

2009

# Horizons: A Vision for the Future

Long Range Plan for Housing Nantucket



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## ***Executive Summary***

NHA Properties Inc. d/b/a Housing Nantucket has entered its 16<sup>th</sup> year of operation – growing from a small non-profit focused on moving and renovating houses to an organization that has a broad mission of creating sustainable housing options for Nantucket residents. This mission includes housing development, housing management, technical assistance and general organization administration. The future for the organization appears strong and the Board of Directors faces a future of new challenges and solutions to help stem the tide of decreasing affordability on Nantucket.

The next five years will be marked by:

- An increase in rental housing from the current 26 units to a total of 54 units (including 12 managed units from NET);
- Targeted acquisition of new parcels for continued growth;
- An increase in Nantucket Housing Needs Units to a total of 70 units;
- Growth of educational and outreach programs – such as an expanded homebuyer education program, responsible renter programs and increased “green building” education programs;
- Development of a public/private partnership to expand privately held affordable housing;
- Development of a fundraising program and expanded grant requests;
- The restructuring of staff to fulfill the organizational mission;
- The addition of new board members; and
- Completion of the Housing Resource Center.

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## ***Background:***

NHA Properties Inc. d/b/a Housing Nantucket is a 501 (c) 3 non-profit dedicated to creating and sustaining community housing solutions. Established in 1994 as NHA Properties Inc., the organization began as an outgrowth of the Nantucket Housing Authority. This early version of the organization focused primarily on moving and renovating houses for use as affordable housing. There was one part time staff person and the organization shared space with the Nantucket Housing Authority.

The current organization grew out of efforts by the Nantucket Resident Housing Partnership to focus housing activities on the current needs. This group, coupled with two study documents which both called for greater coordination of housing efforts, helped lay the groundwork for the current organization. See the section titled “Community Goals” for more information on how Housing Nantucket has achieved many of these goals.

Since first being staffed full time in 2002, the organization has developed three central programs – housing development, housing management and technical assistance. All three of these programs fall under a central administration and finance umbrella.

### *Housing Development*

Housing Nantucket owned 26 rentals as of June 2009. These affordable rentals have been created through public/private partnerships where land, formerly owned by the Town of Nantucket and transferred to the Nantucket Housing Authority, is put out to bid for development as affordable housing. The organization has been the recipient of many of the winning bids for these parcels.



Historically, Housing Nantucket has utilized a “House Re-Cycling” program to move houses to these parcels. Private donors donate houses which are in good condition but are not needed. HN facilitates the move of these houses to the lots and then oversees the management of the rental. This generated 22 units over the first 14 years of operation.

While this house recycling program is a “green” program because it minimizes waste, from time to time the organization has parcels where a traditional house move does not make sense – due to lot constraints or housing need. The organization then utilizes standard construction to build new units. In 2007, the organization adopted a policy entitled “Affordable & Green.” This policy encourages all new units constructed as part of the organization’s rental program to reach at least a LEED for Homes certification level. The two newest units for the organization will meet that level and surpass it, reaching as high as Gold. Innovative construction methods – such as Insulated Concrete Forms – and materials – such as Low-VOC paints and cabinets – are combined with innovative energy methods such as solar thermal panels to create an affordable housing unit that is comfortable and energy efficient.

As part of the organization's homeownership development programs, the organization oversees Nantucket Housing Needs Covenant (NHNC). While, HN does not directly create the unit through construction, these units are a method for a public/private partnership to create housing through existing units. NHNC provides housing for moderate income residents – those earning up to 150% of median income – by allowing the creation of condominiums of existing secondary dwellings. These condominiums can be sold for a maximum price, determined annually, and can only be sold to qualified buyers, who are certified through an internal process. The organization does not facilitate the actual purchase and sale, but rather qualifies all the parties and confirms the purchase process.

### *Housing Management*

Currently, Housing Nantucket is the largest non-profit property manager on the island. With twenty-six units and families to manage, the organization has committed over \$750,000 in the last two years towards the renovation and upkeep of the units. Some of the work was critical maintenance work, while others were upgrades such as the installation of Rinnai heaters and improved insulation for energy efficiency. The goal of “Affordable & Green” has moved from new construction to the maintenance of existing buildings. In early 2009, the organization performed its first “green renovation.” This project replaced floors with bamboo, used low-VOC paints and used recycled cabinets.



Furthermore, the organization has been engaged as the asset manager for the Nantucket Education Trust, which includes twelve additional units for school staff personnel. HN is responsible for all property management and also manages basic asset bookkeeping. HN is in discussions to expand its property management scope to other pending affordable housing projects around the island.

### *Technical Assistance and Services*

Outside of building and managing rental and homeownership units, Housing Nantucket uses its experience to provide technical assistance or professional services to local groups and individuals. This can include homebuyer education, answering basic questions about income levels, detailing how a developer can build affordable housing, answering questions from around the country on our issues and finding new partnerships with local groups to grow the base of affordable housing.

As part of the homeownership program, the organization has provided first time homebuyer courses hosted through the Community School. Currently two sessions are held per year, with approximately 10-15 attendees per sessions. The organization has been certified by Bank of America as a provider and has received the seal of approval from the Massachusetts Homebuyer Collaborative. Educational sessions have also included one-on-one courses for those seeking to obtain a certificate before the next class. Housing Nantucket has started to explore additional programs for the community – such as design assistance and renter education.

Homeownership creation includes financial based services. Primary on this list is the “Down Payment Assistance Program” or gap finance. This program provides up to a \$5000 grant to first time homebuyers earning below 100% of income and who have permanently restricted housing – such as 40B lottery winners and covenant homeowners. A second part of the financial based services is the ability to serve as a 40B lottery monitor. Housing Nantucket currently serves as the permanent lottery monitor for the Abrem Quarry 40B development



Planning for affordable housing on Nantucket has, until late 2008, been inadequate because of a lack of a professional, Town-based, housing planner to coordinate activities around the island. Housing Nantucket sought to fill that breach. Recently the organization has been focused on local zoning amendments for the NHNC program. However, the staff has also tried to engage the planning staff by developing new educational programs and to encourage amendments to better fit the housing of the island to its income ranges. The staff has also been working with 40B consultants to understand the ways which the 40B rules can work effectively on Nantucket without alienating neighbors and the community as a whole. In late 2008, the Nantucket Planning and Economic Development Commission hired its first Housing Planner in over 15 years. Housing Nantucket has been working with the current Housing Planner and hopes to continue to build on this new relationship.

The organization has taken the lead to work for passage of the Nantucket Housing Bank Bill. This bill will provide funds for the creation of affordable housing and will be derived from a surcharge on real estate sales over \$2,000,000. The staff has also been working with local professionals, residents, boards, and organizations to better understand how the organization can be effective within the community. This partnership program, which has included real estate brokers, builders, designers, environmentalists, preservationists, and human services, has begun to generate new ideas and programs for the organization. Finally, the staff has taken steps to create an effective local website which will detail the issues of housing and provide resources to the community.

