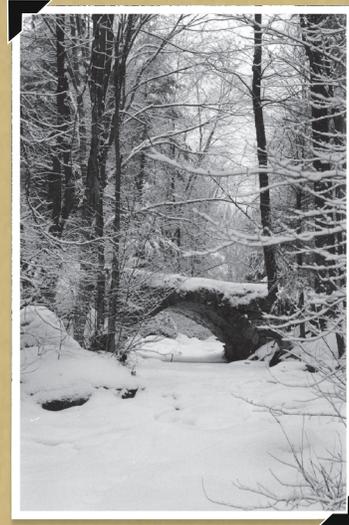




*Edwin Baylies Farm in 1953*



*Stone bridge over Globe Brook, District 10*



*West entry of Rider Tavern*



*Joni Mower House on Mellward Rd*

# *Town of Charlton 2008 Master Plan*



SUBMITTED BY  
**VHB** *Vanasse Hangen Brustlin, Inc.*  
101 Walnut Street, P.O. Box 9151  
Watertown, MA

IN ASSOCIATION WITH  
Central Massachusetts Regional  
Planning Commission

# Acknowledgments

The Charlton Planning Board would like to thank the following individuals who played a significant role in preparing this Plan. They contributed in many ways and put in numerous hours of volunteer time to make this Plan a reality.

## **Charlton Planning Board:**

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Jean Vincent, Exec. Director, Charlton Housing Authority  
Kathleen Walker, Select Board  
Lisa Westwell, Town Webmaster and President, Charlton Heritage Preservation Trust

**Citizen Involvement:**

The Board also would like to acknowledge the individual citizens and community representatives who took the time and effort to join the parties above in participating in the three master plan workshops and numerous master plan working sessions, as follows:

Armand Bessette, Historical Commission  
George W. Butz, Council on Aging  
Irene Carpentier, Resident  
Laurie Degnan, Capen Hill Wildlife Refuge  
Diane Dombrowski, Alliance Realty  
Sheri Faubert, Southbridge Savings Bank  
Lois Fay, Resident  
Bill Fontaine, Resident  
Michael Forrest, Resident  
Ralph W. Harris, Sr., Former Town Fire Chief  
Harry Howard, Resident  
Rob Scully, Resident  
Nancy Smith, Capen Hill Wildlife Refuge  
Jayne Windham, Resident

**Consultant:**

The planning consulting team was charged with writing the report, preparing GIS maps, and facilitating the public forums.

Vanasse Hangen Brustlin, Inc. (VHB)  
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# 1

## Introduction & Plan Summary

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### Purpose

In 2000, the Town of Charlton adopted its last Master Plan. The plan contained over 70 recommendations on the future direction of land use policy. To its credit, the Town implemented approximately two-thirds of those recommendations. As a result, a decision was made to move forward with an update of the plan for two main reasons. First, the Town wanted to chart a new and updated course for its land use decision-making process with an updated and expanded implementation program. Second, the Town felt it was necessary to update its land use and demographic data in order to ensure that the new recommendations were based upon the most reliable set of data available.

---

### The Master Plan Process

The Planning Board was responsible for overseeing the planning process. In the fall of 2006, the Board entered into a contract with Vanasse Hangen Brustlin, Inc. (VHB) to prepare the Master Plan Update. Central MA Regional Planning Commission (CMRPC) prepared the Geographic Information System (GIS) maps that accompany this plan.

Two public forums were conducted, one in November 2006 and the second one in June 2007. The first forum included a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis, in which participants noted what they liked and disliked about Charlton. Breakout groups discussed specific land use topics such as housing, open space, economic development, public facilities, and transportation.

The second forum focused on the future of Charlton Center, which built upon the work done by the CMRPC in 2003. This is discussed in more detail in Section 9 of this plan.

Finally, a presentation was made to the Planning Board and this plan was adopted in September 2008.

---

## Master Plan Elements

The Charlton Master Plan is a document that is intended to guide the Town's actions over the next several decades. It is a policy document that is essentially a "To Do List" for achieving the community's vision for guiding future growth and development, and ensuring that the desired community character is maintained. The Master Plan provides hundreds of recommendations for all branches of the municipal government to consider, as well as ways to involve private agencies, the business community, boards and commissions, and private individuals in the Town's efforts to implement the Master Plan. The Master Plan consists of the following elements:

- Land Use;
- Population & Housing;
- Economic Development;
- Natural & Cultural Resources;
- Open Space & Recreation;
- Transportation & Circulation;
- Town Services & Facilities;
- Charlton Center Village; and
- Implementation.

Within each Master Plan element, background information provides a context of existing conditions and recent trends relative to the particular focus area. Included are statistics, narrative descriptions, summaries of existing reports and documentation, and anecdotal information from interviews conducted with Town staff and various stakeholders. This background information is not meant to be an exhaustive account and evaluation of all that is going on in Charlton. Rather, its purpose is to identify key issues and concerns, document trends that could shape the future, and to identify areas of opportunity for program enhancement and new initiatives.



---

## Goals, Strategies and Actions

Each section of the plan contains a list of goals that were created from the input received at the November 2006 public forum. They emanate from the 2000 Master plan goals and have been updated to reflect current thinking on the direction of land use policy in Charlton. Strategy and action recommendations are made at the end of each element based upon the data assessment and needs of the Town.



---

## Implementation

The last element of the plan goes into more detail about how the recommendations are to be implemented. A matrix was created that identifies each action item, who the responsible party is for implementing that item, a suggested timetable for action, and funding sources are identified where applicable and available. One of the key recommendations is that the Town charge some entity, such as the Planning Board, with overall responsibility for plan implementation.

---

## Public Input Summary

During the planning process, two public forums were held. A number of comments and policy suggestions were made during those meetings, which are categorized and summarized below.



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## Overarching Goals

- To maintain the rural character of the town.
- To protect open space and preserve natural resources.
- To control the rate of development such that the town's service capabilities, and facilities will not become overburdened.
- To provide a range of housing opportunities.



---

## Land Use Element

- Continue Charlton's traditional pattern of denser development in and around vibrant villages, separated by open landscapes of natural resource areas and rural scale development.
- Protect Charlton's natural resource base, including water resources, corridors of wildlife habitats, and scenic landscape views.
- Take advantage of regional markets, and public investments in transportation, sewer, and water systems, by locating with careful site planning high value industrial and regional office and commercial development along Route 20 and certain areas of Route 169 and certain areas of Route 31.
- Achieve consistent, coordinated planning and administration among town boards.
- Develop stricter environmental resource protection standards, and assign them a threshold status within the development review process.
- Revise and upgrade zoning bylaws and subdivision regulations to reflect specific recommendations of Master Plan elements.

- Add flexible zoning districts to allow for more creative development as an alternative to the conventional subdivision plan.



---

## Population & Housing Element

- Retain Charlton's rural character.
- Consider ways to slow residential growth.
- Provide a wide range of housing opportunities:
  - rural homes in landscape settings;
  - homes for seniors that meet their changing needs and resources; and
  - homes for families, singles, young people starting out, and others with varied needs, resources, preferences.
- Increase affordable housing (ties into goal above, with wide range of housing)



---

## Economic Development Element

- Achieve a range of business activity in Charlton that offers a range of benefits to the community, including employment opportunities, convenient sources of goods and services, and net tax revenue for the town.
- Locate business development where it will serve different market opportunities in ways that maximize benefits while minimizing negative impacts.
- Encourage desired economic development by promoting Charlton as a good place to do business.
- Increase allowed uses in Charlton to facilitate business growth (ties into above).
- Increase the business tax base to comprise a greater percentage of Charlton's total tax base.



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## Natural & Cultural Resources Element

- Protect Charlton's water resources by addressing pollution problems and avoiding new degradation.
- Preserve critical masses of wildlife habitat, to include greenway corridors.
- Preserve open land and scenic vistas.
- Preserve historical features, including buildings, cemeteries, monuments, and archeological sites.
- Emphasis on water resources and wildlife habitat, which got less attention in 2000 Plan.



---

## Open Space & Recreation Element

- Protect Charlton's valuable open space resources for passive recreational and preservation purposes.
- Protect Charlton's water resources for health and recreational purposes.
- Provide adequate active recreational facilities and programs for all residents of Charlton.
- Adopt and implement an open space & recreation acquisition and management plan to promote maintenance and use standards for town owned land, set usage goals for parcels with clear open space or recreational value, and strategically target for acquisition parcels, portions of parcels, development rights, and easements.
- Increase public access to and use of open space lands and improve visibility of and signage to public open space.
- Consider amending the zoning bylaws to create an open space overlay zoning district that restricts development activities within designated corridors to preserve wildlife habitats, greenway corridors, and other linkage of open space resources and recreational lands.
- Establish a standard signage system, map, and guide book to identify open space and recreation sites and their access points (see above).
- Institute an assertive land acquisition program, seeking out funding sources other than the annual town budget.
- Consider amending the zoning bylaw to include a provision for the transfer of development rights to conserve open space resources as part of the development process.
- Strive for at least 25% of Charlton's land base to be permanently protected open space.
- Consider adopting the CPA.
- Acquire more land through purchase and donation.
- Develop an educational campaign to inform the residents of the value of open space protection.



---

## Transportation & Circulation Element

- Strike a balance between roadway maintenance and improvements for safety, and scenic rural roadway character.
- Cluster heavy traffic generators where they can be served by existing major roadways.
- Increase townspeople's opportunities to walk and bicycle safely about Charlton.
- Periodically review which roads in Charlton should be priorities for repaving, repairing, and maintaining, following the recommendations of the Central Massachusetts Regional Planning Commission's Preliminary Local Pavement Management Study for the Town of Charlton, Massachusetts, January 1999.

- Improve consistency of street signage.



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## **Town Services & Facilities Element**

- Maintain, expand and improve town buildings so as to provide quality services in accessible, safe, efficient, and well-maintained facilities.
- Improve and expand town services and government to keep pace with Charlton's growing population. (e.g. Fire)
- Continue to improve and expand sewer and water systems in ways that support the goals and strategies of other elements of the master plan.
- Provide communication links throughout town departments including: police, fire, town hall, highway, library, elderly services, and emergency management services (also cell coverage).
- Maintain Charlton's high standards for education, provide adult education courses to meet future employment requirements.

## Land Use & Growth Management Element

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### Introduction

Land use within a community is defined as the pattern of residential, commercial, industrial and public development, interspersed with what is generally considered as open space, such as forests and natural features, undeveloped land, agriculture, parks and recreational areas. The evolution of land use within a community is the product of local economic conditions; growth and development is based on such factors as access to jobs and employment and the availability of affordable land for new housing or commercial development.

Land use forms the basis for master planning and determines, to a large extent, a Town's need to provide public facilities and infrastructure, transportation networks and services, and how best to protect environmental resources. As communities plan for their future, determining how and where growth should occur will provide the basis for planning where investments for municipal services will be needed, as well as to determine what controls will be necessary to protect areas of the Town from unwanted development. Communities have the ability to control land use and development patterns through a variety of mechanisms, including zoning and subdivision regulations, provision of public utilities and infrastructure, and protection of open space lands through acquisitions and the dedications of conservations restrictions/easements.

The following sections provide an overview of the current land use patterns in Charlton. The discussion includes a breakdown of the percentages of land devoted to different types of development, the Town's zoning patterns and initiatives in past years to control growth and development, an overview of recent land use trends based upon the Town's initiatives, and a listing of current land development activities that will impact development trends and land use activities in the future.

---

### Current Land Use Patterns

The following section describes Charlton's existing land use conditions, including the make up of landscape and Charlton's historical development pattern.

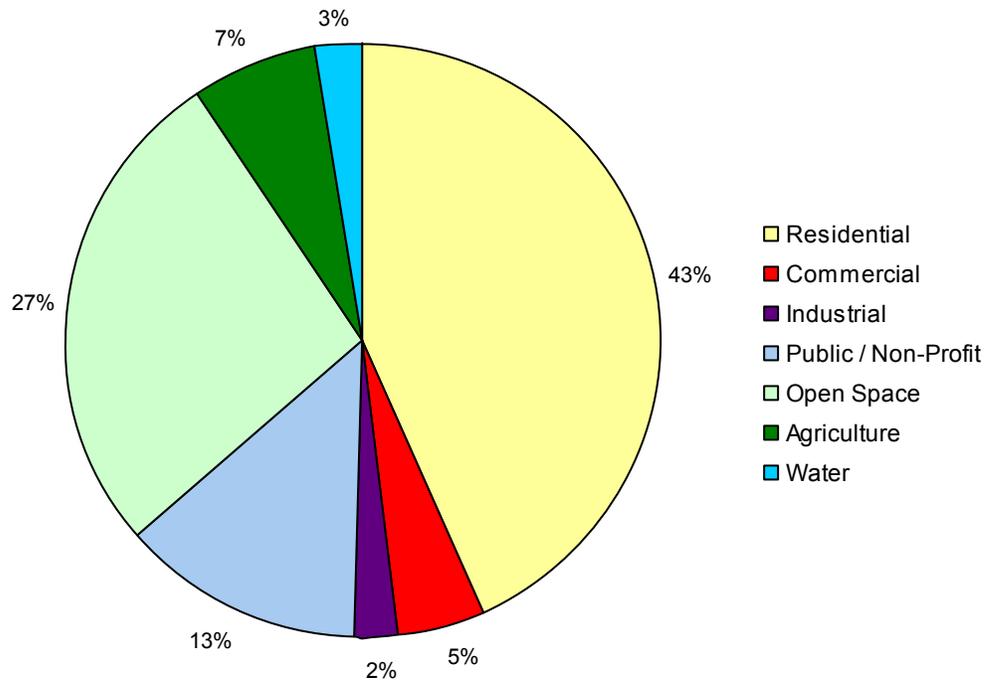
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**Existing Land Use**

The total land area in Charlton is 42.53 square miles. As shown in Figure 2-1 below, much of Charlton’s landscape is dominated by undeveloped forest land, comprising nearly 30 percent of Charlton’s total land area as measured by the Assessor’s data, but nearly 70 percent as measured by Massachusetts GIS services.<sup>1</sup> Charlton contains hilly forest slopes, agricultural fields, open meadows, ponds, streams and wetlands. The topography is predominantly gentle to rolling hills and valleys; elevations range from less than 500 feet to 1,070 feet above sea level. Charlton contains over 700 acres of water, which consists of ponds, reservoirs and streams.

**Figure 2-1  
 Land Use, 2000**



Source: Town of Charlton Assessor’s Office, 2006

Note: Assessor’s data does not include streets, highways or bodies of water. However, in order to illustrate the amount of water in Charlton, I have included approximately 700 acres of water coverage in the above chart.

Developed land in Charlton is primarily residential. Residential uses comprise 43 percent of Charlton’s land area. Lands used for agricultural purposes occupy 7 percent. Notice that commercial and industrial uses comprise only 7 percent of Charlton’s land area. Nearly one-seventh of the town’s land is owned by non-profit providers, the Town of Charlton, the Commonwealth of Massachusetts, or the

▼  


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<sup>1</sup> NOTE: The land use categories depicted on the land use inventory and shown on Figure 2-2, the Land Use Map, are defined according to the Land Use Code definitions system utilized by MassGIS and have been consolidated as listed in the table on Figure 2-1. The data shown in Figure 2-1 and Table 2-1 is categorized by land ownership and designation as provided by the Town of Charlton Assessor’s Office. Therefore, there may be discrepancies in the data due to differing methodologies.

United States Government. As many of the citizens expressed in the first public forum and Table 2-1 confirms, much of Charlton is still a rural community with an incredible amount of open space resources, including forests, hills, meadows and vistas.




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## Land Use Classifications

Data from Charlton’s Assessor’s office shows a slightly different story because the Assessor uses different land use classifications. Assessor data assigns a category to each lot based on its primary use. For example, a lot designated single family residential could in fact be a very large lot containing significant open space or forested land. Table 2-1 outlines the amount of developed, undeveloped land, and undevelopable land, based on the Assessor’s classifications.

**Table 2-1  
Charlton Land Use by Assessors Classification (2006)**

Land Use Category	# of Acres	% of Total
Residential	11,786	43.5%
Commercial	1,243	4.6%
Industrial	601	2.2%
Public / Non-Profit	3,596	13.3%
Open Space	7,352	27.1%
Agriculture	1,844	6.8%
Water	700	2.6%
<b>TOTAL</b>	<b>27,123</b>	<b>100.0%</b>

Source: Town of Charlton, Assessor (2006)

Note: Minor discrepancies in acres of total land use due to differing data sources.

## Figure 2-2 Land Use Maps

*Please see following pages.*

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## Generalized Development Patterns

The following section describes the general development patterns of Charlton, which is clearly dominated by residential and agricultural uses.

---

## Residential Development

New residential development has been the predominant land use in Charlton in recent years. The Southwest Subregion (Auburn, Oxford, Webster, Dudley, Southbridge, Sturbridge and Charlton) was one of the fastest growing areas in Central Massachusetts between 1985 and 1999, adding 4,500 acres of new residential development; Charlton accounted for 1,600 of those new residential acres. Much of this new development occurred on converted farmland.

This trend of rapid population and housing unit growth is anticipated to continue in the coming decade. In a presentation to the Comprehensive Economic Development Strategy (CEDS) meeting on April 19, 2006, the CMRPC predicted that Charlton would be one of eight towns leading the Central Massachusetts region in population growth. As stated in Charlton's 2004 Community Development Plan, the Town has a significant amount of developable land zoned in such a way as to encourage this continued growth.

---

## Commercial and Industrial Development

Charlton also led the Southwest Sub-region of the CMRPC study area with the largest gain of industrial land (over 100 acres) between 1985 and 1999. Anticipated future trends include increased commercial activity as a result of infrastructure improvements and potential increases in the amount of industrially-zoned land. To that end, the community recently introduced the Business Enterprise Park (BEP) zoning district, discussed in more detail below, to encourage certain types of commercial and industrial uses to locate, in appropriate areas, along Route 20. Since the inception of the BEP zoning district, Charlton has converted an additional 102 acres of land into the BEP zone.

Commercial sites are primarily located along Route 20, with some isolated commercial sites on Carpenter Hill Road, Route 169, and Route 31.

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## Zoning

This section of the Master Plan considers the important role played by zoning in guiding future land use decisions. It analyzes the zoning bylaw from a variety of perspectives and includes recommendations for changes and amendments that revise the bylaw so that it achieves the Goals and Objectives of the Master Plan.

Additionally, updates are recommended to reflect changes in state land use law, case law, and remove internal inconsistencies. Some of the recommendations are simply aimed at improving the manner in which the bylaw is presented so that it becomes more "user-friendly".



