

Conservation-Based Affordable Housing



*Improving the Nature
of Affordable Housing
to Protect Place and People*



THE CONSERVATION FUND

by Kendra J. Briechele

About The Conservation Fund

The Conservation Fund is the nation's foremost nonprofit dedicated to protecting America's land and water legacy. Seeking innovative conservation solutions for the 21st century, the Fund integrates economic and environmental goals. Since its founding in 1985, the Fund has helped its partners safeguard wildlife habitat, working landscapes, community "greenspace," and historic sites totaling more than 5 million acres. The Fund assists business, government, community and conservation nonprofit organizations work toward sustainable use of natural resources as a tool for economic development. With 1% fund raising costs and 96% program allocation, The Conservation Fund has gained top ratings by both the American Institute of Philanthropy and Charity Navigator.

This study of Conservation Based Affordable Housing is a project of The Fund's Center for Conservation and Development. Working with the private sector, conservation and professional organizations, and public officials, the Center seeks to enhance the quality of life in communities by strengthening local economic opportunities and ensuring protection of the nation's green infrastructure. Center initiatives are improving American land protection and land use through a unique vision pairing smarter conservation with smarter development.

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Executive Summary

Conservation-Based Affordable Housing: Improving the Nature of Affordable Housing to Protect Place and People spotlights the opportunity to develop housing for low- and moderate-income residents and also protect natural and working landscapes. These case studies, information about limited development as a conservation tool, and a perspective on where this trend may be headed are part of the Fund's report.

For decades, proponents of land conservation and affordable housing have rarely seen the common ground they might occupy. Instead of collaborating, principals from these two interests competed over development proposals and scarce funding. Thankfully, new approaches are helping communities move away from an “us-versus-them” debate and toward recognition of the connections, and even the benefits, of integrating land conservation and development.

Smart growth is prompting new partnerships between former adversaries in communities nationwide. “Sustainability” has moved beyond a mere buzzword to become a way of doing business for an increasing number of businesses and government leaders. Increasingly business, land development, and environmental professionals, along with local and state government officials, are recognizing the benefits of greater integration between the built environment and nature.

At the same time, land conservation and housing professionals are experiencing unprecedented challenges to protecting places and providing for people. The accelerating consumption and fragmentation of open space is the number one challenge to the preservation of natural areas. Each year more than two million acres of farms, woodlands, and natural areas are developed. The results too often have produced subdivisions amid Civil War battlefields, isolated and unproductive farms, fragmented wildlife habitat, and damaging stormwater discharges into wetlands and waterways.

These headlines are joined with others that report a widening gap between wages and housing costs. In Las

Vegas and Lincoln, Seattle and Sarasota, and places in between, housing prices are accelerating faster than wage increases, exacerbating the housing shortage for low- and moderate-income community members such as teachers, nurses, firefighters, and police officers. The National Low Income Housing Coalition reports that low-income workers are priced out of housing markets across the country. In 2005, nearly 95 million people—35 percent of U.S. households—had some type of housing problem.

The Response

The Conservation Fund recognizes that sustainable communities have good jobs, adequate housing, and a strong sense of place derived from local natural and cultural resources. To this end, the Fund pioneers a balanced approach to land conservation that integrates economic and environmental objectives.

The Conservation Fund embarked on its Conservation Based Affordable Housing study to discover whether conservation-based collaboration and market-based mechanisms could integrate community, economic, and environmental goals. “Green building” focuses on material composition, energy, and water use, but “conservation development” adds more emphasis on protection of the land and water resources. While the body of case material for conservation developments is growing, the well-known project examples are limited almost exclusively to the upper end of the housing market. To this end, The Conservation Fund set out to uncover and document conservation developments for the low- and middle-income housing market.

The Findings

The study details 16 successful examples of conservation-based affordable housing, ranging across urban, suburban, and rural communities. The profiles document each development's housing and conservation features, while providing background on design and financing, as well as information on the protection and stewardship of the housing and conservation land. The study also provides the lessons learned from the devel-

opers, land trusts, local governments, and housing organizations behind these developments, including site assessment, public support, and financing. The study includes promising trends for conservation-based affordable housing and strategies for forging more creative partnerships between land conservation and affordable housing. Of note,

- Communities can provide well-designed homes for low- and moderate-income residents as well as preserve treasured community lands. The profiled developments provided between 2 and 1,200 affordable homes and from 7 to 1,500 acres of open space. All but two of the developments—both urban infill redevelopment sites—provided more than 50 percent open space for a variety of conservation purposes.
- Conservation-based affordable housing can exist in urban, suburban, and rural settings. Successful examples range in age from 30 years old to as recent as 2005.
- The innovative leadership behind these developments required varied and unusual partnerships between private developers, local governments, land trusts, housing organizations, and other nonprofit groups.
- Partnerships among diverse organizations allow them to share skills and reduce risk to any one organization.
- New funding sources can spring from the pairing of land conservation and affordable housing. This counters the assumption that affordable housing or land conservation drives up costs.

- By addressing community needs for housing and natural resource protection together and engaging community members in the process, conservation-based affordable housing developments can forge new public and political support.
- The best conservation-based affordable housing examples reflect the need for connections to ensure the strategic protection of conservation areas, appropriate to the conservation intent, and the location of housing in a pattern that least disturbs the resources while ideally placed close to jobs, services, and transit opportunities, appropriate to the landscape setting.

Next Steps

The Fund hopes its study will encourage more communities to develop affordable housing that values the surrounding natural resources. These developments can and should reflect innovative site design and green building techniques that meet the needs of people, whether of modest, moderate, or wealthier means. There is a great need in the United States for a more strategic vision to achieve sustainable development protective of irreplaceable landscapes, finite natural resources, and unique community character, while enhancing economic opportunities for all.

The Conservation Fund calls for a summit on conservation-based affordable housing. Leaders from all affected interests need to pioneer new partnerships to advance land conservation and development that serves people and places. The Fund welcomes information on other examples of conservation-based affordable housing to further promote the will, commitment, and leadership that guide such successful strategic initiatives.

Introduction

LAND CONSERVATION is guided by a passion for special places and natural resources coupled with the desire to protect this legacy for future generations. In recent years, the stunning increase in land development and the accompanying consumption and fragmentation of farms, forests, and green space have led to the realization that environmental protection must stretch beyond traditional bounds. In response, some in the conservation community have developed a richer strategy toward land protection, recognizing, for example, that economic growth can and should complement land conservation and that development can also be the means to preserve, protect, and maintain land. Green infrastructure, conservation development, and the protection of working farms and forests all reflect new practices in land conservation that shift from preservation of “nature for nature’s sake,” or a single-purpose approach, towards a conservation strategy that realizes multiple goals and benefits.

In a parallel vein, the concern for people and their need for quality housing guide affordable housing advocates. Forces similar to those challenging land conservation organizations are also prompting housing advocates to become more strategic. The real estate boom and rising land and housing prices have increased the housing crisis in communities across the country. Low- and moderate-income workers are priced out of housing markets across the country as increases in housing costs surpass wage increases. Affordable housing organizations have responded by forging partnerships with traditional and nontraditional allies, advocating for smart growth, community revitalization, adaptive reuse, and economic development. Both conservation and housing advocates have realized the benefits of addressing multiple community goals.

Communities can benefit from more strategic and integrated approaches to housing and conservation. One tool for more strategic conservation pairs land conservation and development, using environmentally sensitive design to protect specific natural features or systems,

reduce the construction footprint, and create livable communities. With conservation development, landowners conserve natural resources on private lands providing a different consumer housing choice in the marketplace: residences alongside high-quality protected conservation land.

Conservation development communities such as Prairie Crossing, Jackson Meadows, and the Fields of St. Croix reflect high standards of development and conservation. Those private developments demonstrate that businesses and individuals value a good view and access to green space, that adjacency to protected land translates to a sales premium, and that private resources can provide the means to permanently protect natural resources. Other conservation developments have been led by conservation land trusts, local governments, and other non-profit organizations.

While the body of case material for conservation developments is growing, project examples are limited almost exclusively to the upper end of the housing market. For the low- to middle-income housing market, little research has been done to document case studies of development projects. This study aims to address that gap.

The link between land conservation and affordable housing is usually at the forefront when a community is growing rapidly, threatening both natural areas as well as the ability of low-income residents to find or retain a home. But, as in the smart growth movement, those two issues have typically remained separate sides of a coin. Affordable housing is proposed in one place, usually a downtown or urban center, and land conservation in another area, usually a rural or exurban area facing development pressures. Or municipal bonds fund both affordable housing and land conservation but on separate sites. Rarely are solutions proffered that address both issues simultaneously. Rarer still is the active marriage between the two areas. However, this research explores the potential for affordable housing and land

conservation to be thoughtfully planned and developed on the same site (or at the least considered within the same transaction), at a mix of scales, and in a variety of landscapes.

Such an approach harks back to the very passion for conservation—the desire to protect special places and their unique character—that is woven tightly with concern for the people and the broader community. Good land stewardship depends on meeting human needs and relating those needs to the landscape’s protection. Achieving long-term land protection hinges on meeting community needs like jobs and housing and acknowledging the fundamental human needs—regardless of financial situation—for food, shelter, clean air and water, and green space. Too often, affordable housing and land conservation are viewed as either-or propositions. All people deserve well-designed housing as well as access to green space and the benefits of protected natural systems and habitat. Gus Selig, executive director of the Vermont Housing and Conservation Board spoke of the integration of conservation and housing in *The Providence Journal*, “It’s all about the relationship between land and people,” and making room “for all species, including human beings.”

With such purpose in hand, The Conservation Fund set out to research and document examples of conservation-based affordable housing, that is, housing for low- and moderate-income households paired with direct land protection, to meet a variety of conservation objectives. These 16 development projects (in 15 profiles) show unique landscapes being protected in conjunction with affordable housing. Some of the case studies presented in this paper also include market-rate housing, commercial development, or recreational, farm, or forestry uses.

By recording and analyzing these innovative efforts, we wish to broaden the reach of conservation, to demonstrate the potential for housing solutions at a variety of income levels and in a variety of settings, and to strengthen the potential for conservation development to meet the needs of communities and people who care about the land.

Why This Link?

The Connection between Land Conservation and Affordable Housing

Forty years ago, the passage of the Land and Water Conservation Fund provided federal funds for parks, natural areas, and outdoor recreation, resulting in millions of acres of protected land across the country. But since the 1980s the amount of federal and state monies for land conservation has slowly dropped. At the same time, the pace of development across the United States has accelerated dramatically, reaching 11.2 million total acres developed in the years between 1992 and 1997.

While grassroots support for land conservation has swelled, the conservation community just does not have enough funds to purchase all the land it wants to protect. In addition, the land conservation community has frequently worked fervently to “save the farm” but in its singular focus on one property, has “lost the farming”, or a similar broad conservation purpose. It is vitally important to step back, identify the root causes of loss of natural areas, set community priorities, and use conservation techniques and resources to resolve those problems and realize those priorities.

A different course is needed, one that sets priorities, stresses multiple benefits, and makes wise use of limited resources. Gretchen Schuler with the town of Wayland, Massachusetts, says “In today’s world there’s not a way to preserve a lot of land outright so we must work strategically” in order to protect resources and simultaneously achieve multiple goals. The inclusion of affordable housing can, as in the case of other forms of conservation development, generate new sources of funding to conserve land, while helping meet a public need.

In addition, many of our country’s significant natural areas are also the poorest communities or have sizable numbers of low-income residents. Economically distressed, high amenity areas, such as the southern Appalachians, the South Carolina Sea Islands, or the Southwest, have long-time residents being displaced by second-home, retirement, or resort development, creat-

ing a desperate need for affordable housing. In other treasured natural areas, a visitor industry is driving the demand for retirement or second homes, using outside money to push up local housing prices and challenging the cost of living for long-time residents.

Many areas across the country experience a dominant second-home industry, where visitors attracted by the natural beauty decide to purchase retirement or vacation homes. Other areas just feel the pinch of rapid or poorly planned growth that displaces low-income renters or tenants, as long-time landowners sell land for development. And so many communities today require larger lots for each proposed dwelling.

In many places housing prices are accelerating faster than wage increases, exacerbating the housing shortage. For example, the Martha's Vineyard Commission documented the accelerating housing affordability gap (the gap between maximum home cost eligibility and median sales price) on the island rose from \$182,500 in 2000 to \$343,600 in 2004. On Block Island, which had the state's highest priced homes in 2005, the gap increased 198 percent between 1998 and 2004, according to a report from HousingWorks RI. Seasonal variations in housing demand as well as second-home buyers with high income may pinch the ability of local residents to locate year-round affordable housing.

The conservation-based affordable housing developments profiled herein tend to be in areas with rapidly rising or high incomes. This does not mean that such developments could not take place in lower-income areas. The author uncovered a few developments proposed for lower-income landscapes but these have not yet borne fruit.

The Conservation Fund has always recognized the need for a more strategic approach to conservation, one that achieves both economic and conservation goals. The Fund has engaged in, studied, and promoted conservation development as one tool within strategic conservation planning. In so doing, it noted the overwhelming focus on high-end conservation development. Conservation developments are sometimes described as “golf

course communities without the golf course”. Instead of the fairways, residents pay a premium for a view of protected farms, forests, wetlands, or waterways. While such development projects can, and often do, result in good conservation outcomes, this study was an attempt to locate and document the projects that instead paired *affordable* housing with land conservation.

While there are not an abundance of such developments, the profiles here underscore the diversity of geographies, scales, forms, and techniques. Even more promising is the strategic mindset of the individuals and organizations involved in such projects that led to multiple benefits for their communities and neighbors. Such a mindset came from housing and conservation advocates as well as developers—and was realized in urban, suburban, and rural settings.

Warren Hanson, president and CEO of Greater Minnesota Housing Fund stated, “Open space can and should always figure into the planning of affordable housing.” His organization has been pushing for the integration of the two areas and its Building Better Communities program holds promise for achieving it.

Others found it a natural fit. Keith Lewis of Block Island, Rhode Island, wrote in the *Block Island Times*, “On an island this size, affordable housing and conservation are related issues simply because both deal with scarce acres. Both have to contend with powerful, external market forces beyond their control. Blaming one another is counterproductive.” Instead they came together at the island's Beacon Hill Lane project.

Mark Zelnick, former executive director of the Franklin Land Trust and coordinator of the Loomis Farm project, expressed his view that the conservation community has a moral imperative to help provide affordable housing. As land conservation may limit the amount of developable land, land prices may rise due to less land availability or because of the increased desirability of the community. The community must recognize its broader needs and ensure that conservation does not displace long-time residents and their offspring from their hometowns.

“It ain’t easy” to combine conservation and affordable housing, says Stephen Johnson of Sudbury Valley Trust. But his involvement in the Greenways project led him to comment that he “will go to his grave thinking it’s the best project I’ve ever worked on.” Working together enabled his group and others to “meet numerous important public purposes that we couldn’t have achieved alone.” Both the results achieved and the partnership between the land trust and the municipality to accomplish a variety of public purposes provide a model for the conservation and housing communities.

