

Pd \$360.-  
12/30/19

**TOWN OF SOMERS**  
**ZONING COMMISSION**  
**P.O. BOX 308**  
**SOMERS, CT 06071**

#20-001

SPECIAL USE PERMIT     ZONE CHANGE  
 Text Amendment

FEE: \$360 (\$60 ST fee incl.)

**PLEASE TYPE OR PRINT**

DATE: 12/30/2019

APPLICANT: Gingras Development PHONE: 860-916-0049  
ADDRESS: 19 Royal manor EMAIL: tomcarenzo@cox.net  
LOCATION: Eleanor Road, Somers  
OWNER OF PROPERTY: Gingras Development  
ZONE: A1 SPECIAL USE SECTION: see attached proposal

COPY OF DEED REQUIRED FOR PROPERTY DESCRIPTION - ZONE CHANGE ONLY

**STATE ACTION AND USE REQUESTED:**

Proposed text amendment:  
Add Article XXVI - Detached Housing Development  
(DHD) Zone

~ see attached ~

**INTENDED USE OF PROPERTY SHOULD APPROVAL BE GRANTED:**

NUMBER OF OFF STREET PARKING SPACES:

SIGNATURE: [Signature] DATE: 12/31/19  
-----DO NOT WRITE BELOW-----

DATE OF PUBLIC HEARING:

DECISION:

## **Proposed Text Amendment**

### **Article XXVI – Detached Housing Development Zone (DHD)**

#### **§ 214-153 Purpose.**

It is the purpose of this article to allow for greater variety and flexibility in the development of housing types and to facilitate the construction and maintenance of streets, utilities and public services in a more economical and efficient manner while at the same time conserving important natural site features and permanently preserving open space, while at the same time providing for low density detached and semi-detached housing for young professionals empty-nesters.

#### **§ 214-154 Procedure.**

After a public hearing, the Planning Commission may grant a special use permit for the development of detached and semi-detached housing units.

#### **§ 214-155 Definitions.**

As used in this article, the following terms shall have the meanings indicated:

##### **Detached Housing**

Detached housing units are single-family dwelling units that do not share any walls or other structural elements with other units.

##### **Semi-Detached Housing**

Semi-detached housing units are single-family dwelling units that share walls or other structural elements with other units. No more four units can be attached or connected.

#### **§ 214-156 Application.**

**A.** The applicant shall submit a written application on the prescribed form containing all the information required hereafter, including the following materials:

- (1)** A development statement listing the development team, setting forth the development concept, including, in tabular form, the number of units, type, size (number of bedrooms, amount of living space, gross floor area), ground coverage and summary showing the area of residential development and common open space as percentage of the total area.

(2) A development site plan of the entire tract in accordance with the requirements of this section and §§ 214-101 and 214-102 and meeting, to the extent applicable, the requirements set forth for a definitive plan in the Somers Subdivision Regulations.<sup>11</sup>

[1] *Editor's Note: See Ch. 213, Subdivision of Land.*

(3) An architectural rendering of the site plans and typical structures, including floor plans and elevations.

(4) A traffic study of the area as it may be affected by the proposed development, including present and anticipated traffic counts, flow patterns, and capacity analysis of present and proposed intersections and entrances serving the development.

(5) An engineering report regarding the adequacy of sewage disposal, water supply and stormwater drainage as the proposed design relates to existing utilities to the Town.

(6) A copy of the sewage disposal plans and application to the State Department of Health or Department of Environmental Protection.

**B.** Said application shall contain sufficient information so that the Planning Commission can determine the applicability of said application for the following items:

(1) Consistency with the Somers Town Plan of Conservation and Development;

(2) Preservation and protection of the character of the Town and especially the immediate neighborhood, giving due consideration to such features as public safety, including traffic control and traffic impact upon surrounding roads; development of adequate recreational facilities for the use of the residents of said proposal; adequate fire protection; public health, including sewerage disposal, drainage and water supply; and the compatibility of the size, location, architecture, and landscaping of said project with the adjacent neighborhood and the Town;

(3) Minimizing potential adverse environmental impacts upon the Town;

(4) The application is likely to result in a financially stable, soundly and attractively constructed and well managed and maintained project; and

(5) Conformity to the specific provisions of the design guidelines of this section.

**C.** Said permit shall not be issued unless the Planning Commission affirmatively determines that each of the above listed criteria is met by said applicant.

**D.** The applicant shall pay an application fee which is computed as the total of the following which are applicable to such application:

(1) Base application fee: \$200.

(2) Eighty-five dollars for every 100 feet, or any part thereof, of new roadway proposed to be constructed as part of the project and intended to be deeded to the Town as public right-of-way.

(3) Fifty-five dollars for every 100 feet, or any part thereof, of existing or previously approved public rights-of-way for Town or state roadways abutted by the boundaries of the land contained in the proposed project.

(4) The following will be added according to unit count:8

(a) For each of the first 25 units: \$100.

(b) For each of the 26th through 50th units: \$75.

(c) For each new unit over the 50th lot to be created by the project filed with the Planning Commission: \$50.

(5) Applicable State of Connecticut fee pursuant to Section 22a-27j of the Connecticut General State Statutes.

(6) Fifty dollars per building for sedimentation and erosion control measures review.

(7) All applicable fees must be paid in full at the time the application is filed with the Planning Commission.

(8) If the application for DHD modifies an existing approval where the application fees in subsection (2), (3), and (4) above have already been paid, the application fees shall not apply.

**§ 214-157 Use regulations.**

The following uses shall be permitted:

A. Up to a story-and-one-half one-family detached dwellings = one unit;

B. Up to a story-and-one-half two-family detached dwellings = two units;

C. Up to a story-and-one-half semi-detached dwellings not exceeding four units per building = four units;

D. Recreational uses and community facilities such as parks, gardens, swimming pools, tennis courts, clubhouses and community buildings;

E. Accessory uses customarily incidental and subordinate to the principal uses listed above, but expressly excluding any commercial or retail enterprises or home occupations.

