agreement, Northeast negotiated a new contract with Constellation for electricity supply on Mahar's behalf. In July, 2008, Northeast sent Mahar a proposal for the new contract with Constellation, listing a price of \$0.1380 per kilowatt hour for a five-year term commencing in December, 2008, and ending in

Page 691

December, 2013. [\[Note 4\]](#) Under the provisions of the amended price watch agreement then in effect, Mahar had until August 1, 2008, to decline the proposal. [\[Note 5\]](#) When Mahar did not decline the proposal, Northeast, as agent for Mahar, executed the electricity supply contract with Constellation on August 1, 2008.

In 2009, Mahar's superintendent, Michael Baldassare, became concerned about the rate Mahar was paying for electricity, which he believed was in excess of that being paid in other Massachusetts school districts. [\[Note 6\]](#) His attempts to negotiate a lower rate with Northeast were unsuccessful.

By two letters sent in March and May, 2010, Mahar advised Northeast and Constellation that it believed the price watch agreement to be invalid and unenforceable because the agreement had not been subject to the competitive bidding procedures contained in G. L. c. 30B, and specifically

that the automatic renewal provision violated G. L. c. 30B by renewing the agreement without Mahar's "affirmative approval." [\[Note 7\]](#) The letters further advised that Mahar would not be renewing the agreement, that

Page 692

Mahar intended to put out to bid "immediately" a contract for electricity services, and that Mahar would seek a declaratory judgment that its contracts with Northeast and Constellation were void.

In July, 2010, Northeast filed the underlying declaratory judgment action in the United States District Court for the District of Massachusetts, and Mahar counterclaimed. [\[Note 8\]](#) In December, 2010, Mahar filed a motion for a preliminary injunction in the Federal case, seeking to enjoin the enforcement of Mahar's contracts with Northeast and Constellation; Northeast and Constellation opposed the motion and filed cross motions for summary judgment on Northeast's claim that the agreements at issue are exempt from the requirements of G. L. c. 30B and therefore valid and enforceable. After a hearing, the judge issued an order certifying the questions now before us.

[\[Note 9\]](#)

2. Discussion. The first certified question asks that we determine whether an agreement between an energy broker and a regional school district for the procurement of a contract for electricity is a contract for "energy or energy related services" pursuant to G. L. c. 30B, § 1 (b) (33), that is exempt from the competitive bidding requirements of G. L. c. 30B. We conclude that it is.

"The starting point of our analysis is the language of the statute, 'the principal source of insight into Legislative purpose.' " *Simon v. State Examiners of Electricians*, [395 Mass. 238](#) , 242 (1985), quoting *Commonwealth v. Lightfoot*, [391 Mass. 718](#) , 720 (1984). We apply familiar principles of statutory construction, interpreting the Legislature's intent "ascertained from all its words construed by the ordinary and approved usage of the language, considered in connection with the cause of its enactment, the

Page 693

mischief or imperfection to be remedied and the main object to be accomplished, to the end that the purpose of its framers may be effectuated." *Harvard Crimson, Inc. v. President & Fellows of Harvard College*, [445 Mass. 745](#) , 749 (2006), quoting *Hanlon v. Rollins*, [286 Mass. 444](#) , 447 (1934). "Statutes are to be interpreted, not alone according to their simple, literal or strict verbal meaning, but in connection with their development, their progression through the legislative body, the history of the times, prior legislation, [and] contemporary customs and conditions

General expressions may be restrained by relevant circumstances showing a legislative intent that they be narrowed and used in a particular sense." *Simon v. State Examiners of Electricians*, *supra* at 243, quoting *Commonwealth v. Welosky*, [276 Mass. 398](#) , 401-402 (1931), cert. denied, 284 U.S. 684 (1932).

a. Uniform procurement act. General Laws c. 30B, the Uniform Procurement Act (procurement act), is a public bidding statute "designed to prevent favoritism, to secure honest methods of

letting contracts in the public interest, to obtain the most favorable price, and to treat all persons equally." Phipps Prods. Corp. v. Massachusetts Bay Transp. Auth., [387 Mass. 687](#) , 692 (1982). Unless a specific exemption exists, the procurement act applies "to every contract for the procurement of supplies, services or real property . . . by a governmental body." [\[Note 10\]](#) G. L. c. 30B, § 1 (a). As is relevant here, the procurement act does not apply to "energy contracts entered into by a city or town or group of cities or towns or political subdivisions of the [C]ommonwealth, for energy or energy related services." G. L. c. 30B, § 1 (b) (33). [\[Note 11\]](#) However, the term "energy related services" is

Page 694

not defined in the procurement act, and the parties advance substantially different definitions in support of their respective positions.

To support its claim that the contract with Northeast is not one for energy related services, Mahar relies on a May 18, 2010, letter from the office of the Inspector General, which is charged with enforcing the public procurement laws. See G. L. c. 12A, § 7. According to that letter, energy related services are limited to those services "that are ancillary to the delivery of energy, such as reactive power and voltage control, loss compensation, and load following." [\[Note 12\]](#) Northeast asserts that, based on the plain meaning of the term "related," its services of "identifying and selecting electricity suppliers, [and] negotiating and executing agreements," are "associated" with or connected by means of an established or discoverable relation" to the purchase of energy, and are therefore exempt under G. L. c. 30B, § 1 (b) (33).

To some extent, focusing on the phrase "energy related services" misses the point. The essential inquiry is whether the agreement at issue is of the type that the Legislature intended to exempt from the public bidding requirements of the procurement act. The exemption does not apply to energy related services as distinct from energy; rather, it applies to "energy contracts . . . for energy or energy related services." G. L. c. 30B, § 1 (b) (33). The operative term in this sentence is "energy contracts." Although neither "energy contract" nor "energy related" are terms defined in the procurement act, a precise definition is unnecessary to resolve the question before us; [\[Note 13\]](#) it is apparent from the statutory scheme that the agreement at issue is an energy contract that the

Page 695

Legislature intended to exempt from the requirements of the procurement act.

b. Restructuring act. In 1997, the Legislature enacted a comprehensive restructuring of the electric utility industry in Massachusetts, see St. 1997, c. 164 (restructuring act), changing it from a government-regulated monopoly to "a framework under which competitive producers will supply electric power and customers will gain the right to choose their electric power supplier." [\[Note 14\]](#) St. 1997, c. 164, § 1 (c) (ii). Much of the legislation was codified as amendments to G. L. c. 164, but numerous other provisions of the General Laws were also affected, including sections of the procurement act. See, e.g., St. 1997, c. 164, § 58. Among its declared purposes, the

restructuring act was intended to provide affordable electric service "to all consumers on reasonable terms"; to introduce "competition in the electric generation market" in order to "encourage innovation, efficiency, and improved service from all market participants" with resulting "reductions in the cost of regulatory oversight"; to achieve long-term reductions in energy costs by "allowing market forces to play the principal role in determining the suppliers of generation for all customers"; and to preserve and augment "consumer protections, full and fair competition in generation, and enhanced environmental protection goals." St.1997, c. 164, § 1 (b), (f), (k), (l).