## *Administration and Finance*

Administratively, the organization has typically had a two person staff. The Executive Director is responsible for all day-to-day operations, including billing, finance, and personnel. The Executive Director serves as the property development specialist and property manager. The half time Community & Resident Services Manager focuses on NHNC administration, resident services, and fundraising projects. Co-Op students and interns have been hired to provide design services and to learn about affordable housing. The organization has a board of seven members, which meets once a month. This board has responsibility for all policy setting and review of the Executive Director. The board is made up of bankers, lawyers, real estate agents, builders, and housing advocates.

Currently Housing Nantucket sustains itself from a series of grants and funding mechanisms – the largest being the Community Preservation Committee which has been a continuous supporter of the work of the organization. The Massachusetts Housing Partnership has also granted HN \$50,000 over two years for operational funding. Smaller grants from Bank of America (\$11,000) and Tupancy Harris Foundation (\$40,000) have also been received. No major fundraising program has been established to date.



## ***Community Goals***

Housing Nantucket is a product of the community's needs. The original NHA Properties grew out of the Nantucket Housing Authority's work to create an organization that would respond to community needs more quickly. Later, at the end of the 1990s, efforts by the Nantucket Resident Housing Partnership to focus housing activities on the current needs led to several studies which called for greater coordination of housing efforts, helped lay the groundwork for the current organization.

The first study document, *Charting the Future: the Nantucket Comprehensive Community Plan*, was written in 2000 and ratified in 2001. The plan states:

*"Housing is without question the most critical issue on Nantucket's agenda. For people born and raised here who do not already own a home, no problem is more severe than the lack of housing at a price they can afford. The problem is no less severe for those who own Nantucket businesses or manage school or Town of Nantucket departments who are concerned about housing for both seasonal and year-round employees. Housing prices are now out of reach for most people whose income is earned from on-island resources." (51)*

The action plan of this document called for the creation of a "Nantucket Housing Office" (Objective 2.1) "that will promote, implement, and administer programs developed to meet the housing needs of those committed to year-round residency." This organization was to serve as the "central information and certification agency" for housing. Specifically, this organization would manage what would eventually become the Nantucket Housing Needs Covenant.

The second study document, written in 2002, was a "housing needs study" written by John Ryan and published by the Resident Housing Partnership. The study called for the creation of 600 new units – 400 ownership and 200 rentals – in the next ten years. The study also encouraged development of new revenue streams and community partnerships. Most important, the document encouraged a housing office to take the lead in creating this housing stock and revenue.

Besides striving to fulfill global goals, Housing Nantucket (HN) was established and operates in an effort to accomplish the goals of the Nantucket community set forth in various plans and reports (1990 Goals and Objectives, 2000 Comprehensive Community Plan, 2002 Community Housing Needs Assessment/Action Plan, and 2009 Master Plan). This section identifies these community goals divided into the below sections and assesses how far Housing Nantucket, the Town, and/or other entities have come in meeting these objectives.

## COMMUNITY HOUSING DEVELOPEMNT AND MANAGEMENT

The lack of affordable housing on Nantucket for year-round residents, seasonal and permanent employees, the elderly, and special needs population has been well documented in an array of studies and reports (i.e. 2000 Comprehensive Community Plan and 2002 Community Housing Needs Assessment). As an outgrowth of the Nantucket Housing Authority, HN was established to address this need of affordable housing on the Island. The overlying goal of the Nantucket community is to create and maintain affordable housing units in dispersed locations throughout the Island. These objectives below work towards this main goal.

Town-Related	HN Leads	Other Leads
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Goals and Objectives	Responsibility	Progress	Completed	Next Steps
Create 400 new homeownership units over the next eight years (50/year) for year-round residents earning between 80 and 150 percent of median household income (2002 Community Housing Needs Assessment/Action Plan)				
100 new units built on land newly purchased through municipal bonding	Town of Nantucket	No such activity to date as taken place.	No	No further action on the part of HN.
75 second dwelling conversions using NHNC	Housing Nantucket, Housing Authority	As of August 2009, a total of 39 ownership units. These units are for those earning up to 150% of median income, located on scattered sites.	39 units	Continue to add more units.
75 new opportunities through zoning initiatives	Planning Board, Town of Nantucket	Inclusionary zoning requirements in Major Commercial Development (MCD) and the Multi-Family Overlay District (MFOD) have created some units.	Number is hard to quantify due to the constant flux of commercial and multi-family developments.	Develop method to quantify units.
50 existing homes purchased by first time homebuyers with a shared equity investment funded by a private real estate investment fund	REIT (Partnership with AHTF and HN)	Never established by any entity on Nantucket. Left consideration due to current housing situation and lack of interest.	No	In order for HN to undertake a program like this, a constant stream of funding with advance expertise and research would be needed.

Create and maintain 200 new units of permanently affordable, year-round, rental housing over the next eight years (25/year) for residents earning less than 100 percent of median income (2002 Community Housing Needs Assessment/Action Plan and 2000 Comprehensive Community Plan)				
50 units of employer-provided community housing for year-round employees with outreach and financing assistance	Employers (i.e. Town of Nantucket, Nantucket Island Resorts, Marine Home, Stop & Shop, Nantucket Cottage Hospital, banks, and restaurants) provide employee housing on an "as-needed" basis with no other involvement by the Town or other organization.	The exact number of all employer-provided community housing for year-round employees is unknown due to its changing nature.	Marine Home Center provides approximately 20 units for their employees, and Nantucket Island Resorts provides approximately 128 units for their employees.	The notion of providing outreach and financing assistance by the Town or HN to aid in employee housing development can be considered; however, this practice might create an unnecessary "middle man" and complicate actual housing production.
50 units for Town employees and other residents on existing and new House Authority- and Town-owned land	Town of Nantucket, Housing Authority, Housing Stakeholders	As of August 2009, HN owns and manages 26 rental units, and the Nantucket Education Trust owns 12 rental units for those earning up to 150% of AMI. Estimated range falls short of 50 unit target due to limited House Authority- and Town-owned land.	38	Continue to create new units.
50 year-round units created through zoning initiatives	Town of Nantucket, Planning Board	Inclusionary requirements somewhat successful in producing new rental units.	Number has not been compiled by Planning Board.	New actions need to be researched, like Barnstable's amnesty accessory apartment bylaw.
50 new units of mixed income that uses equity from the U.S. Treasury's housing tax credit program	Housing Nantucket, Private Developers	None	No	Housing Nantucket should develop program that would utilize these credits

				(generally over 12 units in size).
Expand the availability of NHNC in neighborhoods and ensure that a majority of new housing units intended for year-round occupancy are on NHNC lots (2000 Comprehensive Community Plan)	Housing Nantucket	Expanded the availability of NHNC lots.	39 units created	Do more advocacy and purchase restrictions to ensure that a majority of new housing intended for year-round occupancy are on NHNC lots.
Develop a comprehensive housing project for the elderly and special needs population that integrates rental and owner-occupied units on Town-owned land (2000 Comprehensive Community Plan)	Private Developer, Town of Nantucket, Housing Nantucket	The development of Sherburne Commons	Sherburne Commons	Sherburne Commons has filed for bankruptcy, and its future is unknown.
Meet the planned production goal of 20 dwelling units per year (2009 Master Plan)	Housing Stakeholders	2 units completed, 8 planned	No	HN will strive to reach and will likely exceed with predicted rental and ownership unit development.