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### Overview of the Zoning Bylaws

#### What is zoning?

Modern zoning began in the early 1900's in response to the location of potentially incompatible and noxious land uses next to commercial and residential areas. The zoning bylaw has evolved as a means to limit the types of land uses that could locate in a particular area of the municipality, resulting in a separation of uses. Ideally, the Master Plan is the blueprint for the Town and the zoning bylaw is the regulation that implements the plan. Typically, a zoning bylaw regulates land use by:

- Specifying and distinguishing different land use types;
- Creating development standards for the size and shape of lots and the buildings erected on those lots;
- Addressing lots, buildings and uses that predated the adoption of the zoning bylaw (non-conformities);
- Establishing criteria for the evaluation of permit applications for new buildings;
- Establishing procedures for permitting uses not specifically allowed by right;
- Defining terms that have specific meanings under the bylaw; and,
- Creating a map that displays the geographic extent of each zoning district.

Charlton adopted its Zoning Bylaw relatively recently, in April 1987. Therefore, much of Charlton's existing development is "grandfathered" pursuant to the provisions of Massachusetts General Laws Chapter 40A (MGL Ch.40A). Many of the existing structures were constructed prior to the adoption of zoning, are not subject to the Zoning Bylaw, and would not be allowed under the current Zoning Bylaw. Charlton's zoning map contains a total of seven zoning districts and three overlay districts (Flood Plain, Wireless Telecommunication Facilities and Adult Entertainment).

Permitted uses within each of the zoning districts, as well as dimensional and density regulations for building sizes and yard areas are set forth within the Zoning Bylaw. The bylaw includes three residential districts (A, R-40 and R-SE), two commercial districts (NB and CB), and two industrial districts (I-G and BEP). The Residential Small Enterprise (R-SE) district also allows certain commercial uses, in keeping with a traditional "Mill Village." In addition to providing for the lowest density housing, the Agricultural district (A) serves the goal of preserving the rural and agricultural heritage of the town and to protect open space and natural resources.

#### **Agricultural (A)**

This is a standard agricultural use district allowing primarily agriculture and the lowest density residential uses; some recreational and public uses are also allowed (such as golf course, riding stable, nursing home, and community center). All non-residential uses require Site Plan Review. The primary goal of this district is to preserve or enhance open space and scenic views, protecting the rural character of Charlton.

**Low Density Residential (R-40)**

This district allows for low density residential development, in keeping with the predominant character of Charlton. Compatible home oriented activities and pursuits are also allowed such as the recreational and public uses mentioned above. All non-residential uses require Site Plan Review.

**Residential – Small Enterprise (R-SE)**

The primary purpose of this district is to provide sites for a mixture of low- and medium-density residential uses and small scale (up to 20,000 square feet) commercial and light industrial uses appropriate to an existing mill village. All non-residential uses require Site Plan Review.

**Neighborhood Business (NB)**

Uses allowed in this district include a variety of small scale business and industrial uses serving local and pass-through customers and compatible with low- and medium-density residential development within the village setting. All allowed commercial uses require a building permit or site plan review. Landscaping and site design require attention to the natural landscape and historic environs, protecting existing views, minimizing the visibility of parked automobiles, avoiding the appearance of a commercial strip plaza, avoiding added congestion in the streets and ways, and retaining the character of a rural New England village.

**Community Business (CB)**

This district serves to provide businesses that serve the entire town as well as those passing through. Uses allowed in this district include a variety of business and industrial uses and includes a wider range of commercial uses than allowed in the NB district. All allowed commercial uses require a building permit or site plan review. To the maximum extent possible, properties in this district should avoid the appearance of commercial strip plaza and adverse impacts on streets and ways.

**Industrial General (IG)**

The purpose of this district is to provide sites for industry which create employment opportunities and capitalize on Charlton’s access, environmental conditions, and labor force without undue adverse impact on traffic, water quality, sewage, and other neighborhood or environmental impacts. Residential uses are not allowed in the industrial districts. In addition to several commercial uses, the IG district uses, including light manufacturing, research and development, sawmills, and scrap metal

storage yards. Most uses are allowed either with site plan review or with only a building permit; several require a Special Permit from the Planning Board.

**Business Enterprise Park (BEP)**

The BEP District replaced the Industrial Park District in 2003 with the purpose of providing parcels of land zoned as industrial parks, where “compatible industries” are encouraged to locate in a park-like setting. Residential uses are not allowed in the industrial districts. These industries shall be “abutter friendly;” that is, they shall have minimal impacts in sight, sound, odor, and traffic on abutting lands. Allowed uses include manufacturing, research and development, office, distribution, and other compatible uses which offer an opportunity for employment growth and tax base expansion.

**Flood Plain Overlay (FP)**

This is an overlay district designed to minimize flood damage and any impediment to the natural flow of flood waters. A special permit is required.

**Adult Entertainment Overlay (AE)**

The purpose of this overlay district is to provide an area where adult entertainment uses are allowed and regulated. A special permit is required.

**Wireless Telecommunication Facilities Overlay (WCF)**

The purpose of this overlay district is to provide locations where wireless communications facilities are allowed, but regulated to minimize their aesthetic impacts as much as practicable.

**Figure 2-3  
Zoning Map**

*Please see following page.*

A listing of the zoning districts and minimum lot sizes is provided in Table 2-2.

**Table 2-2**  
**Intensity of Use Schedule**

Zoning District	Abbreviation	Minimum Lot Area (Sq. Ft.)
Agricultural	A	60,000
Low Density Residential	R-40	40,000
Residential Small Enterprise	R-SE	40,000
Neighborhood Business	NB	20,000
Community Business	CB	40,000
General Industrial	I-G	40,000
Business Enterprise Park	BEP	80,000

Source: Town of Charlton, 2007

The majority of land in Charlton is zoned for residential use, as shown in Table 2-3 and Figure 2-3. Land in the three residential districts comprises approximately 95 percent of the land area in Charlton. As stated earlier, since 2000 Charlton converted approximately 100 acres (0.5 percent) of land to the BEP District; 140 acres were removed from the R-40 District and added to both the I-G and the BEP Districts.

**Table 2-3**  
**Zoned Land Use**

Zoning Code	District	Number of Acres	Percent of Total
A	Agricultural	23,499	84.5%
R-40	Low Density Residential	2,623	9.4%
R-SE	Residential Small Enterprise	240	0.9%
NB	Neighborhood Business	91	0.3%
CB	Community Business	315	1.1%
I-G	General Industrial	700	2.5%
BEP	Business Enterprise Park	344	1.2%
<b>TOTAL</b>		<b>27,812</b>	<b>100.0%</b>

Source: EOEa Build-out Analysis, 2001. Based on zoning map of July 1999 and updated with information from the Town of Charlton in February 2007.

Note: Acreage calculations are approximate and include water bodies as well as streets.

All residential districts allow Flexible Development on parcels of 10 acres or more, by Special Permit from the Planning Board. Such subdivisions are allowed a greater density of housing and waivers from typical subdivisions standards in exchange for the permanently restricted open space equal to 25 percent of the total land area of the subdivision. For example, in Agricultural districts, the minimum lot size is reduced from 60,000 to 45,000 square feet.

Landscaped buffers of 20 feet in width are required along the lot frontage in both BEP and IG districts. In addition, any use in these districts abutting an R-40, an Agricultural, or a Historic District must have a landscaped strip of 100 feet in width along the site boundary.

Residential development, particularly subdivisions, is regulated through Charlton's Rules and Regulations Governing the Subdivision of Land in Charlton, Massachusetts (the Subdivision Regulations). The current Subdivision Regulations were adopted in December of 1989. As is typical, the main purpose of Subdivision Regulations is to protect the "health, safety, convenience and welfare of the inhabitants of Charlton" by specifying construction standards for new roads that ensure safe roads, adequate access to all lots, and provision of utilities within subdivisions. For example, the Subdivision Regulations require streetlights, sidewalks, street trees and specify pavement widths for each type of subdivision road. These regulations are significant in determining what new residential subdivisions will look like.

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## Land Use Trends

The following sections provide an overview of land use trends in the past several years.



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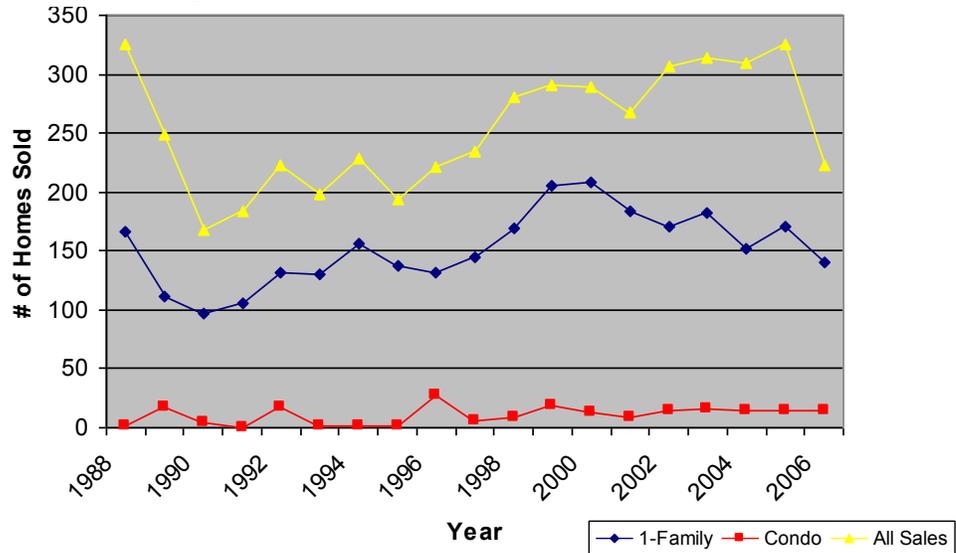
### New Homes and Subdivisions

Authors of the 2000 Charlton Master Plan observed that most housing in Charlton was not constructed in subdivisions, but on individual house lots along existing public roads. This trend has changed in the past six years, as evident in Chapter 2 Housing. Twenty-three subdivision plans have been approved since 2000; this is well over two times the number of subdivisions approved between 1993 and 1999 (10). In 1999, out of 135 new house lots approved by the Planning Board, only 45 were in subdivisions. Development of individual house lots along existing public ways requires only the submittal of an "Approval Not Required" (ANR) plan to the Planning Board. As long as the lot(s) shown on the plan have frontage on a public way and complies with zoning, the plan must be endorsed. However, this trend has

changed since the 2000 plan. In 2006, out of 271 new house lots approved by the Planning Board, only 59 were created via ANR plans.

As shown in Figure 2-4 and in more detail in Chapter 2 Housing, single-family home sales have dominated the residential market in the last few decades. Condominiums and multi-family housing developments have become more prominent in the last few years, but still make up a small segment of Charlton’s housing production.

**Figure 2-4  
Charlton Housing Production: New Units**



Source: The Warren Group



### Senior Housing in Multi-Family Developments

In line with the population trend toward an aging population, Charlton has seen an influx of senior housing in town. Below are descriptions of three relatively new developments, all serving segments of the population over 55 years-of-age.

#### Overlook Life Care Community

The Overlook Life Care Community, a state-of-the-art senior living community developed and administered by The Masonic Home, is located on a 450-acre site in Charlton. The community consists of 219 independent living residences (205 apartments and 14 cottages) with floor plans ranging in size from 618 square feet to 2,595 square feet. Residents of the community also have access to over 50,000 square feet of common space, which includes a fitness center, indoor heated pool, Performing Arts Center, a variety of dining venues, convenience store, library, game room and much more.

The Overlook offers a full continuum of care on the site including enhanced living, skilled nursing and post-acute rehabilitative services at the Overlook Masonic Health Center, as well as home care through the Overlook Visiting Nurse Association, Inc. & Hospice Services. The local community often utilizes the Overlook campus for fitness programs and to schedule events through Overlook Catering.

The 450-acre site is still not fully developed; leaving hundreds of acres of land available for additional phases of development that could be designed and proposed in the future. In June of 2005 the project was nominated for by the Charlton Planning Board, and received, a Smart Growth Award from the Central Massachusetts Regional Planning Commission (CMRPC).

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## **Peaceful Woods**

In the summer of 2005 this project received both Planning Board definitive subdivision plan approval and senior living special permit approval. The project proposes the development of a Senior Living community consisting of 66 units in duplex and triplex townhouse design on a parcel of land located northerly of Stafford Street and easterly of Center Depot Road. The main entrance will be off of Center Depot Road. The applicant to-date has yet to break ground on the project.

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## **North Sturbridge Road Senior Living Development**

In October of 2006 the Planning Board approved an unnamed preliminary subdivision plan application for a 34-unit 55-and-over Senior Living development to be built on land off of North Sturbridge Road. The Planning Board is awaiting submittal at a future date of a definitive subdivision plan application and a senior living special permit application.



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## **Non-Residential Development**

Since 1999, Charlton has had various small- to medium-sized commercial and industrial developments go through site plan review and/or special permit review. Of these, one project of note includes the Griffin Realty Trust Business Enterprise Park (BEP), recently approved by the Planning Board in November of 2006 through both definitive subdivision plan and BEP special permit.

The developer will break ground in spring of 2007 on a subdivision roadway which will front five buildings on 12.69 acres of BEP-zoned land on Route 20. This will be Charlton's first BEP Park under the BEP zoning that passed Town Meeting in 2004. Buildings in this development will be leased to tenants in such land use categories as light manufacturing, hi-tech, warehouse/distribution and/or professional office use.

Please see the Economic Development section for a discussion on additional non-residential opportunity sites in Charlton.

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## Future Trends / Build-out Analysis

Between 1999 and 2002, the Commonwealth’s Executive Office of Environmental Affairs (EOEA) sponsored a build-out analysis for each Massachusetts community. The resulting maps and analyses depict currently developed and protected land within a community and what a community would look like if remaining undeveloped land was completely developed in accordance with local zoning (as-of-right). In many communities, these analyses resulted in growth numbers that would drastically increase the size of a community. Charlton, whose build-out analysis was prepared by CMRPC, is one of those communities, where the analysis predicted 20,000 new residents moving into Town.

However, these build-out analyses did not take into account the town’s historic growth pattern. Charlton has issued approximately 100 single-family building permits annually. Given this data, Charlton would reach the proposed build-out in Table 2-4 sometime around the year 2075. Recently, the CMRPC has conducted population projections that represent a more reasonable picture of Charlton’s growth future; these are discussed in Chapter 2.

**Table 2-4**  
**Build-out Statistics (New Development and Associated Impacts)**

Developable Land (sq. ft.)	764,364,240
Developable Land (acres)	17,754
Total Residential Lots / Units	7,401
Comm./Ind. Buildable Floor Area (sq. ft.)	4,760,641
Residential Water Use (gallons per day)	1,543,322
Comm./Ind. Water Use (gallons per day)	357,048
Municipal Solid Waste (tons)	12,409
Non-Recycled Solid Waste (tons)	7,511
New Residents	20,578
New Students	6,069
New Residential Subdivision Roads (miles)	144.4
New Roads in the Industrial Districts (miles)	6.5

Source: EOEA, Build-out Analysis, 2001

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## Land Use and Growth Management Recommendations

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### Goals for Land Use Element

- Continue Charlton’s traditional pattern of denser development in and around vibrant villages, separated by open landscapes of natural resource areas and rural scale development.
- Encourage the use of Flexible Development Zoning to help preserve the rural character.
- Protect Charlton’s natural resource base, including water resources, corridors of wildlife habitats, and scenic landscape views.
- Take advantage of regional markets, and public investments in transportation, sewer, and water systems, by locating with careful site planning high value industrial and regional office and commercial development along Route 20 and certain areas of Route 169 and certain areas of Route 31.
- Achieve consistent, coordinated planning and administration among town boards.
- Develop stricter environmental resource protection standards, and assign them a threshold status within the development review process.
- Revise and upgrade zoning bylaws and subdivision regulations to reflect specific recommendations of Master Plan elements.

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### Recommendations

#### LU-1

Encourage the use of Flexible Development zoning to preserve the rural character of Charlton. This zoning technique is a useful tool on larger parcels where certain open space and natural or unique features could be preserved through creative development. Flexible development allows for the development to proceed by laying out the house lots, driveways, utilities, and roads in a way that recognizes and enhances the features of the land. It is an alternative design approach to the typical “cookie cutter” subdivision.

#### LU-2

Use enhanced zoning tools and techniques to protect Charlton’s natural resource base. Such resources include surface and ground water supplies, wildlife corridors, wetlands, and scenic landscapes. Among the tools that could be used are the Flexible Development zoning mentioned above, transfer of development rights (discussed below), a hilltop/slope protection bylaw, and a minimum upland requirement.

#### LU-3

Achieve consistent, coordinated planning and administration among Town Boards. As development proposals get more sophisticated in the growing Charlton market, it

will be increasingly important for the Town's permitting boards and commissions to conduct coordinated reviews.

**LU-4**

Larger development proposals can have a number of different impacts on the natural and built environment in Charlton. The Town should consider requirements for a local environmental impact assessment for larger projects that exceed a certain threshold.

**LU-5**

Revise and update the zoning bylaw and subdivision regulations. The Town's land use codes have been periodically amended over time, but have not been reviewed and updated in a comprehensive manner. Such a review should address the format of the bylaw and regulations as well as to ensure that they are consistent with this master plan and take advantage of modern zoning tools and techniques. Use classifications, parking regulations, and other standards should be updated.

**LU-6**

Incorporate "green" building and design standards for new buildings and site improvements into the zoning bylaw.

**LU-7**

Reconsider adoption of the Community Preservation Act (CPA). Used for projects that help develop or acquire open space, increase the number of affordable housing units, and support historic preservation efforts, the CPA is funded through a property tax surcharge of no more than 3%. If adopted, 10% of the funds must go toward open space, 10% toward affordable housing, and 10% toward historic preservation. The remaining 70% can be divided as the city or town determines among these three categories. The CPA ensures that funds will always be available for preservation activities.

**LU-8**

Improve regulation of "major residential developments" through a more complete review and permitting process under site plan review and coordinate with Flexible Development standards (also see LU - 4 and 5 above)

## Population and Housing

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### Introduction

Housing is the most prevalent land use in Charlton, and its cost and availability are critical components defining the character of the Town of Charlton. While the community's housing stock today serves the need of most of its citizens, market changes – accompanied by significant population changes – are making it difficult for certain segments of the community to live in Charlton. The following sections provide a brief summary of the population and household characteristics and changes that are occurring in Charlton, followed by a description of the existing inventory of housing choices and how market forces affect Charlton's housing mix. A brief summary of Charlton's affordability is also included.

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### Population

To better understand the housing needs of Charlton residents, the following section explores the population characteristics of Charlton.



