

Madalyn Letellier

From: [REDACTED]
Sent: Thursday, April 16, 2026 3:57 PM
To: Public Comments
Subject: Concern Regarding Proposed Zoning Amendment for D6

Follow Up Flag: Follow up
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Dear members of the Land Use Committee and Planning Board,

My name is Jennifer Lawrence, and I am writing on behalf of the Somerville Chamber of Commerce, a membership organization representing over 200 businesses in Somerville.

We are writing to urge you not to approve the proposed zoning map amendment for 1 Union Square (D6 in the Union Square Master Plan).

The revitalization of Union Square is guided by a planning and zoning framework established through an extensive public process. Its implementation is also governed by agreements between the designated master developer and the Somerville Redevelopment Authority.

We respectfully urge you to consider the potential implications of taking an action that could disrupt or weaken this framework.

Maintaining consistency in how the framework is applied is important to ensuring the continued success of the district and the long-term vision that shaped the plan.

We are concerned that moving forward with a parcel-specific zoning change could put those outcomes at risk and put the city in a difficult legal position given its agreements with the current master developer.

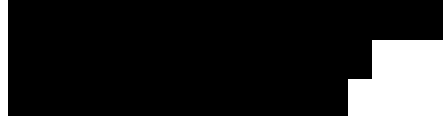
Thank you for your time and consideration.

Regards,

Jennifer Lawrence
On behalf of the
Somerville Chamber of Commerce

Acting Director
Somerville Chamber of Commerce

[REDACTED]
Somerville, MA 02143
www.somervillechamber.org



April 16, 2026

RE: **1 Union Square, Somerville**

Dear Land Use Committee and Planning Board,

My name is Shauna Gillies-Smith, and I am a business owner in Union Square in Somerville. I also worked for many years as the landscape architect on the planning team of the Union Square redevelopment and was trained as an urban designer as well as being a landscape architect.

I am writing to oppose the approval of the proposed zoning map amendment for 1 Union Square (#26-0257).

The Union Square redevelopment was guided by a planning, zoning and redevelopment framework developed over many years with the City of Somerville and with substantial community involvement. I was directly involved in many of the community meetings as well as in regular dialogue with City staff so have a clear appreciation of the careful consideration that went into the mix and disposition of uses.

I firmly believe that any changes that would significantly alter the overall mix of uses within the master plan should be considered as part of a broader, coordinated planning process, not through a parcel-specific amendment. It could set a precedent that could potentially unravel years of collective work by City Staff, the development team and by community groups and individuals.

I respectfully ask that any potential changes to land use in this area be evaluated within the context of the full Union Square plan. If adjustments to the housing mix are appropriate, they should be considered comprehensively and in coordination with the existing planning framework.

Thank you for your time and consideration.

Kind regards,



Shauna Gillies-Smith, MAUD, FASLA
Ground Inc. Landscape Architecture

Madalyn Letellier

From: Shauna Gillies-Smith [REDACTED]
Sent: Thursday, April 16, 2026 4:37 PM
To: Public Comments; All City Council; Planning1
Subject: 1 Union Square- comment letter
Attachments: 1 Union Square Comment Letter.docx

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Dear all,

Please find attached my comment letter in opposition to the proposed zoning change of 1 Union Square. Thank you very much.

Kind regards,

Shauna Gillies-Smith Principal MAUD, BArch, FASLA, LEED AP [REDACTED]
ground landscape 285 Washington Street, #204 Somerville, MA 02143 [REDACTED] [REDACTED]

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Madalyn Letellier

From: Jamie deRosas [REDACTED]
Sent: Friday, May 1, 2026 12:31 PM
To: Public Comments
Subject: MR-6 union Square

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Hi,

I saw online public comments are being accepted on a proposal to develop housing over lab space on Somerville Ave & Prospect St and just was to add my enthusiastic support of this idea. Lack of housing gives a supply advantage to landlords who use that to raise our rent

Please consider more housing! I do not want to be priced out of Somerville.

Thank you
Jamie deRosas
[REDACTED] F
Somerville MA 02145

Madalyn Letellier

From: Ashish Shrestha [REDACTED]
Sent: Thursday, April 30, 2026 9:10 PM
To: Public Comments
Subject: Proposed Housing in Union Square

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Hello,

I'm writing to provide public comment on the proposed housing by The Hamilton Company in Union Square in the parcel currently occupied by Buk Kyung, Mandarin, etc. This central area of Union Square is in desperate need of revitalization, being a holdover from prior to Union Square's modern iteration with T access and commercialization. In addition, we are in the middle of a housing crisis and this area is almost directly adjacent to the current Union Square T station which makes it optimal for transit-oriented development. While I understand that the area was initially slated for lab space development, it's obvious that such a construction project is unlikely in the near-term given the current federal administration's opposition to future science work. Rather than leave this area undeveloped for the next decade while we hope that the lab science market regenerates (if it even does), it would be far more beneficial to allow a company to develop dense transit-oriented development on a parcel that would result in no displacement.

Ashish Shrestha
Ward 5

Madalyn Letellier

From: George Schneeloch [REDACTED]
Sent: Thursday, April 30, 2026 9:25 PM
To: Public Comments
Subject: Writing in support of Union 2 Associates zoning map amendment at April 16 2026 Land Use Committee meeting

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Hi, I'm a resident who lives a 10 minute walk from the D6 parcel in Union Square. I support zoning changes to enable more housing, even at the expense of commercial uses of the space. I support item "Union 2 Associates, LLC requesting a Zoning Map Amendment to change the zoning district of 2 and 9 Union Square, 286, 290, and 298 Somerville Avenue from Commercial Core 5 (CC5) to Mid-Rise 6 (MR6)." from the April 16 2026 Land Use Committee meeting.

Thanks,
George Schneeloch
[REDACTED] Somerville

Madalyn Letellier

From: Brendan McLoughlin [REDACTED]
Sent: Thursday, April 30, 2026 9:49 PM
To: Public Comments
Subject: Support for the MR6 rezoning at 1 Union Square (D6 parcel)

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To the Planning Board and Land Use Committee,

I'm a homeowner at [REDACTED] Spring Hill, about 0.8 miles northeast of the D6 parcel. I support the MR6 zoning change and the Hamilton housing proposal.

Mandarin Chinese is one of my favorite restaurants in the city. I eat there a lot, and I'll miss it during construction. I'm still in favor.