**PROGRAMS, TECHNICAL ASSISTANCE, AND SERVICES (POLICY)**

The creation and operation of affordable housing can be facilitated through changes in regulations, the provision of incentives, and other policies and programs. These objectives and goals seek to develop strategies that facilitate the development, attainment, and retention of affordable housing units.

Town-Related	HN Leads	Other Leads
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Goals and Objectives	Responsibility	Progress	Completed	Next Steps
Amend the Zoning Bylaw, Town Code, and/or Regulations Governing the Subdivision of Land to:				
assist in creating a supply of lots with NHNC (2000 Comprehensive Community Plan)	Town of Nantucket, Planning Board	Inclusionary zoning requirements have created a number of NHNC lots.	On-going	Continue creating NHNC lots.
establish a linkage-fee program (2000 Comprehensive Community Plan)	Town of Nantucket, Planning Board	AHTF has been created to provide funding to affordable housing projects.	No	An official linkage-fee program has never been established due to its perceived ineffectiveness by the Town.
provide incentives for the use and occupancy of existing and future secondary dwellings for NHNC units, especially in the Town Overlay District (2000 Comprehensive Community Plan)	Town of Nantucket, Planning Board	No such regulation changes have taken place.	No	Further research needs to be done in rental covenants and possible HN partnership with ReMain Nantucket, as well as more education on current incentives.
encourage the creation of new apartments with NHNCs downtown, in the mid-island area, and associated with mix-use Neighborhood Centers (2000 Comprehensive Community Plan)	Town of Nantucket, Planning Board	Incentives that have been provided include covenant requirements increased from 80% to 150% of median income and subdivision allowance with no condominium requirement.	On-going	Current incentives have had no real impact; therefore, the Town will not implement additional ones unless demand rises.

provide clear standards and guidelines for small- and large-scale seasonal employee housing development (2000 Comprehensive Community Plan)	Town of Nantucket, Planning Board	No clear standards and guidelines have been developed by the Town. A Dormitory Overlay District (DOD) was in effect. However, it was never used, so it was omitted.	No	Current attempts at providing guidance have been allowing the MFOD in the TOD by right.
permit and provide standards for the creation of large-scale co-housing developments for senior citizens (2000 Comprehensive Community Plan)	Town of Nantucket, Planning Board	This type of project has never been considered or developed.	No	No real interest is shown from the Town to undertake this type of project.
assess community housing impact fees on residential properties above a certain price threshold (2002 Community Housing Needs Assessment/Action Plan)	Town of Nantucket, Planning Board	Has been somewhat addressed with the Community Housing Bank.	No	No real interest is shown from the Town to implement impact fees.
Create incentives to:				
allow more flexible land development code (1990 Goals and Objectives)	Town of Nantucket, Planning Board	Cluster zoning was implemented in 1972; however, modifications and changes to the zoning code have created a variety of choices for a developer. Additionally, 40B and 40R state regulations have allowed for added flexibility.	Yes	None
allow use of phased growth waivers conditional on an acceptable affordable housing component (1990 Goals and Objectives)	Town of Nantucket, Planning Board	Major Residential Development (MRD) utilizes phased growth waivers, in exchange for affordable housing inclusion.	Yes	None
enable a streamlined permitting process (1990 Goals and Objectives)	Town of Nantucket, Planning Board	Chapter 40B comprehensive permits provide a streamlined permitting process.	No	No local guidelines exist in the Town, but should be pursued and advocated by HN.

provide up-front layout and design guidance (1990 Goals and Objectives)	Town of Nantucket	Done on a project-by-project basis by the Town, but not often.	No	Do more research into grant funding and possible partnership with the Town.
allow separate ownership of multiple housing units on a single lot (1990 Goals and Objectives)	Town of Nantucket, Planning Board	Through the NHNC program one of the housing units on a single lot must be under a covenant.	Yes	Keep supporting these efforts.
enable pursuance of financial assistance (1990 Goals and Objectives)	Housing Nantucket, Town of Nantucket, Planning, Board	Community Development Block Grants (CDBG) and other federal grants have been used.	On-going	HN needs to pursue additional funding avenues.
encourage the conversion of existing dwellings to year-round housing (2000 Comprehensive Community Plan)	Town of Nantucket, Planning Board	Has been done through the NHNC program.	Yes	Keep supporting these efforts.
minimize the conversion of existing year-round rental and owner-occupied housing to seasonal vacation rentals (2000 Comprehensive Community Plan)	Town of Nantucket, Planning Board	Has been done through the NHNC program and taxes.	Yes	Keep supporting these efforts.
give priority to the development of community housing especially those with permanent affordability provisions (2002 Community Housing Needs Assessment/Action Plan)	Town of Nantucket, Planning Board	Precedence is giving sometimes to community housing through various incentives (i.e. inclusionary zoning requirements).	No	HN needs to advocate for a real plan of action.
allow state and local tax credits for business owners who provide housing for their employees (2000 Comprehensive Community Plan)	Town of Nantucket, Planning Board	No such incentives have been developed.	No	HN needs to do more research into and education about various tax credits available.
allow tax breaks for property owners who voluntarily impose NHNC or who rent to year-round residents for long-term periods (2000 Comprehensive Community Plan)	Town of Nantucket, Planning Board	No such incentives have been developed.	No	HN needs to advocate more.

subdivide a lot containing a secondary dwelling into two lots by imposing a NHNC (2000 Comprehensive Community Plan)	Town of Nantucket, Planning Board	These subdivisions have been and are taking place throughout the Island.	Yes/On-going	Keep supporting these efforts.
create restricted housing units, especially in the TOD and preferably in perpetuity (2009 Master Plan)	Town of Nantucket, Planning Board	Restricted housing units have been established in the TOD, as well as other parts of the Island.	Yes/On-going	Keep supporting these efforts.
Investigate, establish, and administer programs and policies that:				
Drive down the cost of land per units of housing through (1990 Goals and Objectives):				
density bonuses	Town of Nantucket, Planning Board	The MFOD provides density bonuses in appropriate areas.	Yes	Keep supporting these efforts.
a housing land bank	Town of Nantucket	The Nantucket Community Housing Bank legislation is awaiting approval by the Massachusetts legislature.	In Progress	Keep supporting this effort.
the creation of "flag lots"	Town of Nantucket, Planning Board	This action is not applicable to Nantucket and not even considered by the Town.	No	No further action.
the conveyance of tax title parcels	Town of Nantucket	These transactions have and continue to take place.	Yes/On-going	Keep supporting these efforts.
low-cost land leases/purchase options	Town of Nantucket	Some examples include 2 Fairgrounds Road and the Miacomet property.	Yes/On-going	Keep supporting these efforts.
Drive down the cost of construction per unit of housing through (1990 Goals and Objectives):				
conversions of single-family homes to two-family dwellings	Town of Nantucket, Planning Board	No preference by the Town between the conversions of single-family homes to two-family dwellings and duplex development.	Yes/On-going	Keep mind that duplexes are restricted to some areas on the Island and their standard, box-like appearance is not ideal.