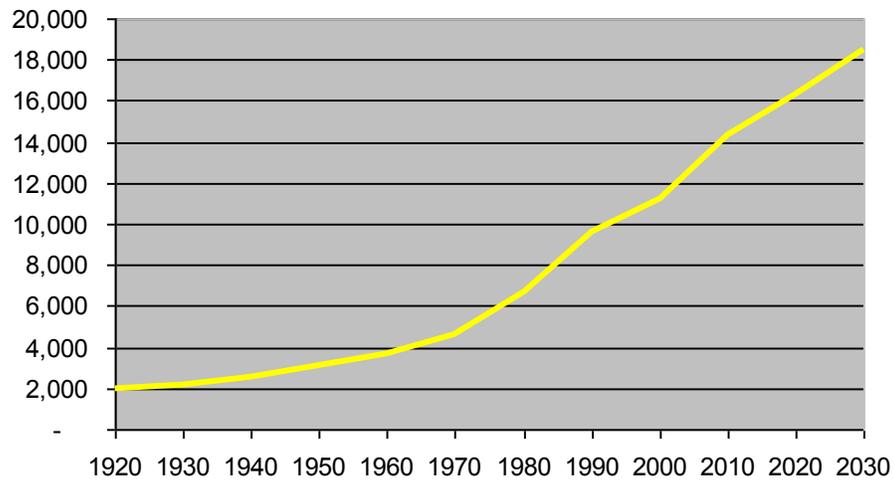
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### Existing Population

Figure 3-1 shows that Charlton has experienced steady growth in the last century, with the most substantial growth being in the 1970's and 1980's and projected to continue at a similar pace through 2030. Charlton's population grew by 1,687 persons between 1990 and 2000, an increase of 18 percent. Since the last decennial census, the population has continued to increase to 13,714 in 2006, an additional 2,451 people (22 percent) in six years. In 2000, the Central Massachusetts Regional Planning Commission (CMRPC) projected Charlton's 2010 population to be 12,476. After only six years, the town has already exceeded that estimate by approximately 1,200 people. CMRPC's updated population projects from March 2006 estimate that the town will have a population of 14,300 in 2010 and grow to a population of 18,500 by 2030.

With a total landmass of 44 square miles, Charlton's population density is 312 people per square mile, approximately 50 more people per square mile than in 2000 (264.8).

**Figure 3-1**  
**Population over time (1920 to 2030)**



Source: U.S. Census, Charlton Master Plan, Town of Charlton and CMRPC.

Charlton’s population growth reflects the expansion of housing from the eastern portion of the state into suburban and rural locations beyond the I-495 belt and into Central Massachusetts. Charlton is absorbing much of this regional growth. Charlton has continually out-paced its region, the county and the state in population growth. At 21.8 percent, Charlton’s population since 2000 has increased nearly 4 times the rate of population growth in the CMRPC region (6.3 percent) and fifteen times the rate of population growth in the state (1.4 percent), as shown in Table 3-1. This pace of growth is not uncommon for Charlton in the past few decades, as shown in Figure 3-1. This rate of growth will have a major impact on the community in terms of housing demand and spending on goods and services.

**Table 3-1**  
**Population Comparisons, by Region (1970-present)**

	1970	1980	1990	2000	2005/2006
Charlton	4,654	6,719	9,576	11,263	13,714
		(44.4%)	(42.5%)	(17.6%)	(21.8%)
CMRPC Southwest Subregion	75,285	79,082	88,496	92,018	97,776
		(5.0%)	(11.9%)	(4.0%)	(6.3%)
Worcester County	637,037	646,352	709,705	750,963	n/a †
		(1.5%)	(9.8%)	(5.8%)	
Massachusetts	5,689,000	5,737,000	6,016,425	6,349,097	6,437,193
		(0.8%)	(4.9%)	(5.5%)	(1.4%)

Source: 1970, 1980, 1990, 2000 U.S. Census and present populations obtained from town records and reports.

† The County Government system in Massachusetts was discontinued in July 1998.

The 35 to 54 year old age cohort, along with their children (ages 5-17), accounted for most of this growth between 1990 and 2000; but this picture has changed

significantly since 2000, as shown in Table 3-2. In the last six years, while the 35 to 54 year-old age cohort has continued to grow, the 18 to 24 year old cohort has increased more than 100 percent over that cohort's 2000 population and the population of children younger than 17 has decreased. Growth in the 18 to 24 age group is atypical in a bedroom community like Charlton. Many people in this age group are in college or just beginning their careers and may not be financially ready to purchase a home. This data could mean a number of things: (1) many children have recently aged out of the 5 to 17 year old age cohort; (2) children may be living with their parents beyond the age of 18; and/or (3) families with older children may be moving into Charlton at a faster rate than families with young children. The decrease in 5 to 17 year old population will have an impact on public education and the capacity of Charlton's schools, possibly reducing any previous over-capacity issues.

The population also is aging, with the number of people aged 55 and older increasing by 374, or 28 percent, between 1990 and 2000 and another 61 percent from 2000 to the present. The median age in Charlton grew from 31.2 in 1990 to 35.4 in 2000, an 11 percent increase in ten years. Charlton's median age is now on par with the national average of 35.3, but Charlton's population has aged more quickly than the nation, which had a median age of 32.9 in 1990 (7 percent increase).

**Table 3-2**  
**Distribution of Population by Age (1990 to 2000)**

Age Cohort	1990	2000	# change	% change	2006	% change
Under 5	867	810	(57)	-7%	562	-31%
5 to 17	1,968	2,566	598	30%	2,502	-2%
18 to 24	827	657	(170)	-21%	1,355	106%
25 to 34	1,958	1,519	(439)	-22%	1,584	4%
35 to 54	2,640	4,022	1,382	52%	4,998	24%
55 to 64	537	822	285	53%	1,400	70%
65 to 84	631	690	59	9%	1,110	61%
85 and over	147	177	30	20%	203	15%
<b>Total</b>	<b>9,575</b>	<b>11,263</b>	<b>1,688</b>	<b>18%</b>	<b>13,714</b>	<b>22%</b>

Source: 1990 and 2000 U.S. Census, Town of Charlton

The population is evenly distributed between males (49 percent) and females (51 percent) with little change in the distribution expected. Charlton's population is relatively homogeneous, as shown in Table 3-3. According to the 2000 Census, the community was 98.1 percent white, 0.5 percent Asian, 0.2 percent African-American, and 0.2 percent American Indian. Only 0.6 percent of the population identified themselves as having two or more races.

**Table 3-3  
Population by Race**

Race	Number	Percent
White alone	11,047	98.1%
Black or African American Alone	26	0.2%
American Indian and Alaska Native alone	23	0.2%
Asian alone	52	0.5%
Native Hawaiian and Other Pacific Islander alone	7	0.0%
Some other race alone	38	0.3%
Two or more races	70	0.6%
<b>Total</b>	<b>11,263</b>	<b>100%</b>

Source: 2000 U.S. Census



**Existing Households**

According to the 2000 U.S. Census, Charlton had 3,788 households (occupied housing units), an increase of 641, or 20 percent from 1990, as shown in Table 3-4. Despite the shrinking household size nationwide, the number of households increased at a comparable rate to the population increase (18 percent), which indicates that there is little change in the household size in Charlton in the past decade. Housing unit development continues in Charlton at a faster rate than population growth. This is not surprising when one considers the national trend towards smaller household sizes. Couples are having fewer children today and many households are the single parent variety. Charlton’s census data confirms this trend. In 1980, the typical Charlton household contained 3.11 people. By 1990, the persons per household figure had declined to 2.98 and by 2000, to 2.92 persons per household.

**Table 3-4  
Change in Housing Units: 1990 to 2000**

	1990	2000	# change	% change
Total Housing Units	3,438	4,008	570	17%
Occupied (“Households”)	3,147	3,788	641	20%
Vacant	291	220	(71)	-24%

Source: 1990 and 2000 U.S. Census

Among Charlton’s households, 3,045, or 75.9 percent, were considered “families,” 2,555 (63.7 percent) were married couple families, 1,830 (45.6 percent) contained children under the age of 18, and 527 (13.1 percent) had individuals over the age of 65 years. A total of 192 non-family households were recorded by the U.S. Census and 551 householders, including 166 over the age of 65, were recorded as living alone (See Table 3-5).



**Table 3-5  
Household changes by type**

	1990	2000	# change	% change
Family households	2,842	3,045	203	7%
Married couple family	2,216	2,555	339	15%
Households with <18	2,835	1,830	(1,005)	-35%
Households with >64	595	527	(68)	-11%
Nonfamily households	240	192	(48)	-20%
Householder living alone	463	551	88	19%
and over 65	155	166	11	7%
<b>Total Households</b>	<b>3,147</b>	<b>3,788</b>	<b>641</b>	<b>20%</b>

Source: 1990 and 2000 U.S. Census

Just fewer than 200 people live in group quarters in Charlton, the majority of who live in nursing homes. These numbers have remained consistent since 1990.

Charlton’s household growth in the past decade is the highest increase among its neighboring communities, as shown in Table 3-6. Only Uxbridge (30 percent growth in the 1990’s) has grown at a rate close to Charlton’s pace. The communities immediately surrounding Charlton—Spencer, Sturbridge, Southbridge, Dudley, and Oxford—encountered less household growth in the past decade than Charlton.

**Table 3-6  
Regional Household Growth**

Year	Charlton	Dudley	Leicester	Oxford	Spencer	Uxbridge	Webster
1980	2,107	2,929	2,961	3,813	3,708	2,900	5,626
1990	3,147	3,387	3,458	4,492	4,321	3,773	6,529
	(49.3%)	(15.6%)	(16.8%)	(17.8%)	(16.5%)	(30.1%)	(16.1%)
2000	3,788	3,737	3,683	5,058	4,583	3,988	6,905
	(20.4%)	(10.3%)	(6.5%)	(12.6%)	(6.1%)	(5.7%)	(5.8%)

Source: 2000 U.S. Census

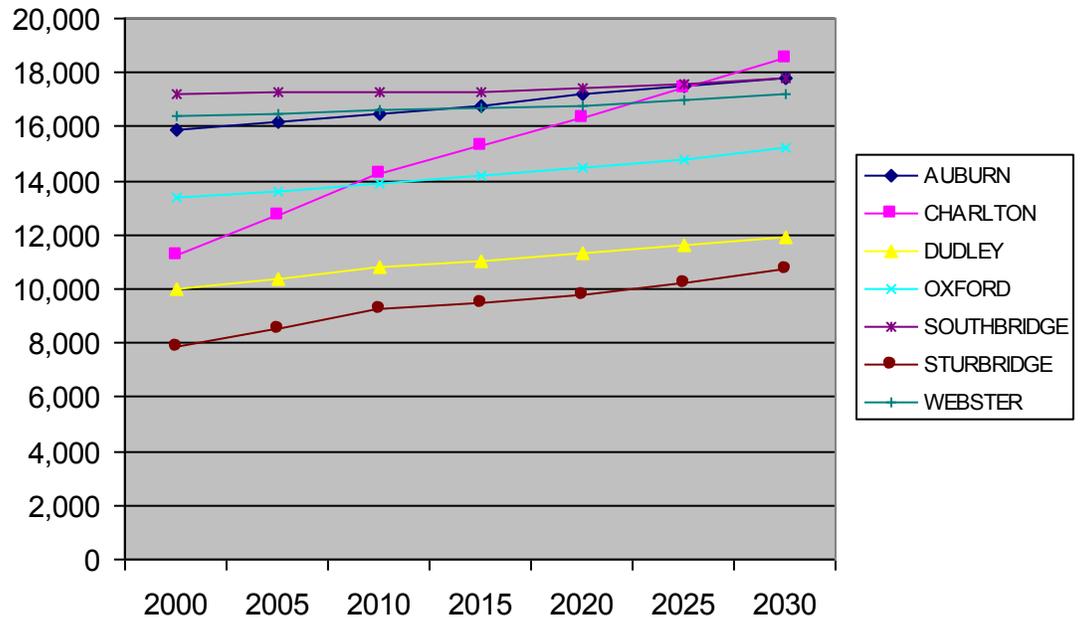


## Population Projections

According to Charlton’s 2004 Community Development Plan prepared by CMRPC, the Town is expected to grow by 1,213 persons between the years 2000 and 2010. Taking into consideration the trend towards smaller household sizes and assuming the average household size will decline at the same rate as the previous decade, to an estimated 2.86 persons per household by the year 2010, it is anticipated that an additional 424 housing units will need to be produced between the years 2000 and 2010 in order to house the expected population increase.

When viewing the population projections created by the CMRPC, a notable trend stands out (see Figure 3-2). Charlton will continue to grow at a significantly faster pace than its neighbors, from the 3<sup>rd</sup> least populated town in the Southwest Region of Central Massachusetts in 2000 to the most populated town by 2030.

**Figure 3-2**  
**Projected Population Growth in the Region**



Source: CMRPC, [http://www.cmrpc.org/Agency/CMRPC\\_Demographics.htm](http://www.cmrpc.org/Agency/CMRPC_Demographics.htm)

## Housing

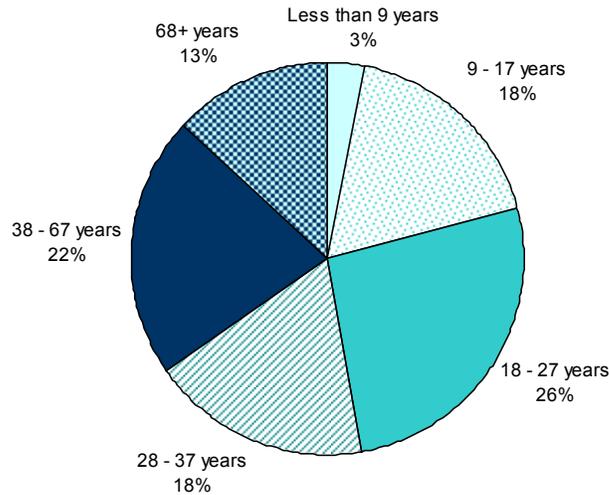
This section outlines the existing condition of Charlton’s housing stock and estimates future housing demands given the town’s expected continued population growth, as discussed above.

### Existing Housing Conditions

There is a mixed housing base in Charlton, with older homes built in the 1700’s to new homes constructed in recent years (see Figure 3-3). Most of the older homes were built in village areas, near workplaces, such as Charlton City, Charlton Center, Charlton Depot, and Northside. These villages were inhabited and grew because of their proximity to the workplace. Most of the remaining homes built prior to the 1940’s were farmhouses scattered around the town. The areas near Cranberry Meadow, Glen Echo Lake, Pierpoint Meadow, Granite (South Charlton) Reservoir, Buffum Pond, Little Nugget Lake, and Gore Pond, were predominantly seasonal

villages which have since been converted into year round homes. Public housing for low-income and elderly residents of town is limited to the Charlton Housing Authority Complex on Masonic Home Road and a few other units.

**Figure 3-3**  
**Age of Housing Stock**



Source: 2000 U.S. Census

**Occupied Housing Units**

<b>1980</b>	2,107 units
<b>1990</b>	3,147 units
<b>2000</b>	3,788 units

Household growth is the primary driver of housing demand in a community. In 2000, a total of 4,008 housing units were counted in Charlton (see Table 3-7). Households occupied 3,788 units (94.5 percent) leaving 220 vacant units (5.5 percent). 140 of these vacant units were considered seasonal, recreational or occasional use. Between 1980 and 1990, the number of housing units increased by 1,040 units, or nearly 50 percent of the 1980 housing stock (2,107 units). During the following decade, the number of units increased by 641, or 20 percent.

Charlton's housing unit growth has increased at a higher rate than its neighbors. The town with the next highest household growth is Oxford, where housing production grew 18 percent in the 1980's and 13 percent in the 1990's, as reported in Charlton's 2004 Community Development Plan.

The vacancy rate in Charlton declined from 8.5 percent to 5.5 percent, which exhibits a growing demand for housing in Charlton. Five percent is considered a normal vacancy rate; therefore Charlton's vacancy rate indicates that the town is generally meeting most local demand.

**Table 3-7  
Housing Vacancy**

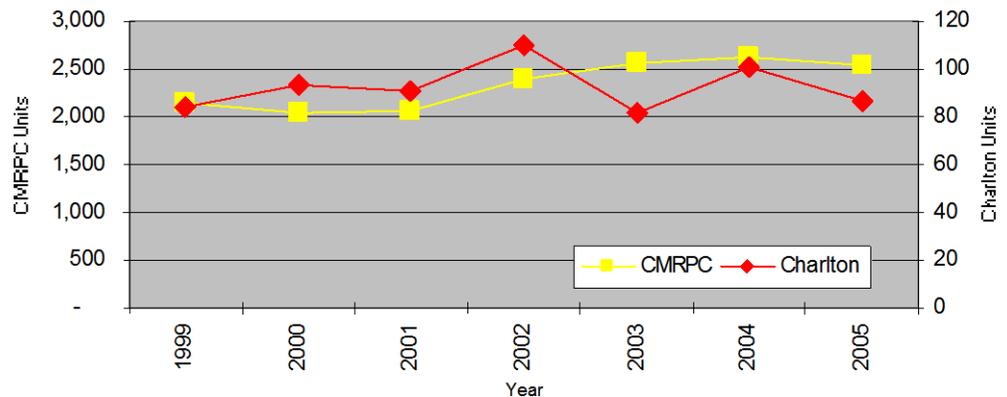
	1990	2000
Total Vacant Units	291	220
Total Housing Units	3,438	4,008
Vacancy Rate	8.5%	5.5%

Source: U.S. Census

The median number of rooms per housing unit was six rooms in 2000, with 94 percent of the units having four or more rooms; 60 percent have six or more rooms. The age of the housing stock is also varied; only 30 percent of Charlton’s housing stock was built before 1960, and 80 percent of Charlton’s housing stock was built by 1990. More than 14 percent of Charlton’s housing stock (approximately 564 homes) was built prior to 1940. While this percentage is lower than comparable communities, it is quite likely that many of these older residences would not meet today’s various housing codes (plumbing, electricity, weatherproofing, building code, etc.). As noted in the 2004 Community Development Plan, Charlton has the youngest housing stock when compared with its neighbors.

Between 1999 and 2006, a total of 700 residential building permits were issued in Charlton (an average of 88 per year) compared to an average 2,338 residential building permits issued annually in the CMRPC region (through 2005, based on available data). Charlton’s building activity ranged from 3.2 percent (2003) of the regional total to 4.6 percent (2002) of the region total. Figure 3-4 tracks the residential building permit relationship between Charlton and the region between 1999 and 2005.