The electric utility industry involves three general components:

Page 696

generation, transmission, and distribution. See *Shea v. Boston Edison Co.*, [431 Mass. 251](#), 253 (2000). Generation is "the act or process of transforming other forms of energy into electric energy or the amount of electric energy so produced." G. L. c. 164, § 1. "Transmission" is the delivery of electric power "from generating facilities across interconnected high voltage lines to where it enters a distribution system." *Id.* From there, electricity is distributed over lower voltage lines to customers. [\[Note 15\]](#) *Id.* See *Shea v. Boston Edison Co.*, *supra*.

Prior to the restructuring act, the Massachusetts electric industry consisted of a "complex mosaic of exclusive service territories supported by electricity generation, transmission, and distribution assets under the individual ownership of eight discrete investor-owned utilities" as well as forty municipal utilities. D.P.U. 95-30 at 5 (Feb. 10, 1995). These companies controlled the entire process from the generation of electricity to its final distribution to customers. They owned the electric generation facilities, high-voltage transmission networks, and low-voltage distribution networks used to serve customers in their service territories. *Id.* at 4-6. See *Concord v. Boston Edison Co.*, 915 F.2d 17, 19 (1st Cir. 1990), cert. denied, 499 U.S. 931 (1991).

The restructuring act separated these three utility services and opened the supply of generation services to competition, recognizing that "the interests of consumers [could] best be served by an expedient and orderly transition from regulation to competition in the generation sector consisting of the unbundling of prices and services and the functional separation of generation services from transmission and distribution services." St. 1997, c. 164, § 1 (m). This functional separation of services, which limited a "company's ability to provide itself an undue advantage in buying or selling services in competitive markets," was regarded as a necessary first step in moving toward "a

Page 697

fully competitive generation market based on customer choice." See D.P.U. 95-30 at 16 (Aug. 16, 1995).

In the competitive marketplace, consumers of electricity could choose among different suppliers of electricity services, while still receiving their electricity through the existing transmission and

distribution networks. D.P.U. 95-30 at 9-10 (Feb. 10, 1995). Consumers could purchase electricity directly from a distribution company or through a "competitive supplier," an entity licensed by the Department of Public Utilities (department) to purchase wholesale power from generation companies for resale to end users. See 220 Code Mass. Regs. § 11.02 (2008). Consumers could also purchase electricity by utilizing the services of an "electricity broker," an entity that "facilitates or otherwise arranges for the purchase and sale of electricity and related services to [r]etail [c]ustomers, but does [not] sell electricity." [\[Note 16\]](#) Id. The restructuring act also directed the department to promulgate rules and regulations that would "provide retail customers with the utmost consumer protections contained in the law" and govern licensing of "all generation companies, aggregators, suppliers, energy marketers, and energy brokers." G. L. c. 164, § 1F, inserted by St. 1997, c. 164, § 193.

A "[s]upplier" of electricity is defined as "a supplier of generation service to retail customers, including power marketers, brokers and marketing affiliates of distribution companies." G. L. c. 164, § 1. That "supplier[s]" are defined to include energy brokers recognizes that suppliers and brokers perform

Page 698

functionally equivalent services that enable consumers to select and purchase electricity from an array of competitive sources. In directing the department to promulgate licensing regulations for the restructured industry, the Legislature also included brokers as a type of supplier. See G. L. c. 164, § 1F (1) (requiring department to license "all generation companies, aggregators, suppliers, energy marketers, and energy brokers," and referring to "energy brokers, energy marketers, and other suppliers"). It is apparent from the inclusion of energy brokers within the statutory scheme that the Legislature envisioned that such brokers, by facilitating the sale and purchase of electric energy from the suppliers of energy, would play an important role in "accommodat[ing] retail access to generation services and choice of suppliers by retail customers." G. L. c. 164, § 1F.

Although the department's regulations distinguish between competitive suppliers and electricity brokers, in that a broker does not own or sell electricity to a consumer and only "facilitates or otherwise arranges" for its purchase and sale, 220 Code Mass. Regs. § 11.02, a broker is treated as equivalent to a supplier in the broader regulatory scheme. [\[Note 17\]](#) Consistent with the statutory language, brokers are explicitly enumerated in various regulatory definitions of "supplier." See 220 Code Mass. Regs. § 12.02 (2008) (defining "[n]on-affiliated [e]nergy [s]upplier" as any entity "engaged in marketing, brokering, or selling natural gas, electricity, or energy-related services to retail customers where such product or service is also provided by a Competitive Energy Affiliate"); 940 Code Mass. Regs. § 19.03 (1998) ("[r]etail [s]eller of [e]lectricity" is "any business, person or entity selling, offering to sell, arranging for the sale of, or engaged to market electricity or related products or services to

Page 699

consumers, including . . . to all entities which are regulated, or which are required to be licensed,

by the [d]epartment for these purposes"). Suppliers and brokers are generally subject to the same requirements. See, e.g., 220 Code Mass. Regs. § 11.05 (2009) (establishing "requirements applicable to all Competitive Suppliers and Electricity Brokers").

c. Application to the first certified question. At the same time that the Legislature created this newly competitive energy marketplace, it also exempted from the procurement act's complex public bidding requirements "energy contracts entered into by . . . political subdivisions of the commonwealth, for energy or energy related services." G. L. c. 30B, § 1 (b) (33). There is no dispute that a contract for the purchase and sale of electricity entered into directly between a regional school district and an energy supplier is an "energy contract" within the meaning of the exemption. Because a broker that facilitates or arranges for the purchase and sale of electricity on behalf of a retail customer performs functionally the same service as an energy supplier, the Legislature could not have intended to require that such contracts with energy brokers be subject to the procurement act, while exempting agreements for the direct purchase of energy from energy suppliers.