**§ 214-158 Dimensional regulations.**

Property for detached housing use shall comply with the following dimensional requirements:

A. Minimum parcel size. The total parcel shall have a minimum area of not less than 20 acres. A minimum area of 10 acres of the total area required for zoning compliance shall consist of buildable area as defined in § 214-4, Definitions.

**B.** Minimum parcel frontage. The total parcel shall have a minimum frontage on an approved public way of at least 100 feet. Frontage need only be met on one road. There shall be no frontage requirements within the zone.

**C.** Front, side and rear yards. The minimum front yard (setback), side yard and rear yard requirements shall be 80 feet and shall pertain only to the periphery of the parcel.

**D.** Buffer area. A landscaped buffer strip not less than 30 feet wide, as described in Article **IX** of the Somers Zoning Regulations, shall be provided along the perimeter of the property. The buffer area shall be counted as part of the front, side and rear yards. Additional buffering may be required in environmentally sensitive areas at the discretion of the Planning Commission. The Commission may modify or waive the buffering requirements where variations in topography, natural features, or compatible land uses negate the need for such a buffer.

§ 214-159 **Density regulations.**

The maximum number of dwelling units permitted shall be determined by the Planning Commission to assure compliance with the purpose and intent of these regulations, and in any event shall not exceed four dwelling units per acre of buildable land. The maximum number of units permitted per development shall equal the buildable area of the parcel multiplied by four. The Commission may allow the units to be concentrated on a small area of the site or spread over the entire site.

§ 214-160 **Building requirements.**

**A.** Building character. The detached housing shall be an architecturally integrated development. An architectural theme shall be carried out by the use of common building materials, colors, exterior detailing, bulk and/or roof lines. Rigidity in design shall be avoided. Design characteristics shall be stated in the development application and shall include, but not be limited to, building materials, architectural design, and street furniture, and shall require Planning Commission approval.

**B.** Building location. Building location and orientation shall reflect:

- (1)** Relationship to the street line and to other buildings in the development if in close proximity, in order to protect privacy and create visual coherence;
- (2)** Views, solar access, and access to common open space, in order to enhance occupant's scale and identity;
- (3)** Organization of large developments into recognizable subareas in order to provide scale and identity;
- (4)** Avoidance of major topographic change and destruction of significant natural site features, including removal of native trees and vegetation in order to preserve and protect the environment;
- (5)** Reduction of visual intrusion into abutting properties in order to protect existing character. To the extent practicable, the units shall be developed more towards the interior rather than the periphery of the tract so that the detached and semi-detached residences, if any, border adjacent properties, act as buffer between the development and preexisting one-family neighborhoods.

**C.** Maximum building height. The maximum height of structures shall be 1.5 story and 35 feet above the ground.

**D.** Maximum number of bedrooms. The maximum number of bedrooms or rooms used primarily for sleeping purposes per dwelling unit shall be three.

**E.** Minimum floor area. The minimum floor area for any one dwelling unit shall be 900 square feet.

**F.** ADA requirements. All exterior facilities shall comply with the current ADA requirements.

**§ 214-161 Utilities.**

**A.** Each dwelling unit shall be provided with access, drainage and utilities that are functionally equivalent to that provided under the Somers' Subdivision Regulations.<sup>[1]</sup> All utilities shall be placed underground.

[1] *Editor's Note: See Ch. 213, Subdivision of Land.*

**B.** All structures that require plumbing shall be served by a sewage disposal system and a public water supply. All sewage disposal systems require approval from the Town's designated agent and the State Health Department and/or the Department of Environmental Protection.

[Amended 3-15-2018 by the Board of Selectmen, effective 4-5-2018]

**C.** All lighting and illumination in and around the buildings and in the public areas shall at a minimum meet IESNA standards.

**§ 214-162 Parking and circulation requirements.**

**A.** There shall be an adequate, safe, and convenient arrangement of pedestrian circulation (such as sidewalks, pathways, and walkways), roadways, driveways and parking.

**B.** Vehicular access to the development shall be provided from an existing public right-of-way, dedicated and accepted by the Town or state, which in the opinion of the Planning Commission is adequate to service the proposed development. As a matter of public safety, an alternate emergency access may be required.

**C.** All roads within the development shall be privately owned and maintained and shall be designed with sufficient width, suitable grade and adequate construction to safely provide for the needs of vehicular traffic generated by the development. All roads shall be designed and constructed according to the requirements of the Somers Subdivision Regulations<sup>[1]</sup> or as otherwise modified by the Planning Commission.

[1] *Editor's Note: See Ch. 213, Subdivision of Land.*

**D.** Garages or off-street parking spaces, or a combination thereof, shall be provided for all occupants, employees, and visitors, and shall be not less than 2.0 spaces per dwelling unit, one of which must be in a garage.

**E.** The use of exterior stairs and raised curbing in areas where there is pedestrian activity shall be minimized. Single-riser steps or stairs and ramp stairways, as well as individual wheel stops in or around parking lots, shall be prohibited. When a barrier is needed to separate vehicles from islands, walks, signs, etc., other devices shall be used as approved by the Planning Commission.

§ 214-163 **Landscaping requirements.**

A. A coordinated landscape design for the entire project area, including landscaping of structures, parking areas, driveways, and walkways, and buffer strips, shall be submitted for approval by the Planning Commission.

B. Wherever possible, existing trees and vegetative cover shall be conserved and integrated into the landscape design.

C. Proper maintenance of the landscaping, including the buffer strip, shall be the responsibility of the Association, and shall be a condition of conformance with the Zoning Regulations.

§ 214-164 **Common open space requirements.**

A. All land within the development which is not covered by buildings, roads, driveways, parking areas or other development, or which is not set aside as private yards, patios or gardens for the residents, shall be common open space. The area of the common open space shall equal at least 30% of the total buildable area of the development tract. Such land shall have a shape, dimension, character, and location suitable to assure its use for park, recreation, conservation, or agricultural purposes by all the residents of the development. Land used for septic system(s) may be part of the open space calculation.

B. Suitable and usable outdoor recreational area or areas shall be provided for the use of tenants. At least 2,000 square feet per dwelling unit must be usable open space for active and passive recreation. Such space shall be defined to include land for community gardens, hiking/jogging paths, tennis courts or similar facilities.

