Project Orientation:

Vermont Homes for All Toolkit:

A 'Design & Do' Toolkit for Small-scale Home Builders, Investors & Community Leaders

May 25, 2023

AARP® Vermont

VERMONT
AGENCY OF COMMERCE & COMMUNITY DEVELOPMENT
DEPT. OF HOUSING & COMMUNITY DEVELOPMENT

Project Team Introduction

**Vermont Agency of Commerce & Community Development,
Department of Housing & Community Development**

AARP Vermont

Josh Hanford
Commissioner of Housing &
Community Development

Chris Cochran
Director of Community Planning
& Revitalization

Jacob Hemmerick
Planning & Policy Manager

Kelly Stoddard Poor
Director of Outreach,
AARP Vermont

Dan Groberg
Community Planning & Project
Manager

Richard Amore
Planning & Outreach Manager

Amy Tomasso
Planning Coordinator

AARP VT is partnering with the State of Vermont to support increased community engagement on neighborhood infill design considerations for this project.

AARP Livable Communities initiative supports the efforts of state entities, local leaders and residents to make communities more livable and age-friendly. Among the keys to livability is housing that's both suitable for and adaptable to the diverse and ever-changing needs of Vermont households and individuals.

Consultant Team Introduction

The project lies at the intersection of:

- Residential design
- Community planning and regulatory frameworks, and
- Feasibility, financing, and implementation

This is our specialty and where our passion lies.

Utile Roles & Expertise
- Project Management
- Engagement Lead
- Planning
- Urban Design
- Architecture
- Sustainable Design

Subconsultant Roles & Expertise
- Policy and Feasibility Analysis (Neighborhood Workshop)
- Local Community Development Advising (CommonLand Solutions)

Core Management Team

Matthew Littell, LEED AP
Principal-in-Charge, Utile

Zoë Mueller,
Project Manager & Urban Planner, Utile

Dedicated Specialist Team

Jessy Yang,
Architectural/Urban Design Lead, Utile

Vermont Local

Alex Davis, AIA, CPHC®
Housing Architect, Utile

Neil Heller
Policy and Feasibility Analysis,
Principal, Neighborhood Workshop
Faculty, Incremental Development Alliance

Vermont Local

Liz Curry
Local Community Development Advisor,
Principal, CommonLand Solutions

Purpose & Scope Overview

Why now? Why does this matter?

- Vermonters need more diverse, affordable housing options in walkable communities.

- Meeting that need requires changing the ways homes are built in Vermont, especially the location and types of new homes.

- Building from Enabling Better Places: A Zoning Guide for Vermont Neighborhoods, this Toolkit and community engagement process will re-introduce "Missing Middle Homes" to Vermont as a strategy to address Vermont's housing and affordability crisis through small-scale, gentle infill and incremental development.

What do we mean by "Missing Middle Homes"?

Missing Middle Homes is a housing term that describes a range of house-scale residential building types that have multiple units that are compatible in scale and form with detached single-family homes. In the context of this project, this term is intended include Accessory Dwelling Units (ADUs), duplexes, townhouses, courtyard apartments and mixed use neighborhood commercial building types.

What do we mean by "Missing Middle Homes"?

Here are some examples of potential "Homes for All" design & development approaches

Two Household Dwellings

What do we mean by "Missing Middle Homes"?

Here are some examples of potential "Homes for All" design & development approaches

Fourplexes

Sixplexes

Village Live-Work

What do we mean by "Missing Middle Homes"?

Here are some examples of potential "Homes for All" design & development approaches

Townhouses

Cluster and Courtyard Development

What do we mean by "Missing Middle Homes"?

Here are some examples of potential "Homes for All" design & development approaches

Vermod Cottage

Accessory Dwelling Units (ADUs) is a technical term used most by planners, inspectors, and governments referring to a home that is secondary to the primary home on a single platted property containing all the facilities necessary for living, including cooking and sleeping.