New commercial lab spaces aren't getting built any time soon. And you don't even need the regional numbers to see this. There's vacant lab space at 10 Prospect Street, basically next door to this parcel, and a vacant tough-tech office building at 599 Somerville Avenue, less than a mile down the road. If the lab and commercial market is coming back to Somerville, those two will fill first. By the time they do, MR6 housing on this parcel could already be built and occupied. The "preserve our commercial tax base" argument depends on commercial space actually getting built and leased, approved zoning is not tax revenue.

Meanwhile we have a brand-new Green Line stop five minutes' walk from this parcel and a real housing shortage. 150-200 units, sitting on top of frequent transit to Boston and Cambridge, there is not an obviously better site for housing in Somerville right now.

On the master-plan dispute between Hamilton and USQ: I'll leave the contractual question to the lawyers. The question for the city is whether housing here serves Somerville better than waiting on a lab market that has structurally changed. I think it clearly does.

Please approve the amendment.

Thanks,
Brendan McLoughlin
[REDACTED]
Somerville, MA

Madalyn Letellier

From: David [REDACTED]
Sent: Friday, May 1, 2026 8:11 PM
To: Public Comments
Subject: Support for the zoning change in Union Square

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I'm a resident of Gilman Square, and I spend a lot of my time down the road in Union Square. I think it's wonderful that developers are considering adding new residential and retail space to Union Square. I understand the land is currently zoned for commercial, and the intent was to add lab space. But clearly the lab market is in an extended slump, and moreover I think it's a mistake for Somerville to put all its eggs in the basket of life science lab space for tax revenue. We're seeing how precarious being a one-industry town is right now. Union Square is in desperate need of revitalization, and a modern housing + retail development would be a godsend. I strongly encourage you to approve the zoning change so we can start building again.

Best
David Tatarakis

Madalyn Letellier

From: [REDACTED]
Sent: Saturday, May 2, 2026 9:22 PM
To: Public Comments
Subject: US2 Zoning Amendment Comment

Follow Up Flag: Follow up
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Hello,

I am a Somerville resident living in Union square at [REDACTED] and wanted to comment on the proposed zoning change from lab space to residential.

My view is that the city should be relaxing its zoning in general and I would be in favor of this proposal, especially if the developer is doing ground floor commercial as shown in the proposal.

Lab space is famously in too high supply in the current moment and I don't think it's a leap to understand that, in the current market, if the developer has to build lab space, they won't build anything at all. Even looking at any commercial use in general, if the developer does not think they will be able to sell/rent the space, it won't build. It doesn't matter if the city wants commercial to raise more tax revenue (not necessarily a bad thing) but forcing developers to build it or nothing doesn't work when markets change over time, which they always do.

I am usually a proponent of government being to do good, but I think this is a case where we know the government (the city in this case) is putting unnecessary restrictions on developers which are the main source of new housing/commercial space supply.

Furthermore, I am against raising the percentage of affordable units required. We have a housing shortage, and requiring affordable units is a tax on new units (it lowers revenue while keeping costs the same) which is ultimately passed on to those who buy/rent the units. I think having affordable units is a good goal, but the way this is implemented makes the rest of the housing more expensive. I would be more in favor of (for example) incentivizing affordable units by allowing for bigger buildings above the allowed zoning when more units are affordable or subsidizing them via a general tax on all residents of the city.

I appreciate your time in reading this message. I hope that the city works with the developer to reach a conclusion that is beneficial for all parties, and not forcing the developer into an unsustainable financial situation. That will not attract more builders when what we need is more buildings.

Thanks,
Zachary Jicha

Madalyn Letellier

From: Tim Buntel [REDACTED]
Sent: Sunday, May 3, 2026 10:02 AM
To: Public Comments
Subject: Support Hamilton Company zoning change in Union Sq

Follow Up Flag: Follow up
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Hello,

As a nearby resident and frequent patron of Union Square businesses and restaurants, I'm writing to strongly support the zoning change from CC5/Commercial Core 5 to MR6/Mid-Rise 6 for the 1 Union Square "D6 parcel" as requested by The Hamilton Company. That stretch of Union Square does not represent the needs and values of Somerville in its current state. But the addition of 150-200 units of housing, 20% of it affordable, would be a tremendous improvement - far better than the initially proposed lab space. In addition to addressing our housing crisis, additional benefits such as "as a library branch, a park behind the buildings that is the size of Winthrop Park in Cambridge's Harvard Square, two-way bike lanes on Prospect Street and relocation help for the businesses displaced by construction" all make this an ideal project for that location. The public comments against the project made at the April 16 Land Use Committee meeting do not represent my views, nor do I believe the views of the majority of Somerville residents. I urge you to approve this project as quickly as possible.

Thank you,

Tim Buntel

[REDACTED].

Somerville



DLA Piper LLP (US)

[REDACTED]

Brian Hochleutner

[REDACTED]

April 15, 2026

VIA *ELECTRONIC MAIL*

City of Somerville City Council
City Hall
93 Highland Avenue
Somerville, Massachusetts 02143

[REDACTED]

City of Somerville Planning Board
City Hall, 3rd Floor
93 Highland Avenue
Somerville, Massachusetts 02143

[REDACTED]

Re: Zoning Map Amendment Application Submitted by Union Square One Development, LLC (with its affiliates, "Hamilton") to the City Clerk's Office on February 10, 2026 seeking a Somerville Zoning Map Amendment (the "Hamilton Proposal")

Dear Members of the City Council and the Planning Board:

We represent Union Square RELP Master Developer LLC ("US2"), the master developer designated by the City of Somerville to redevelop Union Square's "D Blocks", including Block D6 located at 1-9 Union Square and 282-290 Somerville Ave (the "D6 Site"). We write to oppose the Hamilton Proposal for the D6 Site.

This is not the first time Hamilton has asked the City Council to amend zoning for the D6 Site: in 2023 and 2024, Hamilton previously sought amendments to the Somerville Zoning Ordinance ("SZO") in an effort to develop a large lab building on the D6 Site. Hamilton's prior efforts failed, and it is now back with a similar proposal. The current Hamilton Proposal, like Hamilton's prior zoning applications, should be rejected.

A. The Hamilton Proposal Is Inconsistent With Years of Planning and Approvals for the Redevelopment of the D6 Site and Union Square.

