



CAPE COD
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Evaluation of Development Options for South Sandwich Village Center and Surrounding Areas



Prepared by the Cape Cod Commission

PROJECT MANAGER:

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Sandwich RESET - DLTA Final Report

INTRODUCTION

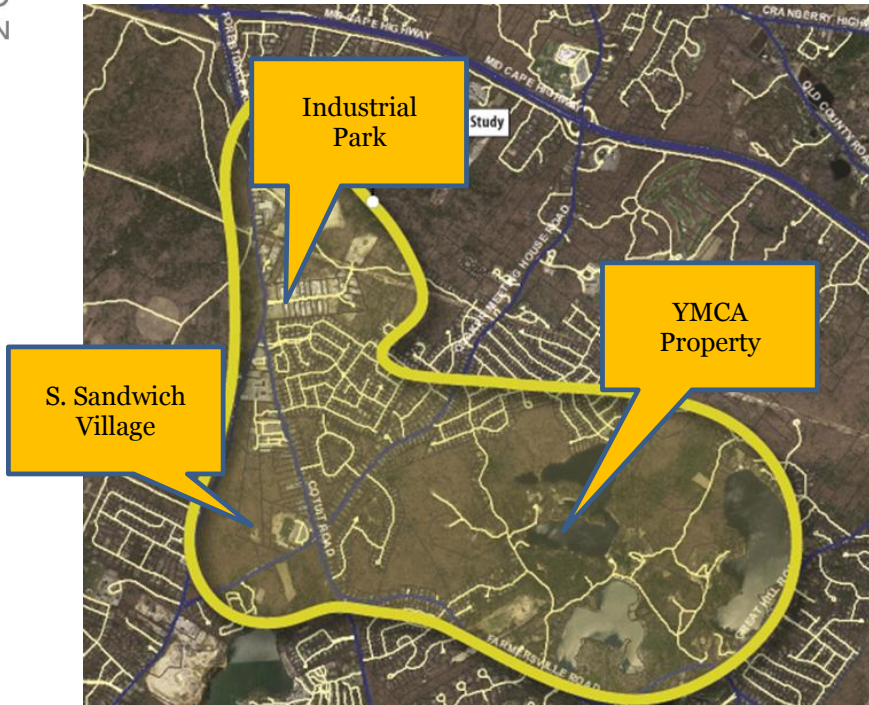
The Town of Sandwich requested technical assistance from the Cape Cod Commission (CCC) to evaluate development options for South Sandwich Village Center and surrounding areas.

The area identified for development as the South Sandwich Village Center is a triangle of land currently partially developed with strip style commercial development. The Town would like to see a dense, walkable mixed use village style development at this location. Commercially zoned and vacant land within the SSVLC includes property that was granted a permit for a supermarket, which was acquired by an adjacent property owner, and a 55-acre tract of town owned land. The boundaries of the area are two major roads to the east and south and open space owned by Massachusetts Fish & Wildlife to the west with the point of the triangle facing north. There are no internal roadways or water or wastewater infrastructure in the undeveloped southern part of the triangle.

The Town has been seeking a developer for their parcel (approximately 55 acres in the southern portion of the triangle) for over ten years. They have issued three requests for proposals to sell the property but, for a variety of reasons including lack of infrastructure and permitting requirements, they have not yet sold the property. Currently, the Tsakalos Realty Trust is in negotiation with the Town to purchase the property. They are also in discussions with the Cape Cod Commission and the Town about completing a three way development agreement seeking approval for a mixed-use village on the property that they control.

STUDY AREA

The study area for this project focuses on the South Sandwich Village Center triangle but also includes the town's industrial park and the YMCA land within the Three Ponds District of Critical Planning Concern. This report focuses only on the tasks pertinent to the South Sandwich Village Center area.



PROJECT GOAL

The overall goal of this project was to provide development scenarios for South Sandwich Village.

The specific objectives of the project are to:

- Complete baseline research on the study area
- Complete a market analysis to determine existing and future demand for retail and office space on the Cape with a focus on Sandwich in particular.
- Craft three development scenarios for the study area, the first based on current zoning, and:
 - Complete a fiscal impact analysis for each development scenario including determining which scenarios will generate the most taxes, what level of service they will require, and complete a tax shift analysis by taxpayer type (commercial v. residential)



- Complete an impact analysis for transportation, water resources, natural resources, and the regional economy for each of the scenarios
- Based on this information the town will select a preferred scenario
- Complete a regulatory analysis and strategy for the preferred scenario consistent with town fiscal goals, the Sandwich Local Comprehensive Plan, and the Regional Policy Plan
- Compile a final report with visualizations from task deliverables

TASKS

The Cape Cod Commission agreed to a comprehensive scope of work with the Town of Sandwich for the following tasks:

