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#### FRANKLIN TOWNSHIP HOUSING ALLOCATION STUDY AND CONFORMANCE REPORT

Prepared for the

FRANKLIN TOWNSHIP MAYOR AND COUNCIL

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by

JOHN T. CHADWICK, P.P. E. EUGENE OROSS ASSOCIATES

PROFESSIONAL PLANNING,

ENVIRONMENTAL CONSULANTS

and

LANDSCAPE ARCHITECTS



This report presents a general description of Franklin Township, Somerset County and traces in a brief manner the land use policies and regulations of the community. Further, the report sets forth the methodology and calculation of the Township's fair share housing obligation of present and prospective low and moderate income households. Finally, the report sets forth an analysis of the existing zoning policy of the community in context with the Mt. Laurel II fair share housing allocation.

The calculation of the Township's fair share housing obligation relies to some extent upon research and computation prepared by others. Specifically, this report has utilized statistical data prepared for the Court of the Honorable Judge Serpentelli in the matter of Urban League of Greater New Brunswick vs. Carteret et als. Said report was prepared by Carla L. Lerman. Additional sources of data include the New Jersey Department of Labor and Industry, U.S. Census of Population and Housing, U.S. Department of Housing and Urban Development (Newark Area Office), New Jersey Department of Community Affairs and Franklin Township Planning Board records and reports.

#### FRANKLIN TOWNSHIP-PROFILE

Franklin Township is located in Somerset County. The New Jersey State Development Guide Plan shows that the northerly portion of the Township, as well as a narrow area coinciding with the Route 27 right-of-way are located within a designated growth area. All other land areas of the Township are designated as limited growth area in the state SDGP.

The Township has continuously monitored and studied development patterns within the Township as well as within its region. The original master plan of the Township was adopted in 1959. The most recent master plan was adopted in 1982.

The current zoning ordinance is under review and major revision. Notwithstanding, all statements of fact and conclusions set forth in this report are based upon the ordinance currently in effect. If and when ordinance revision occurs, findings and conclusions of this report shall be reviewed and adjusted as warranted.

The Township of Franklin has a land mass of approximately 47 square miles. This community extends from the Raritan River south to the Borough of Princeton.

Route 287 crosses the most northerly area of the community in the vicinity of South Bound Brook. This area of the Township has featured considerable economic development over the past several decades.

No other major highways exist within the municipality. The only other state highway in the Township is Route 27 which generally describes the easterly boundary of the municipality and generally coincides with the boundary line of Middlesex and Somerset counties. This highway is a four-lane roadway along the Franklin-City of New Brunswick boundary. The roadway south of New Brunswick is a two-lane highway which passes through the villages of Franklin Park, Kendall Park and Kingston.

The Township's land mass is bounded on the north and westerly sides by rivers. The Raritan River generally defines the northerly boundary of the Township. The Delaware and Raritan Canal-Millstone River, a designated national historic site, define the westerly and southerly boundaries of Franklin Township.

The Six-Mile Run reservoir (land acquired by the state of New Jersey, but not yet constructed) is located at the approximate center of the Township when measured on a north-south access. This reservoir facility extends from Route 27 west to the Delaware and Raritan Canal.

The Township's 1980 population is estimated by the US Census at 33,172 persons. The latest population projection prepared by the Somerset County Planning Board (preliminary) for the year 1990 is 45,724 persons. "The 1990 population projection (Somerset County) equates to total new housing production of 3800 to 4400 new dwelling units depending on family size."

Currently, two major developments known as the Bonner PUD and the Franklin Fields planned unit development have approvals (preliminary and various sections final). The total approved housing development within just these two developments exceeds the projected housing development within the Township over the 10 year projection period as estimated by Somerset County.

The Township's land use and zoning policies have been subject to intense review and debate, as well as review and decision by courts over the past 12 to 15 years. During this course of time, the Township has continously examined changing conditions and adjusted land development policy accordingly.

The Township of Franklin in the early 1970's adopted a zoning ordinance providing for planned development in various zone districts of the community. This development option specified a requirement to provide housing for low and moderate income families. This original provision established in 1973 remains in the current zoning ordinance of the Township (Section 1212).