US2 has spent more than a decade working with City officials and staff, the Union Square community, and other stakeholders to advance a comprehensive plan for redevelopment of the Union Square "D Blocks", including the D6 Site, as part of a state and municipally approved Urban Renewal Plan. The Hamilton Proposal contradicts these plans and many existing City approvals issued through this process, including:

- (1) City adoption of SomerVision and the Union Square Neighborhood Plan ("**Neighborhood Plan**");
- (2) Adoption by the Somerville Redevelopment Authority ("**SRA**") of the Union Square Revitalization Plan ("**Revitalization Plan**"), the official urban renewal plan for Union Square under M.G.L. c. 121B, which has been approved by the Department of Housing and Community Development (DHCD);
- (3) The City's formal designation of US2 as master developer for all of the Union Square "D Blocks";
- (4) Execution by the SRA and US2 of a Master Land Disposition Agreement ("**MLDA**");
- (5) Execution by the City and US2 of a Development Covenant ("**Development Covenant**");
- (6) Approval by the Planning Board and adoption by the City Council of Union Square Overlay District zoning and Master Planned Development overlay district and Union Square sub-area zoning (collectively, "**USOD Zoning**");
- (7) Issuance by the Planning Board of a Coordinated Development Special Permit ("**CDSP**") to US2; and
- (8) Execution by the Union Square Neighborhood Council and US2 of a community benefits agreement ("**CBA**"), documenting additional US2 commitments.

These existing approvals are premised on the implementation of a master-planned development across all of the Union Square “D Blocks”, including the D6 Site, which US2 has been actively implementing as the City’s designated master developer. Together, these approvals call for a coordinated and master-planned redevelopment that is consistent with the community’s objectives as determined through a lengthy series of processes.

The Hamilton Proposal asks the City to depart from this established approach and replace years of thoughtful community input and planning with the preferences of a single parcel owner. Adopting the Hamilton Proposal could set a dangerous precedent, allowing a property owner to undermine the integrity of a public planning process and pursue piecemeal and ad hoc development. That is precisely the kind of outcome that the referenced planning and existing approvals were designed to prevent.

B. The Hamilton Proposal Fails to Address Master Planned Development (MPD) Overlay District and USQ Sub-Area Requirements Under the Somerville Zoning Ordinance.

The Hamilton Proposal seeks to amend the underlying zoning map for the D6 Site, and suggests this would be sufficient to allow it to develop Hamilton’s proposed project at the D6 Site. However, Hamilton does not address the MPD Overlay District and USQ Sub-Area requirements under the SZO, which require Hamilton to obtain a Master Plan Special Permit (“MPSP”), and Hamilton’s proposed project does not satisfy the MPSP requirements.

Under the SZO, the MPD Overlay District and USQ Sub-Area zoning requirements apply to the D6 Site irrespective of whether development is pursued through reference to the underlying zoning map, and these requirements call for an MPSP for any redevelopment on the D6 Site:

1. Section 8.4.3.a states that MPD Overlay District requirements are applicable to all real property within the MPD Overlay District as shown on Somerville’s Official Zoning Atlas, and the D6 Site will remain within the MPD Overlay District even if the Hamilton Proposal were approved.
2. Section 8.4.3.c states that MPD Overlay District requirements “supplement or supersede the provisions of the districts upon which it is superimposed” and where MPD District provisions conflict with those elsewhere in the SZO (e.g., provisions that outline underlying zoning district requirements), the MPD Overlay District requirements apply.
3. Section 8.4.17.d states that all development within the USQ Sub-Area of the MPD Overlay District – which includes the D6 Site – “requires a Master Plan Special Permit as a prerequisite to the development review required for subdivision or the development of an individual lot.”

These provisions require an MPSP for development of the D6 Site, even if the Hamilton Proposal were approved. Critically, Hamilton’s proposed project would not satisfy the MPSP requirements applicable to the D6 Site. For example, the MPSP requirements call for (under Section 8.4.17e.i) all projects to include at least one neighborhood park of not less than 27,000 square feet, plus an additional plaza.

C. The Hamilton Proposal Also Contravenes Legal Obligations Binding on the City and SRA.

The Hamilton Proposal, if adopted, would be inconsistent with the SRA’s contractual obligations under the MLDA and would undermine City and SRA commitments to implement the Revitalization Plan. The MLDA is a binding contract between the SRA and US2 and it requires US2 to acquire and redevelop all of the D Blocks, including the D6 Site, in accordance with the Revitalization Plan, the Neighborhood Plan, the CDSP, and various other approvals. The MLDA further provides that development of the D Blocks (including the D6 Site) by third parties such as Hamilton may not occur without the prior consent of both the SRA and US2. No such consent has been given here.

US2 has relied on these binding commitments. US2 and its investors have expended significant capital in reliance on the City's and the SRA's commitments. This investment has resulted in substantial progress: US2 has completed the first phase of Union Square's redevelopment, transforming the Block D2 site from an environmentally challenged, vacant parcel into a mixed-use project with a new commercial building, 450 new residential units (including 90 affordable units), new retail and open space, and improvements that facilitated the opening of the MBTA's new Union Square Station. US2 has also made progress toward development of the next commercial project, acquiring and clearing the Block D3.1 site, and completing the design review process. Throughout, US2 has invested in the community and collaborated with local organizations, including Union Square Main Streets, Somerville Arts Council, Somerville Community Corporation, and Somerville Homeless Coalition.

If the Hamilton Proposal were approved, US2 would be required to evaluate all available rights and remedies under the MLDA, the Revitalization Plan, and applicable law, to protect and preserve US2's ability to fulfill its obligations to redevelop the D6 Site.

D. The Hamilton Proposal Would Jeopardize Long-Promised Public Benefits.

The Hamilton Proposal would jeopardize future public benefits memorialized in the MLDA, Development Covenant, CDSP and CBA. Each of these documents assumes that US2 will be the developer across all of the "D Blocks" or will consent to allow development of individual parcels by others. Allowing piecemeal development that is inconsistent with what has been previously approved would make it impossible to provide such benefits. For example: the CDSP authorizes development across all of the "D Blocks" and, in exchange, imposes significant obligations on US2 as master developer, including the creation of eleven (11) civic spaces and a large neighborhood park. The Development Covenant requires US2 to make substantial monetary contributions in connection with the redevelopment of the D Blocks, including the D6 Site. Similarly, the CBA commits US2 to deliver specific community benefits tied to that same multi-parcel redevelopment. These benefits cannot be realized absent the site-wide approach reflected in US2's master plan for the D Blocks.

The remaining (potentially endangered) benefits are significant. US2's development of Block D2 alone has generated more than \$30 million in fees, contributions, and land payments to the City. Block D2 is generating more than \$4.0 million annually in new tax revenue to support City programs. These contributions represent only the first phases of US2's planned delivery of more than \$100 million in community and public benefits and more than \$500 million in new tax revenue over the next three decades through the redevelopment of the D Blocks.