Detached Accessory Dwelling Units and Cottages

Missing Middle Homes Development Approaches

Gentle Infill & Incremental Development

Gentle Infill is infill compatible with existing surroundings to achieve community design goals. Many times, this type of new development goes largely unseen due to its location within or behind an existing structure.

Incremental Development is small-scale development that is primarily undertaken by developers who live in the community they are operating in. This term includes both housing and commercial development types. Can also be a development strategy.

Project Overview

What is the purpose of this project?

- Provide a policy, design, and development foundation to encourage the creation of more diverse housing typologies in Vermont that meet housing needs.

- Develop "homes for all" typologies and designs with a character and scale that is modest, sensible, and aesthetically familiar to a broad range of Vermonters.

- Develop educational capacity building and training tools to encourage broad support of and contribution to a healthy and diverse implementation of the housing concepts developed through this effort.

Vermont Homes for All Toolkit

This, when compiled, will provide a foundation for the implementation of "homes for all" typologies in Vermont by providing predevelopment-ready site and building designs, guidance on how to address design factors for incremental infill development in existing communities, and start to finish guidance on the development process.

1. Missing Middle Homes Design Guide

2. Vermont Neighborhood Infill Design Case Studies

3. Builders' Workbook

4. Training Resources

Toolkit Trainer Summit

Part 1. Missing Middle Homes Design Guide

What this section of the Toolkit will cover

Codify context-sensitive "homes for all" typologies with illustrated designs.

- Research typologies, vernacular design elements, and local case studies
- Develop schematic floor plans, elevations, and 3D modeling of different typologies
- Create predevelopment-ready building and site designs

Submit photos of Vermont vernacular typologies:

https://vnrc.org/housinghunt/

Deadline: June 30th

Pittsfield Tyler Street District Plan

Boston Flood Zoning Overlay Design Guidelines

Store Houses near Boylan Ave Adaptive Reuse Study

Part 1. Missing Middle Homes Design Guide

We understand the patterns that define rural New England vernacular design

Big House, Little House, Back House, Barn: The Connected Farm Buildings of New England