The Township has further amended its zoning code to specifically address the requirements of the Mt. Laurel II Supreme Court decision relevant to procedures for maintenance of housing affordable to low and moderate income households over time as well as other issues and considerations flowing from the aforecited decision. This ordinance is known as Ordinance No. 1158 (zoning ordinance amendment).

In brief, the Township of Franklin land use and zoning policy has long encouraged and provided for development of large,

comprehensively planned development areas designed to produce a variety of housing and with the specific requirement that a portion of such housing be affordable to low and moderate income households. Clearly, the Township's policies have been progressive and comprehensive.

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#### FRANKLIN TOWNSHIP FAIR SHARE HOUSING OBLIGATION

This section of the report sets forth a calculation of the fair share housing obligation of Franklin Township. The terms such as "region, low income household, moderate income household, affordable housing, etc.," are as described at length in the report entitled "Fair Share-Urban League of Greater New Brunswick vs. Carteret et als.," prepared by Carla Lerman (April 1984). This report is on file with the Honorable Judge Serpentelli.

In context with the foregoing, the dual region concept and income levels determinant of housing affordability are accepted without qualification by this consultant.

The specific methodology of fair share housing calculation and ultimate municipal obligation is described hereinafter as well as the extent departure from the aforecited report exist.

Indigenous Housing Need

Indigenous housing need includes dwelling units occupied within Franklin Township lacking complete plumbing, having inadequate heating facilities and overcrowded units. Utilizing the Lerman report data filed with the Court, a total of 344 dwelling units are classified as such. The breakdown of units constituting this total is as follows:

1. Overcrowded units: 265.

2. Lacking plumbing: 60

3. Lacking adequate heating: 95.

The above three components of substandard housing yield a total of 420 units. Based upon studies by others (Tri-State Regional Planning Commission, <u>people</u>, <u>dwellings</u>, <u>neighborhoods-1978</u>) 82 percent of housing units exhibiting physical deficiencies were occupied by low and moderate income households. Multiplication of the figure 420 by the factor of 82 percent yields 344 units.

The indigenous housing need in the opinion of this consultant is not a component of the fair share housing obligation to be addressed totally through zoning plan. Specifically, the number of units that are physically deficient (lacking adequate plumbing and adequate heating) should be addressed by the Code Enforcement and Housing Rehabilitation Programs developed through the Urban County Block Grant Program. Franklin Township is a member of Somerset County's Block Grant Program.

The number of overcrowded units (units having an occupancy of more than 1.01 persons per room) has been examined in some detail utilizing detailed census publication (STF files). Based upon this examination, it is concluded that a maximum of 50 percent of the total number of overcrowded units are occupied by low and moderate income households. This conclusion is based upon a preliminary printout of overcrowded housing by tenure and income.

In context with the foregoing, the indigenous housing obligation to be addressed by zoning policies pursuant to Mt. Laurel II Supreme Court Decision is 133 units.

#### Reallocated Present Need

The reallocated present need of Franklin Township is generated from an 11-county region as described within the Lerman report cited herein. The Lerman report computed that the total reallocated existing housing need for the 11-county region was 35,014 units. That total number of units is based upon the U.S. Census of Housing Publication. The total is not verifiable for table II of the Lerman report (4/84).

This consultant has investigated numerous sources to determine whether or not this figure is appropriate. It is the conclusion of this consultant that the dynamics of the ll-county region has resulted in significant improvement of the physical condition of housing within the ll-county region over the past four year period. This opinion is based upon the following:

 93 percent of the region's reallocate need is generated by 12 municipalities. From 1980 through December 1982, 13,379 units were demolished within these same 12 communities.

2. Hudson County contributes 31 percent of the total housing pool. There exists a clear and undeniable revitalization process underway within the county. For instance, based upon investigation of the housing rehabilitation progress within Jersey City, in excess of 4600 units have been rehabilitated for low and moderate income households from May of 1980 through May of 1983. In addition, all communities of Hudson County are recipitents of Community Development Block Grant entitlement or Urban

County Block Grant funds. Without exception, a considerable portion of the annual grant to each municipality is utilized for rehabilitation of dwellings occupied by low and moderate income persons. A precise accounting of the success of programs within Hudson County has not been made as of this date owing to the scope of such research and the available information.