- Baseline Analysis: (completed) review of the Sandwich Local Comprehensive Plan (LCP), local development bylaws, the goals of the Regional Policy Plan, market research on the South Sandwich Village Center, and Development of Regional Impact decisions that affect the properties to be studied.
- Regional Market Analysis: (completed) complete a market analysis of demand and supply for retail and office space for the entire cape and sub-regions therein.
- Redevelopment Scenarios: (draft completed) 3 redevelopment scenarios of possible future land use patterns will be developed. The mix of uses to be considered in the scenarios includes retail, housing, office, accommodations, public facilities, arts facilities, research and development, and light manufacturing.
- Focus Groups: (underway) Conduct focus with town staff and others as directed by the Town Manager. The purpose of the focus groups is to consider the different scenarios and suggest changes, as appropriate.
- Fiscal Impact Model Analysis: (draft scenarios completed) Develop a case study marginal cost analysis net fiscal impact model for the town. Analyze the fiscal impact to the three redevelopment scenarios.
- Regional Resources Impact Analysis: (underway) Evaluate the impact of the different development scenarios on regional resources including transportation, water resources, natural resources, and the regional economy.



- Regional Permitting Analysis: (underway) Identify the most appropriate regulatory tool(s) for regional permitting of the preferred scenario for each of the different segments of the study area.
- Final Report: Compile a draft report from the task deliverables for review by the Town Manager and the Board of Selectmen. Incorporate comments into a final report.

District Local Technical Assistance (DLTA) funding was used to complete the baseline analysis, redevelopment scenarios, and fiscal impact analysis aspects of this project.

POLICY CONTEXT

LOCAL COMPREHENSIVE PLAN

The Town of Sandwich completed its local comprehensive plan in 2009 and updated the development by-laws at the spring 2013 Town Meeting. A number of studies and planning exercises have been completed around the LCP to clarify what is desired and possible in terms of developing the South Sandwich Village Center.

The Sandwich Local Comprehensive Plan (LCP) starts with a strong vision for the town:

“A sustainable future will support the welfare and lifestyle of residents while preserving and enhancing the environment, providing education and housing, and providing business opportunities through guided economic development. The Town of Sandwich seeks to plan its future so that the historic, community, and cultural character and natural beauty of the community can be sustained for future generations.”

The Land Use and Growth Management goals provide a clear guide to the types of development the public would like to see in Sandwich:

Goal LGM-1 Sandwich shall encourage sustainable development that is consistent with the carrying capacity of the Town’s natural, historic and social environments and supports economic health and quality of life.



Goal LGM-2 Sandwich shall minimize adverse impacts on the land by using land efficiently and protecting sensitive resources, and to create vibrant communities by directing growth and redevelopment to appropriate locations.

Goal LGM-3 Sandwich shall protect the distinct characters of its Villages, and prevent the extension or creation of new roadside "strip" commercial development that diminish the vitality of established villages.

Goal LGM-4 Sandwich shall direct new commercial, industrial and mixed use development to its Growth Centers. These Growth Centers are as follows: the Route 6A/Tupper Road/Town Marina Area; the South Sandwich Village Center; the Historic Village/Route 6A Area; and the Sandwich Industrial Park and Zoning District along Route 130.

Goal LGM-5 Sandwich shall closely review the existing Zoning By-law for its use and intensity and compare them to carrying capacities and desired future mix of uses to determine where revisions are necessary. Sandwich shall encourage "village", "cluster" and "smart growth" and consider regulatory tools to facilitate this type of growth in targeted areas including a transfer of development rights program, evaluation of site plan review regulations, design review regulations, and additional natural resources protection and hazard mitigation regulations.

Goal LGM-6 Sandwich shall work to protect and enhance the remaining camp lands in order to preserve their important scenic qualities, recreational opportunities and their intrinsic value as open space.

Goal LGM-7 Sandwich shall pursue a policy of equal and fair enforcement of all land use regulations, including special permits.

Goal LGM-8 Sandwich shall use the Comprehensive Plan as a guidance document. This document is intended to shape all land use policy throughout the Town from economic development to the preservation of open space.

Goal LGM-9 Sandwich shall work to protect and enhance the remaining active agricultural lands. New development adjacent to lands in active agricultural production shall maintain or provide a



thickly vegetated buffer of sufficient width to prevent conflicts between the development and existing agricultural uses. New agricultural operations in developed residential areas shall also provide a buffer to minimize impacts on these adjoining areas.

Goal LGM-10 Sandwich shall provide capital facilities and infrastructure efficiently and in a manner that is consistent with Cape Cod's environmental, cultural, and economic strengths, and that reinforces traditional village-centered development patterns.