Darby Bradley of the Vermont Land Trust spoke of the importance of thinking and planning for community needs more strategically. VLT tries to get communities think about where they want conservation and where they want development ahead of time. Land adjacent to a village is generally a more logical location for affordable housing or a town expansion. VLT set aside several parcels for affordable housing in more rural locations but ultimately decided that they weren’t appropriate given their location far from a village and its services.

A more strategic approach to land conservation and development can help make the link between conservation and affordable housing. It can also help generate funds, new sources to support both areas through a more cooperative approach, a view expressed by professionals on the nonprofit side and on the private developer side. In addition to being “the right thing to do”, affordable housing in a conservation setting can also provide a market opportunity.

Land conservation and affordable housing may not be paired all the time. But what this research demonstrates is that they can be paired successfully, with good outcomes for both housing access and land conservation. Conservation-based affordable housing should be viewed as a strategy for project managers in both camps and indeed for developers and serve as a means to broaden a project’s support when well integrated.

Why Not? Traditional Barriers to Conservation-Based Affordable Housing

Given the nascent connections between land conservation and affordable housing, there are still several reasons why more projects integrating both realms have not occurred. To start with, land conservation and affordable housing have traditionally taken place in different locations—conservation in rural or exurban areas and affordable housing in urban or town settings. In many ways this takes best advantage of the opportunities for each area: large blocks of land, relatively undisturbed natural areas, and lower land values in rural areas make for less complicated conservation while concentrated population, jobs, housing organizations, and infrastructure give logical rise to affordable housing. Affordable housing has been primarily viewed as an urban problem and urban densities provided an environment ripe for higher density housing types such as multifamily apartments, townhouses, and condominiums. But such trends discount the need for conservation of natural systems and green areas in urban areas as well as the need for low- and moderate-income housing in rural areas. This research acknowledges that conservation based affordable housing will vary in form depending on location, recognizing, for example, the economic and design challenges associated with providing large blocks of conservation land in urban development locations.

Typically, conservation and housing groups also followed a “sector” mentality, as did funding agencies, with resources and commitment devoted to the single interest. Some places witnessed a backlash against conservation or against affordable housing. Conservation was charged with taking developable land out of play, resulting in higher housing prices while opposition to affordable housing often centered around fears of negative effects on property values or concerns of increased crime. As in so many fields today, the pace of change and the realization of interconnectedness has spawned a more holistic, integrated approach in land conservation and in housing. Affordable housing, to meet the needs of police officers, teachers, and other workers, is best integrated into the fabric of the community rather than

concentrated in one area. Mixed-income developments have ensured protection of nearby property values and better echo the traditional community mix. Meanwhile, recent research on growth management has demonstrated that market demand, not land constraints, is the primary determinant of housing prices.¹ Leaders in both fields are embracing the potential of partnerships, drawing on each other's complementary strengths to achieve multiple community goals. Conservation based affordable housing helps do so. But such partnerships require commitment, resources, and effort.

Definition of Terms

CONSERVATION-BASED affordable housing demands good outcomes for both land conservation and housing. Upfront protection and ongoing stewardship and management are fundamental to achieving such outcomes. Land conservation techniques range from an outright land purchase, to deed restrictions and conservation easements, to land regulation. Similar protections need to ensure the permanence of affordable housing. For each project this study explains the character of the protection, stewardship, and management.

When combining conservation and development of any form, design plays a critical role in the creation of high-quality housing and high-quality natural areas. These principles are reflected in the profiles and the definition of terms.

Defining **land conservation** could take its own research course. Gifford Pinchot defined it as such: "Conservation means the greatest good for the greatest number for the longest time." while Aldo Leopold waxed that "Conservation is the state of harmony between man and nature." The Conservation Fund promotes conservation through partnerships to preserve the nation's outdoor

¹ See Nelson, Arthur C., Rolf Pendall, Casey J. Dawkins, and Gerrit J. Knaap. *The Link Between Growth Management and Housing Affordability: The Academic Evidence*. The Brookings Institution Center on Urban and Metropolitan Policy, February 2002.

heritage—America's legacy of wetlands and watershed, wildlife habitat, working landscapes, natural areas, and community open space. Underlying the poetry of these definitions is the sense that conservation provides long-term, permanent protection of our land and water legacy and enables realization of multiple benefits.

Land conservation:

- Provides long-term, permanent **protection** of the land.
- Should **connect networks** of conserved land rather than reflect a single parcel focus.
- Depends on the site's **context**. Land conservation can take various forms depending on its location in rural, suburban, or urban locations and its relationship to developed or conserved areas.
- Creates a conservation **amenity** that appreciates in value.
- Reflects local **character, priorities and goals**, such as protection of farmland, forestland, recreational areas, natural systems, plant and animal species, or cultural or historic landscapes.
- Should be defined through a strategic conservation planning **process**. Land inventory and analysis needs to be combined with community priorities and environmental science to determine what areas reap the strongest conservation outcome and to then enable a community to optimize parcel-level decisions. A strategic analysis of the "green infrastructure" can help define the conservation features and identify areas suitable for conservation and the areas most suitable for development.

Any approach to conservation development must first identify the conservation targets on a site (active farmland, wetlands and waterways, wildlife habitat, significant natural ecosystems, scenic viewsheds, forests, etc.), and then identify how a site must be defined to protect these targets. Good conservation groups realize that there are a host of conservation tools in addition to conservation development.

Conservation development² is development that achieves direct and lasting conservation outcomes. These outcomes include permanent protection of land

as a direct result of a site's development, or from smart growth within urbanized areas that reduces land consumption and fragmentation at the urban edge. The Conservation Fund is in the process of creating principles for conservation development, based on the conservation outcome, natural and community connections, natural systems and human health, resource efficiency, place-making, and stewardship. The conservation development featured in the profiled projects is typically residential, with either single-family or multi-family housing, but might also include a mix of commercial enterprises, from tourism uses to community-oriented retail, from live-work units to agricultural enterprises.

Conservation development takes three forms across the landscape:

1. Infill development or redevelopment in urban or village center.

Infill and redevelopment can meet development needs more efficiently, thereby reducing development pressure at the fringe and on greenfield sites and fostering off-site land conservation. Communities may have an overlooked or vacant parcel, a brownfield site, a military base slated for closure, or other land use that is no longer relevant or economically viable. Development or redevelopment of these sites presents an opportunity for on-site ecological protection or restoration. It is critical to ensure the functioning green infrastructure in urban areas as well as to provide green space for city and town residents. The higher land and development or redevelopment costs, site conditions, or size associated with an infill parcel

may limit simultaneous on-site land conservation. This study recognizes only those infill or redevelopment projects featuring on-site conservation.

2. Suburban greenfield development using strategic conservation, new urbanism, and/or smart growth.

When development does take place in a greenfield location it should consider its place within the broader ecosystem and development pattern. The development form ideally will follow new urbanist or smart growth principles, with adjacency or connections to existing development, multiple forms of transportation links, design that fosters walking for everyday needs, and a sense of community through the form. The conservation component should also reflect adjacency and connection to other natural areas, help realize multiple objectives, and be part of a broader natural system.

3. Conservation development in rural/exurban locations.

Piecemeal development decisions can often slowly eat away at the rural and agricultural landscape. But development linked to strategic conservation of the rural lands can help ensure continuation of the rural character and industries such as farming and forestry while providing housing for rural residents. Ideally such development should locate in a village center or cluster in a hamlet or village form, following traditional design patterns, and lie adjacent to other development. Barring this, it should minimize interruptions of the network of conserved land.

All three types of conservation development are reflected in this study with a skew towards projects in the suburban or rural setting. Nevertheless, all forms are included here as models for integrating land conservation and affordable housing. Land prices and availability of undeveloped land often preclude broad land conservation in urban settings but specific site features combined with the desire to provide natural areas for urban residents or to restore natural systems can offer opportunities for urban-based conservation development. Between 2003 and 2025, the United States is expected to grow by

² Randall Arendt, in *Conservation Design for Subdivisions*, defines "conservation subdivision design" as residential development where half or more of the buildable land area is designated as undivided, permanent open space, typically achieved in a density-neutral manner. Jeff Milder in his research on conservation and limited development projects (CLDPs) defines a CLDP as "a land project that uses proceeds from limited, environmentally sensitive development to finance the protection of land. CLDPs are most often conducted or facilitated by nonprofit land trusts, although they can also be initiated by private landowners or conservation-minded developers." This research uses the term conservation development and recognizes private, public, and nonprofit sectors initiating deliberate conservation and housing outcomes.

about 58 million people and, according to an Urban Land Institute report, about 18 million of these will be housed in urban infill areas, underscoring the importance of urban forms of land conservation, including restoration and protection of natural systems, creation of urban habitats, preservation of cultural and historic sites, and provision of parks and recreation areas.

The percent of open space for each project is included here as one project measure. The study did not set a percent open space threshold, instead considering the overall conservation outcome. Generally, more open space is better but in some cases, protection of a small high-quality parcel might be more critical than preservation of a large parcel characterized by lower-quality conservation value. As Jeff Milder states in his thesis on conservation and limited development projects, it often matters more *which* portion of a site is developed than *how much* of the site is developed. Communities that specify a requirement to preserve a certain percentage of the total site for open space need to encourage an outcome that goes beyond the minimum space requirement to incorporate the quality of the protected natural area.

This study uses the Department of Housing and Urban Development (HUD) definitions for **affordable housing**, based on yearly calculations of the median income for U.S. metropolitan and non-metropolitan areas. HUD establishes household income ranges by percent of the area median income (AMI). They are *extremely low income* (making less than 30 percent of the median income); *low income* (31 percent to 50 percent AMI); *moderate income* (51 percent to 80 percent AMI); and *middle income* (80 percent to 95 percent AMI). Most state and federal housing programs are for households that make up to 80 percent of the median income, adjusted for household size. The profiles herein use these classifications unless otherwise noted.

Conservation-based affordable housing (CBAH) is the marriage of these areas—providing high-quality affordable housing for low- and moderate-income residents and conserving high-quality open space in line with community conservation priorities, and within a broader strategic context. CBAH is a subset of conserva-

tion development that includes affordable residential development. Other uses, such as commercial operations, industry, or market-rate housing, might also be included in the development mix but were not necessary for inclusion in this study.

Methodology

THIS STUDY PROVIDES the first broad collection of conservation-based affordable housing developments and a study of their design and features. In order to identify projects, the author sought the professional advice of those in the conservation, housing, and development communities. The author and a researcher interviewed numerous individuals and contacted various groups; conducted Web searches on conservation-based affordable housing; reviewed literature; located additional contacts and materials; and researched existing case studies and profiles. In addition, a few other profiles were contributed and adapted for this study. These profiles are credited within and the contributors acknowledged for their work. The conclusions, recommendations, and lessons learned are derived from interviews, existing case studies and articles, and other research and reflect the author's assessment and subsequent understanding of such projects.

The study is not a comprehensive overview of all existing or planned conservation-based affordable housing developments nor is it a formal controlled study of such projects.³ Rather, the profiles reflect the best attempt at locating development projects that combined basic conservation and housing criteria (see below) and studying them as models for future activities of the conservation, housing, and development professional communities.

The research deliberately strived to locate projects that reflect different geographies. Nevertheless, the successful

³ Pam Boyd of the Vermont Housing and Conservation Board cites 25 of their 400 projects as “dual goal” projects. Four of those projects are included here. The researchers identified additional projects that were not yet ripe for profiling.

conservation-based affordable housing developments are concentrated in a few states.

The researchers chose projects that combined land conservation and affordable housing on the same site or as part of the same project (generally adjacent or otherwise connected parcels). Ideally the identification of the land for conservation was based on an assessment of the land's flora and fauna, unique natural, cultural, and historic features, connectivity to broader ecological processes and role in contributing to the health and quality of life of the community. Most projects profiled here did not include this sort of comprehensive assessment but the selection of conservation land was based on a broad set of objectives and outcomes for the open space.

Excluded were developments that protected open space primarily for active recreation such as pools, health centers, tennis courts, and golf courses.⁴ In addition, the study applauds pairing “green” architecture and building with affordable housing (see sidebar on Promising Trend: The Green Communities Initiative) but excluded such developments from study if they did not include significant land conservation.

Profile Format

EACH PROJECT PROFILE follows a similar format, demonstrating particular factors of interest and elements that illustrate the project and its form and features. They are:

⁴ As an example, Homan Square, a 55-acre redevelopment of the former Sears, Roebuck, and Co. world headquarters in the North Lawndale neighborhood of Chicago, was considered for this study. Shaw Company crafted the plan to return middle-class families and economic stability to the declining neighborhood through mixed-use development, housing for a variety of middle and low-income families, and a community center. Half of the apartments and 40 percent of the houses are supported by some form of public assistance. At the same time, Shaw dedicated one-third of the acreage as common open space and tied the site to an existing urban greenway formed by the Burnham plan. However, the open space is primarily used for parks and recreational uses. It is a project worthy of recognition and is cited as a Promising Trend in this report but it did not fit within this study's criteria for land conservation.

PROMISING TREND:

The Green Communities Initiative

In September 2004, the Enterprise Foundation together with the Natural Resources Defense Council launched the Green Communities Initiative to build more than 8,500 environmentally friendly affordable homes across the country. The five-year commitment provides more \$550 million in financing, grants, and technical assistance to developers to increase the number of affordable units that are built “green”—that is, housing that promotes health, conserves energy and natural resources, and provides easy access to jobs, schools, and services. In addition, the Green Communities Initiative will encourage government agencies at the local, state, and federal levels to “green” their affordable housing programs.

While the “greening” extends beyond the site to emphasize access, the initiative focuses primarily on the structure and materials as environmentally sensitive. Land conservation per se is not one of the program's objectives. More information is available at www.enterprisefoundation.org/resources/green/index.asp.

- 1. Basic Site Characteristics and Project Attributes:** The profiles include information on the character of the site and open space and the housing attributes, including unit price⁵, type, and number.
- 2. Background:** The profiles include a brief description of the project's history, outlining how the project evolved.
- 3. Design:** The profiles provide a portrait of the project's design, and describe the conservation and housing features. Where possible, researchers tried to

⁵ The unit price is not an “apples-to-apples” figure. It may be based on monthly rents or per unit sales price. It is also subject to local market differences, thus what is affordable in one community may not be in another. Finally, since some of the projects are older or have few units, sales may span decades with little current data available.

determine the motivation for the project, assessing whether it was due to a broad organizational commitment or because of a regulatory requirement.

4. **Graphics:** Each profile includes site photos and a site plan or map.
5. **Stewardship, Maintenance, and Management:** The research examines the stewardship and maintenance of both the land conservation and affordable housing. The researchers questioned whether and how the natural areas and the housing affordability were permanently protected and what mechanisms were in place for maintaining them.
6. **Financing:** Each profile details the funding mechanism that was used to support the land purchase, conservation, and housing construction.
7. **Contact Information:** Contact information and sources are included to allow the reader to find out more about the project.

The text is supported by sidebars. Sidebars provide general information, highlight select groups or initiatives, and feature promising trends that increase connections between affordable housing and land conservation.