**Figure 3-4  
New Single Family Building Permits: 1999-2005**

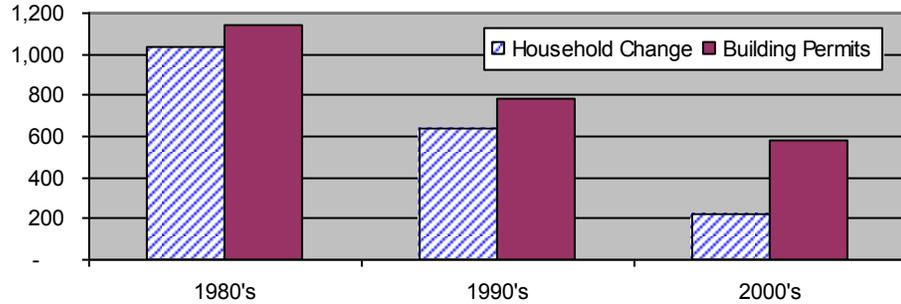


Source: Town of Charlton Building Inspector and CMRPC Regional Data Bank

The measure of housing activity (building permits) when compared with household change, shown in Figure 3-5 below, indicates that some overbuilding has occurred

overtime, with a significantly greater difference in building permits over household growth in the last six years.

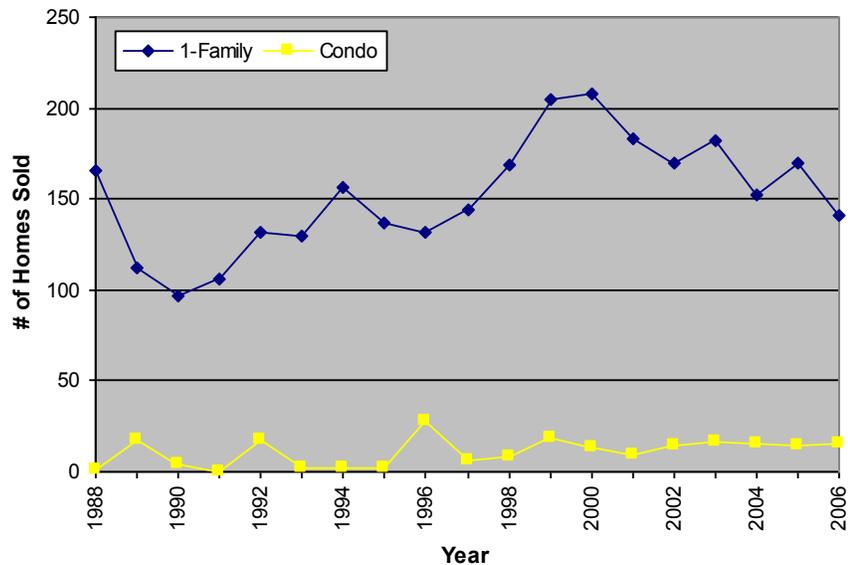
**Figure 3-5**  
**Housing Growth: 1980's, 1990's and 2000's†**



Source: Town of Charlton Building Inspector and U.S. Census  
 Note: † 2000's includes the data for years 2000-2006.

Market trends in residential home sales also reveal an interesting pattern. As shown in Figure 3-6, sales of single-family homes grew robustly in the late 1990's. However, single-family home sales have slowed, if not decreased, in this decade, perhaps reflecting the slow-down in the regional economy. The 141 single-family homes sold in 2006 is a decrease of nearly 50 percent from the peak of 208 homes sold in 2000. The sale of Charlton's limited condominium stock has been steady since 1998.

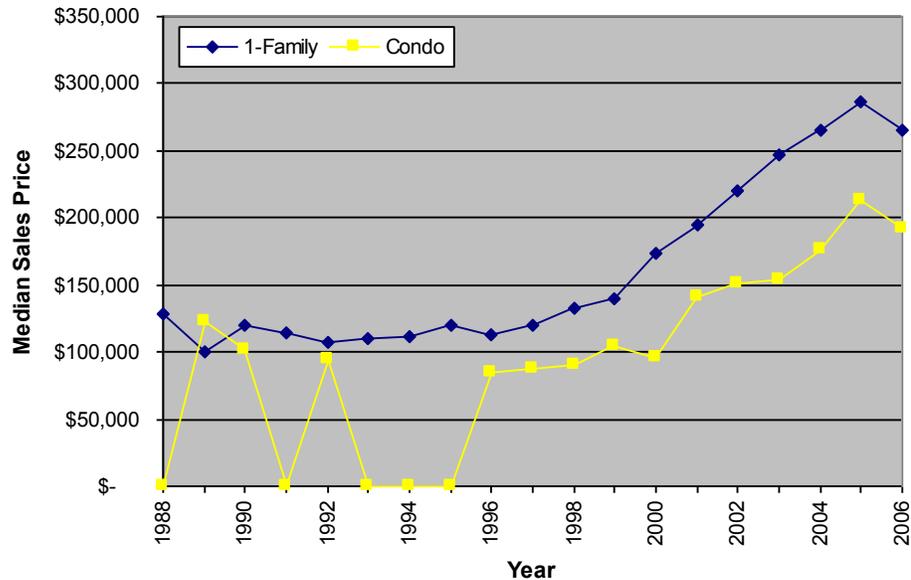
**Figure 3-6**  
**Single-Family Homes & Condominium Sales in Charlton: 1988-2006**



Source: The Warren Group Information Services  
 Note: 2006 sales period through November 2006

Price trends, however, showed strong upward growth since 1996, increasing more dramatically in 2000, as shown in Figure 3-7. The median sales price of a single-family home in Charlton increased by 37 percent between 2001 and its peak in 2005. According to the Warren Group, the median price of a single-family home sold in Charlton was \$265,000 in 2006, while the median condominium sold for \$192,500.

**Figure 3-7  
Median Sale Price Trends in Charlton: 1988-2006**



Source: The Warren Group Information Services  
Note: 2006 sales through November 2006




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## Housing Unit Inventory

Charlton’s housing stock is currently, and has historically been, predominantly single-family, as shown in Table 3-8. Approximately 80 percent of Charlton’s housing units are attached and detached single-family units, 15 percent have between two and nine housing units, and just one percent of Charlton’s housing stock contains ten or more units. Charlton has the highest percentage of single-family housing units when compared with its neighboring communities.<sup>1</sup> There have been no significant changes in housing unit type since 1990.



<sup>1</sup> Community Development Plan, 2004, Table 9 on Page 81.

**Table 3-8  
Housing Units by Type of Structure: 1990-2000**

Type of Housing	1990	% of 1990 Housing Stock	2000	% of 2000 Housing Stock	# Change
S/F detached	2,709	78.8%	3,013	79.5%	304
S/F attached	53	1.5%	155	4.1%	102
2 to 4 units	401	11.7%	429	11.3%	28
5 to 9	164	4.8%	141	3.7%	(23)
10+ units	42	1.2%	20	0.5%	(22)
Mobile/Other	69	2.0%	30	0.8%	(39)
<b>Total</b>	<b>3,438</b>		<b>3,788</b>		<b>350</b>

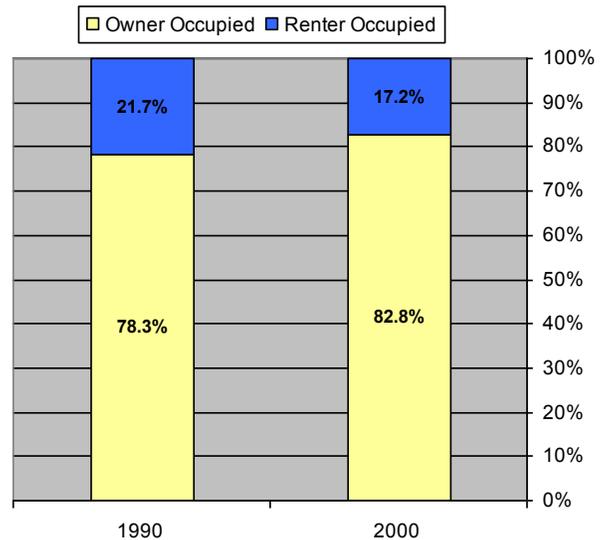
Source: U.S. Census

According to the 2000 census data, in 1999 Charlton had a total of 4,008 housing units, 3,013 (80 percent) of which were considered as detached, single units. Another 155 units (4 percent) were attached single units, either townhouses or condominiums. The rest of the Town’s housing stock was in buildings containing multiple units ranging from duplexes to mid-sized complexes with 10 or more units, as shown in Table 3-8.

**Figure 3-8 (at right)  
Housing Tenure**

Source: 1990 and 2000 U.S. Census

Approximately 83 percent of the current (2000) housing stock is owner-occupied, according to 2000 U.S. Census estimates. This ratio (owner-occupied to renter) has increased only slightly since 1990, when the number of owner-occupied units was 78 percent and renter-occupied was 23 percent.



The information presented below in Table 3-9 is based on an analysis of Charlton’s 2006 Assessor’s database of properties and includes all properties classified under *Residential*. Mixed-use parcels (Code 010-067) listed in Table 3-9 include those with more than use; not all include residential uses.



**Table 3-9  
Residential Property by Assessment Class**

Property Type	Description	Parcel Count	Assessed Value	Average per parcel
101	Single-Family	3,860	\$1,193,305,500	\$309,147
102	Condominium	146	\$23,202,400	\$158,921
104	Two-Family	51	\$14,778,600	\$289,776
105	Three-Family	10	\$2,890,700	\$289,070
106	Out Buildings	75	\$6,636,300	\$88,484
109	Multi-Houses	19	\$6,918,540	\$364,134
110	Trailer Park	2	\$788,700	\$394,350
111	4-8 Unit	39	\$7,954,700	\$203,967
112	Over 8 Units	2	\$1,560,000	\$780,000
130	Vacant Land – Dev.	77	\$10,022,000	\$130,156
131	Vacant Land – Pot. Dev.	601	\$59,252,200	\$98,589
132	Unbuildable	685	\$11,459,700	\$16,729
010-067	Mixed Use	125	\$112,047,645	\$896,381
<b>Total Residential</b>		<b>5,567</b>	<b>\$1,338,769,340</b>	<b>\$3,123,323</b>

Source: Charlton Assessor

Between 1993 and 1999 Charlton approved over 100 lots in subdivision plans, encompassing over 250 acres of land. However, only 11 of those lots were built out by 1999. Since 1999, the Town has approved 430 lots in subdivision plans, a total of over one thousand acres of land (see Table 3-10). Of these more recent subdivision approvals, 9 have been completed, which has produced approximately 116 new housing units in Charlton in the last six years.

**Table 3-10  
Subdivisions Approved Since 1999**

Subdivision Name	Year Approved	Approved Lots	Acres	Houses Built	Status
Angalie Estates	2005	5	35.87	0	Active
Buffum Estates	2003	5	11.9	5	Completed
Cranberry Shores	2007	7	32	0	Active
Dresser Hill	2005	10	23.5	0	Active
Elly Pond Estates	2002	21	45.7	11	Active
Haggerty Landing	2004	6	17	0	Active
Hammond Woods	2003	23	69	0	Active
Heritage Oaks	2003	4	15.5	4	Completed
Lambs Farm Estates	2005	30	66.73	3	Active
Manor Ridge	2003	9	14.5	9	Completed
Ponnakin Hill Estates	2004	57	93.7	6	Active

Subdivision Name	Year Approved	Approved Lots	Acres	Houses Built	Status
Preservation Estates	2003	12	19	12	Completed
Reindeer Estates	1999	20	35.98	20	Completed
Scott Drive Extension	2001	9	39.67	9	Completed
Stevens Estates	2003	2	3.11	0	Active
Stonegate Estates (Phase II)	1999	10	16.27	10	Completed
The Reserve At Barton Hill - East	2007	46	99	0	Active
The Reserve At Barton Hill - West	2007	84	165	0	Active
Tucker Farm Estates	2004	25	97.25	0	Active
Turner Woods	1999	13	26.4	13	Completed
Water's Edge	2000	18	52.59	18	Completed
<b>Total</b>		<b>416</b>		<b>116</b>	<b>9</b>

Source: Town of Charlton

Note: Please also see Chapter 6, Open Space and Recreation, for detail on the provision of open space in any conservation subdivisions mentioned above.

According to the Charlton Build-Out Analysis prepared by CMRPC in 2001 and reported in the 2004 Community Development Plan, there are 17,754 developable acres remaining in Charlton. Given existing zoning bylaw minimum lot size requirements and environmental constraints, vacant residentially zoned land could yield 7,401 new residential lots. According to this analysis, if all of these lots were developed it would mean 20,578 additional residents in town, of whom 6,069 would be students. Table 6 provides a summary of residential build-out related data. Based on the population projections contained in Table 1, there does not appear to be a danger of exhausting the supply of developable land at any time in the foreseeable future.

**Table 3-11  
Charlton Residential Build-Out Statistics**

Developable Acres	17,754
Residential Lots	7,401
New Residents	20,578
New Students	6,069

Source: CMRPC, as provided in 2004 Charlton Community Development Plan

Notes: 1. The number of "Residents" at buildout is based on the persons per household figure derived from the 1990 U.S. Census.  
2. The number of "School-Age Children" at buildout is based on a student per household ratio taken from 1990 U.S. Census.

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## Housing Affordability

As of May 1, 2007, Charlton has an inventory of 52 affordable housing units that qualify under the Commonwealth of Massachusetts Chapter 40B regulations, reported on the Department of Housing and Community Development's (DHCD) subsidized housing inventory (SHI). These units represent only 1.3 percent of the town's total housing stock. This is a decrease of 0.6 percent from 2000.

Charlton is far from being able to meet the Chapter 40B goal of providing 10 percent of its housing stock as affordable; Charlton needs to produce approximately 335 qualifying affordable housing units (without building any market-rate housing) to meet the 10 percent goal. As mentioned above under population projections, an estimated 424 housing units will need to be produced to meet Charlton's projected population growth by 2010. Assuming the number of housing units in Charlton rises to nearly 4,500 to accommodate new growth, approximately 400 affordable housing units will need to be produced. Essentially, 94 percent of the housing produced in Charlton should be qualifying affordable units.




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## Household Income

Charlton's median household income has risen by 48 percent since 1989, which is 10 percent faster than the statewide median household income (see Table 3-12). As a result the town has moved up nearly 40 places in the statewide rank of income among the 351 cities and towns.

**Table 3-12**  
**Median Household Income**

	1989	1999	% Change
MA	\$36,592	\$50,502	38%
Charlton	\$42,461	\$63,033	48%
State Rank (of 351)	142	104	
% of State Average	114.9%	124.8%	

Source: 1990 and 2000 U.S. Census

Median family income is used by the state and federal governments as the baseline for the determination of housing affordability, with incomes determined on a regional basis. Charlton is included in the Boston Metropolitan Area and the Worcester Primary Metropolitan Area. The 1999 median family income in the Worcester Primary Metropolitan Area was \$58,737, approximately \$11,000 less than

the median family income in Charlton (\$70,208). Under guidelines set up by the Federal Department of Housing and Urban Development (HUD), families with incomes at 30 percent or less than the regional median are considered *extremely low income*; those below 50 percent are considered *very low income*; while those below 80 percent of median are considered *low income*.<sup>2</sup> HUD adjusts the median family income each year for inflation and family size. For the current year (2007), the regional median family income for the Worcester MA HMFA<sup>3</sup> is \$72,800, an increase of nearly 24 percent over the 1999 regional median family income, with the following eligibility limits:<sup>4</sup>

Extremely Low Income (30%):	\$21,850
Very Low Income (50%):	\$36,400
Low Income (80%):	\$58,250




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## Affordability

As described in the Town’s 2004 Community Development Plan (CDP), the median family affordable purchase price for a new home in the Worcester PMSA was \$246,000 according to DHCD’s Housing Certification Program. Approximately 43 out of 61 units (about 60 percent) created in Charlton met the affordable criteria in 2000. The CDP suggested the Town should try to maintain this balance; the Town’s short-term numerical goal for total housing unit production was a minimum of 42 housing units per year, and 60 percent or 25 units should meet the affordable purchase price. Compared with the town’s historical housing production, which has averaged 88 units per year since 1986, 42 units per year sets a low expectation for housing production.

The Town currently has a relatively low mix of rental units (17 percent) in comparison to similar communities and should strive to increase or at a minimum maintain this balance. Out of the additional 424 total units projected to be produced by the year 2010, more than 72 units (17 percent) should be rental units.

The CDP’s Housing Assessment and Analysis indicated that much of the housing stock in Charlton is relatively affordable. However, only 1.3 percent of the Town’s housing stock counts towards the Commonwealth’s Subsidized Housing Inventory. As mentioned before, the Town’s percentage of qualifying affordable housing has decreased in the past seven years and the Town is “losing” affordable housing units. More likely, the Town is gaining more market-rate housing units than affordable



<sup>2</sup> HUD’s Income Limit Categories have changed. In earlier years families with incomes at or below 30% were considered Very Low Income, 50% was considered Low Income and 80% was considered Moderate Income.

<sup>3</sup> HMFA stands for Housing and Urban Development (HUD) Metro FMR Area.

<sup>4</sup> Because of HUD’s new reliance on the American Community Survey (ACS) in the estimation process as compared to the General Census, comparisons between FY2006 HUD median family incomes and FY2007 median family incomes are not entirely valid as indicators of local median family income changes. Although the ACS will detect real changes in local median family incomes since the 2000 Census, the ACS also is known to provide generally lower estimates of incomes than the 2000 Census, and HUD’s FY2007 median family income estimates reflect that difference. See [www.huduser.org/datasets/il/index\\_mfi.html](http://www.huduser.org/datasets/il/index_mfi.html) for more information.

units. While this is not unusual for a community like Charlton, there is a shortage of affordable rental units for poverty and low-and moderate-income groups. Furthermore, the Town’s elderly population is growing. The Town should make a good faith effort to increase the supply of these affordable units.

As mentioned earlier, the 2006 median single-family home sales price in Charlton was \$265,000 and the median condominium sales price was \$192,500. Using the HUD 2007 area median income (\$72,800) for the Worcester HMFA, of which Charlton is included, the analysis below shows that affordability gap in Charlton is relatively small.

Below is an affordability gap analysis that uses an average single-family tax bill dollar amount of \$2,251 annually or \$188/month and the HUD area median family income of \$72,800.