The Local Comprehensive Plan also included issues and opportunities analyses for different areas within the town including South Sandwich Village Center. This section is included here in full:

Key Issues:

- The SSVC boundaries and buffers along Cotuit Road need to be defined and protected. Strong edges are needed between the neighborhoods on the north side of Cotuit Road and the mixed uses on the south side;
- Traffic congestion and safety (especially at the two intersections - Route 130/Cotuit Road and QMH/Cotuit Road) need to be improved. There are inconsistent lane alignments at Cotuit Road/QMH intersection and both are unfriendly pedestrian environments;
- There is a high concentration of private septic systems. This area of town is part of the Poppenesset Marine Estuary Recharge Zone and the limits for additional discharge are very strict and set by DEP Title V regulations;
- Public wastewater treatment is currently unavailable in the district and the nearby Forestdale School expansion is an unlikely option;
- Future uses need to be clearly defined and provided for in the revised zoning districts;
- Existing development is largely unattractive and invisible to potential customers because of the large setback and buffer from Cotuit Road and Route 130;



- Recreational activities are currently limited in the district (Pop Warner Field has limited access and State DEM lands have few marked trails);
- Gateway and directional signage is current not adequate;
- Architecture is a mix of traditional Cape Cod and commercial strip styles;
- Internal access is limited. Shared curb cuts, parking, and internal roadways are needed to reduce the number of trips onto Route 130 and Cotuit Road;
- A partial internal connector road (Tom's Way) links some of the larger plazas but is not well marked or known;
- Intermodal transportation opportunities are very limited;
- Ownership patterns create an opportunity for significant change. There are three primary owners – the Town, the Sandwich Housing Authority, and Tsakalos Realty Trust;
- The local sign code is prohibitive and ineffective. Slat signs for individual businesses at entrances on Route 130 and Cotuit Road are hard to read and have a cluttered appearance to the passing driver. Sign code revisions would be appropriate as part of future zoning amendments;
- Traffic congestion along Cotuit Road is a growing issue. Vehicles often pass on the right over private yards because of the lack of curbing on the street;
- Pedestrian and bicycle facilities are limited. There is a five-foot asphalt sidewalk on the south side of Cotuit Road and no sidewalk along Route 130. A new sidewalk is under construction along Quaker Meetinghouse Road. There are also no sidewalk or bicycle connections to surrounding areas such as Forestdale School, the Industrial Park, Oak Crest Cove, or adjacent neighborhoods;
- Streetscape is very limited on Cotuit Road, Quaker Meetinghouse Road, and Route 130. There are no formal street tree plantings or curbing. Design guidelines as part of future zoning amendments would be appropriate; and



- Some good locally-owned businesses are struggling because of location and poor visibility.

Key Opportunities:

- SSVC must have a destination theme to be sustainable and not just a trend;
- Centralized, coordinated and shared on-site parking should be a criterion for development and redevelopment. On-street parking should also be included with new internal access and circulation is key to reducing traffic on surrounding streets;
- Public restrooms should be included in future plans;
- Recreational facilities should be expanded and better connections should be made to Pop Warner, Oak Crest Cove, DEM conservation lands and new fields and facilities;
- Trail connections and interpretive signage should be made on State DEM lands, private lands within the Triangle and to surrounding neighborhoods, the Sandwich Industrial Park, Oak Crest Cove, and Forestdale School;
- Higher density, higher quality, and vertical mix of uses are desired in the SSVC. Uses should include various types of retail, restaurant, professional offices and services, institutional and public uses, and residential (varied types and income levels);
- Connections should be made to other Activity Centers such as the Historic Village, Town Marina, Industrial Park, and schools. This can be accomplished with trails and sidewalks;
- While the buffer between development and Cotuit Road needs to be maintained with landscaping and compatible uses (ie-residential), better visibility and access should be created along Route 130 for existing and new commercial and mixed use development;
- Provide good signage for businesses (attractive but visible from roadway);



- An overall bike access plan should be prepared including connections and maintenance to existing bike trails such as to the Historic Village, the Marina and town beaches;
- New housing (from market rate to basic work force) should be the predominate upper floor use for new mixed use development as well as moderate density residential uses (i.e. townhouses, garden apartments and congregate housing) in the fringe areas of the SSVc;
- Safety and traffic issues need to be sufficiently addressed:
 - Cotuit Road – congestion, multiple curb cuts, pedestrian/bike safety
 - Snow storage needs to be considered in the design
 - Connections to Peters Pond with sidewalks and crosswalks
 - Cotuit Road and Quaker Meetinghouse Road intersection upgrades with consistent lanes and alignment
 - Upgrade the intersection at Cotuit Road and Route 130
- A new roadway that bypasses the Cotuit Road/Quaker Meetinghouse Road intersection on the southeast corner would significantly reduce congestion;
- The internal road (Tom’s Way) should be expanded into a network or grid which connects to all properties, reducing traffic and turning movements on Cotuit Road, Quaker Meetinghouse and Route 130;
- Future public uses should include an educational component such as a museum (i.e. bogs), a new branch library, and new senior center;
- Include a Town Green or similar types of formal public open spaces. Future uses should include public festival and gathering spaces for a farmers market;
- Traditional village center design should be incorporated into future development. Architecture should be attractive but not necessarily in the Cape Cod style;
- Sidewalks with bike trails should be combined. Install paved pathways around the perimeter of the SSVc;