C. Subdivision of common open land or its use for other than recreation, conservation, or agriculture, except for easements for underground utilities, shall be prohibited.

D. Provision shall be made so that the common open space shall be owned in common and readily accessible to the owners and residents of all units in the development, or by a membership corporation, trust or association whose members are the owners and residents of the units. In all cases, the common open space shall be subject to a perpetual restriction running to and enforceable by the Town as a third-party beneficiary, which shall be recorded in the Somers Land Records. Such restriction shall be in such form and substance as the Planning Commission shall prescribe and may contain such additional restrictions on development and the use of common open space as the Commission may deem appropriate. Any proposed documents drafted in accordance with the section shall be submitted to the Commission as part of the application and shall be reviewed by the Town Counsel.

§ 214-165 **Community association.**

An owners' association shall be established, requiring membership of each lot or unit owner in the develop. The association shall be responsible for the permanent maintenance of water, sewage, recreational and infrastructure facilities. An association agreement or covenant shall be submitted with the application guaranteeing the continuing maintenance of such common utilities, land and facilities by assessing each unit a share of maintenance expenses. Such agreement shall be subject to the review and approval of Town Counsel and the Planning Commission as part of the permit and shall comply with the provisions of Connecticut General Statutes § 47-200 et seq.

§ 214-166 **Project identification.**

A. As a condition of its approval, the Planning Commission may permit a sign showing the project name to be permanently affixed at each entrance to the development. Each sign shall be of a size and design to be approved by the Planning Commission, provided that no such sign shall exceed 20 square feet in size. The design of the sign shall be compatible with the character of the development.

B. All streets shall be posted with standard street signs and all street names shall be approved by the Fire Chief and Assessor. Dwelling units shall be assigned street numbers by the Assessor's office.

§ 214-167 **Expiration of special use permit.**

A special use permit issued for such a development shall expire one year following its issuance if construction has not actually commenced. All work in connection with a special use permit issued for a development shall be completed within five years of said approval. The Planning Commission, upon written request and for good cause shown, may extend either or both of these time periods one or more times, provided the total extension does not exceed the original time period. Site preparation alone shall not be deemed to be the actual commencement of construction wider this section. As a condition of its approval, the Commission may establish time limits for any development or phases thereof.

§ 214-168 **Security.**

Before any building permits are issued, the developer shall be required to provide the Town with performance security in a form and amount satisfactory to the Planning Commission, the Town Engineer, and Town Counsel to guarantee the construction of required public improvements. The initial amount of the bond shall be no less than \$10,000. Reductions in the amount of the original bond may be considered by the Commission for work completed; however, the bond shall not be reduced below the initial \$10,000 amount.

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December 23, 2019

Jill Conklin, Chairperson  
Town of Somers  
Zoning Commission  
600 Main Street  
Somers, CT 06071

RE: Proposed Text Amendment – Detached Housing Development Zone

Dear Chairperson Conklin:

On Behalf of Tom Careno (Gingras Development) the owner of property on Eleanor Road, I submit this letter and report as supportive material for the proposed text amendment application to create a Detached Housing Development zone. The proposed text amendment is modeled after the existing Age Restricted Housing zone for process, procedure, density, design, and bulk/area provisions. The difference is that the Detached Housing Development zone is not age restricted, allowing for greater diversity of housing stock that is aimed at non-family households, specifically young professionals and empty nesters.

The following report provides supportive material that address the proposed text amendment regarding consistency with the Comprehensive Plan of Zoning and the Plan of Conservation and Development. In addition, the report provides an analysis of the housing stock and a municipal fiscal impact assessment of Somers that includes an analysis school district enrollments and potential enrollments from the Detached Housing Development zone. Most important, this report demonstrates that the proposed text amendment is consisted with the Comprehensive Plan of Zoning and the Plan of Conservation and Development.

Thank you for your time and consideration of this application. I will be available at the public hearing to answer any questions and addresses any concerns you or other members of the Commission may have.

Respectfully submitted,



Donald J. Poland, PhD, AICP  
Planning and Development Consultant

## **Town of Somers – Zoning Commission**

### **Zoning Text Amendment – The Comprehensive Plan of Zoning**

#### **Overview:**

When reviewing a zone change application, including text amendments, the Zoning Commission (and Planning Commission) should consider if the proposed amendment is consistent with the policies established in the comprehensive plan of zoning and plan of conservation and development. It should be noted that the plan of conservation and development is advisory and is not binding on the Commission's action regarding a zone change and/or text amendment.

#### **The Comprehensive Plan of Zoning:**

The comprehensive plan of zoning consists of the zoning regulations and zoning map as a collective document that sets forth the community's future development plan. Said comprehensive plan provides the community with a reasonable expectation for the present and future use of land within given districts. Recognizing that communities evolve and change over time the Commissions can accommodate change through amendments to the comprehensive plan of zoning. Such changes should be reasonable in nature and should not drastically change the character of an existing district or neighborhood or be contrary to the reasonable expectations of property owners (Fuller, 2007).

For example, a significant change, such as a change from a single-family residential zone to an industrial zone, may in some cases be unreasonable or inconsistent with the comprehensive plan of zoning. In this case, where the proposed zoning text amendment is based on the existing zoning designation (i.e. Age Restricted Housing zone) and utilizes the same processes, procedures, density, design, and bulk and area requirements to create a new zoning designation that will simply allow for same style of housing without the age restrictions, there is no significant or unreasonable change or impact to the comprehensive plan of zoning. Therefore, the proposed text amendment to create the Detached Housing Development zone is consistent with the Comprehensive Plan of Zoning.

#### **Commission Authority:**

When hearing an application for a text amendment, the Zoning Commission has the authority to approve, modify, or deny the application. We are open to consider modifications to the proposed text amendment if the Commission has concerns and we request that Commission discuss possible changes with us during the public hearing.