List of Profiled Developments

1. **Battle Road Farm** (Lincoln, MA)
2. **Beacon Hill Lane** (Block Island, RI)
3. **Codman Farm** (Lincoln, MA)
4. **Great Elms** (Harvard, MA)
5. **Greenways** (Wayland, MA)
6. **Island Cohousing** (West Tisbury, MA)
7. **Jay Village** (Jay, VT)
8. **Lime Kiln Apartments/Winooski Gorge** (South Burlington, VT)
9. **Loomis Farm** (Ashfield, MA)
10. **Martin Farms and Taylor Meadow** (Hancock and Rochester, VT)
11. **Opal Commons and Bonnie Brae** (Orcas Island, WA)
12. **Sepiessa Point** (West Tisbury, MA)
13. **Stapleton Redevelopment** (Denver, CO)
14. **Starlake Housing and Farrell Farm** (Norwich, VT)
15. **Wellington Neighborhood** (Breckenridge, CO)

Findings

THIS STUDY discovered a range of approaches to creating conservation-based affordable housing. The profiled projects demonstrate a variety of scale, size, age, and geography. Some projects protected vast acreage, others a modest amount. Some developments provided a few affordable units; others built hundreds. Some development projects included market-rate units in addition to the affordable housing while others still provide a mix of unit types for various incomes levels, plus other uses.

Project Characteristics

The projects are completely built or significantly underway. One is almost 30 years old. A few development projects were early leaders, but the bulk of those profiled have been built in the past seven years. This section provides a summary overview of the project characteristics.

Project Location

As noted in the Methodology section, the projects come from five states, in New England and the western United States, with a majority of the projects in Massachusetts (7) or Vermont (4). Two projects lie in Washington State and another two in Colorado. Five projects are located on islands.

Project Initiator

Land trusts are a natural group to be leading conservation-based affordable housing. Chart 1 shows that land trusts or foundations initiated 10 of the projects. But rapid growth and the mix of community goals often nudged local governments to lead these efforts or partner with community groups to carry them out. Still, there are a few examples of private developers and affordable housing groups initiating conservation-based affordable housing and the opportunity is present for them to implement more.

Conservation-based affordable housing is not a widespread practice, but when it does take place, the initiator ranged from private companies, local governments, conservation land trusts or community land trusts, and other nonprofits. The projects attracted partners, by the

Chart 1

Project Initiator	Number
Local Government (town, city)	5
Land Trust or Foundation	10
Private Developer	4
Affordable Housing Nonprofit	3

Note: Some projects had more than one project lead, so the total exceeds the number of projects.

very nature of the pairing. So even with a project lead in one realm, most projects had several partners representing a variety of backgrounds. The complexity requires engagement of myriad groups and players.

Project Age

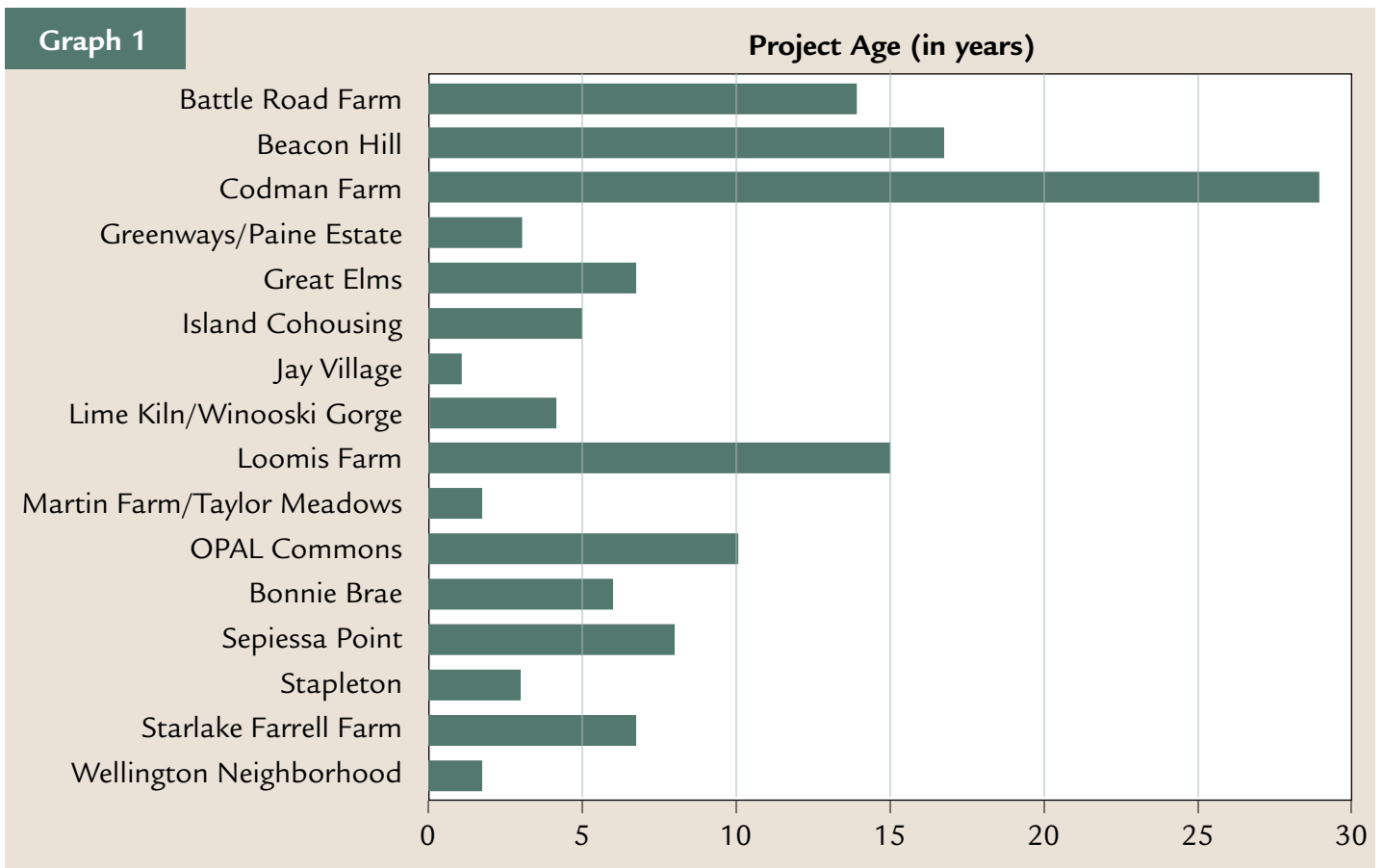
At nearly 30 years of age, Codman Farm is clearly a legacy project—setting an example for projects to follow (see Graph 1). A small cluster of projects occurred about 15 years ago but the majority of projects were launched in the past seven years. Some other early projects are cited in this study but not profiled: the Sweetened Water

Farm in Edgartown, Massachusetts (1973); and the Pilot Hill Farm of Tisbury, Massachusetts (1975). These were excluded due to lack of information because of the project’s age and the loss of the affordable housing, resulting from inadequate protection.

Project Size and Amount of Open Space

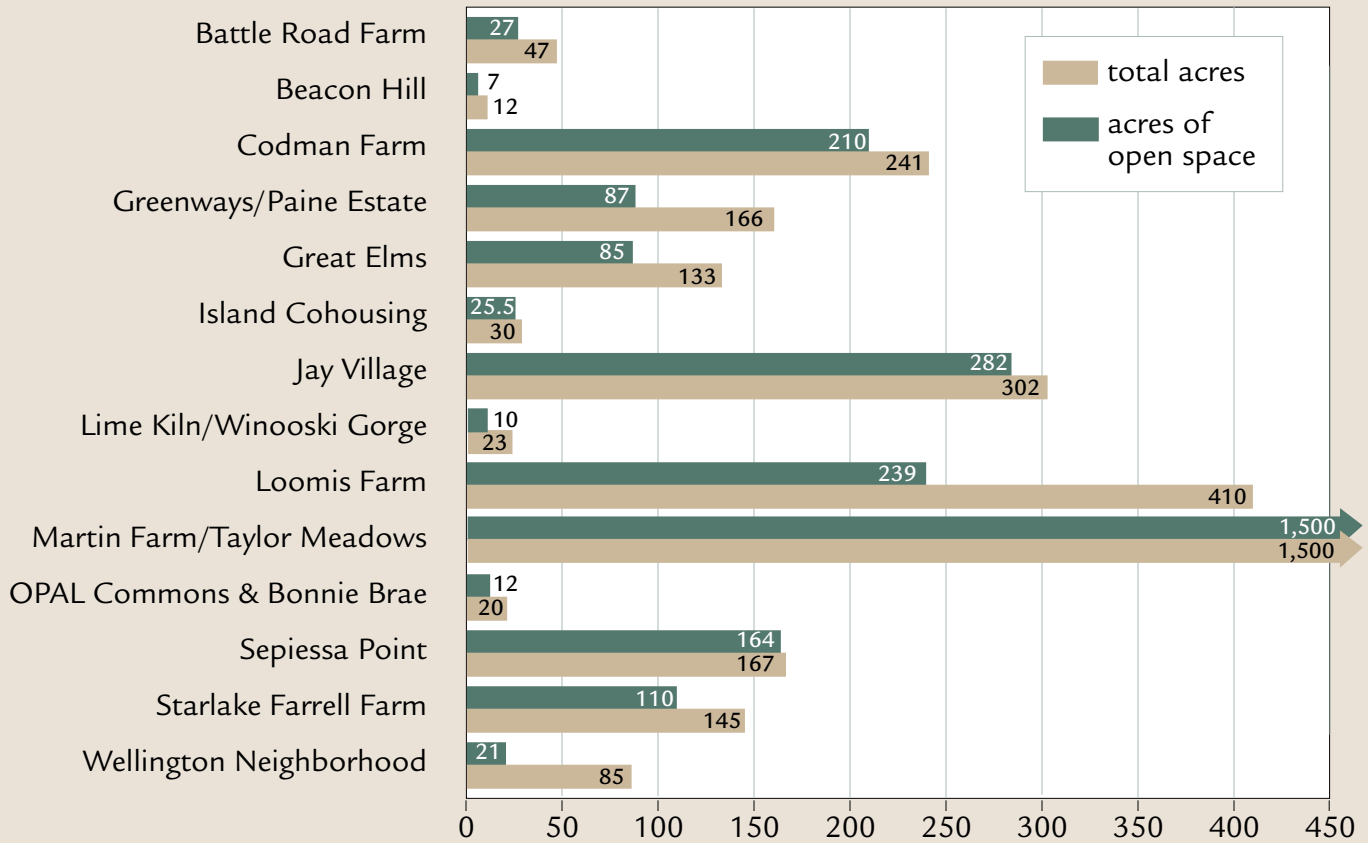
Graph 2 compares the total acres with the amount of protected open space for the profiled development projects. Each is shown, with the exception of Stapleton and Martin Farms, which skew the results because of their size. Stapleton’s 1,100 acres of open space represent almost a quarter of the overall 4,700 acres. Martin Farms has 1,475 acres of protected open space. OPAL Commons and Bonnie Brae, two smaller projects, seven and 12 acres respectively, are combined on this graph.

The bulk of the development projects are small (fewer than 50 acres) or mid-sized (50-250 acres). Only two developments, Stapleton and Wellington, protected less than 50 percent of the total site. Both developments protected a quarter of their land but link with sizable areas of adjacent open space, and, thus, lie within a land-



Graph 2

Acreage Comparison



Note: Stapleton does not appear on this graph, as its large size would skew the results. Martin Farms indicates full protection of open space because of the complex negotiations associated with conservation of the farm with simultaneous provision of a 21-acre in-town municipal site with affordable housing, municipal, and recreational uses. See the text for more information.

scape of conserved land. Both are also privately built brownfield redevelopment projects on infill sites in Colorado. The remediation of brownfield sites means higher upfront costs and requires more time to prepare for development than on greenfield sites. With private developers in the lead the projects might also have needed to be more profitable. These factors—the restoration of natural areas in redevelopment projects and the role of private actors—deserve future research and recognition when pursuing conservation development in a variety of landscapes.

Number of Affordable Housing Units

The developments provide a wide range of housing units (see Graph 3). Leading the pack is Stapleton (off the chart with 1,200 units) and Wellington with a respectable 98 units. The majority of the development projects provide a small number of affordable units—an

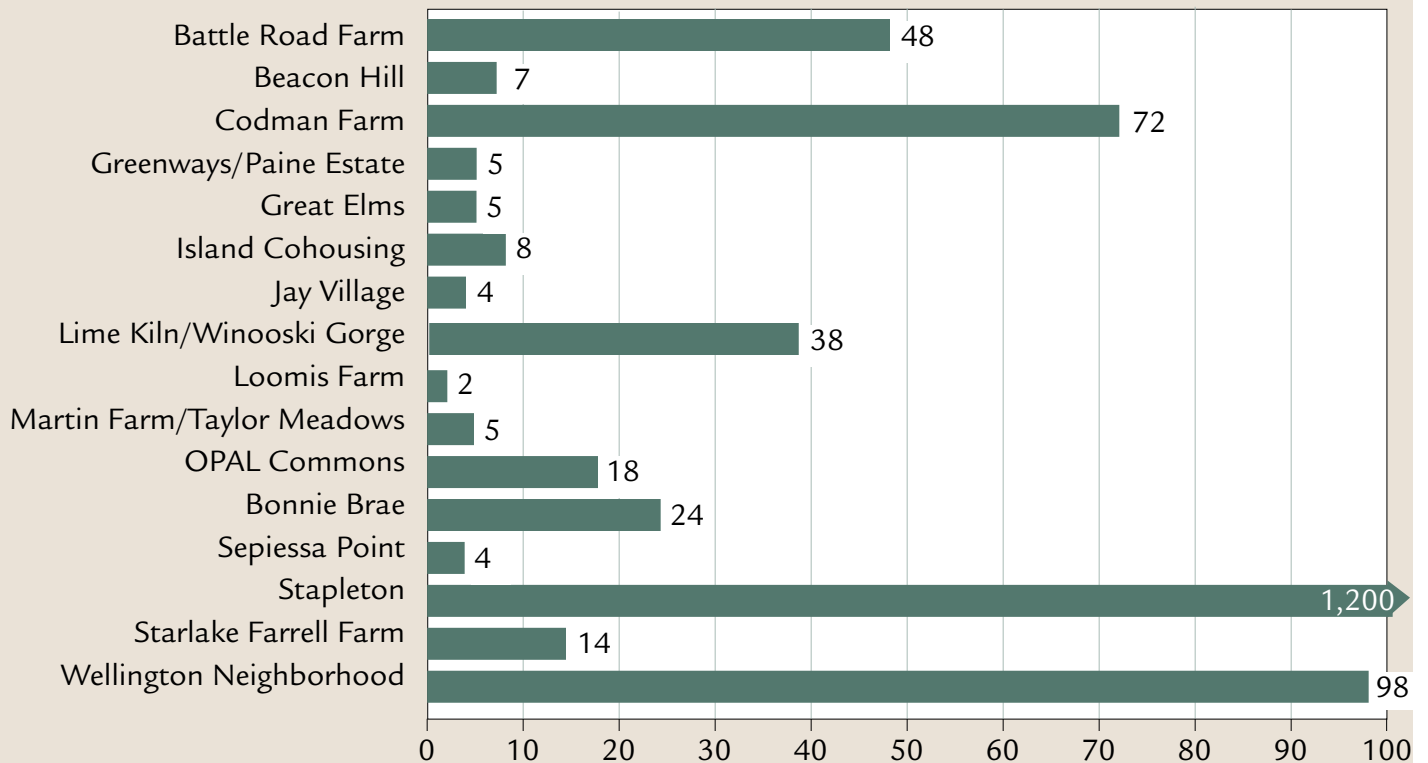
outcome based on carving off a few lots for a limited development project.