- Light industrial and office uses (such as back office uses) should be considered in the mix of uses in the SSVC;
- A new Municipal Campus should be considered at the southeast corner of the Quaker Meetinghouse and Cotuit Road intersection. This is town-owned land (Oak Crest Cove) and may include a new Sandwich administrative building and safety complex containing the police department, fire department and rescue; and
- Businesses of “necessity” that local residents use on a regular basis such as the grocery store, restaurants, hardware, and professional services should be the primary

ZONING

The study area includes several zoning districts, including B2 (business 2) zoning for the area in the triangle, IND (industrial limited) for the industrial park area, and R2 (low-density residential) zoning in the surrounding areas. Much of the area is also within the Water Resource Overlay District, which limits the types of uses otherwise permitted in the underlying zoning district and establishes performance standards for those permitted uses. The YMCA property is within the Three Ponds DCPC.

Zoning changes approved at the 2013 Spring Town Meeting affect the study area in several ways. First, the new Flexible Growth District was created to encompass most of the industrial park area, and the existing Growth Center Technology District was deleted from the area southeast of Route 6 and Quaker Meetinghouse Road. This change greatly expands the amount of land available for retail – particularly large scale retail – in Sandwich.

Second, several new retail use types were added to the Definitions section, defining retail establishments largely by size:

- Retail Sales/Service – Minor = under 2,500 square feet;
- Retail Sales/Service – Major = 2,500 to 9,999 square feet;
- Retail Sales/Service – Regional = 10,000 square feet or more; and
- Major Commercial Complex = 10,000 square feet or more and more than one commercial entity in the same complex).



Third, the Use Table was changed to allow new uses in the B2 and Flexible Growth District. Previous zoning had required a special permit for most retail and commercial uses in the B2 zone. New zoning allows several uses by right in both the B2 and Flexible Growth District: fast food, convenience stores, supermarket, and many entertainment uses. Other uses are allowed by special permit in both the B2 and Flex districts: Major Commercial Complex, Other Retail Business or Service, Retail Sales – Regional, and Hospital. A small number of uses are allowed by right in the B2 zone but are not permitted in the Flexible Growth District: Assisted Living and Hospice.

Lastly, dimensional regulations were changed to allow the 30 foot front setback for buildings in B2 to be reduced to 0 ft., this reduction in setbacks is not allowed in the Flexible Growth District. Maximum building heights in the B2 Zone remain 35 feet; 45 feet is permitted in the Flexible Growth District and Industrial Zones.

South Sandwich Village Center – B2 Zone

By Right Uses
Farm (1)
Farm Stand
Brewery, Winery, Distilleries
Artist Studios
Bank
Beauty Salon/ Barbershop
Childcare Facility
Convenience Store, Retail
Fast Food, Takeout (2)
Medical Offices (21) (No surgical procedures)
Medical Offices (21) (Outpatient surgical procedures)
Office, Professional
Restaurant
Retail Sales/Service, Minor
Retail Sales/Service, Major
Supermarket
Technology Business or Service
Veterinary Office or Hospital
Assisted Living Facility
Continuing Care Retirement Community



By Right Uses
Hospice Care Facility
Municipal Uses
Museum
Philanthropic Institutions
Religious Use
School- Public, Sectarian, Denominational, Non-profit Educational Corp.
Art Gallery
Bowling Alley
Cinema
Game Room
Health Club
Mini-golf
Recreation Facility, Indoor
Social Club
Spa
Theatre
Accessory Apartment
Antenna, Amateur Radio accessory to residential use
Antique shop, art gallery, gift shop accessory to cultural/ institutional use
Automatic Teller Machines accessory to retail use
Construction trailer office, temporary accessory
Convenience store accessory to gasoline station
Home Occupation accessory to residential use
Office, professional accessory to commercial use
Private Garage/ Boathouse
Restaurant accessory to commercial use
Sale of Products Manufactured On-Site accessory to retail use
Swimming Pools accessory to residential use
Tennis Court accessory to residential or commercial use

By Special Permit
Bed and Breakfast (5)
Boat/Motor Vehicle Service/Repair
Car Wash
Dry Cleaning
Funeral Home
Gasoline Station