E. The Hamilton Proposal Has Other Significant Feasibility Concerns.

Aside from the legal and policy considerations discussed above, the Hamilton Proposal raises substantial questions regarding the feasibility of independent redevelopment of the D6 Site.

The MLDA provides that, if US2 is unable to acquire any of the D Blocks (including the D6 Site) through private negotiation, the SRA may initiate eminent domain proceedings at US2's request (and cost) to facilitate redevelopment in accordance with the approved master plan. These provisions are central to the coordinated implementation of the Union Square Revitalization Plan.

US2 has engaged with Hamilton regarding acquisition of the D6 Site, but Hamilton has declined US2's offers and has instead pursued the current proposal (and prior unsuccessful proposals) with full knowledge of the existing framework and US2's obligations.¹

¹ Hamilton was aware that the D6 Site was in the Revitalization Plan before acquiring it, and US2 has made Hamilton aware of its obligations, rights, and intention to develop the D6 Site as described in the Revitalization Plan, the Neighborhood Plan, the CDSP, and other approvals.

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City of Somerville City Council
City of Somerville Planning Board
Page Four

Given these provisions, the existing contractual framework introduces significant uncertainty regarding the ability to finance and implement the kind of project proposed by Hamilton for the D6 Site. This uncertainty would be a material consideration for prospective investors or lenders, given US2's contractual obligation to redevelop the D6 Site and the availability of eminent domain.

The Hamilton Proposal does not present a clear or reliable path toward near-term development of the D6 Site and, if anything, risks introducing delay and complexity into the continued implementation of the City- and State-approved Union Square revitalization plan.

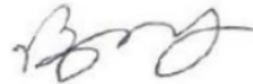
F. Spot Zoning That Would Benefit a Single Property Owner Like This Should Be Rejected.

The Hamilton Proposal, if adopted, also raises serious concerns regarding impermissible spot zoning. Spot zoning is the singling out of a specific parcel for treatment different from that afforded to similarly situated parcels, solely for the economic benefit of the parcel's owner. Here, the likely practical effect of the Hamilton Proposal, if approved, would be to enhance Hamilton's economic position with limited public benefit, and for the reasons stated above it is unclear there would be any public benefit.

The City Council and Planning Board should decline to adopt a zoning amendment that serves to benefit a single property owner with limited or no public benefit, particularly where the amendment is contrary to years of community input and to the explicit provisions of Somerville's zoning and planning framework.

For all of the reasons outlined above, we respectfully urge that neither the Planning Board nor the City Council support or approve the Hamilton Proposal.

Sincerely,



Brian Hochleutner

cc: Somerville Redevelopment Authority
93 Highland Avenue
Somerville, Massachusetts 02143
[REDACTED]

Madalyn Letellier

From: Hochleutner, Brian [REDACTED]
Sent: Thursday, April 16, 2026 11:04 AM
To: All City Council; Planning1; Public Comments
Cc: SRA Email Address; Welsh, Nancy
Subject: Public Comment on Proposed Zoning Map Amendment
Attachments: Letter to Somerville Planning Board and City Council (DLA Piper 4-15-26).pdf

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Dear members of the Land Use Committee and the Planning Board,

I've attached a comment letter regarding the proposed zoning map amendment for 1-9 Union Square and 282-290 Somerville Ave, also known as the Union Square D6 parcel.

For the reasons set forth in the letter, we urge you to vote against the proposed amendment.

Thanks,
Brian Hochleutner

Brian Hochleutner
Partner



[REDACTED], MA 02110-1447



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Madalyn Letellier

From: Jaclyn Fraser [REDACTED]
Sent: Friday, May 15, 2026 11:36 AM
To: Public Comments; Planning Board; Planning1
Cc: Jameson Brown; William J Proia
Subject: Public Comments for File No. 26-0257
Attachments: Fiscal Report & Coverletter_One Union Square Somerville (002).pdf

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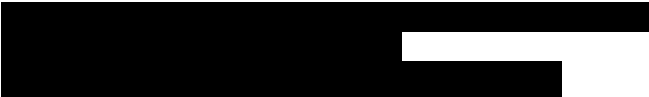
Good morning,

I hope this email finds you well. Per my conversation with the Town Clerk's Office on the process for submitting public comments, attached are same to be submitted for both the Planning Board and the Land Use Committee regarding File No. 26-0257 (Union 2 Associates, LLC requesting a zoning map amendment to change the zoning district of 2 and 9 Union Square, 286, 290 and 298 Somerville Avenue from Commercial Core (CC) to Mid-Ris6 (MR6). This is being submitted on behalf of the Applicant, Union 2 Associates, LLC.

Please let me know if you have any issues opening the attachment or any questions regarding same.

Also, can someone please confirm receipt of the public comments at their earliest convenience, thank you.

Jaclyn Fraser
Burlington Office Manager
Riemer | Braunstein LLP



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Dear Members of the Somerville City Council and Planning Board,

In February we submitted a map amendment to change the zoning of our properties at One Union Square from CC5 to MR6. This change would allow us to seek approvals for an exceptional mixed-use development project with multi-family residential which would help achieve the goals that Somerville and Massachusetts have set for the production of housing around transit while also fostering new economic activity, creating new civic and community spaces, and improving the public realm of Union Square.

We were pleased to share details about the significant benefits this project could provide at the joint hearing on April 16th, but also heard concerns from some members of the public about the municipal fiscal impact of residential development. We believe it is important to have a clear, factual basis for evaluating this and have commissioned the attached Fiscal Impact Analysis which we are pleased to submit for your consideration.

This demonstrates that our proposed project would have **a significant net annual positive fiscal impact**, including the following:

- **Gross project revenue of \$1,044,412**, a nearly seven-fold increase over current tax revenue
- **Net annual positive fiscal impact of \$652,049**, based upon anticipated net new revenue of \$886,345 and estimated expenses of \$234,296.
- An estimated **\$2,100,000 In building permit fees**
- Additional intangible positive economic benefits of creating additional market rate and affordable housing units in the community.

This is a significant amount of net new revenue which will assist the City in funding budgetary goals in the coming years. We are prepared to move forward with this project now, allowing this and all of the other public benefits this project could provide to be realized.