LEGACY PROJECT: Brassnocker Farm

In 1988, the Vermont Land Trust purchased, conserved, and then resold the 772-acre Brassnocker Farm subject to conservation restrictions, reserving three acres for possible future housing development. VLT later donated the reserved acreage to Craftsbury Community Care, Inc. for the construction of a 14-unit community care home, which allows aging citizens a local, and affordable, housing placement with options for care and social services. For more information, contact the Vermont Land Trust at 802-223-5234 or info@vlt.org.

Graph 3

Number of Affordable Units (by project)



Lessons Learned: The Relevance of Conservation-Based Affordable Housing

THE RESEARCH DEMONSTRATES the variety of approaches that can be used to achieve conservation-based affordable housing and a number of lessons for others interested in such pairing. Of greatest import is the realization that the two areas can be successfully combined, with positive outcomes for both land use and housing needs. As stated earlier in this document, Mark Zelnick, of the Franklin Land Trust and the Loomis Farm project, emphasized the moral imperative that the conservation community has to help provide affordable housing. Indeed, what rings true from so many of these examples are the rich benefits that accrue from taking a more holistic approach to the community. Conservation-based affordable housing can help meet critical community needs and through partnerships help realize multiple goals.

The projects reflect a diverse mix—the scale, the location, the actors, and the project age. Nonetheless, several

threads run common to many of the projects. Together these threads weave a fabric of lessons for the adoption and integration of land conservation and affordable housing.

Such lessons are worthwhile for land trusts and conservation leaders who are considering the use of land development to provide funding and meet broader community needs. They are likewise useful for housing advocates interested in crafting high-quality housing for the nation's low- and moderate-income families. Local governments can also learn from these profiles, extracting new ways to manage growth and meet community needs. Finally, the lessons are also useful for the private developer and builder, and for all people as they face a local community's desires—in fact, its need—to provide housing for their teachers and police officers, and provide a community and market asset by protecting natural resources.

What follows are the lessons that emerged with examples drawn from the 15 profiles.

1 Know the land. Conservation-based affordable housing development projects benefit from “knowing the land”. Comprehensive or site planning, public involvement, and upfront site and regional assessments help to document the on-site human uses and natural functions and to evaluate what kind of development, if any, is appropriate, what land to conserve, and what restoration is needed or possible. Conservation should be deliberate and protect more than otherwise undevelopable land. The resulting plan should ensure that the land with the highest conservation value (such as wetlands, prime agricultural soils, valued plant or animal habitat, aquifer recharge areas) is protected and that development avoids the most environmentally sensitive areas. For example, this approach is reflected in the Cherokee County, Georgia plan for conservation subdivisions, which directs that the resulting preserved land should be an amenity that appreciates in value.

Equally important: both conservation and development should maximize the connections between similar and complementary land uses to prevent the creation of an “island” of open space surrounded by isolated affordable housing. Conservation land should be connected to other protected land. Affordable housing is best located close to roads or transit, jobs, and services, and should be indistinguishable from market-rate development.

Both should be integrated into a broader land use strategy. The strongest conservation and housing outcomes come from strategic planning and placement to ensure smart development and smart conservation.

Jay’s Town Selectman Chris Young lauded his town’s CBAH project for this very reason, “As a Selectboard, we recognize the balance among the interests in our town, including those of the ski industry, agriculture, property owners, tourists and business owners. We believe by preserving these lands, we will be better able to strike a balance and continue our growth in a thoughtful, deliberate and progressive manner.”

Stapleton and Wellington featured excellent community and environmental planning. Denver’s Stapleton Development Corporation held more than 100 community meetings and spent ten years creating a strategic redevelopment plan to ensure the property was integrated with surrounding neighborhoods and connected to adjacent open space. The plan called for a transit-oriented, new-urbanist community with shops, jobs, and services within walking distance from the homes. It also restored the natural systems and ecological health of the site by recycling airport tarmac into boulders lining the creeks and swales of the community. Clearly, such an intense public process is not expected for all projects, but given the scale and significance of Stapleton’s redevelopment, it was critical. Other projects gained public input and support through lower costs and less intense means.

The development team at Wellington in partnership with Breckenridge, Colorado, town officials also created a neighborhood plan with a simple grid of connected streets and affordable homes surrounding village greens. They worked closely with national, state, and local environmental organizations to remediate Wellington’s historic gold mine site. Free public transportation links to downtown and ski area jobs and services while residents enjoy access to hiking and walking trails and thousands of acres of open space. Lime Kiln was not located in one of the state’s “growth centers” but, in consideration of the very low rate of vacancies, created 38 units of affordable housing in an area with existing nearby development, just a half mile from a college and hospital and less than a mile from the airport.

Part of “knowing the land” is linking parcels to create networks of natural areas or to connect development. Several projects did so. For example, Stapleton residents enjoy 1,100 acres of on-site open space that connects to 17,000 acres of natural area at the nearby Rocky Mountain Arsenal National Wildlife Refuge. Residents of Lincoln Woods have housing that they can afford, next to 225 acres of protected agricultural land at Codman Farm, which, in turn, connects to a 570-acre swath of conserved open space. The 87 protected acres at Wayland, Massachusetts’ Greenways project are contiguous with the 3,600-acre Great Meadows National Wildlife

Refuge. And Jay, Vermont's affordable housing is located on 20 acres, linking two conservation parcels, which in turn connect with a permanent trail easement to the Catamount Ski Trail, Vermont's end-to-end cross-country ski trail.

The affordable housing and other development associated with these projects are best located adjacent to other development or at the least clustered together, with no or minimal disturbance of environmentally sensitive areas. Not all of the projects achieved such optimal results. Ideally the conservation and development are both considered as part of a broader community strategy. When they are not, the desire for smart growth (adjacency to existing development and services) or clustered versus dispersed development must be balanced with the project's conservation goals. The Milder research indicates that higher density projects result in more negative impacts, and fewer positive ones, to the site's conservation goals. Further discussion and research is needed in at both the community level and among conservation and housing groups to evaluate the appropriate balance. (See also, #14: Choose the place and case carefully.)

2 Work in partnership. By their nature, the combination of affordable housing and land conservation begs for partnership and its many benefits. Keith Lewis of Block Island's Beacon Hill Lane project sang the praises of partnership in the *Block Island Times*, "There's much to be said for these joint efforts. Partners bring different skills to the table; partnerships spread the risks. The project wasn't easy; it unraveled a few times, but we stuck with it. We hoped this joint effort would serve as a model for future projects. Of course, every deal is different, but the value of team effort is obvious. The various groups did it before; they can—and should—do it again."

According to Pam Boyd of the Vermont Housing and Conservation Board (VHCB), the success of dual mission projects starts with a belief that it is possible to meet two missions on one piece of land. Early on, the players need to engage in a conversation on how the project will work. Most VHCB projects stem from cooperation among local nonprofit groups—often a housing

group working with a conservation group—to realize the full potential of a given site. Ongoing stewardship and monitoring are important aspects to iron out any conflicts between the dual goals. Lime Kiln Apartments provides one such example of a housing group, the Lake Champlin Housing Development Corporation, pursuing a partnership with the Winooski Valley Park District, to turn a development liability (steep limestone cliffs) into a community amenity, in the process protecting rare and unusual habitat and natural features that are part of the state Natural Heritage program. Even given some of the issues that arose between the two organizations, the shared experience resulted in the addition of 38 units of affordable housing in a community strapped for housing and protection of a unique natural community.

In general, partnerships evolved from an active engagement between groups throughout the conservation and development process. For example, the parties involved in Sepiessa stressed the need to work together during the initial determination and project planning, through implementation, and evaluation.

In a few cases, the partnership between housing and conservation was inherent in the organizational mission. The Vermont Housing and Conservation Board (see sidebar) supports the dual goals as its mandate and has carried out 25 dual-mission projects. OPAL Community Land Trust has also embraced both housing and conservation in achieving its core purpose. Some local groups fund projects in both areas, as do new state programs in Hawaii and Connecticut (see sidebar on State Efforts).

If nothing else, many of the dual mission projects resulted in a shift in the housing and conservation camps: they began thinking of each other as allies rather than competitors. The Franklin Land Trust did not want to achieve the land preservation at housing's expense, leading it to provide two affordable homes along with the Loomis Farm land protection. The Great Elms project caused the Harvard Conservation Trust to embrace a new role (managing the affordable housing), in support of the organization's mission (protect the rural character). The formation of the VHCB has had lasting effects throughout the state between housing and conservation

The Vermont Housing and Conservation Board

Since 1987, the Vermont Housing and Conservation Board has used the state's property transfer tax to create perpetually affordable housing and protect Vermont's agricultural land, historic properties, important natural areas, and recreational lands. Started by a coalition of housing and conservation groups, the Board has always pursued dual mission projects. In fact, the coalition views the dual goals of affordable housing and land conservation as fundamental to the state's economic vitality and quality of life.

The Board is an independent, state-supported funding agency providing grants, loans, and technical assistance to nonprofit organizations, municipalities and state agencies. Until 2000 (and the passage of the Massachusetts Community Preservation Act), Vermont was the only state that had combined affordable housing and land conservation in one funding agency.

In 18 years, VHCB has funded 25 "dual mission" housing-conservation projects—housing clustered on a site with conserved open space—from an overall total of 400 projects it has supported. Most of the projects are small-scale. As of January 2006, the VHCB has preserved 360,000 acres of land and created 8,000 entry-level homes.

At first, says Pam Boyd, VHCB thought that many projects would be dual goal. But the Board soon realized that housing and conservation could be advanced over time by a mix of project types.

Many towns have both affordable housing developments and conservation projects, which although not developed together, have the desired outcome of providing affordable housing and protecting valued natural resources, farm or forestland, or scenic landscapes.

Since VHCB has staff with housing and conservation specializations, the organization is able to facilitate alliances between local groups, with results of increased community support and local fundraising. VHCB also nudges collaborative thinking: its funding application asks conservation applicants to describe what has been done for affordable housing in the town where a project is proposed, and housing applicants must describe conservation efforts.

VHCB ensures that conservation lands are permanently protected through conservation easements, which are recorded in the land records. Housing is permanently affordable through housing subsidy covenants that are recorded in the land records. These restrict the income of future purchasers and the sale price of the home. In the case of single-family homes, a limited equity agreement keeps the investment of state funds with the house, to be passed on to the next buyer.

For more information, and a list of all of VHCB's dual goal projects, call 802-828-3250 or view the Web site: www.vhcb.org.

groups, within the legislature, and among communities. Partnerships between affordable housing and land conservation can manifest direct public and political support. Sepiessa on Martha's Vineyard was one such project. First envisioned as a conservation deal, initial political opposition led to the inclusion of a small number of affordable units on the site, making the transaction more politically palatable. Sepiessa and other projects

on the island brought housing and conservation advocates together, opening the door for more constant and ongoing proactive exchange between land trusts and housing organizations (see sidebar on Martha's Vineyard, page 30).

Indeed, a community land trust on Martha's Vineyard, the Island Housing Trust, is currently developing a

PROMISING TREND:

State Efforts to Couple Land Conservation and Affordable Housing

While Vermont (see sidebar on Vermont Housing and Conservation Board) is the clear leader in coupling land conservation and affordable housing, a few other states are bridging the two areas in various ways.

Hawaii's Land Legacy Act: In June 2005, Hawaii's Governor Linda Lingle signed the Legacy Lands Act (HB 1308), establishing a statewide fund for protecting wild coastline. The measure doubles the amount of funding for Hawaii's Natural Area Reserves System and nearly triples funds for building affordable rental housing. The bill is expected to generate \$38 million in its first year, including \$10 million for rental housing from increases in the property conveyance tax rates on high-end and speculative real estate transfers. The Act adopted in Hawaii is modeled on the Vermont Housing & Conservation Trust Fund Act.

Connecticut's Law: In July 2005, Governor Jodi Rell signed S.B. 410, "An Act Concerning Farmland Preservation, Open Space, Historic Preservation and Affordable Housing". The Act establishes a \$30 fee for recording land records. The municipality keeps \$4 of the fee and sends \$26 to the state to be placed in the newly established Land Protection, Affordable Housing, and Historic Preservation Account. The fee is expected to generate some \$25 million per year, to be divided into equal parts among the four goals of the act.

New Jersey's Coalition for Affordable Housing and the Environment was originally created to enable the environmental, planning and affordable hous-

ing communities to review issues of mutual concern in a collegial setting. The statewide group of planning, environmental and housing organizations and advocates has evolved to where it develops comprehensive policy strategies to advance the collective and individual goals of its members. The Coalition works to increase affordable housing opportunities, to preserve New Jersey's natural resources, and to rebuild cities throughout the state.

Massachusetts' Community Preservation Act (CPA) is statewide enabling legislation that allows cities and towns to plan for growth by raising local property taxes to:

- Acquire and preserve open space
- Create and support affordable housing
- Acquire and preserve historic buildings and landscapes

CPA also provides significant state matching funds—an estimated \$26 million annually—to participating communities. While the CPA stipulates that a minimum of 10 percent of the annual revenues of the fund must be used for each of the three core community concerns, the remaining 70 percent can be allocated for any combination of the allowed uses, or for recreational land.

Since passage in 2000, more than 108 communities have adopted CPA. CPA gives each community the opportunity to determine its priorities, plan for its future, and funds those plans. The CPA provides a steady funding source for preserving and improving a community's infrastructure.

Sources: Vermont Housing and Conservation Board's Web site: www.vhcb.org; New Jersey's Coalition for Affordable Housing and the Environment www.cahenj.org; Gordon Y.K. Pang and Derrick DePledge. "Taxes on Real Estate Purchases May Go Up," *Honolulu Advertiser*, April 30, 2005; and The Massachusetts Community Preservation Act Web site: <http://www.communitypreservation.org/index.cfm>.

guide for landowners who might donate real estate or land for affordable housing. The guide includes the possibility of donations for both conservation and housing: Contributions of ecologically sensitive land can be paired with thoughtful development of smaller non-conservation properties, or the conservation land could be protected outright with existing housing used for low- and moderate-income residents.