Existing historic landscape and farmhouses in Littleton, MA
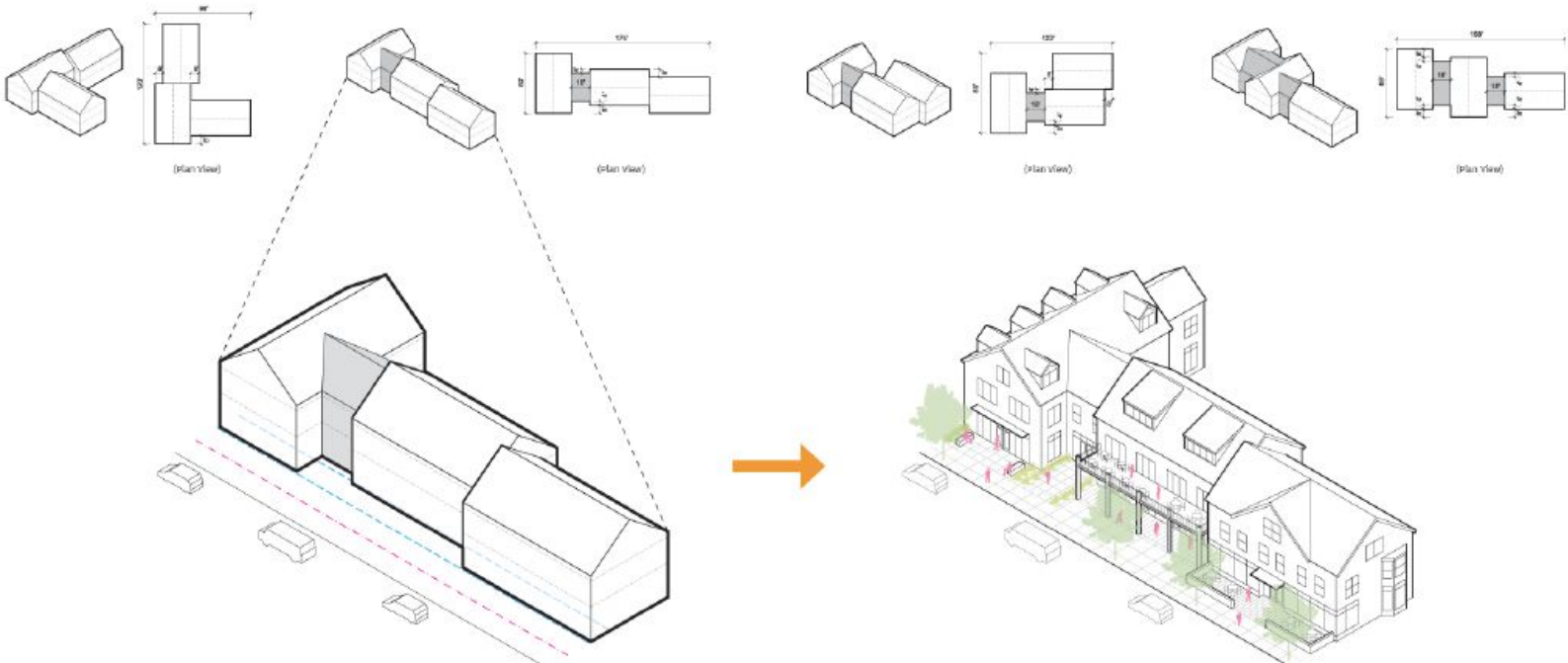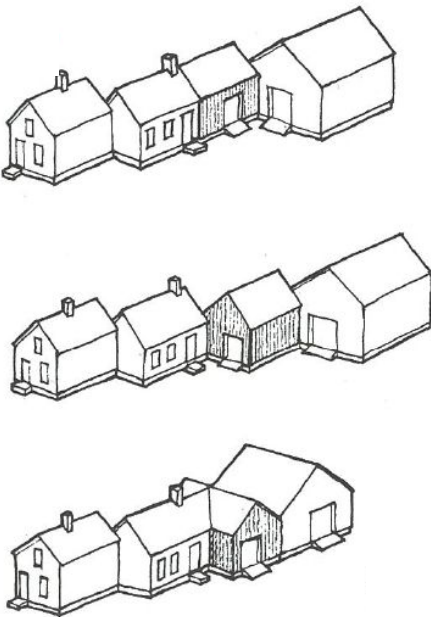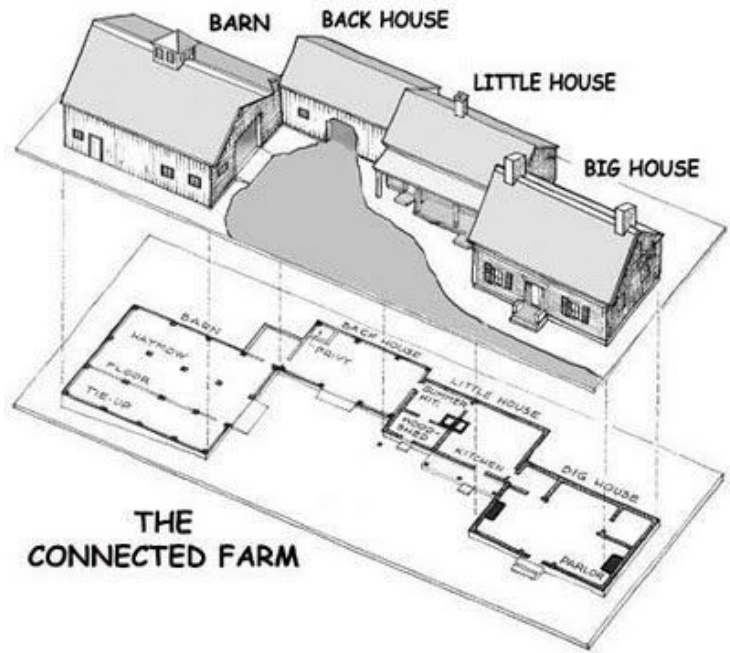
Examples of farmhouse-inspired massing assemblies and their potential building designs