Median Family Income (2007)	\$72,800
Monthly Income	\$6,067
30% of Monthly Income	\$1,820
Less Average Tax Bill (Monthly) <sup>5</sup> &	
<u>Less Average Homeowner Insurance (Monthly)<sup>6</sup></u>	<u>\$288</u>
Amount Available for Monthly Payment	\$1,532

Residents who earn the median family income as defined by HUD can afford to purchase a single family home priced at \$229,000 with a 5 percent downpayment on a 30 year fixed interest rate loan at 6.5% interest.<sup>7</sup> There is an affordability gap of \$36,000 for a single family home and the median condominium sales price in Charlton is affordable for those earning the median family income. The gap increases for those earning less than median income; however this cursory analysis indicates that housing cost is not a prohibitive obstacle to entering the Charlton housing market. However, the community still needs to increase its supply of affordable units to get closer to 10 percent on the SHI.

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<sup>5</sup> Average Single Family Tax Bill, accessed on [yourtown.boston.com](http://yourtown.boston.com), Charlton, on June 7, 2007.  
<sup>6</sup> It was assumed that home or condominium owners would pay at least \$100/month for insurance.  
<sup>7</sup> The overall analysis was meant to be basic and multiple external factors were not taken into consideration. The point is to show the affordability gap in Charlton under the most general assumptions and using the most basic information available. The ultimate figure was calculated using Freddie Mac’s mortgage calculator tools, accessed at [www.freddiemac.com/corporate/buyown/english/calcs\\_tools/](http://www.freddiemac.com/corporate/buyown/english/calcs_tools/) on June 7, 2007.

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## Ongoing Efforts

In 2006, the Planning Board and Housing Authority received a grant from the Mass. DHCD Priority Development Fund (PDF) to hire the Central Mass. Regional Planning Commission (CMRPC) to analyze undeveloped Town-owned land parcels in Charlton for potential development of additional Housing Authority affordable rental units. The study was completed in November of 2006 and recommended further analysis of the two most feasible options, expanding the existing Meadowview Drive Housing Authority development and/or initiating development of Housing Authority units on a few acres out of a larger parcel of undeveloped land owned by the Town located off of Daniels Road. The Housing Authority and Planning Board are in the process in 2007 of applying for further PDF grant funding to further analyze and design affordable unit options for one or both of these potential sites.

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## Housing Recommendations

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### Goals for Housing Element

- Retain Charlton's rural character.
- Consider ways to slow residential growth.
- Provide a wide range of housing opportunities:
  - rural homes in landscape settings;
  - homes for seniors that meet their changing needs and resources; and
  - homes for families, singles, young people starting out, and others with varied needs, resources, preferences.
- Increase affordable housing (ties into goal above, with wide range of housing)

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### Recommendations

#### H-1

As soon as the 2010 Census data is available, the land use and demographic data cited in this plan should be updated. This will give the Town a clearer picture of its growth and population trends which will be necessary in order to validate and implement the recommendations of this plan.

## **H-2**

Use inventory of town-owned land to look for opportunities to provide affordable housing. The Town could issue an RFP to identify a developer that would redevelop the property to provide housing that meets the Charlton's needs.

## **H-3**

Provide a wide range of housing choices and opportunities to meet the needs identified in this plan including:

- Rural homes in landscape settings;
- Homes for senior citizens; and
- Starter homes for families, singles, and young people beginning their careers.

## **H-4**

Reconsider adoption of the Community Preservation Act (CPA). Funding acquired pursuant to CPA could be used for:

- rehabilitation of existing housing stock (loan program)
- develop creative financing mechanisms to assist income eligible households
- purchase existing multi-family homes for rental housing
- buy-down existing housing stock
- construct septic systems for non-profit affordable housing development
- provide matching funds for partnerships with non-profits
- provide housing for disabled and elderly residents

## **H-5**

Revise zoning to expand housing choices by allowing multi-family dwellings, mixed-use development, duplexes, etc. in a variety of zoning districts; allow duplexes by special permit; allow accessory apartments through site plan review by the Planning Board. This will encourage the development of a greater variety of housing types.

## Economic Development

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### Introduction

Economic development includes a wide range of components and activities. Although it is most often thought of in terms of attracting industry to the community, it is much more. The economy of Charlton is driven by the interactions and activities of all business enterprises. These businesses manufacture products, sell goods, and provide services to a variety of markets – some local, some global. The economic development element of the Master Plan needs to address Charlton’s economy as a whole, focusing on actions that promote proper planning for economic growth and diversification of the town’s tax base.

An important aspect of economic development is the desire on the part of the community to increase its non-residential tax base by increasing the stock of businesses that are located in the community. As of 2004, only 11 percent of Charlton’s tax base was funded through businesses.<sup>1</sup> It is generally believed that the tax revenues generated by businesses – either through real and personal property tax payments or sales taxes that ultimately come back to the community – are fiscally positive; that is the tax revenues are greater than the costs to provide municipal services. Businesses located in Charlton also provide secondary benefits through the expenditures of their employees in the community, which in turn support other businesses and subsequent local spending.

Issues or concerns surrounding economic development in Charlton include, as stated in the 2000 Master Plan:

- What is the optimal development that is consistent with Charlton’s values and available resources?
- Will the current state recommended ratio guidelines of 30:70 business tax to residential tax base be attainable for Charlton?
- Do current zoning bylaws curtail future business growth?
- Will areas impacted by the expansion of water/sewer lines benefit business development?
- Does the word “industry” have negative connotations?

▼  
<sup>1</sup> Economic Development Analysis of the Route 169 Corridor in Charlton, Massachusetts, prepared by CMRPC in June 2004.

- Do the definitions in our bylaws accurately reflect current terminology and modern business practices?
- Will the strengths of surrounding cities' infrastructure work to our detriment?
- Will our deliberate attempts to attract desirable businesses be supported by our permitting process and how can we expedite the process?
- Will we capitalize on the strong work ethic of our skilled workforce?

This economic development element will help to bring resolution to some, if not all, of these concerns.

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## Existing Conditions

*"A national economic upsurge began in the 1900s, followed by several years of stagnant production. Across the nation, modernized farming methods and other advances of the Industrial Revolution began paying dividends. By 1900, Charlton was undergoing a transformation from a mill town to a community dependent on agriculture. In the years leading to the Civil War there were more than 50 mills in town. On Cady Brook alone there were 23 mills. Another 21 mills stretched out along Trout Brook. None of the mills were as large as the two that merged to become Charlton Woolen Company. Twelve-hour days and six-day workweeks were common, but because goods could be produced cheaper and better at other locations they were no longer prosperous. A combination of the Depression, natural disasters and obsolescence led to the demise of most mills. By mid-century, local communities enjoyed the economic fruits that followed our nations' war victories and by the 1960's fiber optics began to edge out both farming and local mills. By the 1980's even [the presence of optics industry giant] American Optical in Southbridge was running on borrowed time as fiber optic and laser technologies were enabling the Tri-Community area to be referred to as the fiber optic capital of the world. With the introductions of the new millennium Charlton's Economic Development Commission was proposing zoning changes to convert several hundred acres along Route 20 West to business/technological uses." – Andy Levin of The News*

In the 2000 Master Plan, the community asked *"Is the pendulum swinging back and forth from a manufacturing community to an agricultural society, now back to industry?"* Charlton has seen the demise of the family farm firsthand leaving vacant farmland, fields and meadows scattered throughout the town – and often available for development. Profitability in agriculture is trending downward, impacted by competitive labor markets, cost of utilities, and comprehensive government regulations. Recent data show that Charlton still has a strong manufacturing base, but the provision of professional, educational, health and other services has grown to dominate the economy.

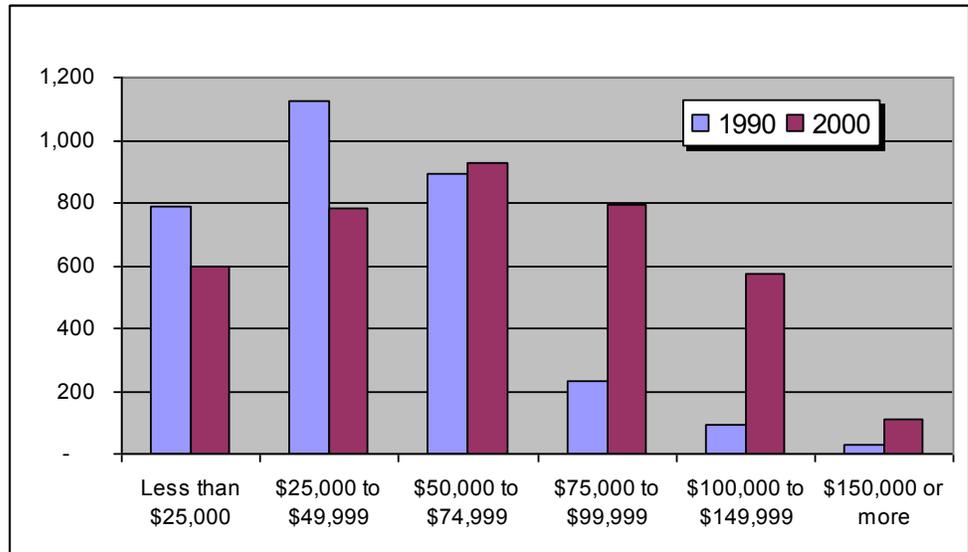
■  
Income

Between 1989 and 1999, the median household income in Charlton increased by 48 percent to \$63,033, a 10 percent more rapid increase than the statewide change (38%) and even further ahead of income growth for Worcester County (34%). Charlton's income is significantly higher than both the statewide median of \$50,502 and the County at \$47,874. Charlton's median household income ranks 104<sup>th</sup> in the state and 46<sup>th</sup> in the County, which ranges from a low in Athol of \$33,475 to a high in Harvard of \$107,934.

As shown in Chart 4-1, household income distribution in Charlton has shifted to the higher income brackets over the past decade, with substantial gains in the number of households earning \$75,000 or more per year. However, Chart 4-1 also illustrates the diversity of incomes that exist in the community.

Per capita income rose 56 percent between 1989 and 1999 from \$15,128 to \$23,626. Although the 1999 per capita income level in Charlton was less than the State (\$25,952), its rate of growth over the decade was greater.

**Chart 4-1**  
**Household Income Levels**



Source: 1990 and 2000 US Census

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## Employment

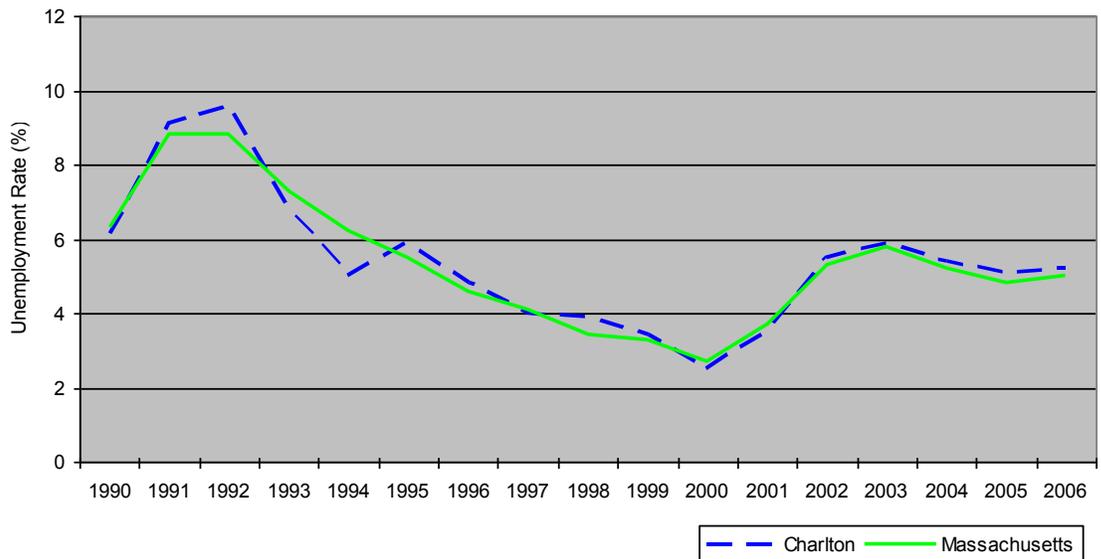
In 2005 there were approximately 300 establishments in the community employing 3,287 workers in a variety of industries and jobs.<sup>2</sup> At the same time, Charlton’s labor force (individuals 16 years and older) was estimated at 6,836, with 6,481 employed and 355 (5.2 percent) unemployed in 2006. This data indicates that Charlton “exports” labor to other communities.

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## Charlton’s Workforce

As shown in Chart 4-2, Charlton’s workforce was relatively stable throughout the 1990’s after a large spike in unemployment with the recession in the early 1990s. Unemployment declined at the same rate as the state and has remained fairly consistent with the state’s rate of unemployment since 1994. In the past six years unemployment has increased both statewide and in Charlton, but has leveled off at approximately 5 percent since 2003.

**Chart 4-2**  
**Unemployment Rate**



Source: MA Department of Employment and Training

As shown in Table 4-1, a little over 80 percent of Charlton’s employed workforce (population 16 and older) is employed in wage and salary positions, while approximately 5 percent are self-employed in non-incorporated businesses. The number of Charlton residents who identify government<sup>3</sup> as their employer has

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<sup>2</sup> Employment figures represent workers at firms who report earnings to the State. There may be a few additional jobs that go unreported (such as domestic help or part-time and seasonal labor).

<sup>3</sup> Government includes town, state and federal government places of employment.

increased 35 percent while the number of self-employed employees has decreased by nearly 20 percent to its current level. Growth of the wage and salary positions has matched the growth in total employment in Charlton.

**Table 4-1  
Employed Workforce: 1990 and 2000**

	1989	Percent of Total	1999	Percent of Total	Change	Percent Change
Private Wage and Salary Workers	4,059	82.3%	4,664	82.5%	605	14.9%
Government-Employed Workers	501	10.2%	678	12.0%	177	35.3%
Self-Employed Workers	363	7.4%	302	5.3%	(61)	-16.8%
Unpaid Family Workers	9	0.2%	11	0.2%	2	22.2%
<b>Total</b>	<b>4,932</b>	<b>100.0%</b>	<b>5,655</b>	<b>100.0%</b>	<b>723</b>	<b>14.7%</b>

Source: MA Department of Employment and Training

Overall employment levels have ranged from 4,800 in the early 1990s to 6,400 in 2006. A more revealing breakdown of employment of Charlton residents is shown in Table 4-2, which shows their place of employment by NAICS<sup>4</sup> sector. Here it is revealed that nearly 25 percent of Charlton's residents are employed in the education, health and social services sector.

**Table 4-2  
Charlton Residents' Employment: 2000**

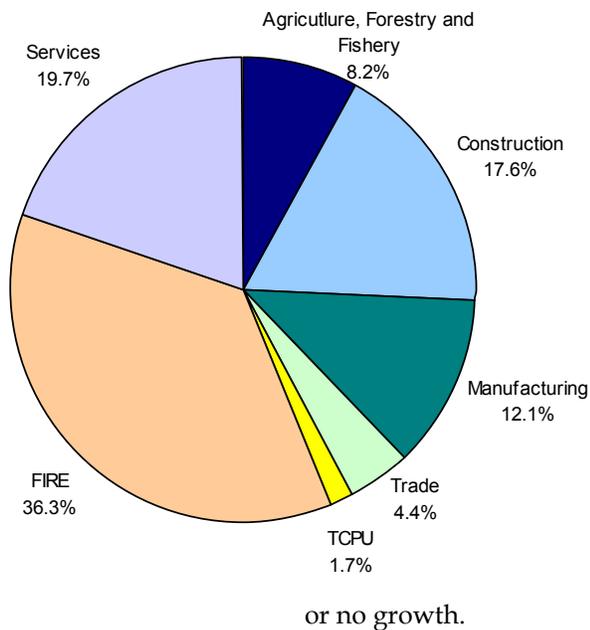
Sector	Number	Percent
Agriculture, forestry, fishing and hunting, mining	19	0.3%
Construction	524	8.9%
Manufacturing	980	16.7%
Wholesale trade	124	2.1%
Retail Trade	529	9.0%
Transportation and warehousing, utilities	323	5.5%
Information	222	3.8%
Finance, insurance, real estate and rental and leasing	589	10.0%
Professional, scientific, management, administrative and waste management services	428	7.3%
Education, health and social services	1,421	24.2%
Arts, entertainment, recreation, accommodation and food services	304	5.2%
Other services	212	3.6%
Public Administration	209	3.6%
<b>Total</b>	<b>5,884</b>	

Source: US Census 2000

<sup>4</sup> NAICS stands for the North American Industry Classification System, which replaced the Standard Industrial Classification (SIC) system that was used from the 1930s through 2002.

## Employment in Charlton Establishments

As stated earlier, Charlton establishments employ approximately 3,300 people. The largest percentage of employment within firms operating in Charlton (nearly 40 percent) is in what is called the FIRE industry (finance, insurance and real estate practitioners). The service industry provides the next largest amount of jobs in Charlton (nearly 20 percent); this category includes professional services; educational, health and social services; arts, entertainment and hospitality services; among others. Construction (18 percent) is also a strong industry. Wholesale and retail trade; the transportation, communications and public utilities (TCPU); manufacturing; and agriculture, forestry and fishing together represent the remaining 25 percent of sources of employment in Charlton.



**Chart 4-3 (at left)**  
**Distribution of Employment in Charlton by Sector: 2005**

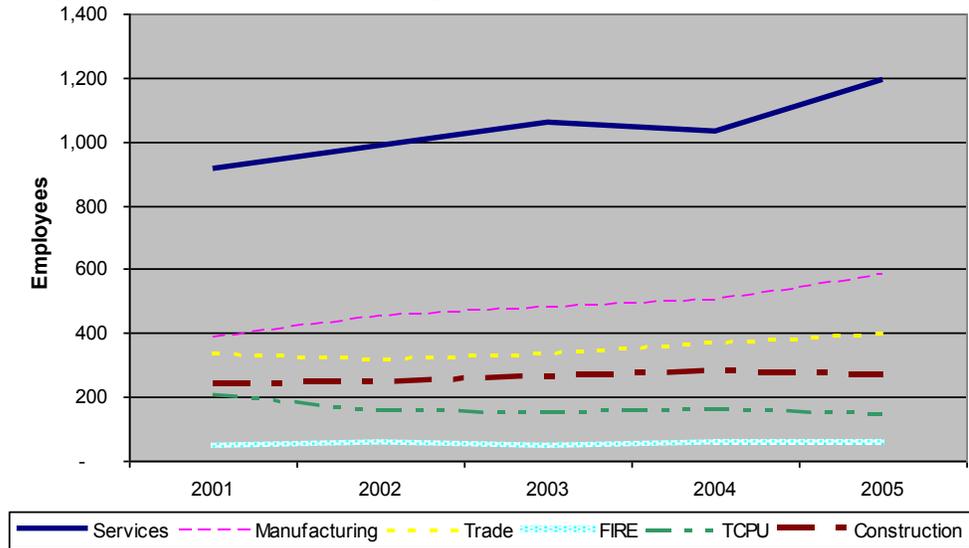
Source: MA Department of Employment and Training

Chart 4-3 graphically illustrates the 2005 mix of employers in Charlton by major industry sector, while Chart 4-4 tracks employment by major sector over the past two decades.