For some of the projects, the partnership was less a pairing of two organizations than integration with a broad plan. Stapleton's master plan was born from broad community participation and identification of needs. The public input and planning processes that led to partnerships strengthened many of the projects. Tom Macy of The Conservation Fund noted that the Aspen Village project (see sidebar, page 23) created a political force from the combination of two or more powerful social issues in the community. The testimonials in the introductory section underscore the roots of partnership in these projects and the resulting benefits.

3 Build support. Given the complexity of dual mission projects, community support was critical. Partnerships helped to build support, as did a number of other techniques.

Know the people. Engage community members in design process. Relationships within the community are often critical to the support and success of the projects. Many of the projects engaged public officials and local residents to design the project and gain input. Public meetings and outreach helped build support.

At Greenways, the Wayland public's keen interest in the Paine Estate, combined with the town's strong tradition of citizen participation, resulted in a groundswell of public involvement in the planning process. Citizens from all walks of life donated hundreds of hours of volunteer time, hosted meetings in their homes, and advocated for the town to acquire the property.

Residents of the OPAL developments in Orcas Island, Washington, actively engaged in the density decision, lot selection, and location and orientation of homes on the

lots. The resident and community engagement eased the development process by deflecting potential opposition through collaborative decision-making and trust building. The OPAL Commons process resulted in ongoing community confidence that collaboration and good design for people and nature are integral to OPAL's business model.

Future residents of Island Cohousing also contributed to the design of their neighborhood. Their participation helped them realize what trade-offs were necessary to achieve great design for all income levels and a strong conservation outcome to boot.

ORGANIZATIONAL HIGHLIGHT: 1000 Friends of Florida

In 1991, 1000 Friends of Florida, a growth management advocacy group, established an affordable housing program "to promote the provision of safe, decent and affordable housing for each and every Floridian." Jaimie Ross, the affordable housing director for 1000 Friends, promotes the concept that good planning for the environment overlaps with good planning for affordable housing. Florida has a strong tradition of land use planning and the state requires local comprehensive planning. Additionally, Florida's land conservation program is arguably the most ambitious in the world. The state has committed more than \$6 billion in bonds to land acquisition since 1989.

Florida's local governments, which are required to provide affordable housing, can access funds through the State Housing Initiative partnership, which provides block grants to entice developers to build affordable housing.

For more information, contact the 1000 Friends of Florida at 850-222-6277 or visit the Web site and see link to affordable housing at <http://www.1000friendsofflorida.org>.

Norwich, Vermont, residents partnered with the Upper Valley Land Trust. They formed two local committees to define goals and strategy and help with fundraising, holding seven public meetings to get the Starlake Housing and Farrell Farm project done.

At Wellington, the proposed new urbanist design was initially at odds with local regulations but the public process swayed the Breckenridge town leaders to not only approve the development but also to waive fees, allow requirements to favor local workers as buyers, and provide other incentives. Business owners can also become supporters of these projects, as seen in the support of the ski resort for the housing and conservation in Jay, Vermont.

This approach is an important part of another helpful strategy: *Forge partnerships with local officials*. Many towns and cities, including Harvard, Breckenridge, Denver, Lincoln, and Wayland, were active participants in planning—and supporting—the conservation-based affordable housing development projects.

Other projects built support by *integrating affordable housing with market rate housing, meeting multiple community needs*, and *creating high-quality design* to deflect criticism of affordable housing. These techniques are discussed in detail later in this section. Finally, depending on the scale of the project, the organizers could build support by *educating realtors, lenders, and appraisers* on the unique nature of the conservation-based affordable housing project although the strategy was not explicit in the studied projects.

4 Play the right role. Some conservation organizations have engaged in limited development projects and some housing groups have protected natural areas. A few groups have married the housing and conservation practice. But these are currently somewhat unusual cases.

Many involved in conservation-based affordable housing stressed the importance of participants knowing their proper roles and drawing on others to complement the project. Conservation groups, including local, regional, or national land trusts, are best at protecting the land;

affordable housing advocates such as housing authorities, community land trusts, or community development corporations, know best how to provide for low- and moderate-income residents. While each should think broadly about the needs of the community, they need to be true to their core principles and mission.

Keith Lewis of Block Island wrote, “The institutions working on these problems each have different mandates according to their charters; they would be violating their fiduciary obligations if they departed from their separate missions. However, there’s no reason why they can’t work together now and then to achieve common goals.” While a few groups have a dual mission or ongoing partnership with their counterpart, most projects sprang from partnerships between groups, each with a defined role.

Loomis Farm project leaders and others interviewed cautioned against a conservation group acting as both the developer and protector because of public perception. A land conservation group risks losing public understanding, appreciation and support for its primary conservation mission. Despite this perception however, a number of land trusts have successfully engaged in conservation development.

Conservation groups are sometimes charged with causing increasing housing costs by reducing the amount of land available for development. The same holds true for housing groups, as they face criticism leveled against affordable housing at the expense of protecting natural areas. Concern may be heightened if public funding is used to achieve the community goals of land conservation on one hand and then affordable housing is built on that same, supposedly off-limits, land. Working with partners may help ameliorate that result. Housing and conservation partners can work with local officials and civic organizations to openly communicate the process by which land was determined appropriate for housing and for conservation (ensuring the proper location of both), the relationship of affordable housing to conservation, and the community benefits that result from meeting these needs.

SPOTLIGHT ON:

Lincoln, Massachusetts

In Lincoln, the commitment for open space preservation is paired with the desire to continue providing housing opportunity for all residents. Back in the 1960s, Kenneth Bergen, a local lawyer, expressed the community's desire to "find a way to provide housing diversity as well as beauty in our town. I'd like to see us put substantial funds into moderate-income housing. Surrounded, of course, by open space." And so Lincoln has.

According to the Boston Globe, Lincoln is known for its social conscience, along with a shared philosophy to protect natural areas. The high percentage of open space in Lincoln is accompanied by Lincoln's achievement of ten percent affordable housing, one of a handful of Massachusetts's communities to meet this goal. Battle Road Farm and Codman Farm are just two examples of conservation-based affordable housing in Lincoln. The town reflects the New England concept of "common land", in the words of a former Lincoln town conservation leader, "the realization that land is not a commodity but a trust. True ownership of land resides...with all those who know and love it."

Bob Lemire characterized the town's ongoing process of building political will and the practice of creative problem solving. He also acknowledged the surrounding landscape that features development from the seventeenth through the twentieth centuries, due in part to the permanent protection of more than 40 percent of the town's land. Such a landscape may remind residents of the outcome that results from combining conservation and housing.

In Lincoln, several groups work together on affordable housing and land conservation within the com-

munity, on both stand-alone deals and combined projects. The Lincoln Foundation, a private non-profit organization, protects and develops affordable housing opportunities in the town. At the same time it "cooperates with government agencies and private charitable organizations to preserve open space and protect the environment, ...enhance the quality of life and community in the town, and preserve the essential values and characteristics of the Town's rural heritage". It works with the Rural Land Foundation, one of three major land conservation organizations in Lincoln. Dedicated to maintaining Lincoln's rural heritage, the RLF works to protect lands identified by the town to be of conservation interest. In addition, it works with the town to identify and secure property for creative land development, including low- and moderate-income housing. In the mid 1970s the RLF purchased the land for the first major affordable housing development in town known as Lincoln Woods, carved from the Codman Farm property.

The Lincoln Land Conservation Trust, a private land trust, manages 375 acres of conservation land and maintains about 60 miles of hiking and walking trails on its own property and on private property. The Lincoln Conservation Commission, a public entity, pioneered support for land acquisition and now manages the 1600 acres of town-owned conservation land.

Located just 13 miles from Boston, Lincoln's future challenge will be to continue providing affordable housing given the community's appeal, which stems in part because of the town's protected fields, meadows, and woods.

Sources: Interviews of Bob Lemire and Sarah Andrysiak; "Landsaving, Lincoln-Style," *Open Space Action*, 1968-69; Lincoln Housing Task Force. *Town of Lincoln Consolidated Housing Plan*, March 17, 2003; Boston.com Real Estate *The Boston Globe Community Snapshot*, February 8, 2004; Teri Borseti, "Lincoln Offers Rural Charm, But Not Cheap," *Boston Globe*, August 25, 2001; and Lincoln's Web site: www.lincoln-ma.com/town_groups/llct.htm.

PROMISING TREND:
White Brook Farm

The desire to provide permanent housing and intergenerational support for foster families is behind the Treehouse Foundation’s planned creation of the 100-unit White Brook Farm community in western Massachusetts. Conservation easements will protect almost half of the 45-acre site, which will connect to an existing town park and middle school. The remainder will combine affordable rental housing for foster families and seniors with 40 single-family market-rate houses. The community will offer foster children and their families animal therapy at the Big Red Barn, walks in the woods through the development-wide pedestrian system, and opportunities to cook and socialize at the community center.

For more information, contact Judy Cockerton, Executive Director, Treehouse Foundation, at 781-784-9908 or jcockerton@comcast.net, Darcy



Rendering of Treehouse Community

Jameson of Beacon Communities Development at 617-574-1141 or djameson@thebeaconcommunities.com, or Peter Flinker of Dodson Associates at 413-628-4496, e-mail peter@dodsonassociates.com, and Web site: www.treehousecommunities.org.

Each partner should stipulate the tenets that ensure a good design and management structure and result in good conservation and development outcomes. Land trusts can secure the property through legal controls and then can determine the amount and location of conservation land upfront and carve off the land to be developed. A conservation group is unlikely to have the resources and expertise to build or manage housing. Instead, a housing group or developer should lead the development. This way, both groups can exert consistent control over the outcome—and help ensure both smart conservation and smart development.

Each party to the transaction shapes public perception. The housing outcome—its site design, building lots, and development impact—will influence how the conservation is perceived and vice versa.

As discussed in Lesson Learned #2: Work in Partnership, most groups still follow a single purpose and forge partnerships to complement their role. A few groups have a dual mission—such as Vermont Housing and Conservation Board; have at times taken on a new role—like the Harvard Conservation Trust with Great Elms; or have incorporating land conservation and environmentally sensitive development practices as part of its provision of affordable housing—the OPAL Community Land Trust. And some local jurisdictions, including both Lincoln and Martha’s Vineyard, Massachusetts, have forged a new way of doing business through partnerships.

Nevertheless, the complexity of conservation-based affordable housing underscores the need for a project organizer to, in the words of Stephen Johnson, formerly of the Sudbury Valley Trustees, serve as “guardian of the

vision,” and to recruit others to the vision. An organizer—a person or a specific group—can be drawn from a conservation or a housing group, a town, or even a private company, but the position requires a long-term vision and the ability to cultivate the funding and public support for the project as well as navigate permitting challenges. The organizer would likely take on the lion’s share of work and possibly some financial risk, as it engages a consortium of groups to achieve success for the combined project.

5 Meet community needs. Conservation based affordable housing projects frequently meet several objectives. In addition to helping meet the first-tier needs of housing for low- and moderate-income resi-

dents and protecting valued landscapes in the community, some efforts also addressed or are striving to meet other community needs. Farrell Farm of Norwich, Vermont, not only offers area residents 14 units of affordable housing but also provides locally grown, organic food. The Treehouse Foundation, in discussions with the town of Easthampton regarding the Treehouse Community at White Brook Farm, discovered the need for tutoring the town’s children and responded by creating and managing a tutoring program in the town schools (see sidebar on Promising Trends). The Greater Minnesota Housing Fund (see sidebar on Promising Trends), a group at the cusp of combining land conservation with affordable housing, seeks to not only address the crisis of too few homes for families who can-

PROMISING TREND:

Greater Minnesota Housing Fund

The Greater Minnesota Housing Fund is committed to increasing the supply of affordable housing for working families throughout greater Minnesota, that area outside of the Minneapolis-St. Paul region. While working with several communities in greater Minnesota, it became apparent that high home costs were only part of the affordable housing problem. Local leaders were also concerned about creating neighborhoods that were assets to the community—neighborhoods that would remain attractive and livable over time.

GMHF responded with a strategy to develop home and neighborhood design strategies that would add value and livability to new neighborhoods at reasonable costs including incorporating more extensive landscaping, more attractive home designs, and better plans for neighborhood amenities such as parks and hiking, biking, and walking trails. Implementing these and other design strategies adds amenities that are often absent in affordable housing developments.

While the GMHF projects were not comprehensive enough to be profiled examples, the GMHF has two initiatives that are spawning better green spaces and parks. Warren Hanson, executive director, expects that that next step will be natural resource protection and a push toward protection of the green infrastructure and use of low impact development measures such as natural stormwater controls. The Building Better Neighborhoods program is often trying to retrofit redevelopment sites and create green space and parks. At a few of their projects, they have tried to integrate natural systems into the development. They made a wetland a neighborhood feature and used native vegetation along stormwater swales (Rolling Meadows in Hutchinson), preserved a prairie grass conservancy (Nicollet Meadows in St. Peter), and provided trail systems to connect to the river, open space and parks (Heritage Greens in Cambridge). Through its Green Communities Initiative, GMHF expects to promote green infrastructure and low impact development stormwater techniques.

Sources: *Building Better Neighborhoods* guidebook; GMHF Web site; Interview with Warren Hanson, president and CEO, GMHF, 4/21/05; and McKnight Foundation interview of Warren Hanson in *Embrace Open Space* newsletter, December 2004.

not afford to pay market prices, but to seize upon strategies that strengthen the whole community.

The projects profiled in this paper created park and recreational land—for walking, biking, cross-country skiing, and camping. They protected farming and forestry and the jobs associated with each. They helped maintain the traditional or rural local character. They restored natural systems or a sense of place. They created town meeting places or fostered a sense of community. They also created commercial enterprises.

In some cases, municipalities began embracing rather than opposing affordable housing as town or city residents realized the need for it and the effect the lack of housing options had on community members. Escalating housing prices prevented young people or long-time residents from staying. Townspeople began to realize that those seeking affordable housing were their own adult children or the community’s teacher, carpenter, or police officer. Such a process happened in Hancock. It took 16 years after the Vermont Land Trust first purchased the 1,550-acre Martin Farms before the affordable housing was created. In that time, affordable housing, well designed and integrated into the town’s fabric, became something that would help the community. In the case of South Burlington, Vermont, the state agencies and legislators decided to support the creation of multi-family, mixed-income housing at Lime Kiln, given a sustained period of limited rental housing availability.

6 Financing can come from many sources Due to their unusual nature the projects drew on a variety of funding sources—local private and public support, traditional bank loans, federal or state funds, and private market funding—to conserve natural areas and to build affordable housing. Some projects also benefited from donations of housing or land to launch their efforts.

Local, regional, state, and national conservation and community land trusts, and other nonprofits, including private foundations, provided both program and financial support to several of the projects. Harvard Conservation Trust, Sudbury Valley Trustees, and Vermont Land Trust are examples of local conservation land

trusts providing support. Two community land trusts were involved as project members in Washington state and Martha’s Vineyard developments: The OPAL Community Land Trust developed the OPAL Commons and Bonnie Brae communities in Washington while Island Housing Trust is involved in the Phase II of Sepiessa. The nonprofit Treehouse Foundation has been the critical support for the proposed foster family community on White Brook Farm (see sidebar of White Brook Farm) in Easthampton, Massachusetts.