Part 1. Missing Middle Homes Design Guide

We have experience designing and building affordable missing middle homes

Chatham, MA Small Scale Infill Typology Development
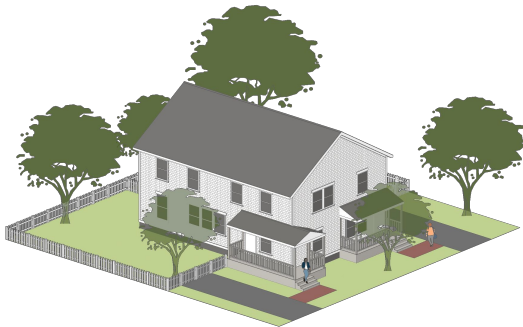
Duplex Type
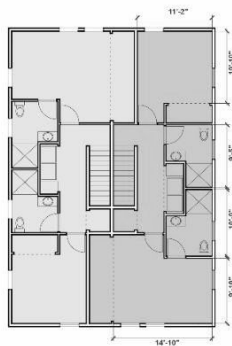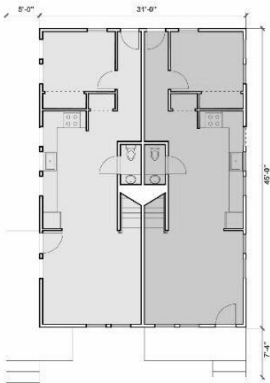
Single-family 3BR Type
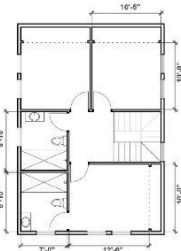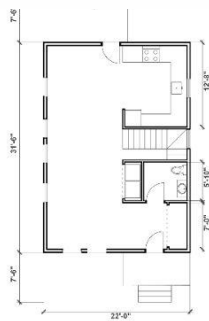
Single-family 2BR Type

Hyde-Blakemore; Roslindale MA

Part 2. Vermont Neighborhood Infill Design Case Studies

What this section of the Toolkit will cover

Test designs and builders workbook concepts in the context of five representative Vermont communities, and make refinements as needed.

- Analysis and review of selected sites and neighborhoods
- Test-fits of typologies in selected pilot communities
- 3D aerial and streetscape views with schematic designs for Missing Middle Home types in context
- Community engagement site visits to 5 pilot communities to refine approach and visualizations of infill Missing Middle Homes in context

Apply to be a pilot community to develop these case studies at
http://accd.vermont.gov/homesforall