As shown below in Chart 4-4, the service industries and manufacturing sector have grown in the last five years. Employment in TCPU fields has decreased slightly, although this industry sector represents less than 5 percent of employment in Charlton establishments. The remaining three industry sectors have experienced little

or no growth.

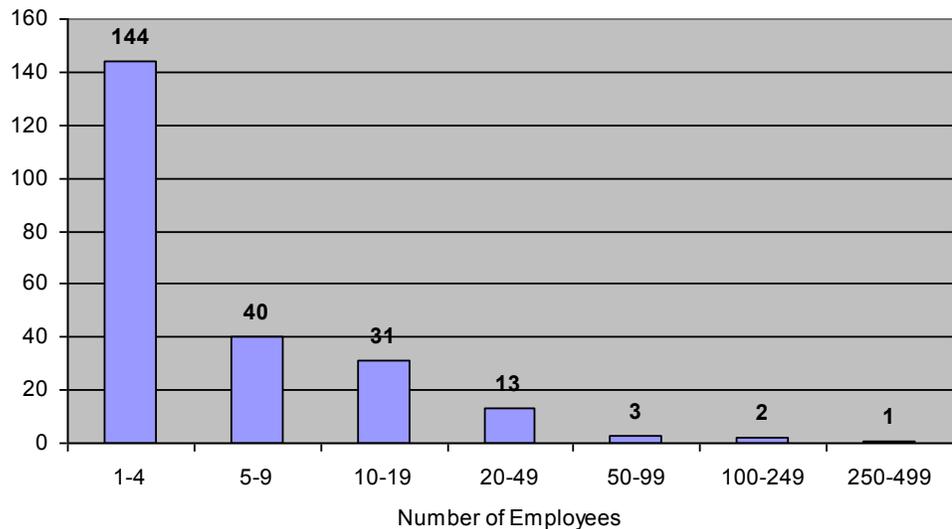
**Chart 4-4  
Employment Trends in Charlton by Sectors: 2001-2005**



Source: MA Department of Employment and Training

Data from the Census Bureau’s County Business Patterns reinforce the idea that Charlton is a small business community. In 2004, well over half (62 percent) of Charlton’s business establishments employed fewer than five employees, and nearly 80 percent had fewer than ten employees, as shown in Chart 4-5.

**Chart 4-5  
Business Establishment Trends: 2004**



Source: US Census 2000 County Business Patterns

These findings are supported regionally; according to the Massachusetts Department of Workforce Development, small employers also dominate the Central Massachusetts Workforce Area. In March 2005, 86 percent of Central Massachusetts

establishments reporting had fewer than 20 employees. However, these firms accounted for just 23 percent of the total number of jobs in Central Massachusetts. By contrast, just 3 percent of establishments reported having at least 100 employees; yet these firms were responsible for almost half of all the jobs in the Central Massachusetts Workforce Area.

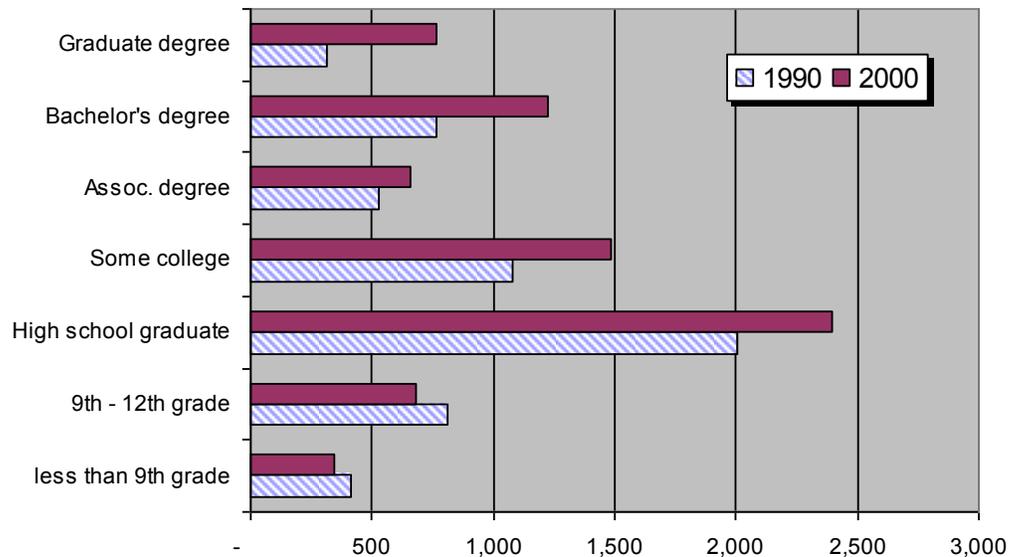
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**Educational Attainment**

Charlton’s population also exhibits a wide range of educational achievement that is becoming more focused on secondary and post-secondary attainment. As shown in Chart 4-6 below, in 2000 the average resident aged 25 and older had more years of formal schooling than in 1990. During the decade, in which this population increased by 18 percent (1,687 people), the number of individuals who had not completed a high school diploma dropped by 16 percent (132 people) while the number of high school graduates (no college) increased by 20 percent (389 people) and those with college degrees increased by 46 percent (591 people). The number of people with graduate degrees residing in Charlton increased by 450 people, or 143 percent, during this time span.

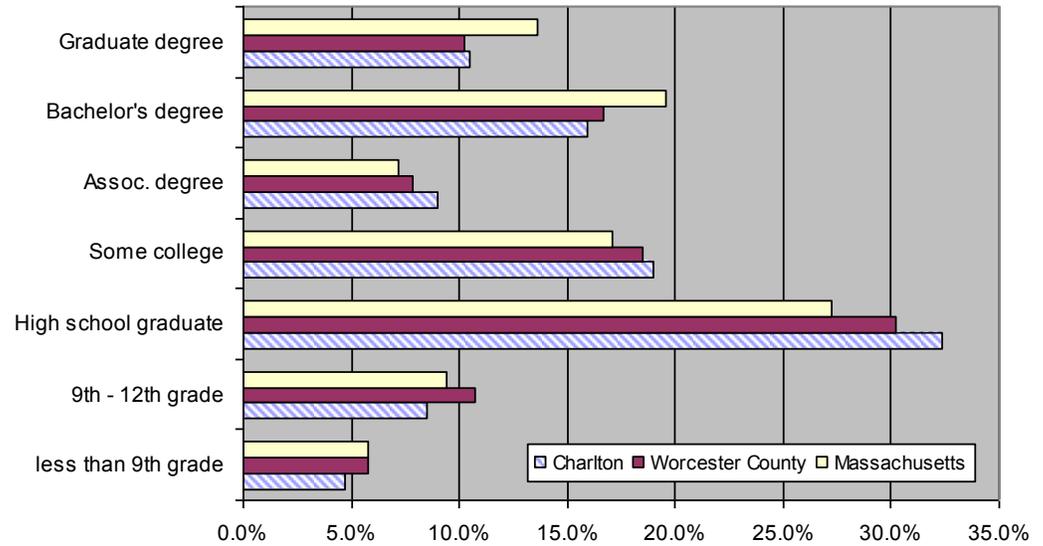
**Chart 4-6**  
**Educational Attainment 1990-2000**



Source: US Census 2000 (SF-3)

As shown in Chart 4-7, Charlton has a slightly higher proportion of residents with high school degrees, some college, and associates degrees than Massachusetts or Worcester County. However, Charlton has a lower proportion of residents with bachelor’s or graduate degrees (including doctorates) than Massachusetts, but the proportion of graduate degree holding residents (10 percent) is comparable with Worcester County.

**Chart 4-7  
Comparative Educational Achievement – 2000**



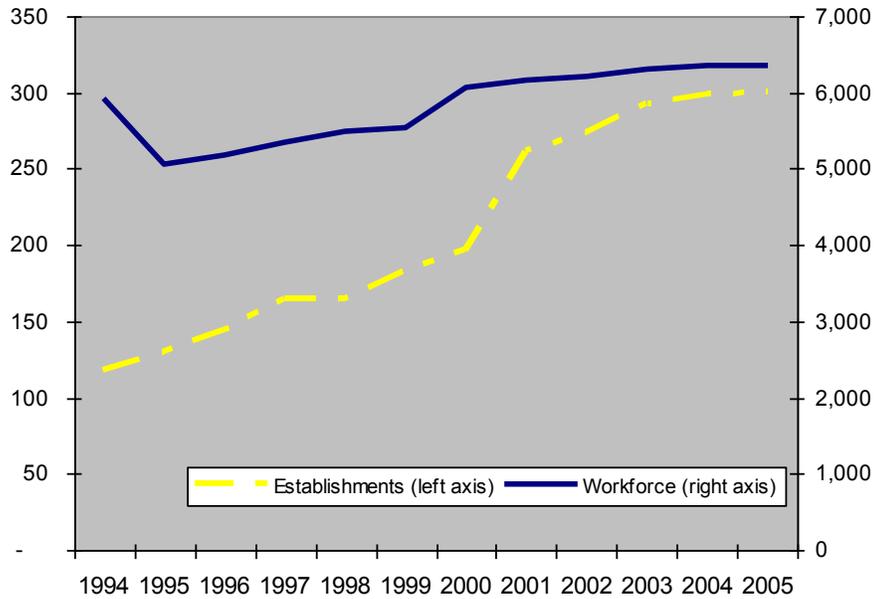
Source: US Census 2000 (SF-3)

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**Existing Businesses**

Charlton is home to approximately 300 businesses employing approximately 3,300 people, ranging from “mom and pop” type retail and service firms to large scale manufacturing companies. Two primary sources were used to estimate the number of businesses in Charlton. The Massachusetts Department of Employment and Training publishes monthly and annual employment statistics on firms by town. The most recently published data (2005) indicated a total of 282 reporting establishments, an increase of 3 over the previous year but an increase of 29 since 2002. These firms represent private sector companies with paid employees that make regular reports to the Commonwealth (an additional 18 establishments were reported as not privately owned).

Chart 4-8 shows the growth of the number of private companies and the workforce levels in Charlton over the past twelve years. The trend toward more businesses and the relatively stable workforce levels support the fact that Charlton is a small business community, with the most frequent range being 1 to 4 employees per company. Information provided in the U.S. Census County Business Patterns indicates that nearly 80 percent of Charlton’s businesses had fewer than ten employees.

**Chart 4-8  
Business Establishment Trends: 1994 to 2005**



Source: MA Department of Employment and Training (Employment and number of establishments from 1994 through 2005) and U.S. Census (number of establishments from 1994 through 2001)<sup>5</sup>

Note: 2006 data for number of establishments not yet available; thus number of employees not included.

Many builders and contractors make Charlton their home; this is confirmed by Table 4-3 below. Plumbers, electricians, renovators and other trades have thrived because of the building boom brought on by vast amounts of land, excellent schools, low real estate taxes, the location with respect to Boston, Providence, Springfield, Hartford and Worcester, and the proximity to regional highway systems such as I-90 through Sturbridge, Route 84 to Connecticut, I-290, I-390, and Route 20 running east to west through Town.

In the 2000 plan, emphasis was placed on the use of outdated mills as “incubators” of machine, injection molding and other expanding industries.

Table 4-3 shows the distribution of Charlton’s businesses among industry sector. Approximately 23 percent of Charlton’s businesses are classified as in the construction industry. The next strongest business operation in Charlton is in the retail sector, which comprises approximately 12 percent of Charlton’s business establishments.

<sup>5</sup> Because of the switch from data source for the number of establishments between 2000 and 2001, you’ll notice a large spike in number of establishments at the year 2001. The data from the U.S. Census was significantly higher than the data from the Massachusetts Department of Employment and Training, which extended through 2004.

**Table 4-3  
Charlton Establishments by NAICS Sector: 2005**

<b>Industry</b>	<b>Number</b>	<b>Percent</b>
Construction	68	22.7%
Manufacturing	18	6.0%
Wholesale Trade	13	4.3%
Retail Trade	34	11.3%
Transportation and Warehousing	9	3.0%
Finance and Insurance	8	2.7%
Real Estate and Rental and Leasing	7	2.3%
Professional and Technical Services	27	9.0%
Administrative and Waste Services	19	6.3%
Health Care and Social Assistance	11	3.7%
Arts, Entertainment, and Recreation	8	2.7%
Accommodation and Food Services	29	9.7%
Other Services (not including Public Admin)	25	8.3%
Other Industries - Not Private Ownership	18	6.0%
Not classified	6	2.0%
<b>Total</b>	<b>300</b>	

Source: MA Department of Employment and Training

## **Establishments**

Key contributors to the economic base in Charlton include:

### **Incom, Inc.**

The world's largest supplier of rigid fused fiberoptic products for commercial applications, Incom has two state-of-the-art facilities in Charlton. The main headquarters are located off Route 169 and the recently established JRD Center is located on Route 20. Founded in 1971, the company employees highly skilled assemblers and fiber optic and product engineers.

### **JRD Center at Bay Path Community College**

The Central Mass Center of Bay Path Community College (headquartered in Longmeadow, MA) offers the One-Day-A-Week Saturday College for adult women. This is an accelerated program that allows women to earn an associate or bachelor's degree in less than 3 ½ years while also balancing a family and work. Currently over 200 women are enrolled at the facility on Route 20 near the Sturbridge line.

### **Karl Storz Endovision**

KSE develops and manufactures imaging fiber optics used in Flexible Endoscopes and light transmission fiber optics for Light Cables out of their facility in Charlton. They have since expanded the floor space by 25 percent in 2005. What began as a small company in 1989 in Southbridge is now a significant contributor to Charlton's economic base.

### **GTC Biotherapeutics**

GTC Biotherapeutics performs advanced scientific research and product development from their Charlton facility and is at the forefront of their field. This facility requires highly skilled labor in the field of science, as well as less technical jobs.

### **The Overlook**

The Overlook Life Care Community contains 219 independent living residences on a 450 acres site overlooking Charlton. The Overlook provides the full spectrum of care to its residents and offers many additional services such as a Health Center, rehabilitation, Visiting Nurses and Hospice. Charlton residents are permitted to use the Overlook campus for fitness programs and for event rentals.

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## **Agribusiness**

In addition to a growing base of high technology industry and professional office uses, Charlton is also rooted in an agricultural economy that contributes to the greater economic base. These uses include:

### **Charlton Orchards**

Charlton Orchards Farm and Obadiah McIntyre Farm Winery is a functional family farm providing "Pick Your Own" and producing fine handcrafted wine.

### **Capen Hill Wildlife Sanctuary**

A gift to the Town, the Capen Hill Wildlife Sanctuary is a 72 acre wildlife and greenspace refute located off Route 20. They provide education on site, in local schools, as well as seasonal activities, and birthday activities.

### **Fay Mountain Farm**

Located north of Stafford Street off Cemetary Road, the 65 acre Fay Mountain Farm was purchased by the town in 2002 with a grant provided by DCR and funding from the Masonic Home. The town preserves this property as an active farm and leases

space for continued apple production. Passive recreation also exists on site through the Mid-State Trail and on other fields and wooded areas.

**Nature’s Classroom**

Nature’s Classroom has 14 educational sites in New York and New England, but it is headquartered in Charlton. The group works with elementary and nursery school to teach an appreciation for their own education. The summer camp offers both residential and day programs and serves children from Charlton and beyond.

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**Employment Projections**

The Central Massachusetts Regional Planning Council (CMRPC) projects a slow increase in employment in Charlton through 2030. The total in-place employment base in Charlton is projected to have approximately 3,760 jobs by the year 2030, representing an increase of 380 jobs in the next twenty years (as shown in Table 4-4). This is significantly slower employment growth than has occurred over the past ten years, when Charlton saw an increase of 2,000 employment opportunities in Charlton. On the other hand, Charlton’s workforce is projected to increase by 2,700 people by the year 2020, as projected by the town in the 2000 Master Plan (see Table 4-5).

**Table 4-4  
Employment in Charlton Projections: 2000 through 2030**

	2000*	2005	2010	2015	2020	2025	2030
Employment	2,839	3,380	3,520	3,600	3,660	3,710	3,760

Source: CMRPC and \*year 2000 from the U.S. Census.

**Table 4-5  
Charlton Workforce Projections: 2000 through 2020**

	2000	2005	2010	2015	2020	2025	2030
Workforce	6,075	6,348	7,000	7,900	9,000	N/A	N/A

Source: Economic Development Commission Projections from the year 2000 Charlton Master Plan. 2000 and 2005 data from the Massachusetts Department of Employment and Training.

These projections are based on historical trends only and do not take into account business attraction efforts, land use, zoning or other local initiatives that impact business activities. There is a good chance, with the ongoing planning efforts surrounding Route 20 and Charlton Center, that the town may exceed its employment projections sooner than predicted.

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## Workforce Development Programs

There are several programs active in Charlton that serve the needs of employers and workers relative to occupational education and development. These programs and service providers include:

- Massachusetts Department of Employment and Training (DET) office located on Airport Road in Dudley.
- Facilities for vocation and employment retraining:
  - Bay Path Regional Vocation High School,
  - Bay Path College
  - Center for Advanced Fiber Applications (CAFA),
  - Shepherd Hill Regional High School,
  - Y.O.U. Inc.,
  - Adult Evening Programs, and
  - Numerous community colleges and universities.

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## Zoning

In 2000, only 11 percent of Charlton's tax base was funded through business ventures. The relatively late acceptance of zoning bylaws (1987) conveyed the town with a mixed bag of zoning districts. The insufficient number of business sites compared to the large amount of open land has stalled Charlton's capacity to be a regional player in attracting new businesses. Narrow commercial zones and the lack of water and sewer along portions of Route 20 have discouraged the kinds of large, campus-like ventures that would have contributed to the tax base, local employment rate, and maintained rural charm.

Adequate amounts of land are zoned for new businesses to locate along Route 20 and 169; however, until public utilities such as water and sewer are established in these areas, choice business development is unlikely.

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## BEP Zoning

Since the 2000 Master Plan, Charlton created a new zoning designation for the Business Enterprise Park (BEP) zone, which replaced the Industrial Park zoning district. At the time of the zoning change, some IP-zoned land became residential or commercial and the BEP zone picked up additional residential or commercially zoned land; this change resulted in a net gain of 102 acres at the inception of the BEP district.