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### Zoning Text Amendment – The Plan of Conservation and Development

#### The Plan of Conservation and Development:

The Plan of Conservation and Development is an *advisory policy* document that allows a community to plan for future growth, development, and conservation and how the Town will accommodate and meet the ever-changing needs of the community over time. The Planning (and Zoning) Commission is required by Section 8-3a of the Connecticut General Statutes to consider the policies of the Plan when acting on text amendment to the Zoning Regulations. The Somers Plan of Conservation and Development was adopted in 2015. A comprehensive review of the Plan reveals that this proposed application and development are not inconsistent (strict consistency is not a reasonable approach or standard considering the wide scope and broad topics of the Plan) with Somers Plan of Conservation and Development. Specifically, regarding housing, the Plan of Conservation and Development promotes policies that are satisfied by the proposed Detached Housing Development zone. For example, the Plan notes:

- Most housing in Somers is owner-occupied, detached housing. Somers has less multi-family housing (which might be of interest to an older household) than surrounding communities (p. 6).
- Since less than 10 percent of the housing in Somers is governmentally assisted or deed restricted to be affordable...Somers is subject to the “affordable housing appeals process” (CGS Section 8-30g) whereby an affordable housing development may be proposed in almost any location, regardless of current zoning (p. 6).
- Encourage Housing in and Near Somers Center: Housing is a critical element of a successful and vibrant village center (p. 34).
- Higher density housing...should be focused in or near the villages not only because of their symbiotic relationship with businesses and other village functions but also because of the availability of utilities to serve them (p. 34).

The proposed Detached Housing Development zone will provide an opportunity for more diverse housing options, at low- to moderate-density (higher than single-family zoning), near the village center (businesses and amenities), and will be served by available utilities. The housing will provide greater housing choice and will appeal to broader spectrum of potential homeowners, including young professionals and empty nesters. Therefore, the proposed Detached Housing Development zone is generally consistent with the Plan of Conservation and Development.

#### Conclusions:

The proposed Detached Housing Development zone text amendment will provide greater housing diversity and choice. Most important, the text amendment is consistent with the comprehensive plan of zoning and the Plan of Conservation and Development and should be approved.

**Town of Somers – Zoning Commission**  
**Housing, School Enrollments, and Municipal Fiscal Impacts**  
**Summary of Findings**

**Property Tax Summary:**

Existing Property Real Property Taxes	= <u>\$4,886</u>
Modified Development Real Property Taxes	= \$130,444
Proposed Personal Property Taxes (Motor Vehicles)	= <u>\$6,886</u>
Total Proposed Property Taxes	= <b>\$137,330</b>

**Findings – Property Taxes:** The modified development with 17 units, including projected motor vehicle taxes, will generate approximately \$137,330 in tax revenue, or \$132,444 more than the \$4,886 in taxes paid by the property at this time.

**School Enrollments Summary:**

Total Enrollments Per Unit (0.25 Rutgers Multiplier)	= 5 PSAEC
New-To-District Enrollments (40%)	= 2 PSAEC
Projected Enrollment Expenditures	= <b>\$43,120</b>

**Findings – Education Enrollment Cost:** By utilizing the total education expenditures per pupil, adjusted local-share tax costs, allocated budget expenditures, and new-to-district enrollments, a range of estimated education costs from a low of \$17,248 to a high of \$86,600 were calculated. Based on experience, the Allocated Expenditures were utilized to provide a conservative estimate cost of \$43,120 for school enrollments.

**Fiscal Impact Summary:**

Total Tax Revenue (Real & Personal Property)	= \$137,330
Total Expenditures (Education & General Government)	= <b>-\$80,199</b>
Positive Fiscal Impact	= <b>\$57,131</b>

**Findings – Fiscal Impact:** The fiscal impact calculations result in \$57,131 net positive tax revenues after education and local government expenditures.

## **Town of Somers – Zoning Commission**

### **Housing Stock and Public-School Enrollments**

#### **Housing and School-Age Children**

Most notable in the context of new residential development are concerns of municipal fiscal impacts resulting from new public-school age children generated by residential development. This understandable concern results from the fact that the largest portion of the municipal budgets go to the funding of public education. Unfortunately, the assumptions made related to the number of public school-age children generated by residential development (both single and multi-family) are often significantly higher than the actual number of public-school age children generated by new residential development. Many persons assume each new housing unit will produce 2 or more school age children. However, changes in demographics, socio-economic, and lifestyle are resulting in fewer traditional households and fewer school age children. In fact, in the state of Connecticut there are 530,612 public school enrolled children and 1,354,713 households or 0.39 public school enrollments per household (or occupied housing unit).

By comparison, Somers has 3,401 household (occupied housing units) and 1,379 public school enrolled children or 0.41 public school enrollments per household (occupied housing unit) and 0.38 enrollments per total housing units (3,593). Enrollments of 0.38 to 0.41 per housing units are far fewer than the commonly assumed two or more children per housing unit. Rutgers University research demonstrates and further supports these low number of public-school age children and enrollments.

The Rutgers *“Residential Demographic Multipliers - Connecticut”* are derived from the 2000 U.S. Census. The demographic fields, differentiated by housing type, housing size, housing price, and housing tenure, have been found by Rutgers to be associated with *statistically significant* differences in Household Size, School-Age Children, and Public School-Age Children. The multipliers are calculated for new housing, defined as units enumerated in the 2000 Census and built from 1990-2000. It is important to note, while the *“Residential Demographic Multipliers”* are derived from the 2000 U.S. Census and based on new housing built from 1990-2000, the data is still relevant and meaningful today.

The analysis of the *Residential Demographic Multipliers for Connecticut* revealed several themes that exist across all housing categories, tenure, household size, and public-school age children. These themes are:

- Single family units with fewer than 5 bedrooms generate fewer than one public school-age child per unit.
- Single family units tend to generate higher numbers for persons per unit (i.e. household size) and school age children per unit than multi-family (5+ units) structures.

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- Multi-family (5+ units) rental units tend to generate more persons and school age children per unit than owner occupied (common interest) multi-family units.
- As the value of housing increases (owner-occupied and rental), the number of persons per unit and the number of school-age children per unit tend to decrease.
- There is little difference between the number of school-age children generated between one and two-bedroom units.