In context with the foregoing, it is the position of this consultant that the rate of rehabilitation of housing substantially exceeds the rate of deterioration. In this context, preliminarily, an adjusted total reallocation for the ll-county region of 29,000 units is utilized for purposes of the following calculation.

#### Existing 11 County Regional Need Reallocation

The data base for following calculations is included in the appendix tables. The formula for allocation is as follows:

twp. empl. +(Land area + economic factor)= allocation2factor

# (allocation factor)(regional need)(percent vacancy) (redistribution)= allocation

The formula set forth above departs from the Lerman study referenced herein in terms of proportionality of the individual components. This consultant proposes that the employment factor be given a 50 percent weight in the allocation factor for redistribution of present need. It is my opinion that employment must be given a major position within the formula pursuant to Mt. Laurel II Supreme Court decision.

The calcuations set forth hereinafter conform to that opinion as shown.

#### Data and Sources

			ll County
		Franklin Township	Region
1.	Employment	11,653	<b>X</b> 1,244,632
2.	Land area	12,800	699,163
3.	Median		
•	income	25,912	24,177

regional need adjusted - 29,000 units (preliminary estimate)

Date source:	1.	NJ Department of Labor and Industry & Lerman	n
		Report 4/84; table 4.	
	2.	EEOA and Lerman Report 4/83: table 5.	

 US Census of Population and Lerman Report 4/83; table 6.

Factor calculation

- A. Employment  $\frac{11,653}{1,244,632} = .0093$
- B. g.a.  $\frac{12,800}{699,163} = .0183$

C. EC.  $\frac{25,912}{24,177} = 1.0776(.0093 + .0183) = 1.0776(.0138) = .0149$ 

.0093 + (.0183 + .0149) allocation factor 2 = .01295

 $\frac{(.01295)(123\%)(29,000)}{3} = 154 \text{ units}$ 

#### Prospective Housing Need

The prospective housing need for Franklin Township is based upon a 7-county commutershed. The methodology of delineation of this region is set forth in the Lerman report referenced herein. Delineation of the regional boundaries was made by measurement of County base maps in accordance with the methodology referenced above.

The data base relevant to employment, growth area within the commutershed and income has been developed from data source tables set forth in the Lerman report on file with the court.

The philosophy of the commutershed region is endorsed by this consultant. However, the methodology of prospective housing allocation computation proposed by this consultant departs from

the Lerman report. Employment and employment growth of the Township as a percent of the region is given a two-thirds weighting factor in the allocation formula. The growth factor has been computed as an annual average and not in accordance with a regression formula as described in the Lerman report. Further, a computation of absolute job growth contrasted to net job growth it utilized.

In addition to the above adjustments, the prospective housing need is calculated on a average six-year projected housing production (1984 to 1990). The base data again is contained within the Lerman report, although it is the opinion of this consultant that the projection of housing resulting from the averaging of two projection models made by the New Jersey Department of Labor and Industry substantially exceeds the trends of housing production in the state. This consultant intends to further examine housing production trends by County and for the state. In this context, the calculated projected fair share housing allocation set forth hereinafter is offered as a preliminary estimate.

#### Calculation of prospective need

#### formula

The formula utilized to estimate the Franklin Township "fair share" prospective need is as follows:

#### step 1

(job growth.twp. (job growth region +		(gr. ar. twp. + ( <u>gr. ar. reg. + econ.</u> 2	$\frac{fac.)}{fact.}$ = alloc
	3	· ·	······································

#### step 2

(A.F.)(.6)(123%) x projected low and moderate = fair share income households allocation