In addition to including brokers within the statutory definition of suppliers, the Legislature required the licensing and regulation of both types of entities. See G. L. c. 164, § 1F. The regulations preclude competitive suppliers from using the services of "any entity to facilitate or otherwise arrange for the purchase and sale of electricity to [r]etail [c]ustomers, unless such entity has been licensed as an [e]lectricity [b]roker by the [d]epartment." 220 Code Mass Regs. § 11.05(5). Furthermore, the Legislature established consumer protections for end users, including regional school districts, in the form of licensing requirements and customer authorization requirements applicable to both suppliers and brokers. See G. L. c. 164, § 1F (1), (8) (a); 220 Code Mass. Regs. § 11.05(2), (4). The Legislature also put in place a mechanism for oversight of energy contracts entered into by cities, towns, and political subdivisions. A contract exempt from the procurement act pursuant to G. L. c. 30B, § 1 (b) (33), must nevertheless be submitted to the department, the Department of

Page 700

Energy Resources, and the office of the Inspector General within fifteen days of signing, along with "a report of the process used to execute the contract."

These licensing and regulatory provisions guard against potential abuses in the new competitive environment, and support a determination that the Legislature intended to exempt from the requirements of the procurement act a contract for energy between a regional school district and an electricity broker, as well as between a regional school district and a competitive supplier of electricity. We therefore conclude that an agreement between a regional school district and an energy broker to arrange for the purchase of electricity is an "energy contract" exempt from the requirements of the procurement act pursuant to G. L. c. 30B, § 1 (b) (33).

3. Conclusion. We answer the first certified question, "Yes." Because of our answer to the first certified question, the second and third certified questions are not applicable, and we do not answer them.

The Reporter of Decisions is directed to furnish attested copies of this opinion to the clerk of this court. The clerk will transmit one copy, under the seal of the court, to the clerk of the United States District Court for the District of Massachusetts, as the answer to the questions certified, and will also transmit a copy to each party.

FOOTNOTES

[\[Note 1\]](#) We acknowledge the amicus brief of the Amesbury Housing Authority; the cities of Beverly, Brockton, Easthampton, and Newburyport; the towns of Easton, Lexington, Natick, Sharon, Stoneham, and Sudbury; and Bay State Consultants, LLC, in support of the plaintiff.

[\[Note 2\]](#) The automatic modification provision provides, in relevant part:

"[D]uring the Price Watch Period, [Northeast] may propose, and [Mahar] may agree to increase the Authorized Purchase Price, if warranted by market conditions, and this Agreement will then be modified to reflect the new Authorized Purchase Price as follows. Upon [Mahar's] receipt of the proposed Authorized Purchase Price, [Mahar] shall have fifteen (15) days to respond to [Northeast] and accept the proposed Authorized Purchase Price, or reject same. [Mahar] agrees that if it does not provide a written rejection of the proposed Authorized Purchase Price within the allotted 15-day period, that this Agreement shall be modified to incorporate the Authorized Purchase Price as proposed."

[\[Note 3\]](#) The automatic renewal provision provides, in relevant part:

"At any time during the renewal period, [Northeast] may propose to modify the Authorized Purchase Price and/or term that will apply to new or renewal Electric Supply Agreements. Upon [Mahar's] receipt of the proposed Authorized Purchase Price and/or term, [Mahar] shall have fifteen (15) days to respond to [Northeast] and accept the proposed Authorized Purchase Price and/or term, or reject same. [Mahar] agrees that if it does not provide written notice of its intention to reject the proposed Authorized Purchase Price and/or term within the allotted 15-day period, that this Agreement shall be modified to incorporate the Authorized Purchase Price and/or term as proposed."

The agreement provides also that Mahar and Northeast shall each have "the right to cancel the automatic renewal" by providing advance notice "received by the other at least 180 days prior to the expiration of the Contract Period"; however, cancellation is not "effective until all Electric Supply Agreements entered into" by Northeast and Mahar have expired by their terms.

[\[Note 4\]](#) The proposal was contained in a July 15, 2008, letter from Northeast to Raza Namin, who succeeded Eileen M. Perkins as superintendent of Mahar. In its suit in the United States District Court for the District of Massachusetts, Mahar asserts that the mailing had the appearance of an advertisement and failed adequately to notify Mahar of the proposed renewal terms. Namin did not respond to the letter.

[\[Note 5\]](#) Northeast's letter to Mahar states in relevant part:

"We are happy to inform you that we will be triggering the Price Watch Aggregation with Constellation NewEnergy as the chosen supplier. The fixed price will be .1380 per kWh [kilowatt hour] (Proposed Authorized Purchase Price) and will be fixed for 5 years beginning on your scheduled meter read in December 2008. The fixed price will apply to all accounts that you had enrolled into the Price Watch program."

"No action is required on your part to take advantage of this fixed rate. If you choose to decline this offering you must notify us in writing by August 1, 2008."

[\[Note 6\]](#) In its complaint for declaratory judgment, Northeast asserts that "[b]y the end of 2008 . . . market prices for electricity declined due to economic conditions, resulting in Mahar having an agreement to purchase electricity for what turned out to be higher than market rates."

[\[Note 7\]](#) The notification to Northeast was based in part on a letter Mahar received from the Inspector General in response to Mahar's inquiry regarding the validity of its agreement with Northeast; the letter set forth the Inspector General's opinion that the price watch agreement was not exempt from the competitive bidding requirements of G. L. c. 30B and that the automatic renewal provision violated G. L. c. 30B, § 12 (c) (5).

[\[Note 8\]](#) Mahar asserted affirmative defenses and counterclaimed that the price watch agreement violated G. L. c. 30B and is therefore unenforceable. Mahar also filed a third-party complaint against Constellation, alleging breach of the implied covenant of good faith and fair dealing and violation of G. L. c. 93A, and seeking a declaratory judgment that the energy services contract between Northeast and Constellation violates G. L. c. 30B and is therefore void.

[\[Note 9\]](#) The judge stayed the Federal action pending our response to the certified questions.

[\[Note 10\]](#) Many of these operative terms are defined in G. L. c. 30B (procurement act). A "contract" includes "all types of agreement for the procurement or disposal of supplies or services, regardless of what the parties may call the agreement"; "[s]upplies" are defined as "all property, other than real property, . . . including services incidental to the delivery, conveyance and installation of such property"; "[s]ervices" are defined as "the furnishing of labor, time, or effort by a contractor, not involving the furnishing of a specific end product other than reports"; and "[g]overnmental body" is defined to include a "regional school district." G. L. c. 30B, § 2.

[\[Note 11\]](#) As do the parties, for purposes of G. L. c. 30B, § 1 (b) (33), we treat a regional school district as both a governmental body, G. L. c. 30B, § 2, and a political subdivision of the Commonwealth. See *Boylston Water Dist. v. Tahanto Regional Sch. Dist.*, [353 Mass. 81](#), 82 (1967).