The BEP zoning by-law adoption has thus far been successful in Charlton. In 2006, the Planning Board issued the first Business Enterprise Park Special Permit to Griffin

Realty Trust to develop the first modern Business Enterprise Park under the by-law. The park will be constructed on 13 acres of land located northerly off of Route 20 at the intersection of Route 20 and Route 169, and will consist of five buildings to be owned and leased by the Trust. Construction is scheduled to commence in late 2007 or early 2008. Potential tenant uses include light industry, warehouse distribution, professional office space and high tech business uses. Additional BEP-zoned parcels along the Route 20 corridor are in various stages of the design, marketing or development process.

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## Other Local Initiatives

### **Economic Development Commission**

Since 2000, the Economic Development Commission (EDC) has worked closely with the Charlton Planning Board and other interested parties to study the Route 20 corridor and appropriately re-zone various locations. The result of this effort is a modern, up-to-date zoning district, the BEP Zone, and a streamlined local permitting process. Both of these activities help promote economic development opportunities in Charlton without sacrificing the character and integrity of natural and historic resources in town.

### **Economic Development Analysis of the Route 169 Corridor**

In June 2004 Charlton conducted a feasibility analysis of the Route 169 corridor for large-scale economic development. Route 169 runs north-south in the western part of Charlton and is the principal route linking Charlton and Southbridge; it is Southbridge's principal means of access to Route 20 and I-90. Classified as a rural minor arterial, Route 169 is a two-lane roadway in generally good condition. The study found that of the area within Charlton, nearly 30 acres have no development potential. The approximately 65 acres of developable land could yield up to 41 house lots or 29 BEP lot.

The study concluded that there is limited potential to create a new high-end office or research park as in the BEP-zoned districts along Route 20 due to topography, the presence of farmland (high value to the Town), and the lack of water and sewer services. Small scale commercial and industrial uses could locate on Route 169 under the current zoning. This study reaffirmed the town's commitment to focusing economic development growth along Route 20.

## **Comprehensive Economic Development Strategy Parcels**

Charlton has four large, vacant parcels along the Route 20 corridor currently designated on the Greater Worcester Area Comprehensive Economic Development Strategy (CEDS) list. Properties on this list are potentially eligible for grant funding from the U.S. Economic Development Administration (EDA), if and when site-specific development projects are proposed.

The most active of the sites is the Konover Development Corporation property, which was rezoned at the May 2007 Annual Town Meeting to Community-Business (CB), and for which we anticipate a Fall 2007 site plan submittal and MEPA submittal.

### **Konover Development Site**

The most active property, this site consists of approximately 125 acres of Community-Business (CB) zoned land along Route 20. Re-zoned in May 2007, the site is now being designed for a major shopping center consisting of approximately 670,000 square feet of retail building space. The site plan application submittal to the Planning Board has been filed and is under review.

### **Green Hill Realty Trust Site**

This site consists of 98 acres of Business Enterprise Park (BEP)-zoned land along Route 20. Located near the Charlton/Sturbridge town line, it offers an excellent location for a future business park with very close access to I-90 and Route 84.

### **Kaszowski Site**

Another 98-acre site of BEP-zoned land along Route 20, this is an ideal site for a business park or commercial use. The site is located near the intersection of Route 20 and Route 169 which leads south to Southbridge.

### **Jaromis Property Trust Site**

This site contains 138 prime acres of BEP-zoned land north of Route 20, along the eastern portion of the Town's Route 20 corridor. This site is being actively marketed for future Business Park development.

## **Other Development Opportunities**

**Route 20/Stafford Street/Maple Street Commercial Redevelopment** – Town Meeting in the Spring of 2005 approved a zoning map amendment that re-zoned two blocks of existing mixed use buildings located northerly off of Route 20 (bounded by Route 20, Stafford Street and Maple Street) from residential Small Enterprise (R-SE) to Community Business (CB). The property owner anticipates an eventual redevelopment that would demolish the existing mix of residential units and small

commercial establishments and replace them with a multi-tenant commercial plaza design. As the future project is planned and designed, particular attention should be paid to traffic engineering review and maintaining the quality of traffic flow along this heavily-traveled segment of Route 20.

**Southbridge Industrial Road Project** – During the past year, the Town of Southbridge has proceeded with the planning, design and eventual implementation of an access road westerly between Route 169 and land in the vicinity of the Southbridge airport to provide access for future economic development in Southbridge. While this effort is located in Southbridge, its proximity to the Charlton town line warrants consideration of this project as it develops for potential traffic impacts due to project traffic flow along Route 169 in Charlton.

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## Opportunities

The residential survey conducted for the 2000 Master Plan in the year 1998 has some interesting and relevant findings to include in this Master Plan Update. “Some industry/mostly residential” was preferred over “residential/agricultural” as the most desirable description of Charlton in the future. The survey indicated strong support for development along Route 20, identifying it as an “incredible opportunity for the Town; we should go slow and carefully plan it.” Fourteen (14) percent of respondents indicated support for “nonresidential growth the entire length” of this highway. In addition, the survey findings supported the notion that “non-residential development” was occurring “not fast enough” since 1990. Interviews conducted for this 2007 Master Plan Update generally supported these findings, with a large percentage of the interviewees indicating a desire for more support and retail services available within Charlton.

Charlton has the opportunity to guide its commercial growth. There is the potential for two focused economic development areas: the Village Center and the Corridors. In the interviews, most identified a desire for more resident-oriented services located in town. Specifically, most interviewees expressed a desire for more restaurants in Charlton. Small scale markets, goods sellers, restaurants, boutiques, and professional services that can be supported by a population the size of Charlton can locate in the town center for ease of access and to promote a more cohesive Charlton Center.

Larger, auto-oriented businesses, such as the CVS being constructed on Route 20, may be located along the major corridors: Route 20 and Route 169. The appropriate location for large scale retailers should be explored in the case these uses want to enter the Charlton market; they may be best suited on the corridors, where economic development opportunity and connectivity to neighboring towns is at its strongest.

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## The Corridors

Charlton has three corridors through town, Route 20, Route 169 and Route 31, which could be suitable for commercial development. Of these, only Route 20 has been identified as well-suited to increased commercial growth. As the data shows, Charlton will continue to grow in both population and businesses and the town should direct the commercial growth to the most appropriate areas. Traffic and safety issues will remain the prominent concerns for these corridors.



As discussed above and presented in the Route 169 Constraint Analysis conducted by CMRPC, Route 169 is significantly constrained by topography and not well suited for a commercial development corridor. In public meetings, residents have expressed an interest in preserving Route 31 as a more rural connector from Route 20 to the center of town and directing the future commercial development along Route 20 where it is most appropriate.

The recent adoption of the BEP Zoning District has been a first step at increasing the potential for attracting light industrial businesses, potential high-technology companies and professional office space to locate in Charlton, along the Route 20 corridor. As more cars flow through Charlton on Route 20, this area will be well-suited for additional retail development, particularly small- to mid-size businesses.

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## Charlton Center

The majority of persons interviewed for this Master Plan indicated a strong desire or preference to enhance the commercial aspect of Charlton Center. In direct response, Charlton Center became the theme of the Town's second public visioning session for the Master Plan Update. The ultimate goal for this area is a more "New England" style Village Center with more small businesses, housing, and a pedestrian friendly environment. Similar to the Route 20 and Route 169 corridors, transportation and traffic issues will be the most significant concern in the growth of the Charlton Center commercial district. Because of the strong interest for a plan for this area, there is a full chapter dedicated to the topic of the Village Centers (See Chapter 9).





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## Opportunity Sites

- Konover Development Shopping Center
- Recent CVS development
- Jaromis Property Trust
- Commercial Property Opportunities
- Green Hill Realty Trust
- POG Realty Trust
- Kaszowski Property
- The Griffin Realty Trust Park



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## Constraints

- Wetland constraints exist north of Route 20 and along one side of Route 169.
- Gasoline spills affect mainly residential and some publicly-owned parcels.
- Utilities such as water and sewer are the biggest short-term limitations to economic development.

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## Economic Development Recommendations

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### Goals for Economic Development Element

- Achieve a range of business activity in Charlton that offers a range of benefits to the community, including employment opportunities, convenient sources of goods and services, and net tax revenue for the town.
- Locate business development where it will serve different market opportunities in ways that maximize benefits while minimizing negative impacts.
- Encourage desired economic development by promoting Charlton as a good place to do business.
- Increase allowed uses in Charlton to facilitate business growth (ties into above).
- Increase the business tax base to comprise a greater percentage of Charlton's total tax base.

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## Recommendations

### **ED-1**

Encourage a range of business activities in Charlton to increase the tax base by locating businesses where they can meet different market opportunities, maximize community benefits, and minimize impacts. Take advantage of regional markets and public investments in transportation, sewer, and water systems by locating high value industrial, regional office and commercial development along major thoroughfares such as Rts. 20, 169 and 31 (i.e. Konover development on Rt. 20).

### **ED-2**

Work with local businesses to promote Charlton as a place of business. Establish a local business directory on the town's website, or create links to local business and non-profit organization websites. Consider having the business community establish a Charlton Welcoming Committee for new businesses.

### **ED-3**

Update and revise land use designations in the zoning bylaw along the Rt. 20 and Rt. 169 corridors for commercial, office, and industrial uses to better reflect the land use types expected along these economic development corridors. Review uses designated by right and by special permit.

### **ED-4**

Explore opportunities for shared wastewater disposal or small package treatments plants to meet the needs of multiple commercial properties, and assure that local regulations do not impede shared systems.

### **ED-5**

Consult with a variety of stakeholders, including developers, engineers and attorneys with working knowledge of Charlton's zoning, to define and identify bottlenecks, conflicts and redundancy.

### **ED-6**

Prepare a development permitting guidebook for use by developers and town boards.

### **ED-7**

Overhaul and update the existing use regulations in the business and industrial districts to foster multi-use development and encourage clusters of compatible businesses.

## Natural, Cultural and Historic Resources

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### Introduction

Natural and cultural resources are a fundamental aspect of the town's character, beauty and environmental well being. Charlton is rich with resources such as water, fish and wildlife, scenic roadways, and vistas, historic and archeological features. Of special concern is the rate of development throughout the town, as shown in Chapter 2. Innovative regulatory tools, advancing planning and creative development are the keys to preserving those treasured resources.

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### Natural Resources

The section below, describing Charlton's existing natural resources, is largely derived from the 1996 Open Space and Recreation Plan. Updates have been provided where the information is available at the writing of this Master Plan Update.



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### Water

Ponds, lakes, streams, brooks, rivers and wetlands exist throughout Charlton. In fact, as reported in Chapter 1, water represents nearly 700 acres (3 percent) of Charlton's land area – no small amount. This abundance of water bodies and streams adds to the pastoral charm. Water resources provide means for recreation, views, and conservation. Many of these areas are man-made and are the result of old industrial operations or farms.

The eastern slope of Charlton is drained by a series of streams into the Little River upper tributary of the Thames River watershed. McKinstry Brook drains the western section of town. Along its course are numerous waterfalls and rapids. Cady Brook rises in Spencer and flows south emptying into the Quinnebaug River; Cady Brook is also the main drainage outlet from Charlton. Over 20 mills were located on this stream, two of which remain. Many mill sites and dams can be found in this corridor.

Water resources are identified on Figure 5-1, *see the following page*. Although aquifer recharge areas exist within town, there are no accurate maps. The town should work with the state to identify these aquifer areas as well as other water resource areas to develop guidelines for their protection.

Charlton is located almost equally within the French and Quinnebaug Watersheds; a small northwestern portion of the town is located in the Chicopee Watershed.

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## Surface Water

The following section describes the surface water resources in Charlton.

### Privately-Owned Ponds

- Putnam Pond
- Snow Pond
- Cranberry Meadow Pond
- Lambs Pond
- Jones Pond
- Wee Laddie Pond
- Hultered Pond
- Sibley Pond
- Blood Pond
- McIntyre Pond
- Ashworth Pond
- Dodge Pond

#### Baker (Gore) Pond

An enhanced Great Pond of approximately 169 acres, Baker Pond was created by the construction of a dam for water power in the 1830's. Its shoreline is populated with approximately 41 homes and an additional 30 plus home are situated within 500 feet of the shoreline. A diagnostic feasibility study was completed in 1987 resulting in a winter drawdown for weed control. In addition, the pond was treated for blue-green algae. The pond exhibits a serious phosphate loading problem that should be addressed before the problem spreads downstream.

#### Granite Reservoir

A 198-acre great pond, Granite Reservoir has a maximum depth of 14 feet and an average depth of 8 feet. It is privately owned and used for swimming and boating.

#### Buffumville Lake

A 488-acre man-made lake, Buffumville Lake was constructed in 1958 for flood control purposes. It is publicly-accessible and used for swimming, boating, and fishing.

#### Pikes Pond

Pikes Pond is 32 acres and without great pond status. A man-made water body, it is privately owned and used for passive recreation and fishing.

#### Little Nugget Lake

Little Nugget Lake is man-made and publicly accessible.

#### Glen Echo Lake

An 11-acre lake without great pond status, Glen Echo Lake has a maximum depth of 25 feet and an average depth of 12 feet. It is heavily built-up on all shorelines and exhibits various water quality problems. Man-made and publicly accessible, Glen Echo is used for fishing, boating, swimming and other recreational water activities.

### **Prindle Lake**

A 71-acre lake without great pond status, Prindle Lake is man made and publicly accessible.

### **Pierpoint Meadow Pond**

Pierpoint Meadow Pond is a 90-acre great pond with a maximum depth of 14 feet.

## **Flowing Water**

### **Cady Brook**

A moderately flowing stream with an average width of 15 feet, Cady Brook runs from Charlton to Southbridge parallel to Route 169.

### **Little River**

A gradual flowing stream with an average width of 15 feet, Little River runs for approximately 400 feet starting south of Route 20. This stream has open access for fishing with occasional large open pools.

### **McKinstry Brook**

A shallow, low-flowing stream averaging 10 feet in width, McKinstry Brook runs for 200 feet. With a depth ranging from 4 inches to 8 inches, it occasionally dries up except for a few small open pools.

### **Potter Brook**

A 200-foot stream with an average width of 6 feet, Potter Brook contains several small rock dams causing the creation of large deep pools. It has easy access for fishing.

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## **Flood Hazard Areas**

Flood hazard areas within Charlton are limited due to the hilly topography which limits flood zones to those areas immediately surrounding water bodies. Federal Environmental Management Authority (FEMA) maps shown in the 1996 Open Space and Recreation Plan portray an accurate description of Charlton's flood-prone areas.

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## **Wetlands**

Little mapping exists of Charlton's wetland resources, other than the areas identified in general on the USGS topographic mapping data. However, the Commonwealth is undertaking a detailed mapping through its Wetlands Conservancy Program. These maps, prepared by the Executive Office of Energy and Environmental Affairs, will

provide significant benefit to the town for future resource protection planning efforts.

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## Aquifer Recharge Areas

Although aquifer recharge areas exist within the town, there has been no comprehensive and up-to-date mapping of aquifer recharge areas. In 1966, the consulting firm of Whitman and Howard, Inc. presented a potential groundwater yield of 1 million gallons per day in an area near Buffumville Lake (see Map #4 of the 1996 Open Space and Recreation Plan). However, as part of an analysis of additional sources of potable water, the town should work with the state and appropriate consultants to update this study, identify aquifer areas and develop guidelines for their protection. At this time, the town water and sewer commission is working with their engineering consultant (Tighe & Bond) to identify aquifer areas for a potential town water system.




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## Vegetation

### Native Hardwood Species

- Beech
- Sugar Maple
- Birch
- Oaks
- White Pine
- Hemlock (wetter areas)
- Black Cherry

The vegetation in Charlton consists of farmland, forests and vegetated wetlands. The farmland is dominated by the remains of once productive or still operating dairy farms, such as Dresser Hill Farm located in south-central Charlton, Cooks Farm located in northeast Charlton and Kaszowski Farm located in western Charlton. Regardless of their current productivity, these areas typically consist of open fields used for grazing or the production of hay or other grain for consumption by cows. Even on those farms that are no longer in production, the remaining fields are kept open through yearly harvesting.

### Native Wetland Species

- Red Maple
- Speckled Alder
- Canadian Serviceberry
- Silky Dogwood
- Eastern Hemlock
- Jack-in-the Pulpit
- Sedge
- Sweet Pepper
- Winterberry
- Arrowwood
- Spice Bush
- Sensitive Fern
- Cinnamon Fern
- Swamp Honeysuckle
- Pussy Willow
- Highbush Blueberry

Forested areas are scattered throughout Charlton; although the predominance of uninterrupted forested areas are found on the outskirts of Town. As of 1985, approximately 70 percent of Charlton is covered by forest.<sup>1</sup> Charlton has been listed in the Department of Environmental Management's Urban Forestry Program's Champion Trees of New England as home of the largest Black Cherry (*Prunus serotina*) tree in Massachusetts.

Wetland vegetated areas are interspersed throughout the Town and associated with the numerous water bodies and streams discussed above. The species noted in the list at left are taken from the *National List of Plant Species that Occur in Wetlands: Northeast*, distributed by the Fish and Wildlife Service, U. S. Department of the Interior.




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<sup>1</sup> As discussed in Chapter 1, this higher proportion of forested land can be attributed to data from MassGIS, which identifies land coverage based on aerial photography and thus differs from Assessor's parcel-based data which categorizes land use based on actual land ownership and use.



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## Fisheries and Wildlife

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### Fisheries

#### Fish Species

##### *Warm Water*

- Bass
- Pickerel
- Perch
- Sunfish
- Bullhead
- Minnows
- Dace
- Shiners

##### *Cold Water*

- Eastern Brook Trout
- Brook Trout (stocked)
- Brown Trout (stocked)

Charlton has diverse and abundant aquatic habitats consisting of cold water and warm water streams and ponds. These habitats are home to many fish species, both native introduced and stocked. Angling opportunities are excellent due to ample public land access.

#### **Warm Water**

Warm water habitats include: Buffumville Lake (good public access), Granite Reservoir, Prindle Lake, Glen Echo Lake and Gore Pond (all limited public access), as well as a number of other small warm water ponds. Water depth, chemistry and aquatic vegetation varies from pond to pond. This variation results in different quality and quantity of fish species composition. Some shallow smaller ponds are subject to oxygen depletion during winter months and breeding stress in spring/summer resulting in some fish mortality. Generally, Charlton ponds have good fish production capability. Northern Pike have been stocked in Buffumville Lake in 1984, 1988 and 1994.