#### date sources:

job growth: N.J. Department of Labor and Industry annual reports

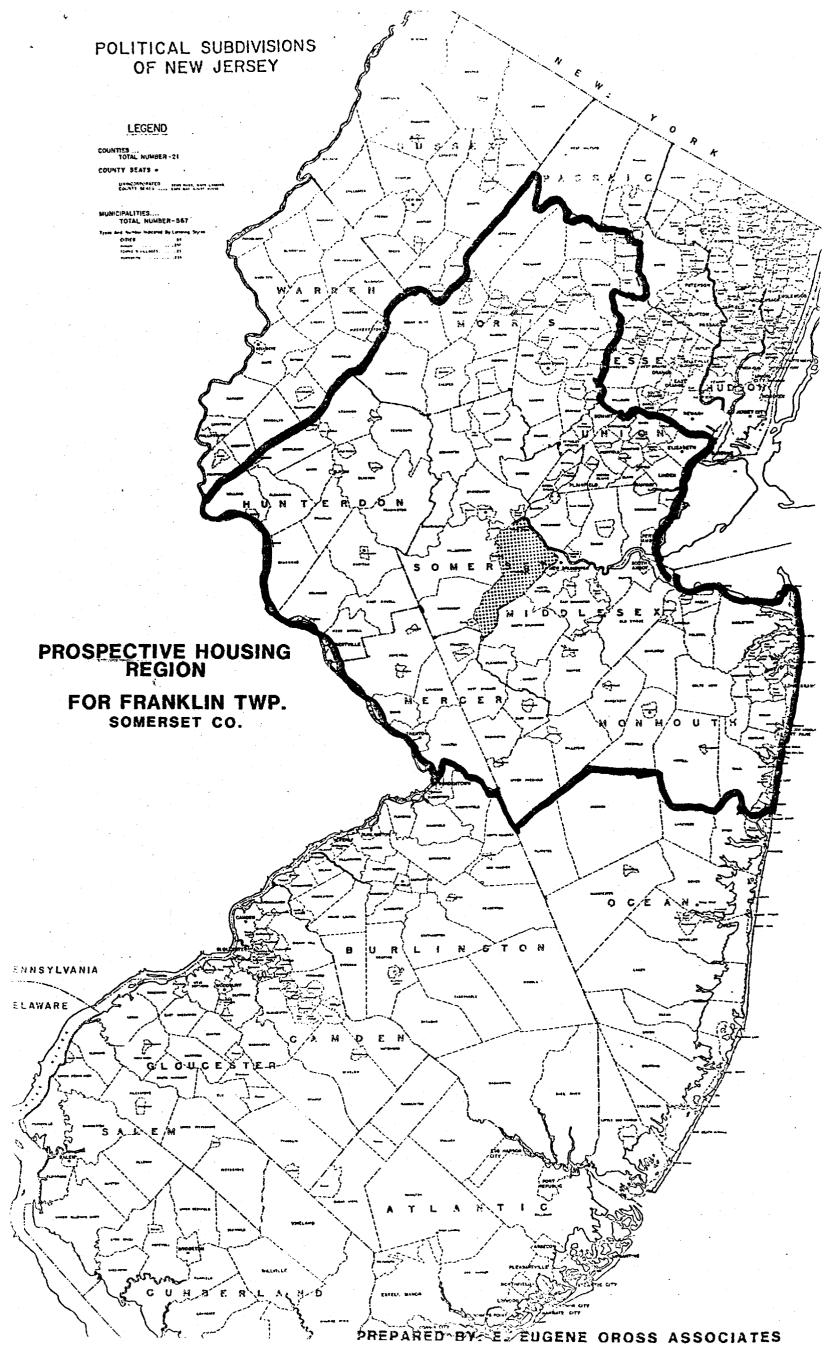
total jobs: ibid

growth area twp: E. Eugene Oross Associates

growth area region: Lerman report 4/7/84 table 5

#### data:

job growth Franklin Township - 8,052 jobs job growth 7 County region - 270,363 growth area Franklin - 12,800 acres growth area 7 County region - 696,564 jobs median income for Franklin Township - \$25,912