attached housing in major residential and commercial developments	Town of Nantucket, Planning Board	Already exists in the Town's inclusionary zoning requirements.	Yes	Keep supporting these efforts.
inclusionary housing requirements for residential and mixed-use developments	Town of Nantucket, Planning Board	Already exists in the Town's inclusionary zoning requirements.	Yes	Keep supporting these efforts.
"sweat equity" housing where first-time homebuyers may choose to band together to help each other self-build some components of their new home	Nonprofits, Housing Nantucket, Town of Nantucket	Habitat for Humanity has built a number of houses throughout the Island.	Yes/On-going	Keep supporting these efforts.
Drive down the long-term operating costs of housing through (1990 Goals and Objectives):				
energy conservation measures use of low maintenance materials and construction practices installation of efficient, economical utilities	Housing Nantucket, Town of Nantucket, Nonprofits	HN's "Affordable & Green" Policy has set standards for low cost, good quality, affordable housing that is a benefit for the community and the environment.	Yes/On-going	Use new projects as case studies
guarantee affordable housing units remain affordable for the long-term and are occupied by residents who need them (1990 Goals and Objectives)	Town of Nantucket, Planning Board, Housing Nantucket	Done through NHNCs, Rights of Reverter, and the Department of Housing and Community Development (DNCD).	Yes/On-going	Keep supporting these efforts.
allow co-op or condominium housing on lots containing secondary dwellings (2000 Comprehensive Community Plan)	Town of Nantucket, Planning Board	Done through NHNCs.	Yes/On-going	Keep supporting these efforts.
condition some new secondary dwellings and some units of new duplexes on use as seasonal housing through Planning Board approval for new secondary dwellings (2000 Comprehensive Community Plan)	Planning Board	These actions are unlawful and go beyond the Planning Board's authority.	NA	No further action.
provide targeted development density bonuses that promote community housing units with permanently affordability provisions (2002 Community Housing Needs Assessment/Action Plan)	Town of Nantucket, Planning Board	The MFOD provides some density bonuses that promote community housing, but no permanent, required provisions exist.	No	Advocate for more permanent, required provisions.

provides a stronger Town-wide enforcement policy regarding nonconforming lots and apartments (2002 Community Housing Needs Assessment/Action Plan)	Town of Nantucket, Planning Board, Zoning Officer	This policy has been somewhat addressed in the allowance of accessory apartments.	No	More to be done, look into Barnstable's amnesty accessory apartment bylaw.
meet the needs for housing and related acreage for special needs population (2000 Comprehensive Community Plan and 2009 Master Plan)	Town of Nantucket, Planning Board, Housing Nantucket, Council for Human Services	Ask Question?	No	Continue to explore possible solutions for vulnerable populations
Encourage and Support the retention of year-round, owner-occupied housing units through (1990 Goals and Objectives and 2009 Master Plan):				
tax policy	Town of Nantucket, Town Tax Collector	No such tax policy is in place.	No	HN needs to do more in educating and advocating for tax policy changes.
estate planning techniques supplemental income home health care financing options	Housing Nantucket, Town of Nantucket, Council for Human Services	No such programs are in place.	No	HN needs to do more in education of available programs and options.
utility assistance home repair and maintenance	Housing Nantucket, Town of Nantucket, Council for Human Services	Council for Human Services provides fuel assistance.	No	HN needs to do more in education of available programs and options.
property owners to continue to offer units for rent rather than converting to seasonal units and others to convert seasonal rental units to affordable, year-round units through (1990 Goals and Objectives) tax policy, financing, a listing service, and public awareness	Housing Nantucket, Town of Nantucket	Done somewhat by HN through their educational classes and websites.	No	More to be done, HN should push forward in the development of a landlord education and certification program.
accessory apartments (2000 Comprehensive Community Plan)	Housing Nantucket, Town of Nantucket, Planning Board	No real progress has been made.	No	HN should form partnerships with Town departments and other private organizations.

the creation of scattered, seasonal employee housing lots for the public and private sectors under the employer's and Town's control (2000 Comprehensive Community Plan and 2009 Master Plan)	Town of Nantucket, Planning Board, Private Entities, Housing Nantucket	The Town and private entities have created some housing on an as needed basis.	Yes/On-going	HN needs to do more in education and outreach efforts.
the creation of additional, elderly housing units by the Town or other entities through (2000 Comprehensive Community Plan and 2009 Master Plan) the leasing of Town-owned land, supplementary funding, and supplementary technical services	Town of Nantucket, Housing Nantucket, Council for Human Services	Has been done through the construction and operation of Sherburne Commons.	Yes	Support current and future efforts.
the development of an assisted- and independent-living facility or facilities (2000 Comprehensive Community Plan)	Town of Nantucket, Housing Nantucket, Council for Human Services	Has been done through the construction and operation of Sherburne Commons.	Yes	Support current and future efforts.
programs that promote shared housing arrangements for senior citizens (2000 Comprehensive Community Plan)	Town of Nantucket, Housing Nantucket, Council for Human Services	Has never been considered by the Town or other entities.	No	No further action, unless urged by Town.
a community task force to identify key outreach, financing opportunities, and simplify legal access for employers to purchase and/or build year-round employee housing (2002 Community Housing Needs Assessment/Action Plan)	Housing Nantucket, Town of Nantucket	No official community task force has been established.	No	HN needs to keep working towards developing a landlord education and certification program to address needs.
a private, nonprofit real estate investment mechanism to create a Shared Equity Fund (2002 Community Housing Needs Assessment/Action Plan)	Housing Nantucket, Nonprofits	Has never been done.	No	HN should research and advocate for this program.
a regional HOME consortium with Dukes and Barnstable Counties to ensure annual federal housing funds (2002 Community Housing Needs Assessment/Action Plan)	Town of Nantucket, Housing Nantucket	Has been found that joining a regional HOME consortium is actually worse for ensuring federal funds.	No	No further action.

## PROGRAMS, TECHNICAL ASSISTANCE, AND SERVICES (PLANNING)

In order for any affordable housing initiative to achieve its intended purpose, the full extent of the problem needs to be known. These goals and objectives deal with the preparation of surveys, plans, and reports that address affordable housing needs on Nantucket.