By Special Permit
Holiday Seasonal Attraction
Hotel/Motel
Major Commercial Complex
Other retail business or service
Retail Sales/Service, Regional
Terminal, Bus or Rail
Sale, Storage or Distribution of Fuel Oil or Gasoline
Use of toxic or hazardous materials in quantities greater than associated with normal household or agricultural use (13)
Wastewater Treatment Facility (17)
Wastewater Effluent Disposal (16)
Animal Rescue/ Adoption
Hospital
Rehabilitation Hospital
Recreation Facility, Outdoor
Cluster Development
Multi-family
Single-family
Two-family
Car wash accessory to gasoline station
Common Driveway
Medical Office accessory to commercial use (20,21)
Use of toxic materials accessory to commercial use
Wastewater Treatment Facility, Accessory (17)
Wastewater Effluent Disposal, Accessory (16)
Wind Turbines accessory to residential use

Industrial Park – Flexible Growth District

By Right Uses
Farm (1)
Farm Stand
Aquaculture Operations
Brewery, Winery, Distilleries
Boat/ Watercraft Sales, Wholesale (8)
Commercial/Recreational Marine Equipment Storage (6)
Contractors Yard
Solar Photovoltaic Installation, Large-Scale Ground Mounted (22)



By Right Uses
Municipal Uses
Religious Use
School- Public, Sectarian, Denominational, Non-profit Educational Corp.
Construction trailer office, temporary accessory
Convenience store accessory to gasoline station
Private Garage/ Boathouse

By Special Permit
Adult Entertainment
Automotive Repair
Beauty Salon/ Barbershop
Boat/Motor Vehicle Service/Repair
Boat and Watercraft Storage Building
Car Wash
Crematorium
Dry Cleaning
Gasoline Station
Holiday Seasonal Attraction
Hotel/Motel
Major Commercial Complex
Major Industrial Complex
Motor Vehicle Rental Establishment
Motor Vehicle Sales, Wholesale (8)
Other retail business or service
Restaurant
Retail Sales/Service, Regional
Terminal, Bus or Rail
Terminal, Trucking
Warehouse Sales, Wholesale and Retail
Bulk Storage/ Warehouse (9)
Disposal and Recycling Facility
Earth Removal
Hazardous Waste Facility
Heliport
Metal Plating (13)
Power Generation, Electrical
Research laboratory, Chemical, bacteriological lab



By Special Permit
Sanitary Landfill
Sale, Storage or Distribution of Fuel Oil or Gasoline
Telecommunications Facility, Wireless (15)
Use of toxic or hazardous materials in quantities greater than associated with normal household or agricultural use (13)
Wastewater Treatment Facility (17)
Wastewater Effluent Disposal (16)
Animal Rescue/ Adoption
Hospital
Art Gallery
Mini-golf
Recreation Facility, Indoor
Recreation Facility, Outdoor
Car wash accessory to gasoline station
Common Driveway
Heliport accessory to commercial/ institutional use
Motor Vehicle Sales, Wholesale, accessory to new car sales (8)
Restaurant accessory to commercial use
Terminal, Trucking accessory to commercial use (23)
Use of toxic materials accessory to commercial use
Used Car Sales, accessory to motor vehicle sales, rental and retail
Wastewater Treatment Facility, Accessory (17)
Wastewater Effluent Disposal, Accessory (16)

The establishment of the Flexible Growth District where large scale commercial uses, particularly retail, are permitted will undermine the desired development of South Sandwich Village Center by creating significant competition where there is limited demand (See market analysis, and excerpt below). These provisions of the current zoning do not appear to be consistent with goals for the area expressed in the Sandwich Local Comprehensive Plan.

SOUTH SANDWICH VILLAGE MARKET ANALYSIS¹

¹ Emphasis added



A comprehensive and well-crafted market analysis was completed for the South Sandwich Village Center was completed in March 2010. The following highlights key verbatim findings of the study.

Findings:

- Much of what the research team found was **consistent with the Local Comprehensive Plan**, with an expansion of some of the concepts in that Plan as well as additional specifics about what might be possible and the challenges that must be faced.
- There was **qualified support for a mix of expanded retail and the creation of office space** to meet the needs of an expanding population in both Sandwich and the secondary market.
- Recommended expansion of **retail** should not include any of the big box variety stores but, rather, should be comprised of small to mid-sized retail operations designed to capture the growing market in Sandwich and the secondary market, while recapturing some of the Sandwich market that shops elsewhere.
- While village centers can attract customers from throughout the region and those from nearby neighborhoods, they are **not always equipped or capable of competing with large-scale retail destinations**. A village center is typically not capable of competing with a shopping mall, because it lacks the wide range of retail establishments that draw consumers to the mall. Big box retail is also rarely successful, as the village center lacks the vast tracts of surface parking required to support them.
- The **office** space could be utilized by those professional and technical services that match current local workforce skills such as accounting and financial planning, legal and medical services. These fields fit well with the type of office space envisioned for a village center and will be supported by a growing, but aging population. Medical office space, as differentiated from medical facilities that provide rehabilitation or outpatient services, could be an important component, allowing a concentration of this sector rather than its current scattered site development throughout the region. Office space could also be utilized by small high-tech start-ups led by entrepreneurs trained locally and enticed to stay in the region. While the arts and creative economy



type businesses do not have the capacity to drive the need for retail and office space, this sector could also utilize space available for advertising and architectural-type services.