As we discussed in our presentation on April 16th, our market analysis has determined that a commercial office or lab development on this site is not viable now or in the future. Newmark has reported a regional lab vacancy rate of around 30% and an approximately 55% vacancy rate in Somerville, noting that it will take many years to absorb current supply. In addition, based on our analysis of publicly available data on recently proposed and approved master plans and individual projects around Union Square, there is already nearly 5 million square feet of commercial space in the development pipeline in the immediate vicinity of this site. We had proposed a zoning amendment to enable a commercial development on this site a few years ago and would have loved to move forward with that, but given current market realities, it is not feasible to develop a commercial building now or anytime in the foreseeable future.

Some have suggested that waiting for a commercial development on this site is the fiscally responsible thing for the City to do, but this would result in a significant loss in revenue potential compared with this project moving forward now. The result of delay could be a net negative municipal fiscal impact for decades, with no guarantee that a commercial building would eventually be built. Rather than propose another commercial building which would compete with existing vacant buildings and the huge pipeline of proposed projects, we have the opportunity to provide much needed housing while also accomplishing other longstanding community goals.

We believe that good development is about more than just financial impacts, and our approach has been to design a project that respects the surrounding neighborhood and public spaces, working within the physical planning framework that the City and community have created over many years. This zoning map amendment would not significantly change the dimensional parameters of what would be permitted on this site, but would allow for many public benefits including:

- Between 150-200 new housing units including 30-40 affordable units on site, consistent with statewide initiatives such as the MBTA Communities Act and Somerville's initiatives to provide denser residential development around transit stops
- A substantial amount of 2- and 3-bedroom units
- Significant new green and open space
- New neighborhood oriented retail and restaurant space
- Potential to include a new branch of the Somerville Public Library
- Building size and scale that is consistent with current zoning and planning initiatives such as the Union Square Neighborhood Plan
- Safer and friendlier streets through implementation of city-planned bicycle and pedestrian streetscape improvements

We appreciate the positive feedback we have received on our preliminary site designs. Should this map change be approved, we look forward to working with the surrounding community to create a vibrant, human-scale place that is uniquely Union Square.

We would be happy to join a meeting of the Land Use Committee meeting to discuss the Fiscal Impact Analysis further if desired.

Thank you,

Jameson Brown
CEO

The Hamilton Company

FISCAL IMPACT ANALYSIS

One Union Square Somerville, MA

Prepared For:
The Hamilton Company



Prepared By:



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May 13, 2026

Introduction

The Hamilton Company is proposing the redevelopment of a block of dated commercial buildings¹ totaling 22,295 square feet of space, which consists of approximately 1.5 acres, into a vibrant mixed-use destination that will include 164 apartment units with 20% of the units set aside as affordable housing, serving a population of approximately 363 persons². In addition, 12,495 square feet of commercial space will be constructed, along with up to 8,300 square feet of civic space (such as a branch library). Approximately 85 underground parking spaces will be available along with 17 surface spaces. On site amenities will also be provided, including bike parking. Table 1 outlines the apartment unit breakdown including affordable units; 40.2% of the units will be studio and one bedroom.

Table 1
Apartment Unit Breakdown

Unit Type	Units
Studio Market	13
Studio Affordable	3
One Bed Market	40
One Bed Affordable	10
Two Bed Market	66
Two Bed Affordable	16
Three Bed Market	13
Three Bed Affordable	3
Total Units	164

¹ 286-298 Somerville Ave. and 2 & 9 Union Square.

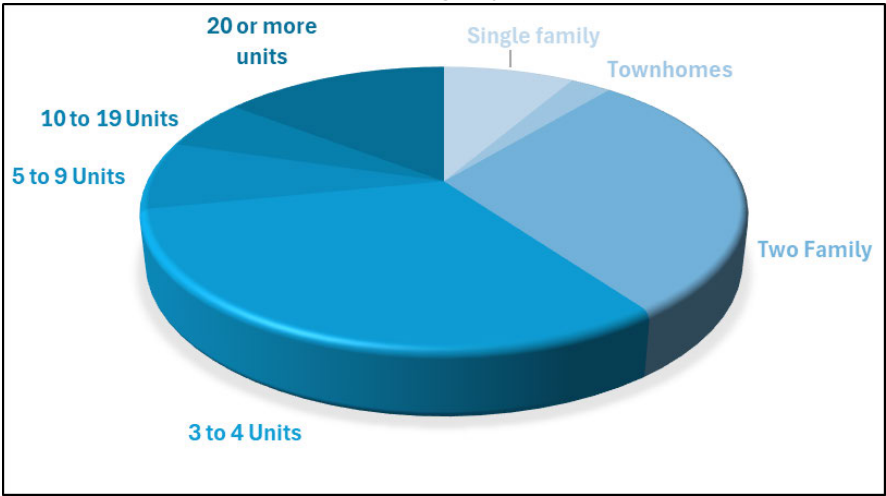
² 2024 Census data, avg. 2.21 persons per rental unit.

Local Trends

Census figures report that from 2010 to 2020, Somerville’s population increased from 79,754 to 81,045, growing 6.9% over the decade. The most recent census data indicates a population of 82,144, reflecting continued population growth. The median age of a Somerville resident is presently 30.9, with Middlesex County reporting a median age of 39.

A majority of Somerville’s housing stock consists of multi-family housing units, with US Census reporting 21,880 housing units out of a total housing stock of 36,498 units as detailed in Figure 1.