Town-Related	HN Leads	Other Leads
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Goals and Objectives	Responsibility	Progress	Completed	Next Steps
Conduct and Evaluate:				
an objective and thorough housing needs survey (1990 Goals and Objectives)	Town of Nantucket, Planning Board, Housing Authority	The 2000 Comprehensive Community Plan, specifically the Housing Needs section, and the 2002 Community Housing Needs Assessment were both done to address this need.	Yes	Since both reports are almost ten years old, it might be time for a new survey to be done.
a survey of seasonal workers to determine the need for seasonal housing (1990 Goals and Objectives)	Town of Nantucket, Planning Board, Housing Authority, Private Employers	No entity (public or private) has done a survey of this type.	No	Advocate for such a survey.
a comprehensive Housing Master Plan (1990 Goals and Objectives)	Town of Nantucket, Planning Board, Housing Authority	The 2000 Comprehensive Community Plan and the 2009 Master Plan were developed as an overall housing plan for Nantucket.	Yes	Follow and support efforts related to plans.
a demonstration project of affordable or elderly rental housing that can be duplicated in the private sector (2000 Comprehensive Community Plan)	Housing Nantucket, Town of Nantucket, Planning Board, Housing Authority, Nonprofits	HN has constructed affordable rental housing to be used as examples (i.e. 2 Clarendon St) .	Yes	HN needs to add an educational component to stimulate duplication in the private sector.
the need and feasibility of providing care facilities to people with dementia and other special needs (2000 Comprehensive Community Plan and 2009 Master Plan)	Town of Nantucket, Council for Human Services	Limited	No	Continue to explore options for vulnerable populations.
the NRCH program annually and make adjustments as needed ( 2000 Comprehensive Community Plan)	Town of Nantucket, Housing Authority, Housing Nantucket	An evaluation of the NRCH program is performed annually.	Yes/On-going	Conduct and support NRCH reviews and adjustments.

**PROGRAMS, TECHNICAL ASSISTANCE, AND SERVICES (Partnership)**

The Town and relevant affordable housing entity cannot take on this huge project of developing affordable housing on Nantucket alone. Therefore, these goals and objectives strive to support and form partnerships with various other private and public organizations working toward the same goals of affordable housing creation.

Town-Related	HN Leads	Other Leads
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Goals and Objectives	Responsibility	Progress	Completed	Next Steps
Support and Create:				
efforts of all agencies, groups, and individuals involved in helping solve the affordable housing problem (1990 Goals and Objectives)	Housing Nantucket, Town of Nantucket, Housing Authority, Employers, Nantucket Community Services, Banks, Development Community, Nantucket Housing Partnership, Planning Board	Partnerships have been and are formed by HN with several Island agencies working towards the same goals of providing affordable housing.	Yes/On-going	Sustain and enhance current partnerships, while creating and supporting new ones.
formal and ad hoc public/private partnerships to create new housing opportunities in dispersed locations for those committed to year-round residency (2000 Comprehensive Community Plan and 2009 Master Plan)	Housing Nantucket, Town of Nantucket, Housing Authority, Employers, Nantucket Community Services, Banks, Development Community, Nantucket Housing Partnership, Planning Board	Partnerships are formed somewhat between housing stakeholders, HN, and various Town departments.	Somewhat	Weaknesses are present and need to be addressed in these relationships.
agreements with lending institutions under the Community Reinvestment Act (2000 Comprehensive Community Plan)	Town of Nantucket, Planning Board, Housing Nantucket, Banks	No real effort has taken place.	No	Support future efforts.
Town efforts to expand the waste water treatment capacity and assure that priority for sewer hook-ups goes to community housing (2002 Community Housing Needs Assessment/Action Plan)	Town of Nantucket, Planning Board, Housing Nantucket	HN has supported the Town in these efforts resulting in a new Sewer Act being passed.	Somewhat	The Planning Office indicates that priority is not going to be given to community housing, but to everyone who needs and is capable of doing it.

Encourage and Motivate:				
nonprofit housing providers to initiate a small-scale demonstration project of affordable or elderly rental housing (2000 Comprehensive Community Plan)	Housing Nantucket	HN has developed several affordable rental housing units to be used as examples to the community (i.e. 2 Clarendon St).	Yes	Enhance outreach and educational efforts.
Town enforcement agencies to coordinate enforcement of housing provisions under the NRCH program (2000 Comprehensive Community Plan)	Housing Nantucket, Zoning Enforcement Officer	The Zoning Enforcement Officer and HN both assure compliance with NRCH program provisions.	Yes/On-going	Continue with current efforts.
year-round and seasonal residents to rent rooms to seasonal employees during peak employment period (2000 Comprehensive Community Plan)	Housing Nantucket, Town of Nantucket, Planning Board	This initiative is in progress with HN, through the development of their landlord education and certification program.	In Progress	Continue with current efforts.
the private sector to maintain a centralized inventory of seasonal rentals for matching seasonal employees with available rentals (2000 Comprehensive Community Plan)	Private Employers, Town of Nantucket, Planning Board, Housing Nantucket	Although private sector entities (i.e. real estate companies) might keep a list of available rentals, it not shared and no centralized list exists.	No	Support future efforts.
lobbying efforts for legislative authorization of the NHNC (2002 Community Housing Needs Assessment/Action Plan)	Town of Nantucket, Planning Board, Housing Nantucket	This legislation has been passed.	Yes	No further action.
the identification of an experienced, Chapter 40B friendly, nonprofit or for-profit development partner that will facilitate new community housing development (2002 Community Housing Needs Assessment/Action Plan)	Housing Nantucket, Town of Nantucket, Planning Board	Some efforts have been made by HN to locate and partner with a Chapter 40B friendly developer.	No	HN needs to focus more on this effort.

## PROGRAMS, TECHNICAL ASSISTANCE, AND SERVICES (EDUCATION)

The constant exchange and availability of information to the public is vital in any successful affordable housing program. These goals and objectives attempt to inform and update the public of the housing problem and the programs and resources available to them.

Town-Related	HN Leads	Other Leads
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Goals and Objectives	Responsibility	Progress	Completed	Next Steps
<p>Create and Ensure:</p> <p>a Nantucket Housing Office (NHO), or other appropriate entity, to serve as a central information and certification agency for Nantucket Resident Commitment Housing (NRCH) (2000 Comprehensive Community Plan)</p>	Town of Nantucket, Housing Authority, Housing Nantucket	HN was created to serve as a central information source and NRCH certification agency.	Yes	Continue with current efforts.
<p>a Housing Advisory Board that will also serve as the Board of Directors for the Nantucket Housing Office (NHO) made up of community members with real estate development, banking, and legal expertise (2002 Community Housing Needs Assessment/Action Plan)</p>	Housing Nantucket, Housing Authority	HN has an Advisory Board that also serves as its Board of Directors with relevant backgrounds.	Yes	No further action.
<p>the Nantucket Housing Office (NHO) meets all legal requirements to serve as a Housing Trust that will serve as a vehicle for receiving tax-deductible private donations and public funds (2002 Community Housing Needs Assessment/Action Plan)</p>	Town of Nantucket, Planning Board, Housing Authority, Housing Nantucket	The Affordable Housing Trust Fund (AHTF) has been set-up to serve this purpose.	Yes	Support current and future efforts of the AHTF.
<p>publication of the Community Housing Action Plan and request its formal recognition or adoption by the Nantucket Housing Office, the Nantucket Housing Authority, the Nantucket Planning &amp; Economic Development Commission, and the Nantucket Board of Selectmen (2002 Community Housing Needs Assessment/Action Plan)</p>	Town of Nantucket, Housing Nantucket, Housing Authority, Planning & Economic Development Commission, Board of Selectmen	The 2002 Community Housing Action Plan was published and recognized by the appropriate agencies.	Yes	No further action.