Deadline: June 23rd by 5pm
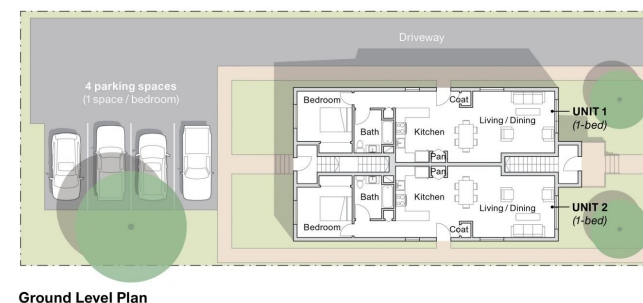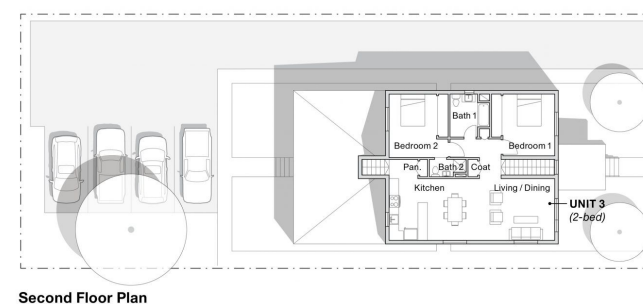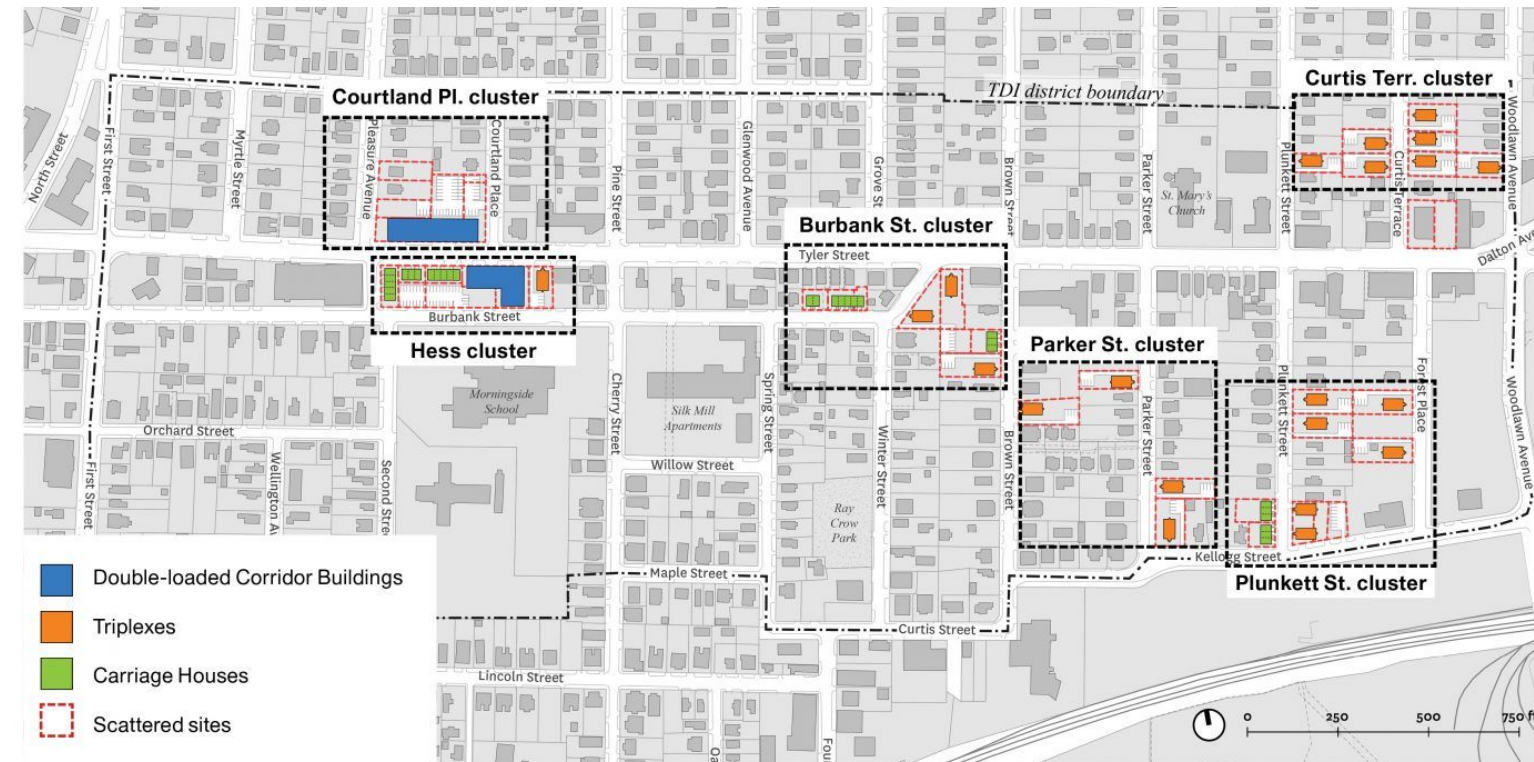
Pittsfield Tyler Street District Plan
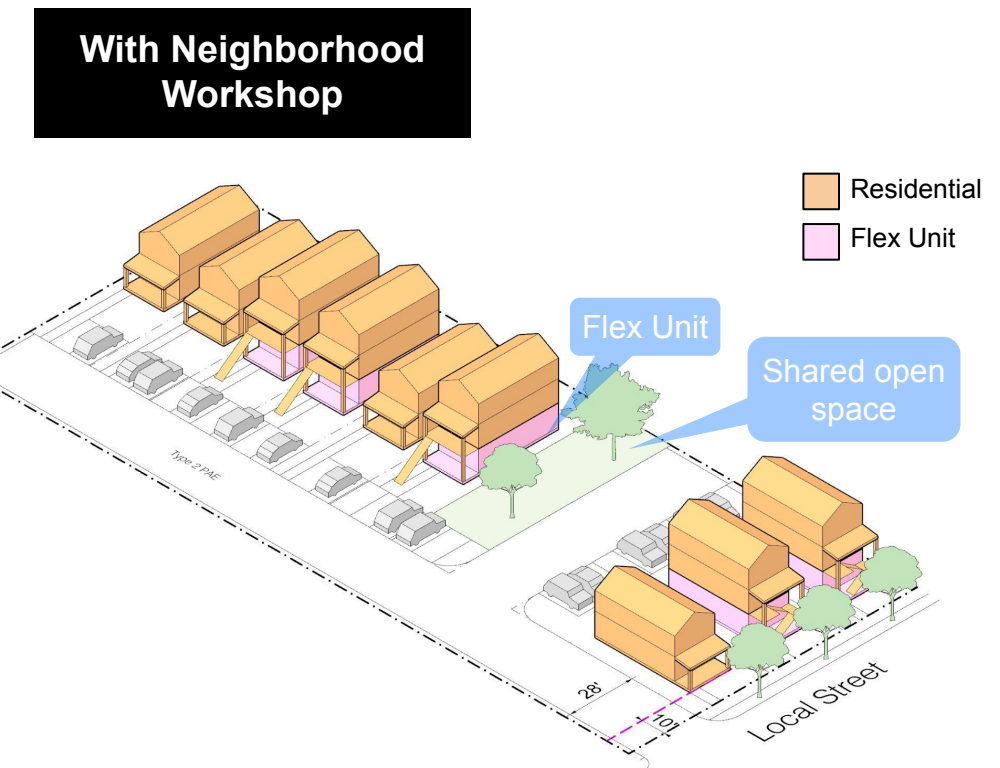
Houston Gulfton Affordable Housing Plan Typologies