Locally dedicated conservation bonds and special taxes funded the land protection at the Sepiessa project in Martha’s Vineyard while state programs support both housing and conservation in Vermont and Massachusetts. Some projects, including Jay, Vermont, received outright donations of land while a few, such as Beacon Hill Lane on Block Island, Rhode Island, had sellers offer the land at a bargain rate. In most cases, conservation lands were purchased outright, although a few projects used the purchase of conservation easements to support overall project costs.

In a few communities, local residents made cash donations to support either the conservation or housing or both. More than 61 households in Norwich, Vermont pledged financial contributions to the Starlake Housing-Farrell Farm project. Overall, individuals donated \$25,000 to protect Farrell Farm.

Among others, Island Cohousing, Loomis Farm, and Great Elms turned the increasing land values into an advantage by splitting off market-rate lots and selling them to generate the funds for housing or conservation. The Vermont Land Trust swapped some of the Martin Farms land with the U.S. Forest Service to gain the best farm and conservation land while acquiring in-town land for affordable housing. The Franklin Land Trust used market forces for its projects. Unable to attract state funding support, it used the money it could glean from land sales to achieve its core conservation goals. If market-rate lot sales cannot support affordable housing local groups must locate a funding source to underwrite the “buying down” of the stipulated limited development lots from market to affordable rates.

THE CONSERVATION FUND: Aspen Village, Colorado

In Aspen, Colorado, the Bartos Family provided the motivation for a rather unique conservation-based affordable housing project. The Bartos, owners of the 879-acre Aspen Village property, wanted to preserve the natural areas and agricultural uses of the land, while also protecting the on-site affordable housing. In addition to the stands of mature aspens that covered the land, the property had a gas station and was home to an existing 150-unit mobile home park. With the land also conveyed Snowmass Creek water rights and development rights for 14 units. The land was worth roughly \$11-\$12 million, but in 1994, the Bartos Family sold to The Conservation Fund at the bargain price of \$1 million. At the sale, Celeste Bartos provided the directive: “Do the right thing with the land, with the people, and with the water.” Tom Macy took that charge seriously and passed on the windfall to the existing residents and the community at large.

The Fund spearheaded a four-year project that culminated in the transfer of the water rights to the state’s citizens, the sale of the gas station to its operator, and the retirement of all but one of the development rights. The Fund crafted a conservation plan that entailed the sale of an 829-acre ranch, with a conservation easement that limited development to one home site while protecting the elk migration routes and natural areas.

Finally, the Fund ensured the continuation of the mobile home park. The mobile home residents—including local police officers and hospital workers—owned their homes, but leased the land on which each trailer sat. The Fund’s Macy used this opportunity to enable the long-time residents to own the land, at a very affordable rate. First, the 34 acres was subdivided into house lots, which were then sold at \$30,000 to \$35,000 apiece to the residents. While the home sales were not subject to any long-term income controls, buyers were required to be current residents or to work in the county. Those restrictions continue through the resident-run Aspen Village Homeowners Association.

Macy noted the creation of a real political force from the combination of affordable housing and land conservation. Because of the Bartos’ generosity, the project respected the interests of people and nature. The concern paid off in the widespread support for the property rezoning as it went before the county commission. Aspen Village retained low-cost housing in a high-priced resort market and allowed long-time residents to remain amid the Snowmass Creek splendor.

For more information contact Tom Macy of The Conservation Fund, Colorado Field Office at 303-444-4369 or tm@tcf-colorado.org.

Source: Interview of Tom Macy (December 13, 2005); J.T. Thomas, *High Country News*, vol. 30, no. 3, Paonia, Colo., February 16, 1998; Colorado Water Conservation Board online article, “Conservation Fund mission makes partnership unique” (undated), http://cwcb.state.co.us/isf/V2IS2_TCF.htm.

Another strategy drew on the land’s resources to finance the project. The OPAL Community Land Trust financed OPAL Commons and Bonnie Brae in part through on-site timber sales from selective, sustainable timber harvests.

The nature of the project organizer can determine the project financing. Nonprofit or public organizations do

not need to achieve the profit returns that private developers may. Thus, the project financing can be more flexible than if such projects needed to satisfy investors. For example, the town of Harvard, Massachusetts, initially spent more than \$1 million to purchase the Great Elms Farm and associated buildings. Sales of the market-rate lots and eased farmland generated \$800,000, leaving a

\$200,000 loss. Such a net cost would be unacceptable for a private development but was a reasonable investment for the town to achieve a public benefit of 85 conserved acres and five affordable units.

The need for a mix of funding and the associated complex funding requirements complicated some projects even while making them possible. Moreover, private developments, such as Wellington and Stapleton, underscore how public incentives can play a role even when no public funding is provided. However, the combination of housing and conservation can generate new funds. Billy Coster of the Vermont Housing and Conservation Board notes that limited development of affordable housing in conjunction with land protection may bring in the extra funds a conservation group may need to complete a project, while still meeting a public good. In his words, “This seems implicit, but some folks assume the affordable housing component drives up costs; instead it often creates a new income source.”

7 Know the market. Market fluctuations can affect the project’s financial picture, its funding sources and ultimate profit or break-even point. Even with great planning, some of the groups completed one project but found themselves unable to launch another because the local market no longer made such projects feasible.

Franklin Land Trust successfully combined land conservation and affordable housing at Loomis Farm. FLT’s lucky timing—the market shot up just after the large farm was purchased—allowed it to tap the sale of the market rate lots to subsidize the affordable ones. But the moribund market of the 1990s and the resulting tight financing prevented FLT from including affordable housing in other projects despite its interest in doing so.

Other projects revised their development plans because of market changes. Battle Road Farm saw local land prices rise, affecting its plans for affordable housing. Originally Battle Road planned for 60 percent of the homes to be affordable but a recession reduced the number to less than 50 percent affordable. Developments are products of their time: the market may have been right for them at one time but market changes,

such as rising land prices, made the project impossible to re-create. It is certain that other conservation-based affordable housing projects were proposed or attempted but fell victim to market fluctuations.

8 Regulations can help or hinder. The effect of local and state regulations were mixed for these projects. Local governments often require protection of natural areas or the provision of affordable housing. But state or local requirements can also limit creativity or restrict good outcomes. Randall Arendt, in *Conservation Design for Subdivisions*, underscores how local zoning typically requires more land per dwelling unit today than it did 15 or so years ago. Housing costs can be reduced by reducing the land cost per dwelling by allowing smaller lots. When design standards that follow vernacular style are used, both affordable and market-rate dwellings, even high-end homes, can be compatibly placed in a conservation development.

Given the public benefit, the projects might engender greater flexibility or even be offered streamlined approval or incentives. Public officials in Breckenridge, Colorado waived fees while Easthampton, Massachusetts, (see sidebar, Promising Trends: Whitebrook Farm, page 20) provided density increases because of the conservation, community, and design benefits.

But in some jurisdictions, regulations stymied good design or blocked a more flexible approach to community needs. At Loomis Farm, zoning prevented the use of smaller, clustered lots or alternative design that would have reduced the footprint of the development on the landscape. Breckenridge annexed the Wellington neighborhood’s 85 acres to circumvent county zoning that would have permitted only four units total. Instead, 122 single-family homes, 98 of which are affordable, were built in a new urbanist pattern, close to the existing town center, thereby maximizing proximity, connecting new with existing development, restoring the site, and protecting natural areas. (Breckenridge also forged a transfer of development rights program with Summit County.)

Developers of some leading conservation developments cited a desire to include affordable units but noted that

LEGACY PROJECTS:

Sweetened Water Farm and Pilot Hill Farm

In the 1970s Martha's Vineyard had begun to experience development pressures similar to the kind of growth that had transformed other shoreline resort areas in the 1950s and 1960s. These early examples of conservation-based affordable housing are documented by Charles Scott Burkett in his 1990 Masters' degree paper, "Limited Development: Development with An Eye on Preservation."

According to Burkett, Vineyard residents wanted to prevent the loss of the rural, open character of the island. A number of concerned citizens formed Vineyard Open Land Foundation (VOLF) in 1970 to buy and sell land, or hold land for conservation purposes. Like Rural Land Foundation in Lincoln, Massachusetts, VOLF engaged early on in limited development efforts, crafting environmentally sensitive development and working in partnership to advance strategic pairing of conservation and development. The 1973 effort to protect Sweetened Water Farm in Edgartown resulted in permanent preservation of 32 acres of the 67-acre parcel with 15 home sites instead of the 110 which local zoning would have allowed. Five home sites were



Pilot Hill Farm conservation land



Sweetened Water Farm

set aside for sale at below-market prices for island residents of moderate income. The sale of the 15 lots covered the cost of acquiring and preserving the 32 acres in perpetuity, "proving the viability of limited development on the Vineyard".

That effort set up the larger project of Pilot Hill Farm in Tisbury. VOLF's final plans for the 182-acre tract proposed 27 building lots, including five that were designated as "Youth Lots" to be sold to young island residents of moderate income, instead of the 135 permitted through by-right zoning. An 80-acre greenbelt of pastures, meadows and brooks was protected with conservation easements while fixed building envelopes designated what areas could be built. Lot design protected the natural appearance of the shoreline by making sure that structures were not visible from offshore. It may have also reduced the ultimate market price but not enough to compromise the project.

VOLF continues to engage in planning and implementing environmentally sensitive limited developments, working alone, as a professional consultant, and in partnership, to advance strategic pairing of conservation and development.

Source: Charles Scott Burkett. "Chapter III: Pilot Hill Farm," Limited Development: Development with an Eye on Preservation. MIT paper, September 1990. For more information, contact Carol Magee, VOLF, at 508-693-3280 via e-mail at volf@gis.net. Photos courtesy of VOLF.

the lack of local flexibility and incentives limited their ability to do so. They pointed to the need for a density bonus or break, reduced or waived permit or impact fees, assistance with affordable mortgages, or allowance of attached or multi-family housing to make the numbers work for such combinations.

In other cases, regulatory challenges spurred states and local jurisdictions to embrace new approaches. Several of the Massachusetts developments circumvented local zoning restrictions under the state's Chapter 40B provisions (see sidebar on 40B, page 26, and States' Efforts, page 16). That process, meant to prevent "snob" zoning, sometimes opened public officials' eyes to change their regulations and allow such development. For example, West Tisbury, Massachusetts, changed its zoning code to allow cohousing once the Island Cohousing community showed how the development benefited the island and its needs. Denver adopted a 10 percent inclusionary zoning requirement modeled on Stapleton's neighborhood plan following its implementation. Inclusionary zoning could help promote conservation based affordable housing (see sidebar, Does Inclusionary Zoning Affect Conservation-Based Affordable Housing?, page 27).

Local governments frequently played more than a regulatory role. The town or city was sometimes the lead and frequently a partner in the effort, advancing both affordable housing and land conservation as community goals. Denver took an active role in the Stapleton development. Even in smaller and less complex projects such as Waylands' Greenway development and Harvard's Great Elms land deal, the town was engaged in the many facets of preserving land and ensuring the creation or maintenance of the affordable housing.

States can also foster creation of such projects by providing incentives, technical assistance, or funding. The Vermont Housing and Conservation Board (see sidebar, page 15) has been involved in more than 25 such dual goal projects since their founding in 1987. The Massachusetts Community Preservation Act (see sidebar on Promising Trends: States' Efforts) provides funding for historic preservation, land conservation, and affordable housing.

Chapter 40B: Massachusetts' Comprehensive Permit Process

Under Massachusetts state guidelines, ten percent of the housing in a municipality must be affordable. In towns not meeting this goal, developers can use a streamlined development approval process. Under Chapter 40B developers bypass local regulations and apply for a comprehensive permit from the Zoning Board of Appeals. The so-called Anti-Snob Zoning Act requires at least 20 to 25 percent of the units be income-restricted to families earning less than 80 percent of the median, and have rents or sale prices restricted to affordable levels. These restrictions must run at least 30 years for new construction. Most affordable units are built without any public funding, subsidized instead by the market-rate units.

For more information contact the Massachusetts Citizens' Housing and Planning Association at 617-742-0820 and view its online PDF fact sheet at http://www.chapa.org/40b_fact.html.

9 Design for the long term. Just as protecting natural resources, wildlife habitats, farms, and forests leaves a land legacy for future generations, the built environment should also be designed as the next great historic neighborhood. The affordable housing should be well built as well as low-cost. Housing for low- and moderate-income residents should neither be shabby nor second-rate but rather built to last.

Affordable housing advocates have discovered that high-quality, low-cost design can diffuse the stigma of and opposition to affordable housing. The small-scale of some of the profiled developments help diffuse opposition. More importantly, the profiled developments are integrated into the fabric of the place, reflective of the community, its local architectural style, and its identity. The builder of Island Cohousing discovered that he could provide high-quality design for all residents and keep costs low by standardizing the product for homes

at all income levels. Shingled cottages, built at Beacon Hill and Loomis Farm, echoed traditional New England design. The simple, two-story gabled homes at OPAL Commons and Bonnie Brae reflect the Pacific coast region's traditional Victorian farmhouse architecture. Gilman Housing Trust in Jay, Vermont built six cape-style starter homes, called "Northern Green Homes," to high standards of energy efficiency. And while Stapleton's mix of carriage homes and modern rowhouses do not evoke a particular Colorado image, they nonetheless are quality new-urbanist design and mix well with surrounding market-rate housing.

The affordable housing at many of the developments reflects the architect's creativity and is symbolic of community values. As noted in the 1989 guidebook, *Combining Affordable Housing with Land Conservation* (see sidebar on Resource, page 28) and in several of the housing examples, historically sensitive design can be applied to affordable housing while maintaining reasonable production costs.

Yet, some of the project organizers expressed a desire for better design. Upon reflection, the participants at Waylands felt the housing—both market rate and afford-

Does Inclusionary Zoning Affect Conservation-Based Affordable Housing?

About 100 communities nationwide have turned toward inclusionary zoning to create much needed affordable housing. Inclusionary zoning is a technique used by local governments that requires developers to set aside a certain amount of housing within a larger residential project for lower-cost housing. When properly designed and enforced, inclusionary zoning can be an effective tool to ensure affordable homes and apartments. It might also be a tool to couple land conservation and affordable homes.

Conservation based affordable housing relies on a commitment to both housing and to protection of the natural resources and their subsequent coupling. Thus, inclusionary zoning might lead to more conservation-based affordable housing if jurisdictions also allow conservation or open space development or have an active land conservation program and focus.

In Massachusetts, many of the conservation based affordable housing developments did occur through the "anti-snob zoning" Chapter 40B process (see sidebar on 40B), which requires that ten percent of the housing in a municipality is affordable. And Massachusetts also has a strong

and long-time commitment and funding programs for land conservation (see sidebar on Massachusetts). The combination has spawned a number of conservation based affordable housing developments in Massachusetts. But other places with both elements have not. Montgomery County, Maryland, for example, has 20-year old growth management and farmland preservation and a 30-year old inclusionary zoning process. While the county allows conservation development, most projects are high-end developments, cashing in on the value of protected open space.