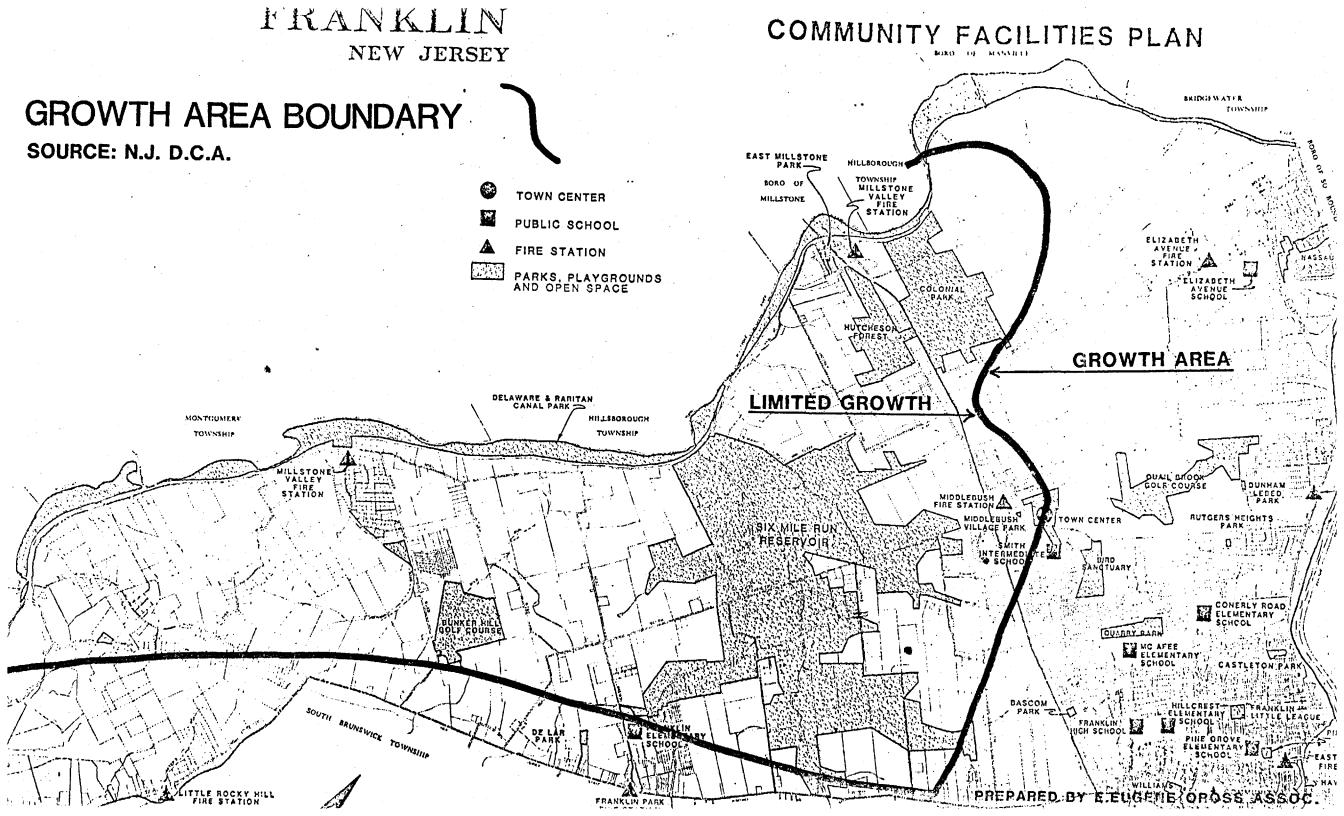


TABLE A STF-3 STF-1 STF-1 STF-t STF-3 STF-3 Tbl 18 Tbl 13 Tbl 15 .X-17 XII-35 1-17 Units Net Units Units Other 7 Units Lacking Surplus Ttl Units Lack Com Lack Room Units w/o ctrl Total Adjusted Occupied Fair Plumbing Ctrl Heat Present Present Dwelling Share Ovrcrwded Lack Com Heaters - Jack ctr htn, with Adcquate Present Cap Necd MICPLTY\_\_\_ Units Plumbing not o/c not o/c w/flue heating inad htng Heating Need Need Units SOMERSET 30 · 884 57 -20 34 75 65 37 Bedminster 6 37 .88095238 45 5 -196 16 45 30 30 51 . 42 3711 238 Bornards 5 .4 -5 54 201 66 146 -92 42 2278 23 Brnrdsv110 11 13 13 42 .64615385 228 -27 56 .40875912 17 .36956522 245 41 BoundBrook 134 73 67 107 81 44 3564 -34 160 153 563 46 17 2396 -120 29 . 17 . 7 Branchburg 7 -404 Eridgewatr 97 28 28 135 71 76 .51700680 70 195 8804 ٠. 241 15 -8 0 7 9 7 · Far Hills - 1 1 7 7 1 644 88 412 344 32 Franklin 265 61 60 207 125 105 .45652174 95 420 10050 -300 28 39 1368 -56 7 21 GreenBrook 15 3 3 21 .75 Hillsbor 49 28 26 120 84 61 .42068966 50 125 103 6439 -309 248 -65 -8 77 71 80 42 224 183 3878 47. Manville 111 51 .52040816 Millstone 2 1 2 2 0 Ö 3 2 171 11 0 - 1 126 482 45 142 17 26 63 36 .58064516 Montgomery 17 19 19 21 57 47 1975 -79 37 90 21 73 6 - -274 143 78 76 253 NPlainfld 34 11 39 .38235294 208 7525 Peapk-Glad 55 16 15 64 13 14 .51851852 31 25 698 -19 122 6 45 .40540541 4 .666666667 149 2212 267 68 66 -20 30 Raritan Rocky Hill 0 ... 3 3 2 4 . 7 -11 69 40 51 47 53 26 58 28 154 77 52 17 -145 58 18 .23684211 4686 300 Somerville 119 188 52 20 101 192 1582 26 19 .40425532 94 63 SBndBrook 16 -140 -87 5. 13 38 .74509804 38 2999 Warren 5 ŕ 104 4312 ź ź 45 • • • 1630 11 Watchung 9.16666667 8 21 626 554 67368 -2404 TOTALS --1146 --- 581-.1340 ..... 833. .725 2326 1907

• . .

Source: Lerman Report 4/84

TABLE B

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Municipality	Cver- crcwded _Units	Total Units Lacking Complete Plumbing	Net Units Lacking Completo Plumbing Nat Over- crowded	Units Lacking Contral Heating Not Over- crowded	Room Heaters With Flue	Other Units Lacking Central <u>Heating</u>	<pre>% Units Without Central Heating With Inadequato Heating</pre>	Units Lacking Adequats <u>Heating</u>	Total Present <u>Need</u>	Adjusted Present <u>Need</u>	Occupied Dwelling <u>Units</u>	Fair Sharc; <u>6.4%</u>	Surplus	Preliminary <sup>(1</sup> Adjustment Surplus,