Part 3. Builders' Workbook

What this section of the Toolkit will cover

Provide step-by-step guidance on all aspects of the development process for a broad audience of potential developers.

- Introduction to small-scale, incremental development
- Team building evaluation
- Development ready community and site identification
- Development feasibility methodology
- Legal and financial frameworks
- Design and construction process
- Implementation and management

Our team will rely on local advisors and our existing understanding of small scale development in rural communities in Northeast New England and beyond.

Diagnostic
for Enabling More Incremental Development
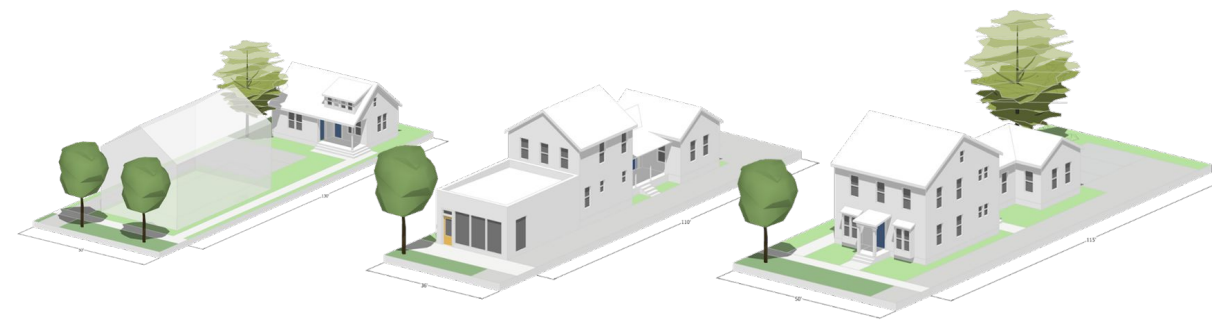
Detached ADU (Carriage Barn) **Live-Work ACU** (Accessory Commercial Unit) **Mansion Flats** (3 units)