**ADMINISTRATION AND FINANCE**

Funding is needed to properly and successfully run any affordable housing initiative. These goals and objectives consider and develop funding sources that allow the development and operation of affordable housing.

Town-Related	HN Leads	Other Leads
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Goals and Objectives	Responsibility	Progress	Completed	Next Steps
Generate and Utilize:				
municipal bonding for the purchase of private land and infrastructure improvements (2002 Community Housing Needs Assessment/Action Plan)	Town of Nantucket	No such initiative has ever been undertaken.	No	Support for future efforts.
Community Preservation Act funds (2002 Community Housing Needs Assessment/Action Plan)	Town of Nantucket, Planning Board, Housing Nantucket	Community Preservation Act funds have been applied for annually.	Yes/On-going	Continue current efforts.
private fund raising campaigns to provide upfront legal, planning, and development costs (2002 Community Housing Needs Assessment/Action Plan)	Housing Nantucket	Any kind of private fundraising has never been done by HN.	No	HN should definitely focus on developing re-occurring private fund raising campaigns.
a portion of pending dedicated sales tax (2002 Community Housing Needs Assessment/Action Plan)	Town of Nantucket	This initiative has never even been introduced in the Town.	No	Support any future efforts.

## ***Global Goals***

Housing Nantucket has a need to be true to its own mission and therefore has developed a series of “global goals” which are intended to be a deeper level to the general mission of “creating sustainable community housing for Nantucket.” Each of these “global goals” are intended to provide direction for the divisions within the organization.

### COMMUNITY HOUSING DEVELOPMENT

- Housing Nantucket shall provide safe, sustainable rental and homeownership units for any Nantucket resident earning below 150% of median income for Nantucket County.
- Housing Nantucket shall provide at least 75% of all units to those residents earning below 80% of median income for Nantucket County AND at no time shall more than 40% of residents earn more than 140% greater than that unit’s stated income level through natural income increase.
- Ownership programs shall serve those considered “affordable” by the Nantucket zoning code (earning below 150% of median income for Nantucket County) and shall respect the values of neighbors and all of those involved in the transaction.
- Housing units designed and constructed by the organization shall be designed to be safe and cost-effective, constructed of the best quality materials, through competitive bids, and shall take into account the goals of Sustainable & Environmental Initiatives. Housing shall blend into the neighborhoods and be designed in such a way that it reflects the values held by the organization.
- Housing shall be developed that is either supported through grants, fundraising, loans, or other financial mechanism that does not unduly burden the organization. Rental development shall show that the rental income will support any relevant loans.

## PROPERTY MANAGEMENT AND RESIDENT SERVICES

- Any Nantucket resident seeking housing shall have access to the organization to apply for housing.
- Residents shall be selected with respect to all relevant fair housing laws and have confidentiality respected.
- Residents shall be respected at all times as the primary consumer of the organization's programs.
- Properties owned and managed by the organization shall be maintained to the highest quality and shall be kept safe at all times while ensuring that incomes derived from rental units covers the cost of maintenance and operation.
- Assets owned by the organization shall be held to the highest standards while ensuring that any income derived for such assets shall cover the costs of operation related to that asset.

## PROGRAMS, TECHNICAL ASSISTANCE, EDUCATION

- Housing Nantucket shall at all time respect those who support the organization's programs. Volunteers and community supporters shall be made to feel welcomed to all programs.
- The organization shall make all programs and activities comfortable, safe, and welcoming for all participants.
- The organization shall develop programs that are cost-effective and show that they are within the financial ability of the organization to sustain such activities.

## SUSTAINABLE & ENVIRONMENTAL INTIATIVES

- Housing Nantucket shall implement the “Affordable & Green” policies and practices in all of its development initiatives, property management, and programs.
- All development projects shall protect natural or historic resources to the greatest extent while maintaining cost effective methods.
- The organization will always seek out local bidders before taking work off island. If work cannot be performed by local bidders, every effort shall be made to minimize the use of off-island bidders.

## POSITIVE IMAGE IN COMMUNITY

- Any outreach, educational or advocacy activity performed on behalf of the organization shall respect the opinions and views of all and shall be performed in such a way as to ensure the organization is not perceived in a negative manner.
- Any partnerships developed with organizations having a mission outside of community housing shall be made in an open and transparent way with an actual benefit towards the creation of housing and will not negatively impact the financial ability of the organization to sustain such partnerships.
- The organization shall have a capable staff with knowledge and expertise integral to the future of providing housing for Nantucket residents. The organization shall support this goal through training and development.
- Any fundraising effort carried out by the organization shall respect all of those participating – from volunteers to staff to those donating funds.



# Recommendations

## Section 1 – Programmatic Recommendations

Housing Nantucket’s three major programs – Housing Development, Housing Management, and Technical Assistance – should continue to be important parts of the organization. Additionally, these programs should continue to develop new ways of reaching the community. Finally, these programs should be fully staffed to provide the highest quality of programs.

Within the Community Housing Development program, the organization must look at new ways to develop land and see out new solutions for growing the available stock of housing. See Section 2 for detailed information on parcels the organization should consider bidding on or purchasing. In anticipation of this bidding or purchasing, this program should establish a full time “Construction Committee” made up the Executive Director, the Property/Asset Manager (see Administrative Recommendations), the Treasurer and two members of the board with design and construction experience. Additionally, the organization must develop relationships with development consultants including affordable housing finance specialists; construction firms; design firms; and 40B legal specialists.



As part of the NHNC program, the organization must seek new creative ways to expand the existing program towards 70 or more units over the next five years (or 14 a year – three times as many as are currently being created). The NHNC program should develop new outreach program to Realtors and second dwelling applicants. Additionally, the NHNC program must have new avenues towards creation explored, such as subdivision or life tenancy.

Within the Property Management and Resident Services program, property management must complete its existing projects and begin the process to evaluate and plan for the next projects. Fiscal oversight of these projects must be tightened up and planned better. A maintenance plan must be put into place for each unit with detailed information on the life span of each project. Additionally, an organizational energy audit may demonstrate some areas of weakness within existing units. Additionally, the organization must take a proactive step to staff the Property/Asset Manager, Assistant Property manager and CRS Manager position with applicants holding the appropriate background. This step will ensure these programs will operate effectively.