The *Residential Demographic Multipliers for Connecticut* reveal that new housing units, regardless of type and tenure, generate far fewer total persons, school-age children, and public school-age children (or enrollments) per housing unit than is commonly assumed.

### Housing Characteristics and Public-School Age Children

Somers's housing stock (3,593 units) is dominated by one-unit detached (single-family) housing (88.1% or 3,165 units) that is predominantly owner-occupied (88.7% or 2,879 units). In addition, the housing stock is predominately occupied by family-households (78.9% or 2,353 units) of which, 28.6% (972 units) have related children under 18 years of age. Most important, 80.1% (or 2,879 units) of the town's housing stock has three or more bedrooms, including 30% with four or more bedrooms. Based on this analysis, Somers housing is most appealing to family households and families with school age children—one-unit detached, owner-occupied, with three or more bedrooms is the housing stock that drives school enrollments. Applying the *Rutgers Multipliers* to the existing housing stock reveals an estimate of 2,171 public school age children or 792 more enrollments than the actual enrollments of 1,379. This demonstrates that housing today typically generate fewer enrollments than the *Rutgers Multipliers*.

**Table 1. Housing, Enrollments, & Public-School Age Children**

Bedrooms	Units #	Units %	Rutgers Multiplier	PSAC
Total housing units	<b>3,593</b>	<b>100%</b>	<b>0.38</b>	<b>1,379</b>
No bedroom	0	0.0%	0.04	0.00
1 bedroom	139	3.9%	0.04	5.56
2 bedrooms	575	16.0%	0.25	143.75
3 bedrooms	<b>1,656</b>	<b>46.1%</b>	<b>0.51</b>	<b>844.56</b>
4 bedrooms	<b>1,053</b>	<b>29.3%</b>	<b>0.95</b>	<b>1,000.35</b>
5 or more bedrooms	<b>170</b>	<b>4.7%</b>	<b>1.04</b>	<b>176.80</b>
<b>Total housing units</b>	<b>3,593</b>	<b>100%</b>	<b>0.60</b>	<b>2,171</b>

## Town of Somers – Zoning Commission Municipal Fiscal Impact: Preliminary Estimates

**Table 2. Existing Property & Tax Value**

Eleanor Road	Acres	Units	Appraised Value	Assessed Value	Tax Value	Taxes /Acre	Taxes /Unit
40-57	22.57	17	\$255,000	\$178,500	\$4,886	\$216.48	\$287.41

**Table 3. Modified Development & Tax Value**

Use	Units	Building(s) Sq. Ft.	Const. Cost/Sq. Ft.	Market Value/Sq. Ft.	Appraised Value	Assessed Value	Tax Value
Common Interest	17	30,260	\$225	\$168.75	\$6,808,500	\$4,765,950	\$130,444

**Notes:**

- Mill Rate = 27.37
- The 17 residential owner-occupied units will be 2-bedroom and approximately 1,200- 1,400 square feet.
- Market Value Per Square Foot is assumed at 75% of construction cost to account for soft costs not included in value.

**Table 4. Modified Development – Personal Property Tax (Residential Motor Vehicles)**

Housing Units	Motor Vehicle Per Unit	Total Motor Vehicles	Estimated Market Value	Assessment Ratio	Assessed Value	Mill Rate	Total Estimated Taxes	Taxes Per Vehicle
17	1.75	30	\$360,000	0.70	\$252,000	27.37	\$6,897	\$230

**Notes:**

- Zoning requires 2.25 parking spaces per unit.
- Vehicles per unit is assumed at 1.75 or 0.50 less than required parking.
- Market value estimated for registered vehicles is estimated \$12,000 per vehicle based on research across a dozen CT communities.

**Findings:** The proposed development, including motor vehicle taxes, will generate \$137,341 in tax revenue, or \$132,455 more than the \$4,886 in taxes paid by the existing property.

**Table 5. Fiscal Impacts – School Enrollment Projections**

Residential Housing Units	Units	PSAC Multiplier	PSAC Enrollment
Two-Bedroom Units	17	0.25	4.25 [or 5.0]

**Notes:**

- The Rutgers University, Center for Urban Policy Research “Residential Demographic Multipliers - Connecticut” are derived from the 2000 U.S. Census. The data, differentiated by housing type, housing size, housing price, and housing tenure, have been found by Rutgers to be associated with statistically significant differences in Household Size and Public School-Age Children.
- Somers has 3,593 housing units and 1,379 students enrolled in the school district. That equals 0.38 students per household. While 0.38 is a higher ratio than the 0.25 projected for the proposed 17 common interest housing units, 80.1% of Somers’s existing housing stock has 3 or more bedroom—the number of bedrooms being the primary driver of school district enrollments.

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**Table 6. Fiscal Impacts – Projected Enrollments & Education Expenditures**

BOE Expenditures	Per Pupil	Total PSE	Total Spend	N-T-D 40%	N-T-D Spend
Total Expenditures	\$17,320	5	\$86,600	2	\$34,640
Local-Share Expenditures	\$12,320	5	\$61,600	2	\$24,640
Allocated Expenditures	\$8,624	5	\$43,120	2	\$17,248

**Notes:**

- Total Expenditures is the BOE budget (\$23,884,137) divided by the total enrollment (1,379) equals \$17,320 per pupil spending.
- Local-Share Expenditure is the per pupil expenditures removing non-local tax revenues (federal, state, and other revenues) from the Town budget. A total of 29% of the Town budget revenues come from non-local tax sources.
- Allocated Expenditures is based on an BOE budget research and analysis that isolates 30% of BOE budgets that are unlikely to be impacted by changes in enrollment. For example, District Office, Utilities, Building Operations, Building Maintenance, etc.
- N-T-D is New-to-District. Based on research and analysis of BOE enrollment data for new housing units reveals that only about 21% of enrollments from new housing developments are new to the local school district. Since this proposed development will be owner-occupied, a conservative estimate of 40% is utilized.