For small or "un-bankable" projects. → Cash / personal debt

1-4 units, flexible terms, fairly simple. *In your own name.* → Residential mortgages

The deep end. More complicated, more cash needed. *LLC zone.* → Commercial mortgages

Many times more complicated. *Consultant zone* → Tax Credits, PPPs, Gov't Grants

Example: Bellows Falls, Vermont

What is in demand?
What is legal?
What fits?
←

Match financing to building type.
←

Part 4. Training Resources & Summit

What this section of the Toolkit will cover

This will support collective implementation of the Toolkit concepts by training veterans and newcomers alike to serve in different implementation roles throughout Vermont.

Training Resources will include:

- *Presentation Slides*
- *Presentation zoom video recording*
- *Handouts and posters*
- *Facilitation guide with talking points and activities*

The Summit will serve as a:

- *Promotional launch of the toolkit*
- *Training on how to make use of the Toolkit*
- *Networking and capacity building opportunity*
- *Template for future similar events*

Public Draft Plan Workshop, Worcester Now | Next Citywide Plan, 2023

Community Trade-off Game, PlanBeverly, 2019

Community Asset Mapping, Worcester Main South, TDI District, 2019

What is the desired impact? What does success look like?

Regulatory and financial barriers have made developing diverse, affordable homes on a small footprint harder and more complicated.

This project aims to change that by creating the framework and resources needed to:

- Build Affordably,
- Grow Small Developers,
- Cultivate Local Support, and
- Empower MMH Champions.

By doing this we hope to establish a viable approach to deliver diverse, affordable homes while enabling community members to earn a living by developing homes that contribute to communities they love.

Process & Next Steps

Milestones & Local Presence

Task 1: Design Guide							Task 3: Community Infill Design				

		Task 2: Builders' Workbook						Task 4: Toolkit Trainer Summit			

Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb

Steering Committee Meetings

- SC — *in-person* (May)
- SC — *virtual* (Jun)
- SC — *virtual* (Aug)
- SC — *virtual* (Nov)

Technical Advisory Group Updates & Milestones

E · E · E · R · E · R · R · R

Site Visits

Kickoff Site Visit	Supplemental Research Site Visit	Neighborhood Infill Design Site Visit	Toolkit Trainer Summit
May 25-26	*If needed, dates TBD*	*October 18-20*	*Dates TBD*

TAG = Technical Advisory Group
SC = Steering Committee Meeting
E = Email Update to TAG
R = Deliverable Review by TAG & SC

Advisory Bodies

Steering Committee Role

1. Advise on <u>key issues, contextual factors, and technical issues</u> the Toolkit should address.

2. Assist with <u>coordination and alignment</u> with existing policies as well as ongoing or future projects and initiatives.

3. Assist with <u>outreach, communication and increasing awareness</u> of the community infill design events and final toolkit trainer summit to boost participation and understanding with key stakeholders, agencies, and members of the public.

4. <u>Review and provide constructive feedback</u> on proposed process, initial findings, interim deliverables and final Toolkit.

Technical Advisory Group Role

1. <u>On-call advising</u> based on area of technical expertise.

2. <u>Review and provide constructive feedback</u> on interim deliverables and final Toolkit.