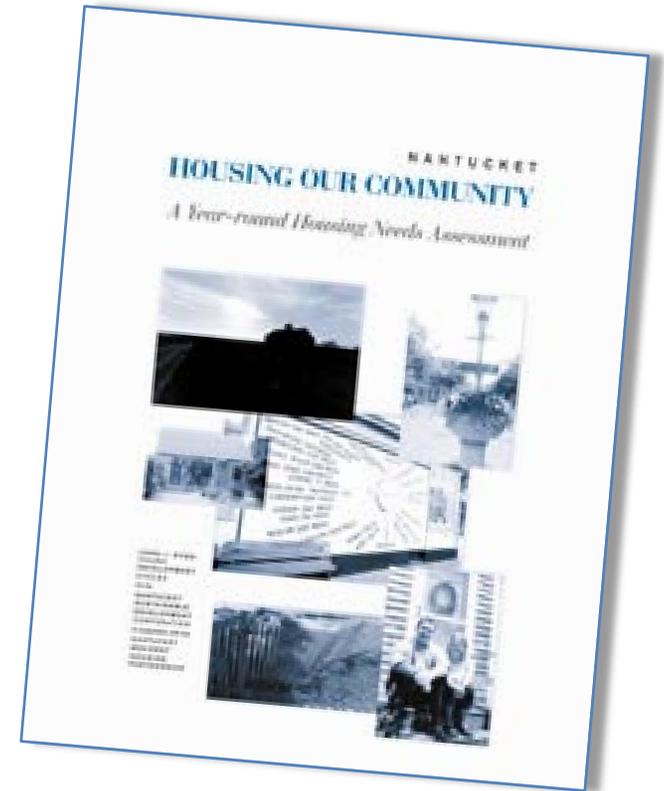
On the resident services side, the organization must take a bigger step towards inclusion of low and moderate income households within the organization. This should occur with a broad resident services program with newsletters, events, information gathering, and welcome

programs. However, the tenants and representatives of the low and moderate community should be invited to be part of the Board of Directors to ensure participation by the users of the housing.

The Technical Assistance program must grow its existing projects. By ensuring the CRS Manager position is appropriately staffed, the organization can continue to build upon the Homebuyer Education program and expand to new community outreach. One community goal that has not been explored by the organization is the development of landlord education and outreach. Housing Nantucket could develop public/private partnerships to ensure privately owned housing around the island is well suited for low and moderate income households. Housing Nantucket may be able to provide verification services for a fee for these housing units.

Of course, the organization should continue to expand and support the existing programs. Working with the housing planner, working towards passage of the Housing Bank Bill, and ensuring information is available for all who need it are programs that should continue to be supported. Additionally, Housing Nantucket is uniquely suited to be a promoter for innovative housing creation techniques. The staff should continue to attend local, state, and national programs to promote house recycling and green affordable housing. The organization should support the existing “green library” but also look to grow this program within the Housing Resource Center.

Finally, new programs – such a community task force to discuss bonding and real estate investment – should be developed. These new programs, some of which may not show up on the 5 year plan, must be encouraged and expanded. Housing Nantucket has been a unique fixture on Nantucket for 16 years and has provided housing options where little had existed previously. By continuing the existing programs, the organization can maintain the status quo. However, by growing and expanding the programs - and developing new ones – the organization can become a model for state and national level rural, scattered site housing providers.



## Section 2 – Site Development Recommendations

Nantucket’s developable land is fast shrinking with few land areas remaining for housing. In order for Housing Nantucket (HN) to remain a viable provider of affordable housing, a plan needs to be put into place where sites are identified for future housing development. In line with these ideals and as part of the long range plan, various parcels on Nantucket were identified and deemed suitable for future development of affordable housing.

The process of identifying these sites began with a review of over 200 Town-owned and vacant parcels from the Town of Nantucket’s Information Technology GIS system. Each parcel was then reviewed via the Town’s Web-Based GIS Home Page to assess suitability for development. Site visits were made to some parcels if not enough information was available via the online system. A variety of factors were taken into consideration, such as the parcel’s location on the Island, the size and shape of the property, solar orientation, transportation, water and sewer availability and the presence of wetland areas. In addition to this review, sites identified for development through a study done by students from Worcester Polytechnic Institute - which included Town and privately owned parcels - were re-examined using the same criteria and added to the list as appropriate.

Table 1 on the following page represents the final list generated from these evaluations. The parcels, grouped into sites, were chosen based on their ideal size and shape for adequate housing development; their location on the Island - including proximity to Town water and sewer and other amenities; and the overall, favored sentiment of the community for development on these parcels.



## Table 1: Potential Properties

*Site Rankings Based on Difficulty Level to Develop (Easiest-Site 1 to Most Difficult-Site 24)*

Site	Map Lot	Address	Zone	Parcel Size (sq ft)	Maximum Ground Cover (sq ft)	Existing Roads	Town Water	Sewer District	Town Owned
1	55.4.1 188	W DOVER ST	ROH	11,108	5,554	X	X	X	X
2	80 140	19 MASAQUET AV	LUG1	95,832	13,721	X			X
	80 97	12 WEWEEDER AV	LUG1	50,094		X			X
	80 97.1	SURFSIDE	LUG1	50,094		X			X
3	79 63	MONOHANSETT RD	LUG2	27,443	2,195	X			X
	79 113	MONOHANSETT RD	LUG2	27,443		X			X
4	76.1.3 92	17 CLAREDON ST	LUG3	16,117	1,500	X			X
5	79 13	WEWEEDER AV	LUG2	52,272	2,091	X			X
6	55 602	40 SPARKS AV	R10	36,590	14,702	X			X
	55 603	42R SPARKS AV	R10	22,216		X			X
7	68 46.3	129 OLD SOUTH RD	RC2	8,930	8,930	X	X	X	X
	68 46.2	127 OLD SOUTH RD	RC2	8,930		X	X	X	X
8	67 336	3 S SHORE RD	LUG2	320,602	22,428	X	X	X	
	67 336.9	5 S SHORE RD	LUG2	80,020		X	X	X	
	67 336.8	7 S SHORE RD	LUG2	80,020		X	X	X	
	67 336.7	9 S SHORE RD	LUG2	80,063		X	X	X	
9	55 266	51 SPARKS AV	RC	120,182	60,091	X	X	X	
10	68 246	21 OLD SOUTH RD	RC2	18,557	9,279	X	X	X	
11	67 784	6 RUGGED RD	R2	23,479	2,935	X	X	X	
12	67 173	61 FAIRGROUNDS RD	R10	39,204	9,801	X	X	X	
13	67 115.2	3 THIRTY ACRES LN	RC2	13,199	6,600	X	X	X	
14	73.4.2 119.4	31C NEW SIAS ST	R1	4,792	7,188	X	X	X	
	73.4.2 120	31B NEW SIAS ST	R1	4,792		X	X	X	
	73.4.2 119.3	7 W SANKATY RD	R1	4,792		X	X	X	
	73.4.2 119.1	11 W SANKATY RD	R1	4,792		X	X	X	
	73.4.2 119.2	9 W SANKATY RD	R1	4,792		X	X	X	

Site	Map Lot	Address	Zone	Parcel Size (sq ft)	Maximum Ground Cover (sq ft)	Existing Roads	Town Water	Sewer District	Town Owned
15	56 14.4	7 HUSSEY FARM RD	R2	24,829	3,104	X			
16	56 14.2	3 HUSSEY FARM RD	R2	20,038	2,505	X			
17	67 125	24 ALLENS LN	R10	10,454	2,614	X	X	X	
18	55 287.1	6 DAVES ST	RC2	5,227	2,614	X	X	X	
19	29 131	38 N BEACH ST	LC	5,140	10,411	X	X	X	
	29 131.1	40 N BEACH ST	LC	5,009		X	X	X	
	29 132	42 N BEACH ST	LC	10,672		X	X	X	
20	41 183	2 WINN ST	R1	33,323	9,997	X	X	X	
21	80 173	3 FOLGER AV	LUG1	43,560	3,049	X	X	X	
22	68 101	14 PINE TREE RD	RC2	13,939	6,970	X	X	X	
23	29 139	37 WALSH ST	R1	12,850	3,855	X	X	X	
24	56 24	14 ROBERTS LN	R2	20,865	2,608	X			



## SPECIAL NOTE PROPERTIES

During this review process sites were found that were substandard, but buildable or were already planned for housing development. These properties are listed in Table 2 with notes attached as to their placement in this list.