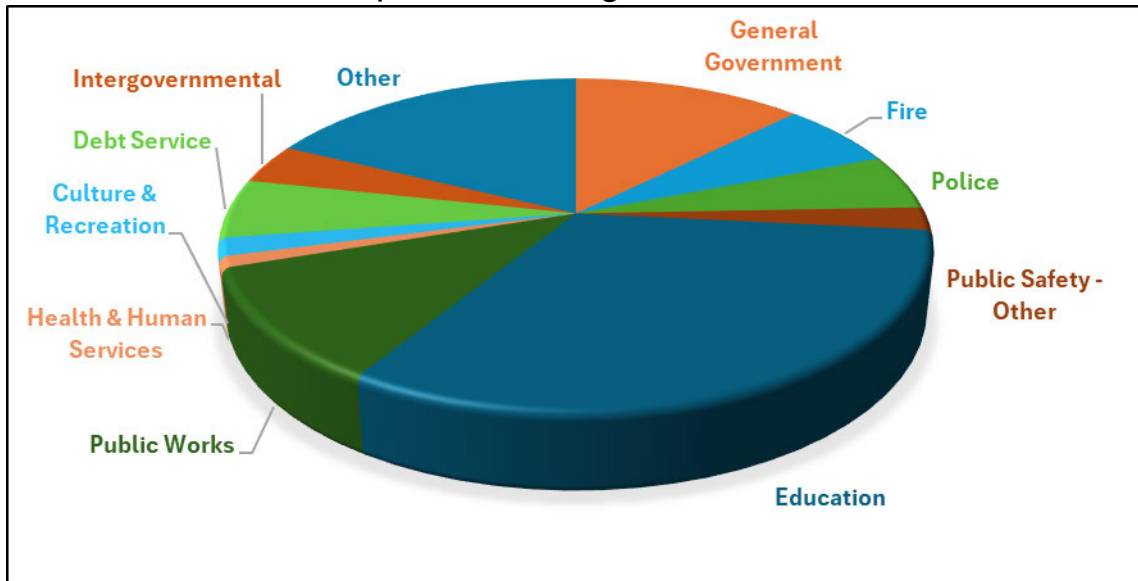
Figure 1
Housing Types



Budget History

Somerville’s total operating budget for FY26 was \$391,964,000, with public safety and education accounting for a large percentage of the total budget as detailed in Figure 2. These departments have the largest personnel and the most direct impact on municipal expenditure. Given the large budgetary impact these departments have on the community and the fact that they will experience the most direct measurable increases in service demands from the proposed development, they are the primary focus of this Report.

Figure 2
Department Budget Allocation



A. Methodology Approach

Fiscal Impact Analysis can have many connotations, this analysis will follow the classic definition of fiscal impact as follows “A *projection of the direct, current public costs and revenues associated with residential or nonresidential growth to the local jurisdiction in which the growth is taking place.*”

There are a number of methodologies that are used to estimate fiscal impacts of proposed development projects. The Per Capita Multiplier Method is the most often used analysis to determine municipal cost allocation. This method is the classic “average” costing method for projecting the impact of population growth on local spending patterns and is used to establish the costs of existing services for a new development. The premise of this method is that current revenue/cost ratios per person and per unit are a potential indicator of future revenue/cost impacts occasioned by growth. New capital expenditures required for provision of services to a development are not added to current costs; instead, the present debt service for previous improvements is included to represent ongoing capital projects. The advantage of this approach is its simplicity of implementation and its wide acceptance by both consultants and local officials. The disadvantage of this approach is that the methodology

calculates the “average” cost as being the expected cost, which is often not the case as costs are exaggerated significantly in some instances. Given the tendency for this methodology to overstate costs, the expense findings in this report should be considered conservative.

As will be shown by the analysis below, measurable demand for increased services will be limited to a few city departments. Any required offsite improvements are expected to be addressed during the approval processes. Solid waste generated by the project will be removed by a private hauler. Water and sewer utility expenses associated with new uses will be offset through user fees. All on-site property improvements will be maintained privately. Given the modest size of the project, only slight increases in service demands are expected from the development limited to a few municipal departments, most notably the school department, along with the police and fire departments. Other town agencies are projected to experience little or no measurable impacts from the proposed development.

B. Local Revenues from Development

A) Property Taxes

Local property taxes provide the bulk of municipal revenues for Somerville, totaling 73.3% of all revenues to the General Fund³. Somerville has both a Residential (\$10.98) and a Commercial tax rate (\$18.94) per \$1,000 valuation; both these rates will be applied to this development proposal.

Based upon local market conditions, which will be reflected within the proposed new residential community, an estimated future project assessment was drawn. As detailed in Table 2, the new mixed-use community is estimated to have a total assessed value of \$87,702,733, generating \$1,000,156 in annual gross property tax revenues.

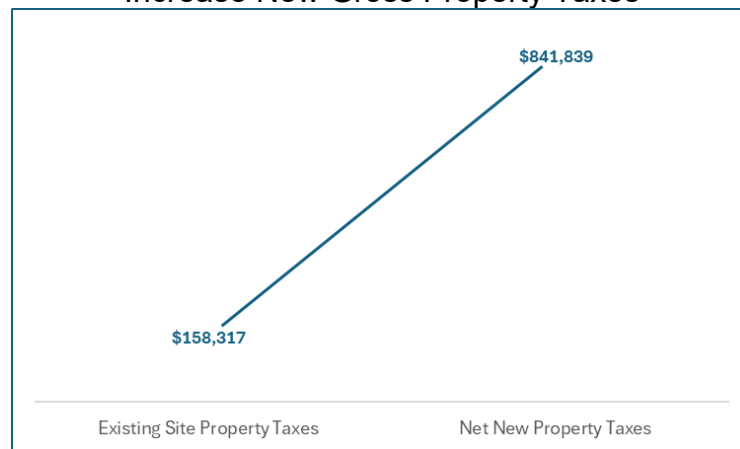
³ Fiscal Year 2026 Budget document.

Table 2
Estimated Yearly Residential Property Taxes

Residential	# Units	Assessment	Assessment/Unit
Union 346	94	\$46,149,302	\$490,950
Prospect Union Square	450	\$229,194,555	\$509,321
Average Assessment	544	\$275,343,857	\$506,147
Proposed Apartments	164	\$83,008,075	
Estimated Residential Property Taxes		\$911,429	
Commercial	Sq. Ft.	Assessment	Assessment/Sq. Ft.
Subject Site	22,295	\$8,358,900	\$375
Proposed Commercial Space	12,495	\$4,684,658	
Estimated Commercial Property Taxes		\$88,727	
Total Estimated Property Taxes		\$1,000,156	
Existing Site Property Taxes		\$158,318	
Net New Property Taxes		\$841,839	

The subject development site is presently assessed as \$8,358,900 and generates \$158,318 in local commercial property taxes, generating a net increase in annual property tax revenues of **\$841,839**. The proposed new mixed-use community will substantially increase property tax revenues as outlined in Figure 3.

Figure 3
Increase New Gross Property Taxes



B) Miscellaneous Yearly Revenues

Community Preservation Surcharge: The city of Somerville has adopted the Community Preservation Act allowing the community to impose a 3% surcharge on property taxes. Based upon the projected net new taxes projected above, an estimated CPA surcharge of \$25,255 as detailed in Table 3.

Table 3

Community Preservation Surcharge New Revenue	CPA Surcharge 3%
\$841,839	\$25,255

Motor Vehicle Excise Tax - Another major revenue source for the community is motor vehicle excise taxes. In fiscal year 2025 the city received an estimated \$7,070,000 from this revenue source⁴. Table 43 outlines the projected vehicle excise tax for the proposed project.