**Table 7. Municipal Fiscal Impacts – Tax Revenues & Education Expenditures**

Revenues & Expenditures	Total			
<b>Revenues</b>				
Residential Real Property Tax	\$130,444			
Personal Property Tax (motor vehicles)	\$6,886			
<b>Total Revenue</b>	<b>\$137,330</b>	<b>\$137,330</b>	<b>\$137,330</b>	<b>\$137,330</b>
<b>Expenditures</b>	<b>Total</b>	<b>Local-Share</b>	<b>Allocated</b>	<b>New-to-District</b>
Education Expenditures	-\$86,600	-\$61,600	-\$43,120	-\$17,248
General Government (27%)	-\$37,079	-\$37,079	-\$37,079	-\$37,079
<b>Total Expenditures</b>	<b>-\$123,679</b>	<b>-\$98,679</b>	<b>-\$80,199</b>	<b>-\$54,327</b>
<b>Municipal Fiscal Impact</b>	<b>\$13,651</b>	<b>\$38,651</b>	<b>\$57,131</b>	<b>\$83,003</b>

**Notes:**

- **Total Expenditures:** the BOE budget divided by the total enrollment.
- **Local-Share Expenditure:** the per pupil expenditures removing non-local tax revenues.
- **Allocated Expenditures:** based on an BOE budget research and analysis that isolates 30% of BOE budgets that are unlikely to be impacted by changes in enrollment. For example, District Office, Utilities, Building Operations, Building Maintenance, etc.
- **N-T-D (New-to-District):** Based on research and analysis of BOE enrollment data for new housing units reveals that only about 21% of enrollments from new housing developments are new to the local school district. Since this proposed development will be owner-occupied, a conservative estimate of 40% is utilized.
- **General Government Expenditures:** estimated at 27% of total tax revenue. This is consistent with fiscal impact studies for non-residential properties because they do not generate school enrollments. Since the school enrollment expenditures are accounted for in the calculations of Education Expenditures, the 27% is utilized to assume general government service.

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**Findings:** The proposed development, including motor vehicle taxes, *will generate \$137,330 in tax revenue, or \$132,444 more than the \$4,886 in taxes paid by the existing property today.* The most conservative expenditures and fiscal impact calculations result in \$13,651 net positive tax revenues and the least conservative calculation results in \$83,003 net positive tax revenue. To be conservative, the Allocated Expenditures estimates are utilized as the formal projection that this project will *generate \$137,330 in tax revenue, \$80,199 in local municipal expenditures, for a net fiscal positive of \$57,131.*

Respectfully submitted,



Donald J. Poland, PhD, AICP  
Planning & Development Consultant

[The findings presented are based on sound research methods and planning practices. The data and opinions provided are specific to the project, location, and community and should not be interpreted to apply to any other applications, locations, and/or projects. I reserve the right to modify numbers, findings, opinions, and recommendations based on the availability of data, sources, and circumstances.]

## Appendix I. Age Restricted Housing Market

### Market Overview

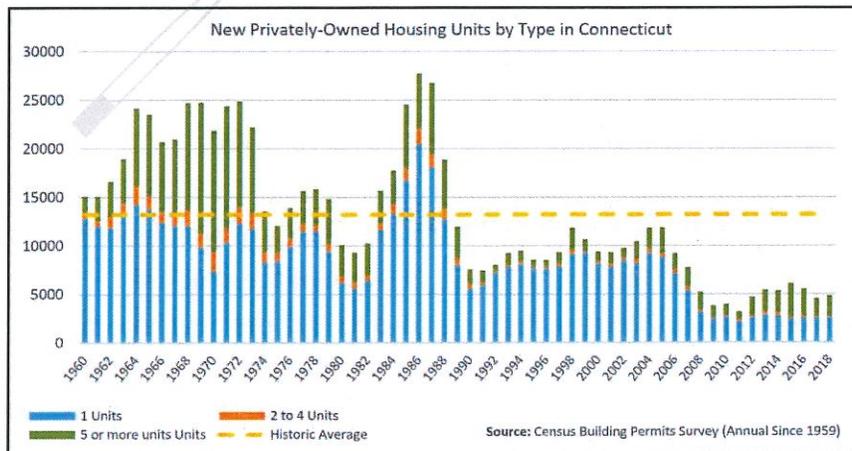
- During the period of 2000 to 2008 the Age Restricted Housing (ARH) market was very strong. Unfortunately, the strong market and 2008 housing market crash resulted in the ARH market being over built.
- The 2008 housing market crash and 2009 recession structurally changed the state and regional housing markets. New housing construction is less than 50% of what it was in 2006, single-detached housing recovery is very slow, homeownership is down, the rental market is strong, multi-family (mostly rental) housing is driving the overall housing market, and the age restricted housing market has all but dried up—non-existent in most communities.
- The need and demand for detached and semi-detached housing—alternatives to conventional single-family dwellings—is robust in the regional market.

### State DECD Housing Permit Data

The following housing permit data shows the decline in state, county, and local housing construction between 2005 and 2017.

**State, County, and Somers Housing Permits**

	2005	2007	2009	2011	2013	2015	2017
<b>Connecticut</b>	11,885	7,746	3,786	3,173	5,424	6,077	4,547
<b>Hartford County</b>	2,487	1,711	810	600	1,063	892	957
<b>Somers</b>	35	46	16	71	11	15	14



## Appendix II. School Enrollment & Expenditures

### State Department of Education Enrollment & Expenditures Data

The State Department of Education enrollment data below demonstrate that school enrollments have been declining at the both the statewide and local district level.

#### State and Somers School Enrollments

	2013-14	2014-15	2015-16	2016-17	2017-18	2018-19	Decrease
<b>Connecticut</b>	549,877	546,347	541,815	538,893	535,025	530,612	= -19,265
<b>Somers</b>	1,515	1,480	1,435	1,431	1,439	1,379	= -136

The State Department of Education school district expenditures data for Somers shows that even as school district enrollments are declining, education costs are still rising. This demonstrates that education costs are not driven solely by enrollments.