**Table 2: Special Notes Properties**

Map Lot		Address	Notes
79 150	5	MONOHANSETT RD	Site currently planned for housing development
59.3 191		N CAROLINA AV	Site currently planned for housing development
59.3 192		N CAROLINA AV	
59.3 193		N CAROLINA AV	
59.3 194		N CAROLINA AV	
59.3 198		N CAROLINA AV	
59.3 199		N CAROLINA AV	
59.3 225		N CAROLINA AV	
59.3 226		N CAROLINA AV	
80 101.1	143	SURFSIDE RD	Site currently planned for housing development
80 101.4	143C	SURFSIDE RD	
80 101.5	143D	SURFSIDE RD	
55.4.4 57	39	PROSPECT ST	Site listed as park land
55.4.4 81	37	PROSPECT ST	
79 149	47	OKORWAW AV	Lifeguard housing, but Town is open to discussion about future
60.2.4 27	15	AMES AV	Site area does not meet 10,000 sq ft standard for development in a none sewerred area
60.2.4 29	15	AMES AV	
59.3 81		ARKANSAS AV	Site area does not meet 10,000 sq ft standard for development in a none sewerred area
59.3 82		ARKANSAS AV	
59.3 151		ARKANSAS AV	
59.4 239		MADAKET RD	Site area does not meet 10,000 sq ft standard for development in a none sewerred area
59.4 240		MADAKET RD	
59.3 203		MIDLAND AV	Site area does not meet 10,000 sq ft standard for development in a none sewerred area
59.3 204		MIDLAND AV	
59.3 205		MIDLAND AV	
59.3 230		MIDLAND AV	

## LARGE DEVELOPMENT OPPORTUNITIES

As to further provide HN with an array of affordable housing development locations, a review of privately-owned, large-size, vacant parcels was done on a GIS map provided by the Town of Nantucket’s Information Technology and GIS department. These parcels, listed below, would make ideal locations for large format (more than 50 units) housing developments. Since the community has generally shown distaste for these types of sites, the organization may only want to consider their acquisition when developed in partnership with open space advocates. Additionally these large sites may have existing restrictions, such as wetlands or endangered species. Development considerations for these sites should not be taken lightly.

Parcels identified as “large development opportunities” include:

	<b>Address</b>	<b>Map/Lot</b>	<b>Acres</b>
1	204 Polpis Road	26/17	
2	0 Phillips Run Road	50/3.1	
3	78 Madaket Road	41/462.6	
	80 Madaket Road	41/462.7	
4	35 Hawthorne Lane	41/463	
5	49R Dukes Road	41/461	
	Dukes Road	41/460	
6	70 Miacomet Road	81/146	

### *Section 3 – Administrative Recommendations*

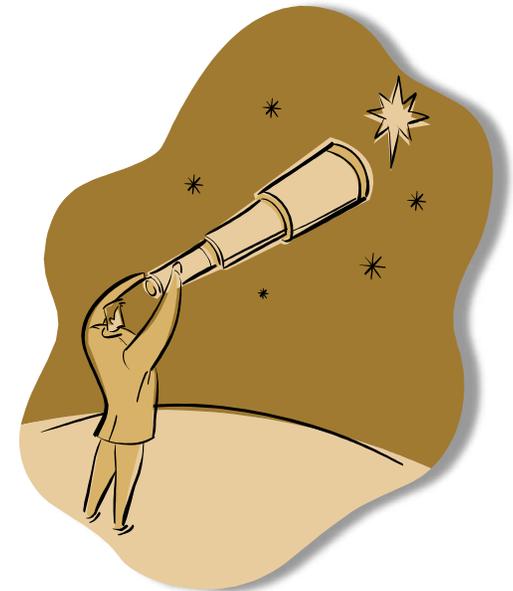
Finally, above all else, the organization must reform its existing administrative methods to ensure that the organization can grow and expand to meet these programmatic and site development goals. The primary way to achieve these recommendations is to review the existing board members and to ensure that the proposed staffing is filled by qualified applicants. However, fiscal oversight must be tightened and reviewed and effective program review and feedback should be implemented.

Staffing changes suggested in this long range plan begin at the Executive Director level. The applicant for this position should have more than five years of experience in administration, fundraising, staff management, and budgeting. However, this person should also have significant experience with construction or property management at a minimum. The organization is primarily a construction and property management organization, so the Director should reflect such a commitment. Additionally, the need for a Director with fundraising experience is high, but this could be fulfilled with a consultant or a suitably qualified CRS Manager.

The Property /Asset Manager should be the second most critical element to the organization. This person must understand budgeting, lending and fiscal management. However, as with the director, they must also have multiple years of direct experience with construction and property management. Their assistant should have similar levels of experience to ensure that projects are carried out effectively.

The Community & Resident Services Manager is the final key to an effective staff. This person is the front line connection between the community, the residents and the organization. Their primary goal is to be an educator, a listener, and a connection. They must be able to express the organization's goals clearly and crisply. A CRS Manager must be able to explain ideas to the public and to the tenants, but also listen and respond effectively. While they may not have experience in construction and property management, they should have experience with providing for the needs of tenants and the community. They should be able to translate a community goal to something that the organization might add to a new project. This position may include someone with fundraising experience.

At the board level, the organization must begin to re-organize itself to better focus on housing creation at a different level than has been sustained in the past. Complex financing deals may be the only way the organization can continue to



grow. The board must also be aware of additional educational programs and continued property management needs. Additionally, the organization should seriously consider having at least 1/3 of the board composition as low and moderate income. This would likely be at least 3 or 4 positions filled by the “constituency.” While they need not be residents, the board should consider having at least one tenant – possibly the Resident Association president – is part of the board discussions. Currently the board relies on the staff to provide input on the issues of the tenants. The board should be more directly linked to the community.



The board should also ensure that a committed chair is selected and rotated on a regular basis. Board membership should not be longer than 3 years and an appropriate educational program should be developed for new members. Nominations should be ongoing and regular to ensure continued turn over. The board should have at least four standing committees – Executive, Fiscal, Construction, and Program. Committees, such as Nominations and Director Review, should meet at least once a year.

The board should ensure that the Director’s review and contract are performed once yearly, preferably coinciding with the end of the fiscal year. The board should not hire the other positions within the organization. Fiscal Committee members will necessarily review the hiring of other staff members, but should remain focused on the overall fiscal health of the organization.

Finally, the organization should review its current space and administrative supply needs. Budget planning should begin at least six months prior to the end of the fiscal year by starting conversations within the staff as to the needs for the upcoming year. Planning should be a central part of the overall organization and there should be less surprises about the outcomes of projects and programs.



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