Steering Committee Roster

- **Leslie Black Plumeau**,
  Research and Community Relations Manager, Vermont Housing Finance Agency
- **Emily Phillips**,
  Associate Housing Director, Vermont Housing and Conservation Board
- **Kelly Stoddard-Poor**,
  Associate State Director, AARP Vermont
- **Kelly Lucci**,
  Director of Strategy and Partnerships, Vermont Energy Investment Corporation
- **Bill Colvin**,
  Executive Director, Bennington County Regional Commission
- **Kati Gallagher**,
  Sustainable Communities Program Director, Vermont Natural Resource Council
- **Katie Buckley**,
  Director, Federal Funding Assistance Program, Vermont League of Cities and Towns
- **Chris Halnon**,
  Business Loan Officer, New England Federal Credit Union
- **Jonah Richard**,
  Principal, Village Ventures

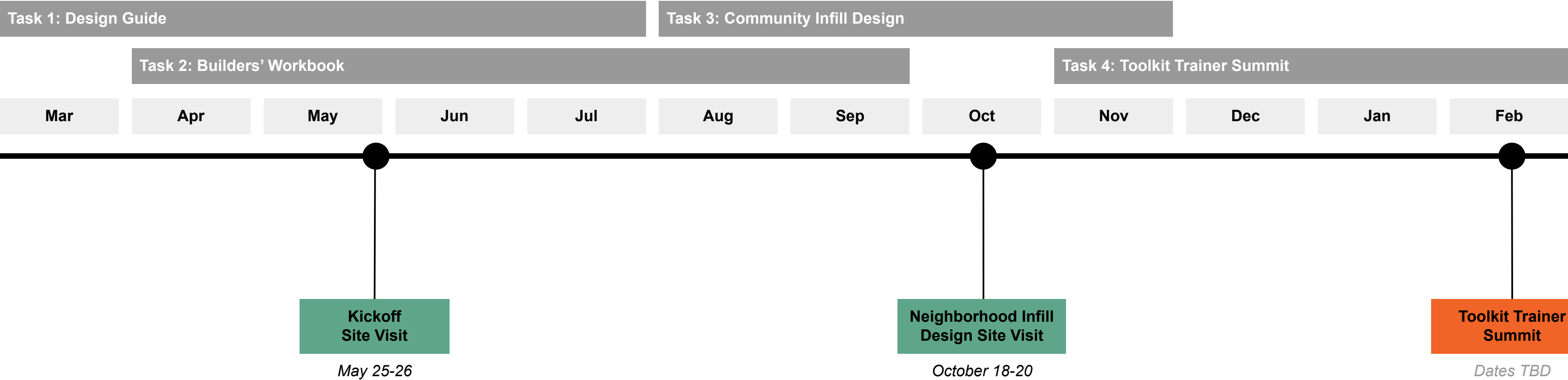## Technical Advisory Group Expertise

- Small scale, cooperative, and affordable housing developers and property managers
- Local government, policy, zoning and land use experts
- Financing partners
- Architects, builders, and experts in code, energy and sustainable design standards
- Real estate professionals
- Community advocates and experts in diversity, equity, inclusion, and accessibility

How to get involved

1. **Visit the project website**
   http://accd.vermont.gov/homesforall

2. **Submit photos of Vermont vernacular typologies by June 30th**
   https://vnrc.org/housinghunt/

3. **Apply to be a Neighborhood Infill Design Pilot community by June 23rd at 5pm**
   http://accd.vermont.gov/homesforall

Task 1: Design Guide							Task 3: Community Infill Design					

| | Task 2: Builders' Workbook | | | | | | | | Task 4: Toolkit Trainer Summit | | | |

Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb

Kickoff Site Visit — *May 25-26*

Neighborhood Infill Design Site Visit — *October 18-20*

Toolkit Trainer Summit — *Dates TBD*

Thank You!

Questions Welcome!

Primary Contact: Dan Groberg
(dan.groberg@vermont.gov)

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