[\[Note 12\]](#) The term "[a]ncillary services" is defined by G. L. c. 164, § 1, as "those functions which support generation, transmission, and distribution, and shall include the following services: (1) reactive power or voltage control; (2) loss compensation; (3) scheduling and dispatch; (4) load following; (5) system protection service; and (6) energy imbalance service." This definition closely tracks one proposed by the Federal Energy Regulatory Commission, which described ancillary services under Federal law as "those services necessary to support the transmission of electric

power from seller to purchaser." See 60 Fed. Reg. 17,662, 17,683-17,685 (1995).

[\[Note 13\]](#) Department of Public Utilities (department) regulations reference "service . . . attributable to electricity" with respect to the disclosures required of competitive suppliers. See 220 Code Mass. Regs. § 11.06(2)(b)(1)(d)(ii) (2008) (where electricity is bundled with any other product or service, competitive suppliers offering generation service "may display the charge [as an] average price . . . assuming the entire price of the bundled service is attributable to electricity").

[\[Note 14\]](#) The restructuring act, "An Act relative to restructuring the electric utility industry in the Commonwealth, regulating the provision of electricity and other services, and promoting enhanced consumer protections therein," added or modified 344 sections of the General Laws. Adoption of the restructuring act followed similar changes in Federal law that created competition within the wholesale electric power industry. See National Consumer Law Center, Access to Utility Service § 1.4.2.4 (1996 & Supp. 1998). The restructuring act reflects considerations underlying the department's earlier investigation: to "promote competition and economic efficiency" in the electric utility industry and to extend to customers "the option of choosing their own electricity suppliers." D.P.U. 95-30 at i, 4 (Aug. 16, 1995) (if "initiatives to restructure the electric utility industry require statutory change, the [d]epartment will coordinate with the Legislature in an effort to bring about change that is in the public interest"). See D.P.U. 95-30 (Feb. 10, 1995).

[\[Note 15\]](#) General Laws c. 164 and the regulations promulgated thereunder, 220 Code Mass. Regs. §§ 11.00, use the term "customer" and "consumer" interchangeably to refer to end users of electricity. See, e.g., G. L. c. 164, §§ 1, 1F; 220 Code Mass. Regs. § 11.02 (2008). A "customer" may also refer to municipalities, which are not necessarily end users. See G. L. c. 164, § 134. For purposes of this decision, we use the terms customer and consumer interchangeably to refer to end users of electricity.

[\[Note 16\]](#) There appears to be a scrivener's error in the definition of "electricity broker" in 220 Code Mass. Regs. § 11.02 ("Electricity broker means an entity . . . that facilitates or otherwise arranges for the purchase and sale of electricity . . . but does sell electricity") in that it omits the word "not" from the clause "but does sell electricity." The word "not" was included in the department's proposed regulations, see D.P.U./D.T.E. 96-100 at A-3 to A-4 (Jan. 16, 1998) (defining "[e]lectricity [b]roker" as entity that "does not produce, purchase, or otherwise take title to" electricity), and in emergency regulations promulgated prior to the notice and comment period. See D.P.U./D.T.E. 96-100 at A-1 (Jan. 9, 1998). In its order promulgating the final regulations, which omits the word "not," the department distinguished between suppliers and brokers as "entities that sell electricity and those that merely facilitate the sale." See D.P.U./D.T.E. 96-100 at 7 (Feb. 20, 1998). An electronic version, available through the department's Web site, contains the word "not." It is apparent from this history, as well as a plain reading of the regulation, that an electricity broker is an entity that "does not sell electricity."

[\[Note 17\]](#) In its order promulgating the regulations, the department notes that the restructuring act defines "supplier" to include entities such as brokers. D.P.U./D.T.E. 96-100 at 6 (Feb. 20, 1998). The department determined, however, that for purposes of documentation and disclosure, a

distinction was needed between entities selling electricity and those that merely facilitate the sale. The department "requires somewhat different documentation from competitive suppliers than from electricity brokers"; "[t]he duty to disclose certain information resides with a competitive supplier, not with an electricity broker." *Id.* at 7. See, e.g., 220 Code Mass. Regs. § 11.05(2)(b) (14) (2009) (documentation regarding supplier participation with New England Power Pool); 220 Code Mass. Regs. § 11.06 (2008) (disclosures, including price of generation services).

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Rationale and language related to a placeholder for a municipal aggregation article on the Annual Town Meeting warrant

The residents and businesses on the Basic Service with Eversource have recently experienced a dramatic increase in electricity rates. The municipal officials of Stoneham are concerned about the impact of this increase on our residents and businesses.

Based on Massachusetts General Law Chapter 164, Section 134(a), the municipal officials of Stoneham are considering the possibility of developing and implementing a municipal aggregation plan that would allow the Town to aggregate the electricity loads of residents and businesses that are on the Basic Service with Eversource. The objective of a municipal aggregation plan is to form a buying group to gain greater buying power for residents and businesses to enter the competitive electricity market to lower electricity rates, stabilize rates for longer terms and provide more options to purchase renewable energy. Stoneham may join with other municipalities to form a larger buying group to gain greater buying power.

The procedure to develop and implement a municipal aggregation plan goes through a very strict and comprehensive consultation and approval process taking 6 to 9 months with the Department of Energy Resources (DOER) and the Department of Public Utilities (DPU). Good Energy will perform all of the grunt work and municipal officials will make the decisions. There will be minimum impact on staff time and resources.

Good Energy is one of the leading energy aggregation consultants in the country serving with over 150 municipal electricity aggregations serving over 2,000,000 residents

The selection of a consultant to guide Stoneham through the municipal aggregation process is an energy-related service that is exempt from the Chapter 30B UNIFORM PROCUREMENT ACT.

Our Energy-Related Services Agreement provides for the brokering of electricity through a competitive procurement process and is exempt from Chapter 30B.

On February 12, 2015, Good Energy submitted aggregation plans for 13 municipalities with over 250,000 people and over 100,000 households including a neighbor of Stoneham, the City of Melrose.

Due to the length of the DOER / DPU consultation and approval process and that the first step in the approval process is a vote by town residents, time is of the essence. A placeholder for a municipal aggregation warrant article for the warrant for the Stoneham Annual Town meeting on May 4, 2015 that closes on February 23, 2015 would allow the Board of Selectmen to consider a warrant article for municipal aggregation at their meeting on March 3, 2015. Suggested language for a municipal aggregation warrant article is as follows:

To see if the Town will vote to grant the Board of Selectmen authority to research, develop and participate in a contract, or contracts, to aggregate the electricity load of the residents and businesses in the Town and for other related services, independently, or in joint action

with other municipalities, retaining the right of individual residents and businesses to opt-out of the aggregation, or take any other action relative thereto.