A more thorough look at this connection is needed, including an understanding of the location of affordable housing and conservation development and how other practices such as transfer of development rights or voluntary agricultural districts might factor into the location of conservation-based affordable housing. Many of these projects demonstrate that it is possible to create attractive, moderately priced housing despite scarce land, high land costs, and rising property values, in many communities, without any public subsidy. Nonetheless, inclusionary zoning seems to be one of the many tools that may be used to bring these projects to fruition.

See also: Levine, Susannah. *Creating Balanced Communities: Lessons in Affordability from Five Affluent Boston Suburbs*. Chicago: Business and Professional People for the Public Interest, February 2005.

able—was too large and too plain in design, although the project overall is viewed as both a housing and conservation success. Affordable housing at some other developments seems similarly nondescript.

Finally, part of the legacy of design is the location of the structures and the connections between the housing and other parts of the community. This was done with varying degrees of success. Wellington in Colorado combined conservation-based affordable housing with smart growth, allowing residents to afford housing that was accessible by foot or by bus to local jobs and services. Children in the Hancock, Vermont, houses can walk to school and eventually to the town green and ball fields.

10 Complexity fosters creativity. More than one of the participants in the dual goal projects confessed that “It ain’t easy,” to do them. Some of them laughed as they tried to describe the complex negotiations and multiple parties involved in the deals. But the very complexity involved in realizing multiple objec-

Resource: Guidebook on *Combining Affordable Housing with Land Conservation*

Drawn from their experience with the Loomis Farm conservation development, Dodson Associates and the Franklin Land Trust co-authored a guidebook on *Combining Affordable Housing with Land Conservation*. Designed to foster more sustainable communities that include both development of affordable housing and the conservation of natural resources, it established design and site planning principles, criteria for site analysis, and a formula for objective assessment of financial resources. It also suggests a number of ways to provide high-quality, low-cost architectural design, ideas for utilities and infrastructure, considerations for protecting visual quality, and guidelines for stewardship of open space.

See Dodson Associates and Franklin Land Trust. *Combining Affordable Housing with Land Conservation*. Ashfield, MA: Prepared for Center for Rural Massachusetts, May 1989.

tives often stimulated creativity, and sometimes made the project feasible through public and political buy-in.

Citizens of Wayland, Massachusetts, came out in droves to craft a project that addressed senior and market-rate housing, municipal uses, historic preservation, and recreational goals in addition to providing affordable housing and protecting 87 of the site’s 166 acres. The potential residents of Island Cohousing deliberately decided to include low- and moderate-income neighbors in their neighborhood by shifting a larger burden of the costs to the larger houses and minimizing customization. In addition, they challenged the local zoning, demonstrating that their process would result in a better community and ecological outcomes.

The Treehouse Community at White Brook Farm in Easthampton, Massachusetts (see sidebar, page 20), proposes to support foster families and include, as well, housing for seniors and market-rate homes. Wellington, Colorado, waived fees and provided incentives to promote redevelopment of a potential community liability: an abandoned and contaminated mine. In its place, rose an award-winning, affordable new-urbanist neighborhood, with transit and pedestrian connections to the town, and preserved open space with blue-spruce stands on site, linked to the thousands of acres in the White River National Forest.

Overall, the case studies demonstrate the creativity needed for such combinations and also underscore the possibilities.

11 Stewardship = Handle with care. Both the affordable housing and open space need to be protected and managed properly to ensure their permanent status in the community, maximizing the benefits of each while minimizing potential conflicts. Therefore, contracts, land deals, and long-term organized oversight need to be structured and managed carefully. A failure to do so can result in loss of or a breach in the land’s protection or the affordable housing.

In a few cases, protection of the land or affordable housing was not entirely permanent. Some projects lost

PROMISING TREND:

Homan Square

Homan Square is a 55-acre redevelopment project of the former Sears, Roebuck, and Co. world headquarters in the North Lawndale neighborhood of Chicago. Owned by the company since 1904, Sears, Roebuck wanted to redevelop the property in such a way that would satisfy both shareholders and stakeholders. Sears asked the Shaw Company to craft a development that would serve as a catalyst to return middle-class families and economic stability to the declining neighborhood. Begun in 1994, Homan Square included mixed-use development, including commercial space that provides jobs, job training, and community services, 310 housing units for a variety of middle and low-income families, and a community

center. Half of the apartments and 40 percent of the houses are supported by some form of public assistance. At the same time, despite the highly urban setting, Shaw dedicated one-third of the acreage as common open space, restoring native plants, green space, gardens, and parks to the neighborhood, and tied the site to an existing urban greenway formed by the Burnham plan. The private development helped create an incentive for homeownership in the area.

For more information, contact Mark Angelini of The Shaw Company at 630-990-8375 or mangelini@shaw-co.com or visit www.homansquare.org.

affordable units: Greenways in Waylands, Massachusetts, was to include 15 affordable senior units (in addition to the four single-family affordable dwellings) but the restrictions did not provide adequate protection and the units instead reverted to market rate. An early conservation-based housing project, the 182-acre Pilot Hill Farm in Tisbury, Massachusetts (see Martha's Vineyard sidebar, page 30), designated five of 27 building lots as "Youth Lots" to be sold to young island residents of moderate income. The lots were sold with a homestead mortgage, allowing the houses to revert to market rate if the original purchaser lived on the property for ten years. This resulted in the loss of these affordable units and a windfall for the original purchaser.

Instead, the affordable housing needs to be protected for the long term. Indeed, according to James M. Libby, Jr., the Vermont Housing and Conservation Board's general counsel, in the case of VHCB, the relationship with the conservation movement helped to introduce the concept of stewardship to the affordable housing community. Deed restrictions and resale provisions such as an equity and appreciation formula, with a permanent management structure, are conventional tools to protect affordable housing but other innovative approaches could be used to encourage permanent affordable housing.

Similar permanent protection is needed for the open space, with deed restrictions that preserve the character and ecology of the site while reassuring adjacent landowners and community members that the property will remain open space. An organization such as a conservation land trust, a municipal agency, or a homeowners' association needs to hold and monitor the easement and ensure the open space is being cared for in perpetuity. The 1989 Guidebook on Combining Land Conservation with Affordable Housing (see Resource sidebar) recommends a number of deed restrictions to help ensure management of the open space. The recommendations include preparing a forest management plan, ensuring continued farming of agricultural lands through agricultural use guarantees and right-to-farm notices, locating building envelope locations, and identifying no-build areas.

All of these projects had specific conservation goals and all ensured protection of the site, but used various tools. Ongoing maintenance and monitoring is an essential part of the long-term stewardship. Some of the projects have maintained farmland for more than 15 or 20 years. Others are far newer and need the time to determine the conservation outcome. Additional research would help assess the nature and success of ongoing conservation stewardship to determine the degree to which these proj-

ects result in good long-term outcomes for the land and its natural resources.

12 The roots are many. The motivations are mixed. Conservation-based affordable housing stems from a wide variety of motivations. Some of the project organizers expressed a moral obligation or a principled commitment to combine the two. Organizers of Loomis Farm, the OPAL projects, and the Treehouse community at White Brook Farm expressed such sentiments. The small towns of Lincoln, Tisbury, and Harvard, Massachusetts, as well as Denver’s large master-planned Stapleton development reflected community needs for both open space and affordable dwellings.

Gallisteo Basin Preserve, New Mexico (see sidebar, page 32), seems to also express this recognition.

Many of the combined projects grew out of the desire to protect both the local character and sense of place, as expressed in both the natural and human landscapes. Rapid and out-of-scale development simultaneously heightens awareness of the need to protect natural resources and natural areas while pushing land prices beyond the reach of long-time residents. Those issues are seen in many communities including the Florida Keys; Martha’s Vineyard and Lincoln, Massachusetts; Block Island, Rhode Island; and Breckenridge, Colorado. Most of these places have an economy based on natural

Martha’s Vineyard

Martha’s Vineyard is known for its maritime heritage and beautiful coastal plains, its bogs and its beaches. It also features extraordinary home values, which have escalated beyond the reach of many long-time residents and newcomers alike. The island’s rich conservation tradition has resulted in 34 percent of its land permanently protected but has also made the island all the more desirable. The beautiful landscape has long attracted wealthy homebuyers. The natural beauty and the development pressures have triggered the desire to protect this unique place as escalating home prices and property taxes have shut many long-time residents or their offspring out of the market.

Philippe Jordi, former executive director of the Dukes County Regional Housing Authority and current executive director of the Island Housing Trust, cited the common awareness among both conservation and housing groups on the island of the need to retain the community and the “story” of the place. In fact, the people at risk of being displaced represent a significant part of the island’s heritage, or in Jordi’s words, “the island’s DNA.”

Nonetheless, Martha’s Vineyard has had several conservation-based affordable housing develop-

ments—from the more recent Sepiessa and Island Cohousing, to projects from 30 years past, Sweetened Water and Pilot Hill Farm. The legacy of the early efforts may be the current willingness to proactively engage other organizations in the marriage of housing and conservation. There has been growing regulatory flexibility for limited development projects. The conservation of these properties also caused adjacent property owners to voluntarily place easements on their land.

Several activists, when asked why such partnership happens on the Vineyard, surmise that it is based on the desire to retain long-time community residents who reflect the place’s heritage, and yet can no longer afford to live on the island. Finding solutions to housing those native Vineyard residents also helps the land conservation movement since such residents often have frequent contact with the land and are instilled with a conservation ethic. In addition, while the Vineyard has the other tools of Massachusetts’ towns, it additionally has the Martha’s Vineyard Commission, a legislatively created body that has very powerful regulatory and planning powers, including the power to trump 40B requirements. (See sidebar on Chapter 40B).

resources and associated tourism, recreation, and seasonal residency. They also face a rapidly growing job market or increasing population that was cited as a factor in making open space preservation a social, environmental, and economic need. But communities also faced the loss of their teachers, police officers, local government employees, and long-time residents or their children, who could no longer afford to live there. Such people frequently represent the traditional values of the community or serve as long-time stewards of the place.

In no case was there an explicit regulatory requirement to combine affordable housing with land conservation. Inclusionary zoning or open space requirements (see

sidebar) or conservation subdivision zoning could potentially foster more examples of developments that link low- and moderate-income housing with land conservation. The section on regulations explores the effect of regulations on conservation-based affordable housing. But communities used a variety of tools to make these projects come to life: partnerships, donations of land and housing, bargain sales, use of public land and dollars, reduced permit fees and use of incentives.

Finally, some projects were born out of a need to gain political support. The combination of the two areas sometimes gave the project “legs”, making a challenging effort politically feasible. For example, Sepiessa was pri-

The practice of pairing conservation and affordable housing continues to evolve on Martha’s Vineyard. The island groups are shifting toward working together on the front-end, avoiding awkward positions by making joint initial determinations on how to use a property to achieve both housing and conservation objectives. Such a strategy helps minimize conflict or perceived competing interests. It also allows a housing group to lead on the development, an area in which they have experience, while keeping the conservation group focused on protecting the land. This means that housing and conservation groups stand shoulder-to-shoulder on the issues, providing a broader base of support for projects.

In part, this is due to the complexity of land use on Martha’s Vineyard. With the limited land on the island, most desirable land is built on so more and more properties that have possible conservation value also have existing structures on them. The Martha’s Vineyard Land Bank is addressing this by purchasing property jointly with Island Housing Trust, a community land trust. The landowner has

subdivided the land then sold the property separately to the IHT and the MVLB. In other cases the MVLB has simultaneously purchased conservation restrictions for some of the land purchased by the IHT. That approach provides the IHT with the necessary land area for zoning and health codes, but ensures that a certain portion of the land is permanently protected, resulting in a lower land purchase price for the IHT and an increase in the housing affordability. The IHT model has been to purchase land, build and sell the improvements (house), and ground lease the property to the owners of the improvements.

The mindset linking conservation and affordable housing becomes ever more ingrained on the island. John Abrams, the developer of Sepiessa Point and Island Cohousing, is convinced of the need for more environmentally sensitive affordable housing in concert with the island’s conservation tradition. And, groups like the Island Housing Trust foster such possibilities by promoting it in their guidebook for homeowners interested in protecting affordable housing within the community.

Source: Interviews of Philippe Jordi, Island Housing Trust; David Vigneault, Dukes County Regional Housing Authority; Matt Pelikan, The Nature Conservancy; and John Abrams, South Mountain Company.

PROMISING TREND:

Village at Galisteo Basin Preserve

The Village at Galisteo Basin Preserve is a proposed master-planned conservation community 15 miles south of Santa Fe, New Mexico's city center. When completed, the property will include a mixed-use village center tightly clustered on 290 acres accompanied by more than 11,800 acres of permanently protected conservation land. The Basin was at risk of being developed into hundreds of 12- to 40-acre ranchettes. Instead, the project, led by the nonprofit Commonweal Conservancy, will leverage the sale of 965 lots for both workforce and market-rate housing and commercial development, to underwrite the acquisition and stewardship of the 14,930-acre Galisteo Basin Preserve property, which includes both public and private conservation lands. The ranch adjoins 4,000 acres of public land owned by Santa Fe County, the state of New Mexico and the Bureau of Land Management.



Galisteo Basin Preserve and surrounding area

The Village residential units will include single-family detached homes, apartments, loft-style live/work units, and cohousing units. In addition, the Village is designed to include more than 290 households that earn 50 to 120 percent of the Area Median Income (AMI), meeting or perhaps exceeding Santa Fe's inclusive housing guidelines.

The Village will include around 150,000 square feet of commercial development and civic-serving facilities including an environmental curriculum-oriented char-

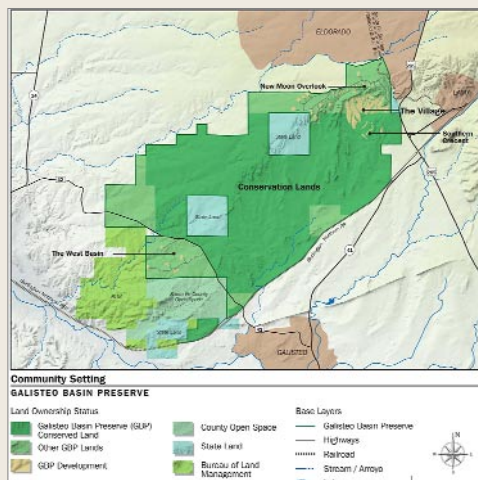
ter high school, a commuter train station, post office, firehouse, community center, library, chapel, amphitheater, retail, and a mix of residential units. The retail includes a café and restaurant, bookstore, neighborhood market, and artists' studios. A proposed equestrian facility will be capa-

ble of boarding 100 horses. The city of Santa Fe proposed a new commuter rail system for the larger metropolitan area. Plans are to extend this line to the Galisteo Basin Preserve village center.

The Commonweal Conservancy submitted the Preserve's master plan to Santa Fe County in January 2006. The land's conservation and development is guided by a rigorous analysis of the land's hydrologic, topographical, and ecological values and constraints. Green building guidelines and design standards will ensure and encourage structures that are safe, healthy, and energy efficient, as well as reflective of the region's beauty. A nonprofit conservation stewardship organization will oversee

care and management of the open space while a community land trust will be established to work with existing affordable housing organizations and the Village's low- and moderate-income residents.