Table 4
Motor Vehicle Excise Tax

# Cars ⁵	Value	Total Value
80	\$12,000	\$960,000
\$25/\$1,000		\$24,000

C) Estimated Yearly Project Revenues

The proposed development is estimated to generate \$886,345 in local revenues from new property taxes and excise taxes; Table 5.

Table 5
Estimated Annual Net New Revenue

<u>Estimated New Property Taxes</u>	<u>\$841,839</u>
<u>Estimated New CPA Revenues</u>	<u>\$20,506</u>
<u>Estimated Excise Taxes</u>	<u>\$24,000</u>
Total New Revenue	\$886,345

Additional one-time payment revenues will also be realized as part of the development, these will be detailed further below.

⁴ Fiscal Year 2026 Budget document.

⁵ Assumes .5 vehicles per unit.

C. Municipal Service Costs

Given the nature of the proposed development project, as will be seen in the analysis below, measurable impacts will be limited to a few key city departments including schools, police and fire departments. All onsite maintenance will be addressed by the property owner, including site access repairs and trash removal.

Department Impacts

Police & Fire

The Police and Fire Departments will experience some increased demand for services from the proposed project. For fiscal year 2026 the Police Department budget is \$21,004,000 and responded to an average of 38,442 incidents⁶ over the last three years (Avg. 739 incidents per week). The FY26 Fire Department budget is \$25,268,000 and responded to an average of 15,360 calls over the last three years (average 295 calls/week), of which 4,739 were EMS calls.

To assess the potential impact to emergency services in the community, call data was obtained from two comparable local apartment complexes. Extrapolating from the comparable call data, increases are projected in the Town's Police and Fire Department call volume as summarized in Table 6. Annual Police calls are projected to increase by 51 annual calls (.98 calls per week), with the existing commercial site generating 46 calls this past year. Annual fire department calls are projected to increase by 24 calls (.46 calls per week); this past year the department responded to the existing site businesses 14 times.

⁶ Police data CAD.

Table 6
Estimated Emergency Calls

Residential Uses	# Units	Annual Police Calls	Police Calls Per Unit
Prospect Union Sq. - Mixed Use	450	66	0.147
Union 346 - Mixed Use	94	19	0.202
Revolution at Assembly Row - Mixed Use	329	28	0.085
AVA	249	45	0.181
Avalon at Assembly Row	195	47	0.241
Average	1,317	205	0.156
Apartments Annual Est. Police Dept Calls	160	25	

Commercial Uses	Sq. Ft.	Annual Police Calls	Police Calls Per Sq. Ft.
Existing Commerical Site Uses	22,295	46	0.002
Proposed Commercial Space Est. Police Calls	12,495	26	
Total Estimated New Annual Police Calls		51	
Existing Commercial Sites Calls		46	

Residential Uses	# Units	Annual Fire Calls	Fire Calls Per Unit
Prospect Union Sq. - Mixed Use	450	49	0.109
Union 346 - Mixed Use	94	11	0.117
Revolution at Assembly Row - Mixed Use	329	44	0.134
AVA	249	26	0.104
Avalon at Assembly Row	195	34	0.174
Average	1,317	164	0.125
Proposed Apartments Annual Est. Fire Dept Calls	160	20	

Commercial Uses	Sq. Ft.	Annual Fire Calls	Fire Calls Per Sq. Ft.
Existing Commerical Site Uses	22,295	14	0.0006
Proposed Commercial Space Est. Fire Dept. Calls	6,800	4	
Total Estimated Annual Fire Dept. Calls		24	
Existing Commercial Site Calls		14	

Police Department

To account for the increased demand for services for the Police Department, several options were reviewed including cost per call and cost per capita. Since calls for service provide a clear measure of impact on the Department, this approach was used and results in an estimated annual impact of **\$34,884** as outlined in Table 7. This cost estimate is not inferring the Police Budget will increase as a result of the proposed development but assigns a “cost” to account for these new land uses in the community. This is a very conservative cost estimate as the existing site generates 46 calls annually. On average, a police officer’s annual salary with benefits is approximately \$130,000.

Table 7
Police Department Impact

Department	FY 2026 Budget	Calls ⁷	Cost/call	Est. Calls	Annual Cost
Police	\$21,041,164	42,750	\$684	51	\$34,884

Fire Department

As with the Police Department, to account for some impact from the proposed development, a cost per call ratio was used which provides an estimated annual expense of **\$39,456** as outlined in Table 8. The existing site generates 14 calls annually to the department.

Table 8
Gross Fire Department Impact

Department	FY 2026 Budget	Calls Per Year	Cost/call	Est. Calls	Annual Cost
Fire	\$25,268,000	15,369	\$1,644	24	\$39,456

Other Departments/Revenues:

Building

Building Department costs were not included in this analysis because they are not permanent annual impacts and will be offset by building permit fees. It is estimated that the proposed project will involve approximately \$100,000,000 in building construction costs, generating an estimated \$2,100,000 in building permit income. Additional fees will be generated from plumbing and electrical permits.

Public Works

All roads within the development will be private and maintained by site owner. Solid waste will be handled by a private contractor with no expenses incurred by the Town.

⁷ Total calls reduced by 20% to remove minor calls.

Other Departments

It is not anticipated that measurable impacts will occur to other town departments and therefore no other costs were analyzed. To be conservative, a **\$20,500**⁸ cost will be carried to account for potential other impacts related to the proposed residential use.

School Department

For the school year 2025/26, Somerville’s total public-school enrollment was 4,876 students housed in eleven schools; the subject site lies within the Argenziano neighborhood school zone. The FY26 Public School budget was \$391,964,000. As noted above, the proposed project involves the development mixed-use development that will include a 164 unit apartment community with 20% of the units set aside as affordable, including a mix of bedroom types as detailed in Table 9.