Comment:

The Commonwealth of Massachusetts, by enacting Chapter 164 of the Acts of 1997, has established a competitive marketplace through deregulation and restructuring of the electric utility industry. The residents and businesses of our Town have substantial economic, environmental, and social interests at stake and are interested in reducing their electricity rates. If an aggregation of electricity load is implemented in our Town, individual residents and businesses would retain the right to opt-out of the aggregation with no penalty and to choose any other competitive supplier or stay with the default utility.

Passing this warrant article at Town meeting does not commit the Town or Board of Selectmen to anything. It simply gives the Board of Selectmen to lower the electricity cost for their residents and businesses.

Chapter 30B Exemption

The selection of a consultant to guide Stoneham through the municipal aggregation process is an energy-related service that is exempt from the Chapter 30B UNIFORM PROCUREMENT ACT. (<https://malegislature.gov/Laws/GeneralLaws/PartI/TitleIII/Chapter30B/Section1>)

MGL Chapter 30B, Section 1(b)(32)

Section 1. (a) This chapter shall apply to every contract for the procurement of supplies, services or real property and for disposing of supplies or real property by a governmental body as defined herein.

(b) This chapter shall not apply to:

(32) energy aggregation contracts entered into by a political subdivision of the commonwealth for energy or energy related services arranged or negotiated by such subdivision on behalf of its residents.

Attached is the Massachusetts case law (NORTHEAST ENERGY PARTNERS, LLC vs. MAHAR REGIONAL SCHOOL DISTRICT, 462 Mass – April 3, 2012) that confirms that a contract for the procurement of energy between an energy broker and a municipality or municipal district is considered an “energy contract” under the law and is exempt from competitive solicitation and bidding procedures set forth in Chapter 30B. See the highlighted text. (<http://masscases.com/cases/sjc/462/462mass687.html>)

Our Energy-Related Services Agreement provides for the brokering of electricity through a competitive procurement process and is exempt from Chapter 30B.

1

To choose the following officers:

Two (2) Selectman for three (3) years.

Two (2) School Committee Members for three (3) years.

One (1) Board of Health Member for three (3) years.

One (1) Planning Board Member for five (5) years.

One (1) Board of Assessors Member for three (3) years.

One (1) Housing Authority Member for five (5) years.

Two (2) Library Trustees for three (3) years.

Three (3) Constables for three (3) years.

TOWN OF STONEHAM
BOARD OF SELECTMEN
2015 FEB 20 A 11: 17

#2

To choose all other necessary Town officers for the ensuing year in such a manner as the Town may determine.

Board of Selectmen

TOWN OF STONEHAM
BOARD OF SELECTMEN
2015 FEB 20 A 11: 14

#3

To hear the reports of Town officers and committees and to act thereon and to choose committees.

Board of Selectmen

TOWN OF STONEHAM
BOARD OF SELECTMEN
2015 FEB 20 A 11: 14

#4

Article To see if the Town will vote to fix the salaries of the several elective officers and the Boards of the Town for the 2015/2016 fiscal year.

Town Moderator	\$0
Board of Assessors	\$1,200
Board of Selectmen	\$3,000
Town Clerk	\$67,295

Board of Selectmen

TOWN OF STONEHAM
BOARD OF SELECTMEN
2015 FEB 10 P 6:04

#5

Warrant Article

To see if the Town will vote to amend the Stoneham Town Code, Chapter 15, Zoning By-law to add to the Highway Business District the following described property:

Parcel A

A certain parcel of land in Stoneham, MA situated on the easterly side of Albion Avenue bounded and described as follows:

Beginning at the southeast corner of the parcel at 9 Albion Avenue;

Thence running S 72° - 05' - 36" W a distance of 15.81 feet to a point;

Thence turning and running N 10° - 49' - 54" W a distance of 50.78 feet and 43.42 feet through the land at 9 Albion Avenue and 11 Albion Avenue respectively to a point;

Thence turning and running S 20° - 30' - 46" E a distance of 122.50 feet by land now or formerly of 211 Main LLC to the point of beginning.

Containing an area of 737 square feet and shown as Parcel A on a plan entitled Plan of Land 9 & 11 Albion Avenue Stoneham, Mass. Scale 1' = 20' dated February 19, 2015 by Benchmark Survey

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TOWN OF STONEHAM
BOARD OF SELECTMEN
2015 FEB 23 P 3:16

Warrant Article
Continued

Name	Address	Precinct
Wayne Fagnardi	11 ELMHURST RD	5
Bob [Signature]	5 HAMIL CT	
John [Signature]	5 HAMIL CT.	
William [Signature]	109 Spring ST	
Christy [Signature]	11 MORGAN AVE	3
Marghou Doyle	11 MORGAN AVE	3
Ed [Signature]	47 Endicott Rd	4
[Signature]	37 Tremont St	5
Jeff [Signature]	16 Brackett Ave	
Elizabeth [Signature]	18 Sheridan Rd	
Michael [Signature]	25 Cottage St	1
Donald J. [Signature]	9 Thompson pond Rd	
Carleen A. [Signature]	9 Thompson pond Rd.	
Patricia [Signature]	15 Killbuck // [Signature]	3

6

Article To see if the Town will vote to raise and appropriate from taxation or by transfer from available funds, such sums as may be necessary to defray Town charges for the ensuing year, including debt and interest and a reserve fund, or do anything in relation thereto.

Board of Selectmen

TOWN OF STONEHAM
BOARD OF SELECTMEN
2015 FEB 10 P 6:04

#7

WARRANT ARTICLE
STONEHAM SCHOOL COMMITTEE

To see if the Town will vote to authorize the Stoneham School Committee to enter into a lease with the SEEM collaborative for the property known as the Old Central School, 25 William Street, for a period of time up to and including ten (10) years, or to take any other action thereon.

TOWN OF STONEHAM
BOARD OF SELECTMEN
2015 FEB 13 A 8:13

#8

Article To see if the town will vote to reauthorize a revolving fund under Massachusetts General Law Chapter 44, Section 53E1/2, for the purpose of using receipts generated from renting space at the Senior Center building to help pay the cleaning, utilities and maintenance costs of the senior center, and authorize expenditures by the Council on Aging Director, not to exceed \$30,000 during Fiscal Year 2016 which may be made from such fund. In addition, transfer any balance remaining on June 30, 2015 from the existing Revolving account into the reauthorized Revolving account. Or do anything in relation thereto.