DERGEN											•		•	
Garfield	363	345	321	821	479	422	.46836848	385	1,069	876	10,754	688	188	188
Lodi	361	185	172	319	268	114	.29842932	95	628	515	9,323	597	-82	
•					200	·			0.0					•
ESSEX						•			•					
Belleville	354	233	220	504	365	193	.34587814	174	748	613	13,108	839	-226	
Bloomfield	298	242	235	500	305	237	.43726937	219	752	617	18,547	1,187	-570	· · · · · · · · · · · · · · · · · · ·
East Orange	2,021	889	785 -	1,833	1,146	951	.45350501	831	3,637	2,983	28,398	1,817	1,165	1,000
Irvington	1,280	626	572	1,843	1,551	739 🗍	.32270742	595	2,447	2,006	24,714	1,582	424	350
Newark	13,665	5,117	4,184	10,376	7,807	6,509	.45466611	4,718	22,567	18,505	110,912	7,098	11,407	10,500
Orange	828	474	430 ·	793	67 B	453	.4053050	318	1,576	1,292	12,138	777	515	515
HUDSON							,		•					
Bayonna	763	636	604	2,170	1,325	1,232	.48181463	1,046	2,413	1,978	25,405	1,625	353	353
Hoboken	1,604	789	672	3,002	2,011	2,111	.51213003	1,537	3,813	3,127	15,407	986	2,141	1,800
Jorsey Dity	7,346	3,227	2,759	7,987	6,529	2,477	.27503886	2,197	12,302	10,087	80,720	5,166	4,921	2,444
North Bergen	771	735	605	656	514	256	.33246753	218	1,674	1,373	18,833	1,205	168	163
Union City	2,127	1,092	936	1,780	1,375	831	.37669991	671	3,734	3,061	20,701	1,330	1,731	1,731
Weehawken	320	189	168	241 .	181	- 98	.35125448	85	573	470	5,050	323	147	147
W. New York	1,245	749	669	1,218	925	555	.375	457	2,371	1,944	15,419	987	957	957
				-,	• • • • •	,		,	-,					
MIDDLESEX						•								*
New Brunawick	- 11 - 11 - 11 - 11 - 11 - 11 - 11 - 1	741	663	699	626	223	.26266196	184	1,889	1,549	13,244	848	701	500
Perth Amboy	1,096	644	567	1,216	1,000	400.	.27027027	329	1,992	1,633	13,617 .	871	762	650
PASSAIC	•	,						•	. •					·
Poponic	1,835	758	634	3,008	1,904	1,801	48609987	1,462	3,931	3,224	19,161	1,216	1,998	1,998
Patorson	•	1,942	1,653	6,158	4,968	2,740.	.35547483	2,189	8,565	7,023	46,113		4,072	3,500
		•	<b>₽</b>			•	• •	•	•	•	-	-	-	-
NIN								•						
Elizabeth	3,143	1,371	1,160	3,295	2,726	1,441	.34581234	1,139	5,442	4,463	38,878	2,488	1,975	1,975
Hillaido	202	87	83	446	· 197	279	.58613445	261	546	448	7,184	456	-6	
Plainfield	985	294	247	1,058	1,005	284	.22032583	233	1,465	1,201	15,269	977	224	224