- Expanded retail and office markets, in and of themselves, do not appear sufficient in providing adequate revenue for a private developer or municipal/quasi-public agency to fully develop the SSVc to its highest potential.
- Therefore, the research team is recommending consideration of an **anchor tenant** that would minimize the development risk and provide the necessary foot traffic and confluence of activities to support and complement the expanded retail and office sectors. The presence of a medical/rehabilitation facility or an educational/entrepreneurial training facility could provide just such an anchor and do so within the context of the rest of the SSVc.
- There also did not appear to be a market for the development or expansion of sectors regarding communications, bio-technology development and manufacturing, and back-office operations. While environmental firms might seem a good fit for any Cape Cod location, their presence closer to sites with direct access to water, particularly in the marine industrial sector, did not allow for the SSVc to be an enticing alternative.
- **Tourism** did not score well in any context for this site and would directly compete with other parts of the town that lend themselves more directly to those who visit Sandwich for that purpose. The hospitality industries would also not be likely to consider investment in the SSVc to any degree unless the anchors were sufficiently strong to justify their presence. The lack of visibility from Route 6 dim the prospects of such investment further, even as it relates to high grade restaurant enterprises.
- The current state of the **housing** market has weakened its development virtually everywhere, but it is expected to slowly recover over time on Cape Cod as well as other locations. In the short term, however, it is not anticipated that housing will be able to play a central role in the SSVc's development. There could still be provisions made for housing to be developed at the site over time, but generally housing is the last component to be developed in village centers. Similar developments utilizing senior or assisted



living housing concepts have not proven very successful. Sandwich might instead consider the development of workforce housing catering to residents needing quality housing in town whose jobs are necessary for the sustainability of the Sandwich economy.

- The use of significant portions of the property for **civic and recreational uses** is vital to the development of the remainder of the property. Town offices could be provided in a central location and the recreational aspects, combined with green spaces, would provide the appropriate atmosphere that allows the Town to truly consider this a village center, while taking nothing away from other locations within the community. **Such municipal enhancements would add to the base of support needed to make the retail and office enterprises viable.**
- **The success of the village center developments that were reviewed for this report hinge on the public uses, open space and local retail demand and usually do not include large commercial uses.**

• **A factor of success is the limited land available that is zoned commercial in Sandwich,** thus future competition from other local developments not a major factor.

- **Constraints on success** include: 1) Proximity to Mashpee Commons and other local retail/commercial developments limits overall potential retail development. 2) Future development of the Massachusetts Military Reservation might attract visitor trips currently made to the SSVC

REGIONAL MARKET ANALYSIS

A regional market analysis for Barnstable County, which includes the Town of Sandwich, was conducted during 2013 to gauge regional supply and demand for retail and office space. **The full study is attached as an appendix to this report.**

The region is heavily dependent on tourism and second home owner spending. The region's draw is its beaches, historic villages, and natural



beauty. It is essential to the area's economic prosperity to keep this special place special and undergo development with care.

The regional market analysis was completed by the Chesapeake Group. It included an industry gap analysis, a resident expenditures survey, interviews with key stakeholders, area reconnaissance, and the use of a proprietary model to estimate final demand. The consultant began the analysis by noting a number of national trends impacting supply and demand across the board. These include:

- Low birth rates
- Low fertility rates
- Low marriage rates
- Higher average age - aging population likely increases the demand for certain activity and decrease demand for other activities
- Greater population diversity
- Manufacturing changes will impact retail space.
- Lesser inventory on site resulting from increased "on demand" production and the internet.
- Retailing survival > combining "entertainment" experience with purchase of goods and services' trips

The industry gap analysis looked at opportunities for business and job creation by comparing Barnstable County to like counties elsewhere in the country. The comparison criteria were:

- Population and Household size
- Incomes
- Transportation network
- Close proximity to major metro area
- Water
- Visitor activity
- Climate

The industry data used was the County Business Patterns dataset collected by the US Census Bureau annually that covers county and zip code geographies. The analysis identified those industry sectors that were over-represented and under-represented relative to the comparison regions. The analysis showed that retail is heavily over represented as is the construction industry. Opportunities exist in manufacturing and wholesale trade, banking, finance, and insurance and professional services particularly medical.