#### Somers School District Expenditures

	2012-13	2013-14	2014-15	2015-16	2016-17
Instructional Staff and Services	12,125,872	12,616,796	12,771,742	12,835,478	13,425,601
Instructional Supplies and Equipment	554,807	465,117	489,007	770,633	551,285
Instruction and Educational Media Services	474,356	478,968	482,981	599,400	592,816
Student Support Services	1,338,807	1,321,352	1,448,317	1,515,060	1,425,439
Administration and Support Services	1,973,207	2,037,295	1,988,914	1,987,041	2,116,199
Plant Operation and Maintenance	2,034,323	2,166,865	2,367,489	2,448,864	2,685,868
Transportation	1,033,428	1,075,665	1,020,911	1,014,835	1,062,255
Students Tuitioned Out	1,067,104	1,114,802	999,245	932,939	1,047,586
Other	294,490	279,373	303,187	316,390	307,537
<b>Total Expenditures</b>	<b>20,896,394</b>	<b>21,556,233</b>	<b>21,871,793</b>	<b>22,420,640</b>	<b>23,214,586</b>

### Capitol Region Housing & School Age Children 1970 to 2000

- **1970:** The Region (29 towns) had 249,229 persons between age 0-19 (37.2% of population).
- **2000:** The 0-19 age cohort declined to 195,943 persons (27.1% of population).
  - **School Age Population:** This is a loss of 53,286 school age children.
  - **Housing:** From 1970 to 2000 the Region added 81,802 net new housing units.
- **Findings:** If new housing was the driver of public-school age children (enrollments), then the Region should have gained school age children, not lost 0.65 school age children for every new housing unit added.

## Appendix III. Ellington Multi-Family Housing Case Study

### Ellington Multi-Family Housing & School Enrollment Analysis

As part of the 2019 Plan of Conservation and Development I analyzed multi-family housing (both rental and common interest ownership development) and the public-school enrollments generated by such development. I was fortunate to have enrollment data provided the Board of Education and unit mix (bedrooms) data provided by the Planning Department for each development. The study included 1,862 multi-family housing units or 80.6% of the total multi-family housing units in Ellington. Therefore, I have a very high level of confidence in the accuracy of the data and finding.

**Findings:**

- 1,862 Multi-Family Units = 80.6% of Total Multi-Family Units (2,309)
- 295 Public School Enrollments / 1,862 Units = **0.158 PSE/Unit**
- 2,309 Multi-Family Units (**34%** of housing) x 0.158 PSAC/Unit = **365 PSE (14%** of enrollment)
- 4,408 Detached Housing Units (**66%** of housing) = 2,323 PSE (**86%** of enrollment)
- 2,323 PSE / 4,408 detached housing units = **0.52 PSEC/Unit**
- Multi-Family = **0.158 PSE/Unit** and Detached (single-family) housing = **0.52 PSEC/Unit**

Apartments/Condos	PSAC Total	Unit Total	B-R 1	B-R 2	B-R 3	B-R 4
Abbott Place (Abbottville)	1	54	0	30	23	1
Autumn Chase*	120	332	97	235	0	0
Chaserall Meadows	8	60	0	43	17	0
Cider Mill Heights (1 Maple St)	14	38	4	34	0	0
Cornfield	23	215	173	42	0	0
Deer Valley (South)	37	256	127	129	0	0
Deer Valley North	14	200	100	100	0	0
Ellington Ridge (1 Abbott Rd, Units 50-207)	13	158	132	26	0	0
Johnny Appleseed	12	120	96	24	0	0
Meadowbrook	3	129	129	0	0	0
Pinney Hill Apartments	1	69	69	0	0	0
Ellington Meadows/Center Village (Steeple View)	10	49	0	10	39	0
Stonebridge Apts	5	79	79	0	0	0
Watercrest Townhouses	5	8	8	0	0	0
<b>Windermere Village (3-6-17) Age Restrictions Removed</b>	<b>28</b>	<b>95</b>	<b>1</b>	<b>27</b>	<b>63</b>	<b>4</b>
<b>Total</b>	<b>294</b>	<b>1,862</b>	<b>1015</b>	<b>1400</b>	<b>426</b>	<b>15</b>

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## Appendix IV. Somers Housing Analysis

### Housing Characteristics

According to the U.S. Census (2017 estimates), Somers has a total of 11,284 person and 3,593 housing units, 94.7% (3,401) of which are occupied and 5.3% (192) of which are vacant (Table 1.). Vacancy rates of less than 10% typically indicate demand and the need for new supply.

Somers's housing stock is dominated by single-unit detached housing—commonly known as single-family housing (88.1%). Including single-unit attached housing (typically condominiums), 80.4% of Somers's housing stock is considered single-family housing—a housing stock that is favorable to homeownership (Table 2). The remaining 9.6% of housing stock is in various forms of multi-family housing (2-unit or more).

**Table 1. Housing Occupancy**

Housing Occupancy	Somers	
	Estimate	Percent
Total housing units	3,593	100
Occupied housing units	<b>3,401</b>	<b>94.7%</b>
Vacant housing units	192	5.3%
Homeowner vacancy rate	---	0.3%
Rental vacancy rate	---	5.0%

**Table 2. Units in Structure**

Housing Units in Structure	Somers	
	Estimate	Percent
Total housing units	3,593	100%
1-unit detached	<b>3,165</b>	<b>88.1%</b>
1-unit attached	<b>84</b>	<b>2.3%</b>
2 units	201	5.6%
3 or 4 units	43	1.2%
5 to 9 units	20	0.6%
10 to 19 units	19	0.5%
20 or more units	<b>61</b>	<b>1.7%</b>
Mobile home	0	0.0%
Boat, RV, van, etc.	0	0.0%

The high percent (88.1%) of Somers's single-unit (single-family) housing stock lends itself to homeownership and explains the 84.7% homeownership rate in Somers (Table 3.). The average household size of owner-occupied units is 2.79 persons per unit compared to 2.37 persons per rental unit.

**Table 3. Housing Tenure**

Housing Tenure	Somers	
	Estimate	Percent
Occupied housing units	3,401	100%
Owner-occupied	<b>2,879</b>	<b>84.7%</b>
Renter-occupied	522	15.3%
Average household size of owner-occupied unit	2.79	(X)
Average household size of renter-occupied unit	2.37	(X)

The median number rooms per housing unit is 6.9 with 57.6% of Somers's housing stock having seven rooms or more (Table 4). More rooms typically indicate larger homes and more bedrooms per housing

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unit. 80.1% of Somers’s housing stock has three or more bedrooms and 34.0% of the housing stock has four or more bedrooms (Table 5).