Source: Lerman Report 5/84, Table 2 (1) EEOA; adjustments based upon preliminary demolition and housing rehabilitation investigation

# TABLE C

# Present Need Reallocation Formula

County	1982 Covered Employment	Deduct Employment in Non-Growth Areas	Deduct Employment in Urban Aid Cities (selected)	Total for Present Need <u>Allocation Formula</u>
Bergen	349,155	0	12,572	336,583
Essex	301,151	0	195,983	105,168
Hudson	171,715	0	122,401	49,314
Hunterdon	20,465	6,987	0	13,478
Middlesex	240,794	0	32,322	208,472
Morris	162,984	3,034	0	159,950
Passaic	156,575	1,152	54,641	100,782
Somerset	82,891	161	0	82,730
Sussex	18,042	13,515	0	4,527
Union	225,505	0	61,124	164,381
Warren	24,632	5,385	0	19,247
ll-County Total:	1,753,536	30,234	479,043	1,244,632
Burlington	85,114	6,625	0	78,489
Mercer	109,951	1,225	23,624	85,102
Monmouth	131,074	5,097	14,246	111,731
Ocean	64,246	19,196	10,540	34,510

Total Covered Employment, 1982, by County

Source: Lerman Report 4/84 Table 4

Housing Uni	t Demolitions for	Eleven County Urban Ai	d Communities
Municipality	1980	1981	1982
Newark	1,421	1,005	1,535
East Orange	150	113	30
Irvington	83	14	1
Jersey City	546	707	499
Union City	2	55	16
Hoboken	47	25	35
New Brunswick	34	44	46
Perth Amboy	12	1	9
Passaic	43	55	0
Paterson	408	305	280
Elizabeth	88	56	28
Plainfield	60	5	16
Total	2,894	2,390	2,495 = 7,7