Table 9
Bedroom Mix

Unit Type	Units
Studio Market	13
Studio Affordable	3
One Bed Market	40
One Bed Affordable	10
Two Bed Market	66
Two Bed Affordable	16
Three Bed Market	13
Three Bed Affordable	3
Total Units	164

School Enrollment

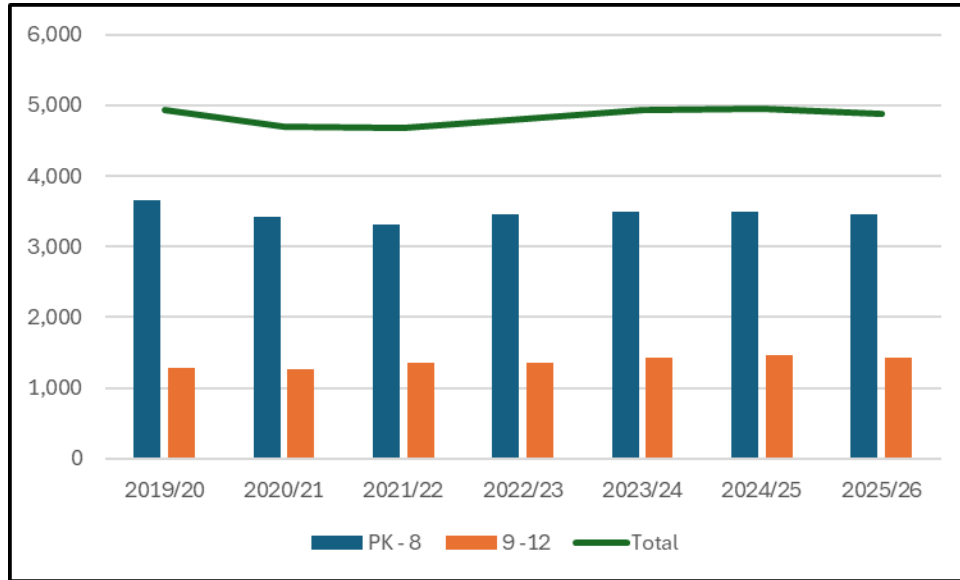
As outlined in Table 10 and Figure 4, since 2019 lower grade enrollment has decreased 5.6%, while the high school enrollment has increased 11.3%. School department data indicates capacity exists at both Argenziano and Somerville High Schools to accommodate new students.

⁸ A cost of \$125 per unit is allocated to “other” city department impacts accounting for potential impacts to other city departments such as the library, human services and administration. This cost approach based upon 20 plus years of reviewing budgetary impacts from development.

Table 10
School Enrollment Trends 2019 - 2025

Grades	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26
PK - 8	3,657	3,420	3,317	3,451	3,490	3,491	3,449
9 - 12	1,282	1,271	1,356	1,364	1,437	1,461	1,427
Total	4,939	4,691	4,673	4,815	4,927	4,952	4,876

Figure 4
School Enrollment Trends 2019 - 2025



Estimated New School Age Children

To estimate the potential number of new students that may reside within the proposed residential community, we reviewed data from 974 comparable Somerville apartment complexes. Obtaining School Age Children (SAC) data, along with the grade level of the students from the school department, reveals a low SAC ratio of .049 students per unit. Applying this ratio to the proposed apartment development generates an estimated 8 school age children as outlined in Table 11. Based on the grade level profiles from the noted apartment developments, it is anticipated that these school age children will be dispersed throughout the grades.

Table 11
Estimated School Age Children

Apartment Complex	# Units	# SAC	#SAC/Unit
Prospect Union Square	450	20	0.044
Revolution at Assembly Row	329	10	0.030
Avalon Great River	195	18	0.092
Total Average	974	48	0.049
Proposed Union Square	164	8	

To estimate potential expenses, we reviewed school department per pupil cost allocations by function detailed in the Department's FY26 Annual Operation Budget. Reviewing those cost functions that are most sensitive to enrollment increases, as detailed in Table 12, a potential per pupil cost of \$16,932 was calculated and when applied to the anticipated number of new students (8), a total estimated school expense of \$135,456 is derived.

Table 12
Estimated Pupil Cost

	Expense	Pupil Sensitive
Administration	\$1,126	-
Instruct. Leadership	\$2,294	-
Teachers	\$9,216	\$9,216
Other Teaching Services	\$2,476	\$2,476
Professional Development	\$434	-
Instruct. Materials, Equip.	\$824	\$824
Guidance & testing	\$1,484	\$1,484
Pupil Services	\$2,932	\$2,932
Operations & Maintenance	\$2,463	-
Benefits & fixed charges	\$4,163	-
Per Pupil Expense		\$16,932
Estimated SAC	8	
Total Estimated School Expense	\$135,456	

Chapter 70 aid provides significant revenues to the community and DESE preliminary aid forecasts notes will receive \$22,934,482 in FY27 or **\$4,541 per pupil**. Potential expense derived from the new students generated from this proposed development may be offset by additional Chapter 70 aid.

FISCAL SUMMARY

Table 11 summarizes the fiscal impact from the proposed development, with a net positive fiscal finding of \$652,049. Fougere Planning does not suggest that budgets should be increased to offset the noted costs, but these findings should be viewed as potential costs with the need for future budget increases addressed by city officials. Any increased Department expenses will require local budgetary review and approval.

Table 13
Estimated Annual Fiscal Impact

Gross Estimated Revenues	\$1,044,412
Net New Revenues	\$886,345
Estimated Municipal Expenses	
Police	-\$38,884
Fire	-\$39,456
Other Dept. Costs	-\$20,500
School Costs	-\$135,456
Total Costs	-\$234,296
Net Annual Positive Fiscal Impact	+\$652,049

- The proposed residential component of the development project is estimated to result in a net annual positive fiscal impact of \$652,049 based upon anticipated gross new revenue of \$886,345 and estimated expenses of \$234,296.
- Increased emergency call volume will occur to emergency service departments, with annual police calls estimated to increase by 51 calls a year (existing land uses generate 46 calls annually) and fire department calls increasing 24 (existing land use generates 14 calls annually).
- Eight school age children may reside within the apartment community; ample capacity exists to accommodate the new students. New Chapter 70 Aid may be generated as a result of the new students.
- Limited measurable impacts are foreseen by other city departments.
- Analysis does not take into account intangible positive economic benefits of creating additional market rate housing units in the community.
- An estimated \$2,100,000 in building permit fees are anticipated.

MARK FUGERE

PRINCIPAL OF FUGERE PLANNING AND DEVELOPMENT

Mark Fougere is an AICP land use planner with over 34 years of public and private sector experience and holds a master's degree in planning. Mr. Fougere has an extensive background in project management dealing with a broad array of planning related issues including spearheading rezoning efforts, managing development teams, site and land use planning, impact fees, fiscal impact analysis, public presentations, expert witness testimony, land use law analysis, and consensus building challenges. Mark has also served on a municipal planning board and as a Selectman. He has managed numerous rewrites and amendments to zoning ordinances and site plan/subdivision regulations. Mr. Fougere has worked extensively in many New England communities on fiscal impact analysis, traffic corridor studies, housing, workforce housing, and land use regulations.