Board of Selectmen

TOWN OF STONEHAM
BOARD OF SELECTMEN
2015 FEB 10 P 6:04

#9

Article To see if the town will vote to reauthorize a revolving fund under Massachusetts General Law Chapter 44, Section 53E1/2, for the purpose of using receipts generated from fees charged for outings and transportation services at the Senior Center to cover costs associated with these outings and providing these transportation services, and authorize expenditures by the Council on Aging Director, not to exceed \$40,000 during Fiscal Year 2016 which may be made from such fund. In addition, transfer any balance remaining on June 30, 2015 from the existing Revolving account into the reauthorized Revolving account. Or do anything in relation thereto.

Board of Selectmen

TOWN OF STOREHAM
BOARD OF SELECTMEN
2015 FEB 10 P 6:04

May 2015 Town Meeting Proposals

#10

Revolving Fund Article

To see if the Town will vote to reauthorize a revolving fund under Massachusetts General Law Chapter 44, Section 53E1/2 for the purpose of using receipts generated from renting space at the Fire Station to pay utility, cleaning and maintenance costs, and Capital improvements of the Fire Station, and authorize expenditures by the Fire Chief, not to exceed \$40,000 during Fiscal Year 2016 which may be made from such fund. In addition, transfer any balance remaining on June 30, 2015 from the existing Revolving account into the reauthorized Revolving account, or do anything in relation thereto.

- **This is the usual article that is submitted every year for our revolving account**

TOWN OF STONEHAM
BOARD OF SELECTMEN
2015 FEB 19 P 1:48

11

Article To see if the Town will vote to reauthorize a revolving fund under Massachusetts General Law Chapter 44, Section 53E1/2 for the purpose of using receipts generated from fees charged for public health services to cover the costs of these services, and authorize expenditures by the Board of Health, not to exceed \$50,000 during Fiscal Year 2016 which may be made from such fund. In addition, transfer any balance remaining on June 30, 2015 from the existing Revolving account into the reauthorized Revolving account. Or do anything in relation thereto.

Board of Selectmen

TOWN OF STONEHAM
BOARD OF SELECTMEN
2015 FEB 10 P 6:04

#12

Article To see if the Town will vote to raise and appropriate, or transfer from available funds, or borrow, a sum of money to pay prior year invoices, or do anything in relation thereto.

Board of Selectmen

TOWN OF STONEHAM
BOARD OF SELECTMEN
2015 FEB 10 P 6:04

#13

Article To see if the Town will vote to raise and appropriate, or transfer from available funds, a sum of money to amend the Fiscal Year 2015 departmental budgets approved under Article No. 21 of the May 5, 2014 Annual Town Meeting, as amended. Or do anything in relation thereto.

Board of Selectmen

TOWN OF STONEHAM
BOARD OF SELECTMEN
2015 FEB 10 P 6:04

#14

To use a sum of money released by the Board of Assessors from the overlay account for an HVAC engineering study for the police station, or do anything in relation there to.

Board of Assessors

TOWN OF STONEHAM
BOARD OF SELECTMEN
2015 FEB 20 A 11:00

#15

Fire Engine Article

To see if the Town will appropriate a sum of Two Hundred Thousand Dollars (\$200,000) and any monies left over from **Article 9 Part A** of the October 2012 Town Meeting to purchase a Fire Pumper Engine and the Town Treasurer, with the approval of the Board of Selectmen, be authorized to sell from time to time, as the occasion requires, town notes, bonds, or other evidence of indebtedness in the amount not to (exceed) \$650,000 in accordance with Chapter 44, Section 7(1) of the Massachusetts General Laws.

- In this article, I am trying to use money left over that was appropriated for the purchase of our Ladder truck back in 2012, as well as \$200,000 to purchase a new Pumper Engine. We were appropriated \$1,300,000 in October 2012 to purchase a new Ladder truck. Our current estimate for the new Ladder Truck is actually between \$850,000 and \$900,000. I am proposing using any monies left over from this article, along with an appropriation of \$200,000 to purchase the new Pumper Engine (roughly \$625,000). Some of this cost will be offset with the sale of our current Ladder Truck and one of our older Pumper Engines (that money would go back to the general fund).

TOWN OF STONEHAM
BOARD OF SELECTMEN
2015 FEB 19 P 1:48

#16

To see if the Town will vote to grant the Board of Selectmen authority to research, develop and participate in a contract, or contracts, to aggregate the electricity load of the residents and businesses in the Town and for other related services, independently, or in joint action with other municipalities, retaining the right of individual residents and businesses to opt-out of the aggregation, or take any other action relative thereto.

Board of Selectmen

TOWN OF STONEHAM
BOARD OF SELECTMEN
2015 FEB 18 P 3:46

#17

ARTICLE: To see if the Town will vote to raise and appropriate or transfer from available funds \$200,000 for the purpose of defraying the cost of constructing water mains or replacing existing water mains, street repairs, hydrant replacement, water meter installations, purchasing equipment, or maintain the water system within the limits of the Town, or do anything in relation thereto.

Board of Selectmen

TOWN OF STONEHAM
BOARD OF SELECTMEN
2015 FEB 23 A 8:23

#18

ARTICLE: To see if the Town will vote to raise and appropriate or transfer from available funds \$200,000 for the purpose of defraying the cost of construction or rehabilitation of sewer mains manholes, pump stations or appurtenances, street repairs, purchasing equipment, or maintain the sewer system within the limits of the Town, or do anything in relation thereto.

Board of Selectmen

TOWN OF STONEHAM
BOARD OF SELECTMEN
2015 FEB 23 A 8:23

#19

ARTICLE: To see if the Town will vote to raise and appropriate a sum of money to implement certain rehabilitation and construction projects on the Town's sanitary sewer system under Phase 10 of the Massachusetts Water Resources Authority Assistance Program and the Town Treasurer, with the approval of the Board of Selectman, be authorized to sell from time to time, as the occasion requires, town notes, bonds, or other evidence of indebtedness in the amount not to exceed \$814,000 in accordance with Chapter 44, Section 7 (1) of the Massachusetts General Laws and further to accept any grants or gifts for those projects or do anything in relation thereto.

Board of Selectmen

TOWN OF STONEHAM
BOARD OF SELECTMEN
2015 FEB 23 A 8:23

20

ARTICLE: To see if the Town will vote to increase the appropriation of \$486,167 voted at the October 2014 Town Meeting to \$729,250 to be received by the Town from the Commonwealth of Massachusetts Chapter 90 local transportation aid funding for fiscal year 2015 for the purpose of continuing the permanent construction program on public ways within the Town or other eligible municipal projects and authorize the Town Administrator to make such expenditure or do anything in relation thereto.