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TABLE C-1

Source: N.J. Dept. of Labor & Industry

## TABLE D

# Present Need Reallocation Formula

# State Development Guide Plan: Growth Area, by County, in Acres

		Deduct	Net Total
		Growth Area in	Growth Area for
County	Growth Area	Urban Aid Cities	Reallocation Formula
Bergen	135,699	2,752	132,947
Essex	77,469	30,746	46,723
Hudson	27,661	23,949	3,712
Hunterdon	26,759	0	26,759
and the second			
Middlesex	154,110	6,432	147,678
Morris	116,769	0	116,769
Passaic	48,280	7,450	41,830
Somerset	100,455	0	100,455
	<u></u>		
Sussex	6,418	0	6,418
Union	65,875	13,050	52,825
Warren	· 23,047	· 0	23,047
•			
Total	н. Н		
11-County	<i>.</i>	•	
Region:	782,542	84,379	699,163
·	. · · · ·		
Counties in		Deduct Growth	
Commutersheds		in Urban Aid	Net
Outside 11-County	y Growth Area		Growth Area
<u>Jucoluce 11 count</u>		<u>Hunterputteres</u>	
Burlington	103,041	0	103,041
Mercer	105,086	4,800	100,286
Monmouth	156,624	4,832	151,792
Ocean	116,187	15,616	100,571

Source: Lerman Report 4/84 Table 5

# Franklin Township Commutershed Adjusted (1) Employment Growth 1972/1982

County	1972 to 1982 Job Growth
Hunterdon	8,826
Middlesex	75,510
Monmouth	36,801
Morris	63,913
Mercer	28,899
Somerset	35,404
Union	21,010
Total	270,363

### Source: N.J. Dept. of Labor & Industry

(1) The word adjustment means calculation of positive employment growth by municipality in growth areas by county.

## TABLE E

	Project	ted Mt. I	Jaurel	Households,	1990	0, by	Cour	nty	
County	<u>Hou</u>	1990 useholds	Less	1980 Households	X	.394	=	Mt. Laurel Households	
Bergen	34	40,666		300,410	х	.394	- ==	15,860	
Burlingt	on l	54,987	-	114,890	х	.394	=	15,798	
Essex	2	87,009	<del>_</del> .	<b>2</b> 99 <b>,9</b> 34 .	x	.394	=	-5,092	
Hudson	1	94,964	-	207,857	x	.394	=	-5,080 -	
Hunterdo	on	37,857	-	28,515	X	.394	==	3,680	
Middlese	ex 2	45,989	-	196,708	x	.394	-	19,417	
Monmouth	n 2.	14,573	-	170,130	x	.394	=	17,510	•
Morris	1	71,692	-	131,820	x	.394	=	15,702	
Mercer	1	18,997	· <b></b> .	105,819	x	.394	1	5,192	
Ocean	1	70,941	-	128,304	X	.394	=	16,798	
Passaic	1	63,202	-	153,463	x	.394	-	3,837	
Somerset	• •	89,681	<sup>2</sup>	67,368	x	.394	=	8,791	
Sussex	•	53,829	·	37,221	x	.394	=	6,543	
Union	1	94,487		177,973	x	.394	=	6,506	
Warren		35,306	-	29,406	X	.394	. =	2,325	
				1					

TABLE F

Source: Lerman Report 4/84 Table 8

MC GIMPSEY & CAFFERTY ATTORNEYS AT LAW

ALEXANDER F. MC GIMPSEY, JR. CERTIFIED CIVIL TRIAL ATTORNEY THOMAS J. CAFFERTY

JOHN V. MC GUIGAN

1445 US ROUTE 130 P.O. BOX 97 NORTH BRUNSWICK, N.J. 08902 (201) 297-8300

#### May 18, 1984

Honorable Eugene D. Serpentelli Ocean County Court House CN 2191 Toms River, New Jersey 08753

RE: Field v. Township of Franklin

Dear Judge Serpentelli:

I am in receipt of your memorandum of May 15, 1984. Apparently I was operating under a misimpression with respect to the date of expert reports as a result of our last status conference. It was my understanding that all expert reports, including that of Mr. Chadwick, would be due no later than May 30, 1984. However, I note from the Court's memorandum that the Chadwick report as to fair share was due May 16, 1984.

Accordingly, upon receipt of your letter I have requested that Mr. Chadwick finalize that report and accordingly, I forward same to Your Honor and to all Counsel by copy of this letter.

Very truly yours,

uma Thomas J. Caffer

TJC/1c Encl. cc: All Counsel of Record

# RECEIVED

# MAY 21 1984