For more information, contact Ted Harrison of Commonweal Conservancy at 505-982-0071 x.13 or on the Web at www.commonwealconservancy.com.



Galisteo Basin Preserve existing conditions

Source: Interview of Ted Harrison and the Village's Master Plan, available online at www.galisteobasin-preserve.com. Photos courtesy of Commonweal Conservancy.

marily a conservation project (and a major one by Vineyard standards), to which an affordable housing element was added, which helped build support for the land conservation. The Wayland Greenways project became a reality due to the wide support for its multiple conservation, housing, and municipal outcomes. The Vermont Housing and Conservation Board has found that combining both interests broadens community support and can make projects politically feasible.

There's been considerable action recently on the role of architectural design in affordable housing and in integrating green building into affordable housing but little on how to link site design that provides open space and protection of critical natural systems with affordable housing. This study is hopefully a catalyst for more action in this area.

13 The Northeast is a leader. The conservation development movement started in the Northeast (the first projects were in Lincoln, Massachusetts) and have slowly taken hold elsewhere. Conservation-based affordable housing seems to follow a similar pattern. In 1972, Codman Farm in Lincoln, Massachusetts became the first documented conservation-based affordable housing project.

Some credit for this trend must go to the rich legacy of conservation in the Northeast—with roots dating to the late 1800s. At that time, the region saw the start of the first land trusts and, according to J.A. Gustanski's research, the Northeast still has the highest density of land trusts in the country. The New England mindset of participatory democracy and protecting "the commons" may be at least partially responsible for a shared concern for the land and its people. This regional perception seems to influence the dual mission projects. (See sidebars, Promising Trends: Why Vermont and Massachusetts, page 36; Martha's Vineyard, page 30; and Lincoln, Massachusetts, page 19.) More support for this trend comes from the work of Randall Arendt, whose books, *Rural by Design*, *Growing Greener*, and *Conservation Design for Subdivisions*, are the oft-cited guides to conservation development. The bulk of the case studies are drawn from the Northeast and Arendt has actively advanced

PROMISING TREND:

City of Minnetonka Conservation Development

Rising land prices coupled with unique natural features or limited land for development is one combination that increases the need for conservation-based affordable housing. Minnetonka, Minnesota provides one such example. Home to the headwaters of the Minnehaha Creek as well as numerous wetlands and forested areas, the city made a commitment in the 1960s to protect natural areas as parkland. More recently, the city adopted conservation development techniques as a means to protect environmentally sensitive property. An on-staff environmental coordinator negotiates to ensure the assessment and protection of natural resources. At the same time, the city is committed to affordable housing, requiring 10 to 20 percent of multifamily development projects to be affordable, but also negotiating on a case-by-case basis for single-family projects. Underway is one such project: Meadow Woods. The redevelopment of this golf course includes 17 units on 21 acres. Amid the million-dollar single-family homes is one affordable duplex (two units). Half of the site is restored wetlands.

Another project, Portico, features six 950-square-foot accessory dwelling units adjacent to single-family homes plus six two-family homes. While not formally designated as affordable, these units might offer housing for a mix of income levels. Fifty-seven percent of the 24-acre property is set aside as protected open space with wetlands, hardwood forest, and alternative stormwater management areas.

For more information, contact Geoff Olson, Planning Director, City of Minnetonka, at golson@eminnetonka.com.

the concept of conservation development through his work with the Natural Lands Trust in Pennsylvania and throughout the Northeast.

Why Vermont and Massachusetts?

This study documents 4 development projects in Vermont and another 7 in Massachusetts, representing 11 of the profiled projects. The Vermont Housing and Conservation Board (VHCB) tallies a total of 25 “dual mission” projects, four of which were included here. The author also discovered other Massachusetts projects that were promising but were not included due to their similarity to existing cases.

Why is there such a prevalence of projects in Massachusetts and Vermont? Both states support both conservation and affordable housing through funding, legislation, policies, and programs and have the local groups to carry through. (See sidebars on Lincoln, Massachusetts; Martha’s Vineyard; Promising Trends: States’ Efforts; Chapter 40B; and the Vermont Housing and Conservation Board.)

Vermont and Massachusetts both have a long tradition of conservation, dating from the late 1800s. They each support land protection with conservation bonds (both states), general fund appropriations (Vt.), environmental license plate sales (Mass.), real estate transfer taxes (Vt.), planning support (Mass.), and local land banks (Mass.). They also allow land use tools, such as cluster subdivisions, that are consistent with affordable housing as well as land conservation.

The support for housing is strong too: Massachusetts gave rise to the first community land trust in the 1960s and has set a goal for communities to

provide 10 percent of housing as affordable. The state’s 40B provisions can challenge municipalities that do not meet the goal. Massachusetts’s Community Preservation Act provides funding for both affordable housing and land conservation while Vermont has the only state-funded agency combining both missions.

The states and local communities support the marriage of land conservation with affordable housing. But what “brings them to the altar” there at a higher rate than anywhere else in the country?

Perhaps it is a matter of imitation. John Abrams of Martha’s Vineyard’s South Mountain Company says the power of good models result in a “positive infection.” New England also takes pride in its unique identity and strong architectural character. A number of those interviewed in the course of this research spoke of an underlying culture that spawns such projects.

The New England town meeting epitomizes community activism and concern for neighbors. Places like Lincoln, Massachusetts have a “purposeful public spirit”, a culture of preservation, and a commitment to look out for fellow citizens that naturally translates to such efforts. Lincoln regularly features townwide conferences on the land use future and spends time educating townspeople on land use to raise issues ahead of time. (See also sidebars on Lincoln, page 19, and Martha’s Vineyard, page 30).

Sources: Interviews of Pam Boyd, John Abrams, Phil Jordi, Bob Lemire, Peter Flinker.; Open Space Action, 1968-69.

The Northeast has also deliberately connected affordable housing and land conservation in several frameworks—through the Vermont Housing and Conservation Board; through Massachusetts’ Community Preservation Act; through Block Island’s partnerships—that are rarely seen in other regions.

The location of conservation-based affordable housing may also be driven by growth dynamics. Polly Nichols and Pam Boyd of the Vermont Housing and Conservation Board, while speaking before a 2004 conference on Hawaii’s affordable housing dilemma, talked about the creation of VHCB. They cited growth pressures that

evolved from tourism. Tourists, who demanded an unspoiled rural landscape for recreation and relaxation, visited and decided to purchase a second home or to stay, using their purchasing power to buy up local housing. This practice limited the ability of local working families to afford housing, land, and the rising property taxes. At the same time, new development gobbled up farmland and was often poorly conceived and designed. Land conservation and affordable housing were linked.

14 Choose the place and case carefully. The Vermont Housing and Conservation Board, which has successfully shepherded at least 25 of these projects to fruition, notes that integrating conservation and affordable housing requires careful thought and a lot of hard work. When considered together each aspect can enhance the other. In VHCB's view, the most successful dual goal projects have been near or in a village or town so that residents have convenient access to services as well as access to conservation areas such as nearby farm and forest lands, swimming, skiing, town parks, trail heads, and so forth, or realize benefits such as protected habitat and species, clean air and water, and healthy natural systems.

However, conservation-based affordable housing is not appropriate in every place or case. Jeff Milder points out, in his thesis research on conservation and limited development projects, that in the case of conservation it often matters more which portion of a site is developed than how much of the site is developed.

When considering a limited development, the conservation community needs to evaluate the extent to which a project contributes to landscape fragmentation or connectivity and what that means to the conservation objective at hand. Much of that depends on the desired conservation goal or target. For example, Milder's research found that certain types of species and ecosystems were more sensitive to fragmentation and rarely compatible with development. Farmland, too, can be degraded by fragmentation. In other cases, some species, even rare ones, can do just fine in an integrated project. The severity of these impacts depends on the scale and intensity of the disturbance relative to the scale of the conserva-

tion target's space needs. Milder found that conservation development projects can help:

- a) Protect small but important conservation resources on the landscape such as riparian corridors, vernal pools, and their surrounding uplands, or small stands of old-growth forest. In this case, the project must retain the connection to the larger landscape necessary to protect the on-site resource.
- b) Function as buffers to large nature reserves or as low-intensity use zones in a regional mosaic of different land use types. In this way, conservation developments can expand the functional size of the core reserve while protecting them from influences of higher-intensity development elsewhere in the landscape.
- c) Provide core nature reserves in their own right.

The profiled projects showed fairly equal distribution in their stated conservation goals among four primary areas: farmland; wetlands, waterways, coastal zones, and riparian corridors; plant and animal habitat; or forest and woodlands. Other goals included scenic/aesthetic qualities, community gardens or parks, or unique natural features. Most projects had more than one stated conservation goal.

Groups undertaking these projects need to carefully consider the conservation goals and evaluate the possible impact the affordable housing and development might have. In some cases, it may be better to approach these projects using a community-wide strategy, integrating affordable housing in village settings while simultaneously meeting community conservation objectives on a separate site. This might benefit low- and moderate-income residents as well as the long-term protection of natural resources, working lands, and other conservation landscapes. But conservation-based affordable housing can have its place. Integrating on one site seems to be most likely in small towns or rural settings, especially to create an "edge"—with housing adjacent to existing development and conservation land buffering development from undeveloped natural resources, natural systems, or working lands. However, a military base closing or brownfield redevelopment may provide an

urban area with the opportunity to redraw the landscape, restoring natural systems and providing conserved lands (or connecting them) along with new housing or other development.

To benefit residents, the best location for the housing is adjacent to existing services, jobs, and transportation, in a smart growth setting. Some projects achieved this better than others—locating in town, adjacent to a school, shopping, commercial areas, or community park—in contrast to other projects where the housing was at scattered sites or clustered, but in an isolated location. However, some dispersed, scattered-site affordable housing might be appropriate such as for housing farm or forest workers or to minimize the overall impact on the conservation targets. In the end, community-based discussions need to continue on the most appropriate sites for affordable housing, to best provide for the people, and to ensure protection of the conservation goals.

The projects underscore the benefit of assessing conservation and development within the community—by undertaking strategic planning in each area and ensuring that land conservation and affordable housing are both intentional and deliberate and evaluating how the pairing may effect the counterpart.

Next Steps

THERE IS STRONG INTEREST and a need for land conservation and affordable housing. The public desires land conservation, as witnessed by the 76 percent success rate for land conservation ballot measures from 1996-2005. Likewise, 62 percent of Americans have deep concerns about whether firefighters, teachers, and others in their communities can afford housing, according to a recent National Association of Realtors study. Seventy-one percent believe government should put affordable housing on its agenda. Yet, data from the National Low Income Housing Coalition shows that low-income workers are priced out of housing rental markets across the country. The Coalition reports that in 2005 nearly 95 million people, 35 percent of U.S. households, had some type of housing problem.

In many cases conservation and housing will be pursued separately but as this study demonstrates, there are strong possibilities for a more strategic and integrated approach toward the two areas. Advancing conservation-based affordable housing will require creative approaches and partnerships, as demonstrated in the projects profiled here. Much of the field depends on good practices to promote both affordable housing and conservation development. Communities can benefit from greater awareness among developers, conservation professionals, and affordable housing advocates of the potential for conservation-based affordable housing at a variety of scales and in a variety of landscapes.

Communities would be well served by starting with a conservation plan: identifying the natural resources, wetlands and waterways, working farms and forests, and wildlife habitat, and determining priorities for protection. By understanding what natural assets it has and what is needed to protect them, a community can identify suitable locations for development, including limited conservation development and the integration of affordable housing.

All sectors would benefit from a defined set of principles of conservation development, to clarify the underpinnings that must be part of such projects. In addition, more can be done to ease the process of conservation-based affordable housing, allowing and enabling creativity to thrive.

Among the land trusts and the conservation community, along with private conservation developers and the public sector, there is a need to convene a discussion on conservation development in general, with special attention devoted to economic and social issues in defined regions, and specific focus on affordable housing as a community need. More advocates within the conservation community need to be made aware of the possibility of consciously linking conservation with affordable housing. Training and outreach at a variety of venues, such as including conservation-based affordable housing examples in courses, conferences, and publications that reach the land trust and affordable housing communities, can build this awareness.

The public sector also needs to know more about conservation development in general and its marriage with affordable housing. Additionally, in the view of VHCB, the involvement of community-based organizations can help restore local control over land use decisions affecting housing and conservation. The possibility for expanding conservation-based affordable housing requires creativity and flexibility from local officials, a desire for making such projects work and support for them with conservation development ordinances, funding, and policies that support affordable housing.

Public sector opposition or barriers can prevent conservation developments from including affordable units or ensuring their permanence. Other practices such as density breaks or bonuses, allowance of attached or multi-family units, breaks in permit or impact fees, or assistance on mortgages, could help foster the connection. Such changes could help make the combination financially feasible.

As for the private sector, this study has touched on integrating land conservation and affordable housing into large master-planned communities as well as mid-size and smaller-scale private conservation developments that incorporate a fewer units of affordable or moderate-income housing. Some high-end conservation ranches provide affordable dwellings for a ranch manager or land steward. Other projects provide a few units of moderately priced attached housing. Such units provide some limited options to accommodate a mix of residents and help address community housing demand.

The Conservation Fund actively seeks more information about other examples of conservation-based affordable housing in order to communicate the exciting growth of this new, productive collaboration of protecting nature and providing for basic human needs. In an effort to share these rich examples with conservation, development, housing, and public sector professionals, The Conservation Funds invites individuals to register projects on its Web site (www.conservationfund.org) or to join the conservation development list serve (www.great-lakes.net/lists/consdevelop/consdevelop.info) and discuss these issues. The Fund recognizes the need to pro-

mote and share this information and build the capacity for groups to undertake such initiatives through a better understanding of the challenges and opportunities realized from such integrated practices.

The Conservation Fund proposes to convene a summit on conservation-based affordable housing to pull together public, private, and nonprofit professional together to recognize new possibilities and benefits from the integration of conservation and affordable housing. Such a summit could include discussion on determining conservation goals, ensuring the stewardships of housing and conservation, and defining the underlying project principles.

This study cites a number of promising trends. With some gentle nudging and greater awareness, the potential exists to increase conservation-based affordable housing and add to the effective approaches that can promote a more sustainable society.

Conclusion

THESE PROJECTS inspire creativity. Projects like Stapleton, Opal Commons, Wellington, and White Brook, devised unusual and sometimes complex but inspiring solutions to common community challenges. They also require a deliberate and focused approach to make these efforts real. The poet Kahlil Gibran challenged us to “Rest in reason. Move in passion.” These projects express the realization of vision and commitment to community ideals of protecting land and providing for people. They demonstrate the interconnectedness of the natural and human systems and the complex solutions that create a win-win for all. Such distinctive combinations benefit communities by providing needed affordable housing and helping to protect the environment by preserving the landscape legacy. More than anything these examples demonstrate what can be achieved through will, commitment, and leadership.