Board of Selectmen

TOWN OF STORHAM
BOARD OF SELECTMEN
2015 FEB 23 A 8-23

And you are directed to have five hundred (500) copies of the Warrant printed and to serve the same by posting duly attested copies in at least ten (10) public places in the town seven (7) days at least before the time for holding said meeting and by causing a duly attested copy of the said Warrant to be published in some newspaper in the Town, the publication to be not less than three (3) days before said meeting.

The remaining copies you are to have at the place and time of said meeting as aforesaid.

Hereof fail not and make due return of this Warrant with your doings thereon to the Town Clerk at the time and place aforesaid.

Given unto our hands this 3rd day of March in the year of our Lord two thousand fifteen.

Board of Selectmen

Thomas Boussy, Chairman

John F. DePinto, Vice Chairman

Ann Marie O'Neill

Robert W. Sweeney

Frank Vallarelli

Pursuant to the within warrant I have notified and warned the inhabitants of the Town of Stoneham qualified to vote in elections and Town affairs of the within meeting by posting attested copies of the said Warrant in at least ten (10) public places in the Town on March 16, 2015 and by publishing duly attested copy of said Warrant in the Stoneham Independent on March 18, 2015 and April 22, 2015.

A true copy. Attest: _____
Constable of Stoneham

Customer		Town of Stoneham, MA		
Quote Title	CodeRED Limitless	Shipping Address	Billing Address	Contact Details
Shipping	Best Way-3 to 7 days	Town of Stoneham	Town of Stoneham	David Ragucci
Payment	Net 25	35 Central Street, Stoneham, MA, 02180	35 Central Street, Stoneham, MA, 02180	dragucci@ci.stoneham.ma.us Ph: 781-279-2602

Details	Avl.	Qty.	Unit Price	Ext. Price
Line # 10 Emergency Communications Network Mfr. SKU U-CR-L. Upgrade to CodeRED Limitless Term: August 4, 2014 through August 3, 2015		1	\$1,036.26	\$1,036.26

Sub Total **\$1,036.26**

Total Amount **\$1,036.26**

Customer Acceptance

A signature submission of this quotation by you, ("Customer"), will hereby serve as authorization for En Pointe Technologies Inc. to purchase the above referenced goods and/or services.
Further, Customer agrees to pay all invoices related to this order according to the terms and condition specified by En Pointe Technologies Inc. which are available at www.enpointe.com/invoice-terms

Name _____

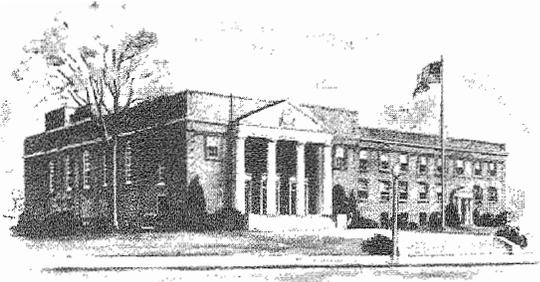
Email _____

Phone _____

PO # _____

Signature _____

Date _____



TOWN COUNSEL
WILLIAM H. SOLOMON, ESQ.

TOWN OF
STONEHAM

MASSACHUSETTS 02180

319 MAIN STREET
STONEHAM, MA 02180
(781) 438-4543

February 26, 2015

Mr. Thomas Boussy, Chairman
Board of Selectmen
Town of Stoneham
35 Central Street
Stoneham, Massachusetts 02180

Dear Chairman Boussy and Board Members:

Please accept this letter as my application for reappointment to the position of Town Counsel for the Town of Stoneham.

I greatly appreciate the opportunity of serving Stoneham as its Town Counsel. It is an honor to work with the Board and assist the Town in meeting its challenges.

Thank you.

Sincerely,

William H. Solomon
Town Counsel

Stoneham Board of Selectmen – Minutes of Meeting of February 17, 2015

Chairman Thomas Boussy called the meeting to order at 7:00 p.m. Also present were Selectman John F. DePinto, Selectwoman Ann Marie O’Neill, Selectman Frank Vallarelli, Town Administrator David Ragucci and Town Counsel William H. Solomon. Selectman Robert W. Sweeney was not present.

Pledge of Allegiance

Department of Public Works Update/Robert Grover

Director of Public Works Bob Grover gave a presentation to the Board on the responsibilities of the Public Works Department. Mr. Grover spoke on the snow and ice budget along with the snow and ice equipment. Mr. Grover states that it is imperative that the Town make a significant investment in its snow-fighting fleet. Mr. Grover spoke on the trash/recycling program in Town. Mr. Grover spoke regarding the maintenance and improvements made at Unicorn Golf Course. Mr. Grover spoke on water and sewer fees and states that Stoneham has lower rates than Reading, Wakefield and Melrose. Mr. Grover spoke on the Works Program which include Chapter 90, Sewer, Sidewalks, Water, Drain and Cemetery. All members of the Board of Selectmen told Mr. Grover that the public works is doing a great job. Selectwoman O’Neill speaking to the Board states she would like to thank you guys for the trash project you undertook to save this amount of money.

Discussion on Class II Auction Only or No Display of Car Licenses

Stoneham residents Toby Donald and Alex Hermosilla spoke to the Board as to why they are requesting the Board to allow these licenses in Town. Selectwoman O’Neill made a motion to take a closer look along with Attorney Solomon at how we would like to move forward with this. The Board decided they needed 60 days to do this, seconded by Selectman DePinto and **unanimously voted (4-0)**.

Selectman Vallarelli made a motion to move up item #13, seconded by Selectman DePinto and **unanimously voted (4-0)**.

Update on Wincrest Development Agreement/2nd Meter Discussion/Attorney Solomon

Attorney Solomon explains the amendments being made to the Wincrest Development Agreement in Section 2(i): (i) Deleting the final sentence: “Second Water Meters shall not be allowed in the Stoneham Lots or the Wakefield Lots and this prohibition shall be contained in each of the initial deeds to the Wakefield and Stoneham Lots”; and (ii) Adding the following two sentences in the place of the above deletion: “Second Water Meters shall not be allowed in the Wakefield Lots and this prohibition shall be contained in each of the initial deeds to the Wakefield Lots”. Second water meters are not prohibited by this Agreement in the Stoneham Lots. Selectman DePinto made a motion to support the amendments, seconded by Selectman Vallarelli and **unanimously voted (4-0)**.

Liquor Licensing Authority

Selectman DePinto moved to go into Liquor Licensing Authority and return as the Board of Selectman, seconded by Selectman Vallarelli.

Voting in Favor:

Selectman DePinto
Selectwoman O’Neill
Selectman Vallarelli
Chairman Boussy

Motion was unanimously voted (4-0).