The ultimate conclusion of the report was that the region could support approximately 2 million square feet of additional retail space over the next thirty years. The report states that there are some very significant policy issues raised by the analysis and the findings of opportunities that suggest that future economic viability and sustainability for Cape Cod is in question without a “correction in course.” The policy recommendations were:

- Modify traditional land use and development patterns
 - Increase density of housing and commercial
 - Advance mix of uses and mixed use development
 - Redevelopment driven over new development
- Increase inter-jurisdictional cooperation
 - Require consistent Local Comprehensive Plans across jurisdictions
 - Attraction of nationally proven developers
 - Establish a regional economic development investment fund

REDEVELOPMENT SCENARIOS

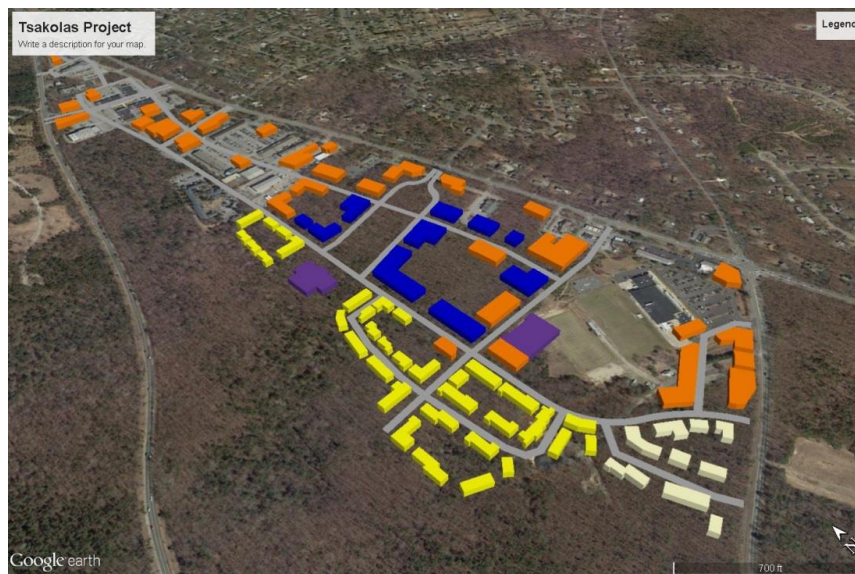
Commission staff considered four different development scenarios for the South Sandwich Triangle area. The scenarios were established following discussions with town of Sandwich staff and were designed to illustrate a variety of possibilities allowed under current zoning. Three of the scenarios were created by Commission staff, and the fourth scenario was proposed by a local developer who owns significant acreage within the study area. All of the potential development scenarios were considered as if they were fully built out as allowed by current zoning, though it is likely that any of the scenarios would be constructed in phases.

Scenario 1: Existing Development Pattern – This scenario assumes that the existing pattern of development and mix of uses would continue in the area. Additional commercial development (retail, office and restaurant) following the current pattern of linear roadside developments and small commercial plazas is projected on vacant lots which front on main roads, but there is no interior lot development. Scenario 1 includes 225,053 additional square feet of commercial development: 78,769 sf office, 123,779 sf retail, and 22,505 sf restaurant. No residential development is projected in this scenario.



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Scenario 2: South Sandwich Village/Tsakolas Proposal – This scenario follows a development and redevelopment plan proposed by a local developer in a Final Environmental Impact Report dated October 1, 2012. The plan includes a mix of residential, commercial, office, hotel and independent living. The development is oriented along new internal roadways with buildings fronting the street and on-street parking. Commercial and civic uses are focused on primary roads and intersections. Residential units are proposed in multi-unit residential buildings and as apartments above commercial or office uses. Some existing uses are integrated into the design. Scenario 2 includes a total of 1,415,000 square feet of development with 437 residential units (in 561,000 square feet) and 854,000 square feet of commercial and other space broken down as follows: 331,000 sf office, 333,000 sf retail, 120,000 sf hotel, 50,000 sf independent living, and 20,000 sf institution.





Scenario 3: Smaller Village plus Residential – This scenario assumes a mixed-use village-style redevelopment of the northern portion of the triangle, and a residential subdivision in the southern portion. The village-style development is focused along a new north-south roadway that passes through the upper portion of the triangle, with small to moderate scale commercial or office uses on the ground floor and residential or office uses on the upper floor. The residential subdivision is kept within an easy walk of the village-style area and is oriented to take advantage of open space and recreational areas. Scenario 3 includes 54 residential lots in the southern portion, and 680,492 square feet of mixed use development in the northern portion as follows: 204,148 sf office, 170,123 sf retail, 34,025 sf restaurant, and 212 apartments (in 272,197 square feet).



Scenario 4: Smaller Village plus Campus – This scenario assumes a mixed-use village-style redevelopment of the northern portion of the triangle (the same as in scenario 3), and a campus-style office/research and development complex in the southern interior portion. As noted above, the village-style development is focused along a new north-south roadway that passes through the upper portion of the triangle, with small to moderate scale commercial or office uses on the ground floor and residential or office uses on the upper floor. The office or research area to the south is oriented around several campus-like open spaces and is



linked to the village-style development to encourage pedestrian and bicycle travel between the two areas. Scenario 4 includes 939,837 square feet of office/research and development in the southern portion, and 680,492 square feet of mixed use development in the northern portion as follows: 204,148 sf office, 170,123 sf retail, 34,025 sf restaurant, and 212 apartments (in 272,197 square feet).