**Table 4. Rooms**

Rooms Per Housing Unit	Somers	
	Estimate	Percent
Total housing units	3,593	100%
1 room	0	0.0%
2 rooms	0	0.0%
3 rooms	109	3.0%
4 rooms	245	6.8%
5 rooms	376	10.5%
6 rooms	792	22.0%
7 rooms	<b>658</b>	<b>18.3%</b>
8 rooms	<b>729</b>	<b>20.3%</b>
9 rooms or more	<b>684</b>	<b>19.0%</b>
Median rooms	6.9	---

**Table 5. Bedrooms**

Bedrooms	Somers	
	Estimate	Percent
Total housing units	3,593	100%
No bedroom	0	0.0%
1 bedroom	139	3.9%
2 bedrooms	575	16.0%
3 bedrooms	<b>1,656</b>	<b>46.1%</b>
4 bedrooms	<b>1,053</b>	<b>29.3%</b>
5 or more bedrooms	<b>170</b>	<b>4.7%</b>

Somers’s housing stock trends a bit older with only 36.6% of the housing stock being built since 1980 and 13.7% of housing being built since 2000 (Table 6.). Maintaining younger housing stock with modern amenities is important to providing a modern, desirable, and competitive housing product and market.

Somers’s householders are mostly new to the community. Nearly 85% (84.8%) of the householders moved into their housing unit since 1980, 72.5% moved in since 1990, and 50.4% have moved in since 2000. This is generally consistent with the age of the housing stock and overall movement patterns of householders. The fact that 50.4% of households moved into their housing since 2000 and only 13.7% of the housing stock has been built since 2000, indicates that Somers is experiencing meaningful turnover in housing and households.

**Table 6. Year Structure Built**

Year Structure Built	Somers	
	Estimate	Percent
Total housing units	3,593	100%
Built 2014 or later	0	0.0%
Built 2010 to 2013	115	3.2%
Built 2000 to 2009	376	10.5%
Built 1990 to 1999	<b>307</b>	<b>8.5%</b>
Built 1980 to 1989	<b>519</b>	<b>14.4%</b>
Built 1970 to 1979	794	22.1%
Built 1960 to 1969	558	15.5%
Built 1950 to 1959	278	7.7%
Built 1940 to 1949	169	4.7%
Built 1939 or earlier	447	13.3%

**Table 7. Year Householder Moved into Unit**

Year Householder Moved into Unit	Somers	
	Estimate	Percent
Occupied housing units	3,401	100%
Moved in 2015 or later	<b>188</b>	<b>5.5%</b>
Moved in 2010 to 2014	<b>644</b>	<b>18.9%</b>
Moved in 2000 to 2009	<b>880</b>	<b>25.9%</b>
Moved in 1990 to 1999	<b>752</b>	<b>22.1%</b>
Moved in 1980 to 1989	420	12.3%
Moved in 1979 and earlier	517	15.2%

Somers’s median value of housing is \$308,500 with over 90.0% of owner-occupied housing valued above \$200,000. In addition, 52.6% of the owner-occupied housing is valued above \$300,000. To afford

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the median owner-occupied home at \$308,500 in Somers, a household needs to have a household income of approximately \$102,833 (\$308,500 x 0.30). This is consistent with Somers median household income of \$101,897. Of the 2,879 owner-occupied housing units, 72.9% (2,099 units) have a mortgage (Table. 9).

**Table 8. Value – Owner-Occupied Housing**

Value	Somers	
	Estimate	Percent
Owner-occupied units	2,879	100%
Less than \$50,000	59	2.0%
\$50,000 to \$99,999	0	0.0%
\$100,000 to \$149,999	83	2.9%
\$150,000 to \$199,999	145	5.0%
\$200,000 to \$299,999	1,077	37.4%
\$300,000 to \$499,999	1,299	45.1%
\$500,000 to \$999,999	184	6.4%
\$1,000,000 or more	32	1.1%
<b>Median</b>	<b>\$308,500</b>	---

**Table 9. Mortgage Status**

Mortgage Status	Somers	
	Estimate	Percent
Owner-occupied units	2,879	100%
Housing units with a mortgage	2,099	72.9%
Housing units without a mortgage	780	27.1%

Of the 3,401 occupied housing units in Somers, 510 (or 15.0%) are one-person households—such households generate zero school enrollments. In addition, 1,369 (or 40.3%) are 2-person households, most of which would not generate school enrollments. Of the 3,401 occupied housing units, 2,685 (or 78.9%) are Family Households, of which only 28.6% (or 972 units) have related children under 18 years of age.

**Table 10. Households, Families, and Young Children**

Household Type	Occupied Units	Occupied %	Owner Units	Owner %	Rental Units	Rental %
Occupied Housing Units	3,401	100%	2,897	100%	522	100%
1 – Person Household	510	15.0%	328	11.4%	182	34.9%
2 – Person Household	1,369	40.3%	1,249	43.4%	120	23.0%
3 – Person Household	690	20.3%	533	18.5%	157	30.1%
4-or-more– Person Household	832	24.5%	796	26.7%	63	12.1%
Family Households	2,685	78.9%	2,353	81.7%	332	63.6%
Married-Couple Family	2,222	65.3%	2,053	71.3%	169	32.4%
Household 15-34	171	5.0%	127	4.4%	44	8.4%
Household 35-64	1,440	42.3%	1,367	47.5%	73	14.0%
Household 65+	611	18.0%	559	19.4%	52	10.0%
Other Family	463	11.5%	300	10.4%	163	31.2%
Non-Family Households	716	26.0%	526	18.3%	190	36.4%
Household Living Alone	510	15.0%	328	11.4%	182	34.9%
Householder Not Living Alone	206	6.1%	198	6.9%	8	1.5%
Family Type & Own Children						
W/Related Children Under 18 years	972	28.6%	844	29.3%	128	24.5%