Meeting recessed at 8:09 p.m. to go into Liquor Licensing Authority.

Meeting reconvened at 8:12 p.m.

FY16 Budget/Town Administrator

Town Administrator Ragucci submitted his FY16 budget of \$657,332 to the Board of Selectmen for review. Town Administrator Ragucci states that FY16 is coming in as an extremely difficult year for Stoneham. Mr. Ragucci states that two of the big things that are drawing on the budget are the Pension costs and Health Insurance costs. Mr. Ragucci states that there are two assumptions he is making one is on the increase in Health Insurance and the other is level funding on our Local Aid. Those are the two topics that will have the biggest effect on this budget. Mr. Ragucci put \$15,000 to cover the transition cost with the Town Accountant retiring. He states he was looking to put on 3 police officers in FY16 and he had to reduce that to 1 officer. Mr. Ragucci states he is asking to use \$400,000 from stabilization to maintain our current services with the strong understanding that after we extinguish our debt from the snow and ice that the rest of the dollars up to \$400,000 go back into the stabilization. Mr. Ragucci states he is looking at

possibly moving out our pension years 2023 to 2024/2025. Mr. Ragucci feels if the Health Insurance came in at 3% we would be in pretty good shape. Mr. Ragucci states he went to PEC to see if they are interested in 80%-20% split. They said to wait until March 4th when the numbers are in. Mr. Ragucci states this budget is a working document and there will be changes as we move forward. He states that the School Department is looking for 1.3 million dollar increase he is suggesting they give the School Department a \$630,000. Dr. Olson told Mr. Ragucci this is result in layoffs. Mr. Ragucci states there will be no layoffs on the Town side. Selectman Vallarelli asks a question regarding Police. Selectwoman O'Neill asked questions pertaining to specific budget line items. Chairman Boussy asks if they should have a meeting with the Finance & Advisory Board to review the budget prior to Town Meeting. The Board agreed they would like to do this. Selectman DePinto asked Mr. Ragucci what is in stabilization. Mr. Ragucci states 2.3 million before interest. Scott LeBeau, 55 Pleasant Street asked if there are two stabilization accounts. Mr. Ragucci states that yes there is Capital and General. Mr. Ragucci states there are two things they are looking to do regarding the overlay account. He is asking the Assessor to release dollars at this Town Meeting to do a HVAC engineering study for the police station and the other is requesting that the overlay be reduced by \$75,000. Selectwoman O'Neill asked Mr. Ragucci questions regarding energy costs. He explains what the town pays in energy. Mr. Ragucci states that he would like to talk with Senator Lewis and Representative Day about the LED lights throughout the Town. There was a discussion on the amount of lights that are out around town. Chairman Boussy talks about the lights being metered and maybe this being something we look into. Selectwoman O'Neill states that Erin the new Town Planner is hopefully looking at us becoming a Green Community where we could get a boatload of money towards savings or energy improvements. Mr. Ragucci confirms this is something she is looking at. Chairman Boussy asks for Erin the Town Planner be put on the agenda so she can be introduced and tell us what she is working on. Selectman DePinto made a motion to give Dave permission to hand the budget over to the Finance & Advisory Board and report any changes at each meeting from this point forward, seconded by Selectwoman O'Neill and **unanimously voted (4-0)**. Selectman DePinto states that Dave and Ron did a great job and the Board agreed.

Approve Minutes

Selectman DePinto made motion to approve minutes of January 20, 2015, seconded by Selectman Vallarelli and **voted (4-0)**. Selectman DePinto made motion to approve minutes of February 4, 2015, Chairman Boussy asks the time be changed from 7 to 6, seconded by Selectwoman O'Neill and **voted (4-0)**.

Approve Executive Session Minutes

Selectman DePinto made a motion to approve executive session minutes of December 15, 2014 and to not release. Attorney Solomon drafted something and requested to send it to the Chairman pertaining to these minutes. Selectman DePinto made a motion to approve executive session minutes of December 15, 2014 and to release with the amendments made by Attorney Solomon, seconded by Selectwoman O'Neill and **voted (4-0)**. Selectman DePinto made a motion to approve executive session minutes of February 4, 2015 and not to release with the time changed to 6, seconded by Selectwoman O'Neill and **voted (4-0)**.

Memorial Day Parade Request

Selectman DePinto moved approval of the Memorial Day Parade on 5/25/15 at 10:00 a.m. and notify Police, Fire and DPW, seconded by Selectwoman O'Neill and **unanimously voted (4-0)**.

Appoint Erin Wortman to MAPC Representative

Selectman DePinto moved to appoint Erin Wortman as the MAPC Representative effective until February 18, 2018, seconded by Selectwoman O'Neill and **unanimously voted (4-0)**.

Discussion on Snow Removal

Chairman Boussy states he was getting calls complaining businesses along 28 especially the northern end of town were not shoveling out and people were forced to walk on Main Street. Chairman Boussy states that our bylaws say they should be shoveling out until he looked up the bylaws and it does not clearly state they should be shoveling out. He states that there is only a small section of Main Street from Franklin to Montvale. Chairman Boussy would like to remind businesses within this bylaw they are required to shovel their sidewalks. He says businesses along Main Street should as a courtesy clear the sidewalks because the Town is working on the school routes. Selectman DePinto says clearing out the fire hydrants would be nice too. Selectwoman O'Neill states this is good business sense.

February 17, 2015 (3)

Town Administrator

Town Administrator Ragucci informs the Board that there was a sprinkler line that blew and flooded out many of the offices and some areas of dispatch at the Police Station. He states good news is none of the equipment was ruined and no one was injured. Mr. Ragucci states that the Senior Center also blew a water line and there is significant office damage. Serve Pro has been out to both buildings. He states that the adjustors have been out and they are moving forward. He states there are deductibles and he thinks they are about \$5000. Mr. Ragucci also states that in some preventative maintenance the Arena roof has been cleared and he feels the other roofs in Town are fine. He will look at the Library roof. Attorney Solomon states that today he worked with EB Rotondi and signed the agreement that they have been working on for a while. Attorney Solomon states it is a three party agreement between EB Rotondi, Town of Stoneham and F&T Manison LLC. He states there are two issues: (1) that the fill and debris be removed by June 1, 2015 and (2) the vehicle equipment be removed by March 31, 2015.

Miscellaneous Correspondence

No items discussed.

Selectman DePinto made a motion to adjourn, seconded by Selectwoman O'Neill and **unanimously voted (4-0)**.

Meeting adjourned at 9:30 p.m.

Respectfully submitted,
Erin Sinclair