Residential Land Use Type	Existing Development Pattern	South Sandwich Village/Tsakalos Proposal	Smaller Village plus Residential	Smaller Village plus Campus
Single Family	0	92	54	0
Condominiums	0	153	212	212
Apartments	0	192	0	0
TOTAL	0	437	266	212

Commercial Land Use Type	Existing Development Pattern	South Sandwich Village/Tsakalos Proposal	Smaller Village plus Residential	Smaller Village plus Campus
Retail	123,779	299,700	170,123	170,123



Restaurant	22,505	33,300	34,025	34,025
Office	78,769	331,000	204,148	204,148
Hotel		120,000		
Assisted Living		50,000		
Ed. Institution		20,000		
R&D Park				939,837
TOTAL	225,053	854,000	408,296	1,348,133

FISCAL IMPACT ANALYSIS

TishlerBise, a nationally renowned firm in the area of fiscal impact assessments, was hired to build fiscal impact models for five towns on Cape Cod including Sandwich. TischlerBise has prepared over 800 impact fees and over 700 fiscal impact analyses - more than any firm in the country. The purpose was to better understand the impact of specific development proposals and of different types of development on public funding and demand for services. The model estimates potential revenues and costs by residential and commercial land use types. Revenues are driven by expected assessed value or sale price and costs are driven by household size, number of school age children, and trip generation rates.

This model was employed to assess the net impact of the four development scenarios crafted in the scenario planning portion of this project (described in previous section). The following tables show a summary of the results denoting the number of residential units and commercial square footage expected and providing an annual estimate of revenues, costs, and the net impact at the time the project is complete.

Scenario	Housing Units Proposed	Housing Square Footage Proposed	Commercial Space Proposed (Square Feet)	Total Square Footage Proposed
1	0	0	225,053	225,053
2	437	561,000	854,000	1,415,000
3	266	380,197 ²	408,296	788,493
4	212	272,197	1,348,133	1,620,330

² The single family homes were assumed to be 2,000 square feet



Scenario	Annual Revenue Generated	Annual Costs Necessitated	Annual Net Fiscal Impact	Annual Net Fiscal Impact Per Square Foot
1	\$496,000	\$742,000	-245,000	-1.09
2	\$3,150,000	\$4,366,000	-1,216,000	-0.86
3	\$2,060,000	\$2,705,000	-645,000	-0.82
4	\$4,175,000	\$4,996,000	-821,000	-0.51

The status quo scenario (#1) that follows the existing auto-oriented commercial pattern is the least cost effective to the town showing the greatest loss on a per square foot basis. The biggest residential build, proposed by Tsakalos shows less of a per square foot loss and offers a much greater mix of uses. The least expensive option for the town is the 4th scenario calling for a mixed use village to the north and a research and development/office park to the south. The market study shows weak demand for either the big build proposed by Tsakalos or the 4th scenario. Overall however, the fiscal model does support the call in the Local Comprehensive Plan for a mixed use village area within the south sandwich triangle area.

In working with the fiscal model it is clear that the net impact is strongly influenced by market values for different types of property. The model uses average assessed value for the properties by type that exist in Sandwich today. These will generally under-estimate the value of new properties added to the market assuming they are quality construction. The negative fiscal impact numbers could therefore be rectified with attention to the character of the area which would significantly increase property values for both commercial and residential types.

It must be noted that there are shortcomings to any fiscal impact model. This model is based on average costs and assumes that there is sufficient capacity to absorb new development without major capital investments in infrastructure, schools, or other public services. Thus the model may severely underestimate the potential costs associated with development. Furthermore, this model does not include the costs of providing water and sewer to the proposed development because these are currently paid for through special districts or do not exist in Sandwich at this time. This means that the model underrepresents the costs of development. The



model also does not capture the cost savings associated with more concentrated development because it is not looking at the value per acre or at the potential infrastructure cost savings associated with more compact development.

NEXT STEPS

The Commission is continuing to provide technical assistance to the Town of Sandwich and explore regulatory permitting options with the Town and potential developers. The next steps of the RESET project are outlined below:

- Regional Resources Impact Analysis: Evaluate the impact of the different development scenarios on regional resources including transportation, water resources, natural resources, and the regional economy.
- Regional Permitting Analysis: Identify the most appropriate regulatory tool(s) for regional permitting of the preferred scenario for each of the different segments of the study area.
- Final Report: Compile a draft report from the task deliverables for review by the Town Manager and the Board of Selectmen. Incorporate comments into a final report.