#### **Cold Water**

Trout fisheries are primarily confined to streams and brooks. The many brooks in Charlton have excellent native trout species, of which Eastern Brook Trout is the primary species. The Department of Fisheries and Wildlife (DFW) stocks trout in Little River, South Fork of the Little River, Potter and McKinstry Brooks.

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### Wildlife

Diversity and variety of wildlife are the strong factors of Charlton's environment. Wildlife habitat includes upland forested areas, numerous wetland types, early successional brushy fields, active agricultural fields, and suburban backyards. All habitats are high quality, as reflected by significant wildlife production.

Wildlife species found in Charlton are common to all of central Massachusetts. Occasionally, uncommon animals are seen in Charlton. Moose, Turkey Vulture and American Bald Eagle have large home ranges and expanding populations. A complete listing of wildlife species including mammals, birds, fishes, reptiles and amphibians is too extensive to be noted here.



**Wildlife Species  
(sample)**

- Raccoon
- Whitetail Deer
- Cottontail Rabbit
- Gray Squirrel
- Red Fox
- New England  
Coyote
- Songbirds – various
- Ruffed Grouse
- Turkey
- Ring Necked  
Pheasants (stocked)
- Moose
- Vulture
- American Bald  
Eagle

**Private Lands**

Most of the wildlife habitats on private land consist of suburban backyards and farmland. The abundant and diverse wildlife species can adapt to this changing habitat; however, adaptability to humans can present problems at times. Crop damage, livestock predation, property damage and health and safety concerns result from the interaction of people and wildlife.

**Public Lands**

The DFW and the U. S. Army Corps of Engineers (Army Corps) are major land stewards in Charlton. Bennett Wildlife Management Area – 281 acres of old fields and forest – is open to the public for wildlife related recreation. Wildlife species such as Whitetail Deer, Ruffed Grouse, Gray Fox, Coyote and Turkey benefit from forest habitat management conducted on state and private lands. Hunting is popular on state lands for Whitetail Deer and stocked pheasant. The Division of Fisheries and Wildlife stocks about 140 Ring Necked Pheasants annually on open covers and suitable habitat in Charlton. These birds are hunted during the fall upland game season.

**Capen Hill Nature Sanctuary**

This 72-acre farm was gifted to the Town by Ruth Wells in memory of her husband and has served the people of Charlton since 1977. Its purpose, as outlined in its charter, is to protect the wildlife refuge and natural resources, to maintain unspoiled areas for the general public to enjoy, to further the scientific and aesthetic study of birds, plants and all wildlife, and to provide environmental education to present and future generations. Capen Hill has membership of almost 2,000 members and has provided summer nature camp for about 200 children yearly. Capen Hill also operates the only wildlife rehabilitation facility in the state accepting injured and orphaned wildlife with care provide by a state and federally licensed wildlife rehabilitator.

**Fay Mountain Farm**

Located north of Stafford Street off Cemetary Road, a town-designated scenic road, the 65 acre Fay Mountain Farm was purchased by the Town in 2002 with a grant provided by the Division of Conservation Services (DCS) and funding provided by the Masonic Home through a state agricultural mitigation fund requirement. The Town preserves this unique property as an active farm resource by leasing it to continue as an apple orchard. The Mid-State Trail, which goes through the site, offers passive recreational opportunities. The orchard occupies 32 acres of the site, but the property also includes an historic barn, Snow’s Pond, blueberry and raspberry plantings, and more than 28 acres of woodlands and fields.

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## Rare Wildlife

Estimated habitats of rare wildlife are located in northeast Charlton along the Little River corridor down to Buffumville Lake, as well as in southern Charlton near East Baylies Road and another area in northwest Charlton. Prime habitat areas for wood turtles in Charlton are located along river corridors, predominantly the Little River Basin. In addition, marbled salamanders have been sighted numerous times in Charlton associated with vernal pools, none of which have been certified officially by the Natural Heritage and endangered species program through the DFW.



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## Scenic Resources and Unique Environments

Although there are no state designated scenic resources within Charlton, there are many scenic resources of importance to Charlton and its residents and worthy of protection. Scenic resources important on the local level include Scenic Landscapes, Geological Features, and Cultural, Archaeological and Historic areas. These features are described in more detail below.

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## Scenic Landscapes

Scenic Landscapes have been defined to include designated scenic roads, agricultural landscapes, open meadows/fields and stream corridors. These unique features are outlined on Map 5 in the 1996 Open Space and Recreation Plan.

The Designated Scenic Roads include:

- North Sturbridge Road - retains original stone walls and ancient maple trees.
- Gould Road/Cemetery Road/Wheelock Road/Buteau Road - form a network of well preserved rural character.
- Smith Road/Tucker Road/McIntyre Road - have large granite boulder walls that are distinctive in shape.
- Horne Homestead Road - ancient way ending at a 360 degree vista of neighboring countryside.
- Jones Road

Agricultural landscapes include:

- Orlando's Property - vistas from a high hill to the west provides some of the finest views for the northwest section of town.
- Kestigan's - high drumlin continues in an agricultural use while providing long range views north and west.
- Dean's Farm/H.K. Davis/Little Mugget Hill - combination of highest hills in Charlton with surrounding fields provides a remnant of once common countryside.

- Tucker - this high hill now returning to woodland gives views to the east and south.
- Horne Homestead - combination of hills, valleys and woodlands provide exceptional evidence of changing phases of agricultural uses.
- A F. Putnam/Partridge Hill - intensely maintained remnant of an early farm is maintained by one of the land's descendants.
- Dresser Hill - view awarded from this high drumlin can not be exceeded by anywhere in southern Worcester County. A series of farms are located on this hill, which represents the most intensely developed agricultural land in town.
- Denfield Road - remnants of once prosperous farms provide insight into the labor required to bring stony acres under cultivation.
- Carpenter Hill/McIntyre Road - a series of former farms here show the possibilities of agricultural uses on stony ledge land.
- Heritage Golf Course/McKinstry - these agricultural lands have been converted to greens for golf courses, but retain open landscape features.

Charlton contains numerous open meadows and fields. These sites are existing open fields maintained to supply their adjacent farms with hay crops. In addition, two sites are institutional establishments which provide produce and supplies to their facilities.

Charlton has two primary stream corridors:

- The eastern slope of Charlton is drained by a series of streams into the Little River upper tributary of the Thames River watershed.
- McKinstry Brook drains the western section of town. Along its course are numerous waterfalls and rapids, a boon to the fisherman and a delight to the hiker.

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## Geologic Features

### Open Hilltops / Scenic Views

- Stedman's Hill
- Doane Hill
- Osgood Hill
- Curtis Hill
- William's Hill
- Little Muggett
- Tavern Hill
- Hammond Hill
- Eastman Hill
- Mugget Hill
- Home Hill
- Conlin Hill
- Wolfe Hill
- Dresser Hill
- Masonic Home Hill
- Carpenter Hill

Charlton's land form also boasts geologic features, such as numerous hills, many of which are open. Geologic features are described as follows:

- Brookfield Road/Bond Sawmill Road - an erratic boulder with a large concave area used as a rock shelter.
- McKinstry Farm/Capen Hill - a bear den and a jumbled mass of boulders containing many small cavities. This location was the site of the last bear sighting in Charlton.
- Upper/Lower Gorge of Little River - streams cut deeply through ledges forming waterfalls and rapids.
- Beech Falls - small stream with a spectacular fall in the midst of a deep beach grove off of Northside Road.



Charlton contains many open hilltops which highlight these land forms and create some of the most scenic views to and around town. These open hilltops are listed to the left.

Much of the visual character of these rural hillsides is provided by private, undeveloped land that has little or no long-term protection as open space. As a result, many are and will continue to come under pressure for development.

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## **Historic and Archaeological Resources in the Town of Charlton**

The Town of Charlton has a rich history represented in physical cultural resources, its historic and archaeological resources, which include buildings, structures, objects, burial grounds, landscapes, and archaeological sites. These historic and archaeological resources provide a valuable material record of the history of Charlton and significantly enhance the quality of life in the town. They enhance the scenic qualities of the landscape, establish community character and identity, and in large part define what is unique about the Town of Charlton. The historic properties and sites that comprise the cultural landscape in Charlton are both finite and non-renewable. Once destroyed, they are lost forever. Therefore, this section of the Master Plan presents a plan to assist in the management of Charlton's rich and varied historic resources.

The following section of the Master Plan contains four separate components associated with the preservation of historic and archaeological resources in the Town of Charlton: (1) Identification and Evaluation of Historic and Archaeological Resources; (2) Preservation-Related Tools and Programs; (3) Historic Preservation Goals and Objectives; and (4) Recommendations. The first section provides a brief overview of the Massachusetts Historical Commission's Inventory of Historic and Archaeological Assets of the Commonwealth as well as the State and National Registers of Historic Places, and notes the properties and districts in Charlton that are included in both the State and National Registers. The second section describes tools and programs that could potentially be utilized by the Town for historic preservation purposes. The third section delineates more specific goals and objectives related to issues defined by the Town of Charlton, and the fourth section provides overall historic preservation recommendations.

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## **Identification of Historic and Archaeological Resources**

The identification and documentation of historic and archaeological resources in the Town of Charlton is a fundamental research and preservation planning process

designed to provide basic information on the current location, appearance, and condition of historic resources throughout the community. Evaluation of their significance and resultant recognition through their listing in the State Register of Historic Places and National Register of Historic Places is an important additional step. Properties that have been documented on state inventory forms are, after acceptance by the Massachusetts Historical Commission, included in the Inventory of Historic and Archaeological Assets of the Commonwealth (the Inventory). Properties that have been evaluated and are determined significant through an official review and approval process (local landmarks and districts, National Register-listed properties, properties with preservation restrictions) are listed in the State Register of Historic Places. Only properties that have been determined significant through a state and federal nomination and approval process are listed in the National Register of Historic Places. The Inventory and State and National Registers of Historic Places are described below.

As noted in more detail below in the Preservation-Related Tools and Programs section, the National Register of Historic Places is the official federal list of districts, sites, buildings, structures, and objects that have been determined significant in American history, architecture, archaeology, engineering, and culture. The State Register of Historic Places was established in 1982 as a comprehensive listing of buildings, objects, structures, and sites that have received local, state or national designations in Massachusetts based on their historical or archaeological significance. The Inventory of Historic and Archaeological Assets of the Commonwealth includes all buildings, structures, sites, and objects that have been recorded on inventory forms in the Commonwealth, not all of which have received an official designation.



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## **Inventory of Historic and Archaeological Assets**

The Massachusetts Historical Commission's (MHC) Inventory of Historic and Archaeological Assets (the Inventory) is a statewide list that contains information about all properties that have been documented on a MHC inventory form. In order to be included in the Inventory, a property must be documented on one of several types of MHC inventory forms, which is then entered into the MHC database. This searchable database, known as MACRIS, is now searchable online at <http://www.sec.state.ma.us/mhc>.

According to the MACRIS, Charlton's Inventory documents nearly 200 properties ranging from the turn of the 18<sup>th</sup> century to the late-20<sup>th</sup> century. Much of the inventory was completed in the 1970s when the town undertook a village survey in preparation for establishing the Northside Village Historic District and was further supplemented in the 1990s in preparation for establishing the Charlton Center Historic District.

Charlton has 14 prehistoric and 18 historic period archaeological sites. One of the historic period archaeological sites (the Bates-Randall Homestead Site, CRT-HA-10)

has been determined eligible for listing in the National Register under Criterion D, which refers to the site's potential to yield important information. Due to the known information about other regions as well as the apparent prehistoric and historic period activity in Charlton it is likely that there will be more archaeological sites identified in the future.

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## State and National Registers of Historic Places

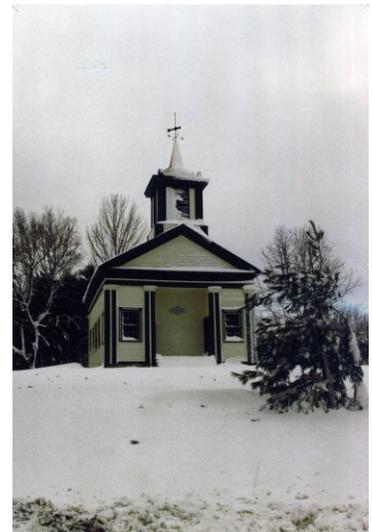


*The west entry of Rider Tavern.*

The Town of Charlton has a number of structures that are listed in the State and National Registers of Historic Places. The first National Register listing in Charlton was in 1976 with the individual listing of the Rider Tavern, followed by the John Spurr House later in the same year. In addition to these two individual listings, Charlton has 2 National Register Districts – Northside Village Historic District and Charlton Center Historic District. All of these properties are automatically listed in the State Register of Historic Places. Three local historic districts – Northside Historic District Central, Northside Historic District East, and Northside Historic District West – also are listed in the State Register. Additionally, the Northside School is a contributing element to the Northside Village

Historic District. Two of the abovementioned properties – Rider Tavern and Northside School – are protected by preservation restrictions drawn up in accordance with MGL Chapter 184, Sections 31-33. A preservation restriction (PR) runs with the deed in perpetuity and is one of the strongest preservation strategies available. All properties that have preservation restrictions filed under the state statute are also automatically listed in the State Register.

For a list of Charlton properties that are listed in the State and National Registers of Historic Places, as well as those properties that are recorded in MHC's Inventory. Please note that no information concerning archaeological resources, especially their locations, can be disclosed in documents prepared for public review in order to protect the sites from possible looting or vandalism. For additional information regarding archaeological resources in the Town of Charlton, please contact the State Archaeologist at the MHC.



*The Northside School in the winter.*

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## Preservation-Related Tools and Programs

Charlton already has important planning tools in place to document current conditions within the town, identify issues of concern to town residents, and to develop strategies for action. This section of the Master Plan identifies a variety of planning tools and programs (both voluntary and regulatory) that are available for preservation planning purposes in the Town of Charlton. Many programs exist at the local, state, and federal levels that are available to assist in the preservation of Charlton's important historic resources. Three broad categories of preservation-related programs are described in this section including Local Planning / Protection of cultural resources; Federal and State Regulatory review, and Financial Programs and Incentives.

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### Local Planning / Protection

#### National Register of Historic Places

The National Register of Historic Places (NRHP) is the nation's official list of significant historic properties. Properties listed in the NRHP include sites, buildings, structures, districts, and objects that are significant in American history, architecture, archaeology, engineering, and culture. Contrary to popular perception, listing in the NRHP does not limit a property owner's right to alter, manage, or sell the property when using private funds. Instead, the designation acts as a key to access preservation programs and incentives at the federal, state and local level.

Some of the key benefits to NRHP listing include eligibility for federal and state rehabilitation tax credits, access to income tax deductions for the donation of historic preservation restrictions, and matching grant funds for preservation related projects. NRHP listing also requires consideration in federal, state, and some local planning projects.

NRHP properties must be at least fifty years old (unless they demonstrate exceptional significance) and must possess physical integrity by retaining enough of its original materials to exhibit its historic appearance during the time period of its historic significance. The NRHP recognizes properties associated with famous figures and events, but also acknowledges places that are associated with the history of important themes and trends in American history and pre-history. NRHP listing is accomplished through a nomination process initiated by an individual, or a private or public entity. Property owners may object to the listing through a certified letter to the Charlton Historical Commission. If 51% of the property owners within a district object to the listing through the certified letter objection process, the district will not

be officially listed in the National Register. The number of properties owned by a single owner is immaterial; each property owner has one “vote”. The nomination addresses the significance and integrity of the resource through a thorough report documenting its appearance and history. The report is reviewed by the MHC staff, the Massachusetts Historical Commission’s state review board, and the National Park Service before final designation.

### **Demolition Delay Bylaw**

The objective of a demolition delay bylaw, which has been instituted in many Massachusetts communities, is to encourage owners of historic buildings to seek and consider alternatives to demolition and encourage preservation or relocation of significant buildings. The adoption of a Demolition Delay Bylaw by the Town of Charlton would add an extra level of protection to historically significant buildings by requiring demolition permit applications to be reviewed by the Charlton Historical Commission. Communities vary on the age and type of properties to be included in their Demolition Delay Bylaws, but communities typically require buildings that are at least 50 years old, and determined to exhibit architectural or historical significance to be reviewed before demolition is allowed.

### **Local Historic Districts**

Local Historic Districts (LHD) can protect the appearance of historic properties and encourage new construction to be designed to complement the historic setting. The designation of a LHD imposes a review and approval process by a commission of appointed members for proposed exterior changes to properties. The primary strength of a LHD is that it can be tailored to specific community needs while providing greater protection for local resources. Design guidelines are developed to address the significant defining characteristics of a particular area. Designation as a LHD is one of the most effective ways to protect the historic character of buildings, streetscapes, neighborhoods, and special landmarks from inappropriate alterations, new construction, and demolition. In addition to protecting historic resources, locally designated districts across the country consistently produce stable property values, increase commercial activity, and attract tourism dollars.

Currently, the Town of Charlton has one local historic district composed of three segments – (1) Northside Historic District Central, (2) Northside Historic District East, and (3) Northside Historic District South – which are regulated by the Charlton Historic District Commission (CHDC). The CHDC reviews proposed changes to exterior architectural features visible from a public way. Removing historic materials or altering a building’s character-defining features is not permitted and repairing historic features rather than replacing them is encouraged. Any architectural changes or necessary replacements are expected to be compatible with the property’s historic character and be approved through a certificate of appropriateness, a certificate of non-applicability, or a certificate of hardship with respect to such construction or alteration.

## **Scenic Road Bylaw**

Similar to Local Historic Districts, Charlton's Scenic Road Bylaw has the ability to protect the appearance of historic properties through the local review of repair, maintenance, reconstruction, or paving projects conducted to designated scenic roads. The Scenic Road Bylaw involves planning board review and approval for the removal of trees and stone walls that are within the right-of-way. Specifically, after a road has been designated as a scenic road, any repair, maintenance, reconstruction, or paving projects conducted are prohibited from the cutting or removal of trees more than four inches in diameter, measured two feet above the ground, or the removal or destruction of stone walls.

## **Certified Local Government Program**

The federal Certified Local Government (CLG) program is designed to help recognize communities that value historic preservation as a community asset. The program is administered by the Massachusetts Historical Commission and establishes a set of basic requirements for local historic preservation programs, including the operation of a preservation commission or board and the maintenance of a survey of historic resources. In return, CLG status gives participating cities and towns exclusive access to at least 10% of Massachusetts' annual Historic Preservation Fund.

The funds are awarded to CLGs through a competitive survey and planning grant program on a percentage matching fund basis and can be used for preservation plans, comprehensive surveys, and National Register nominations. In addition to grant funds, the Massachusetts Historical Commission offers technical assistance to participating municipalities.

## **Community Preservation Act**

The Community Preservation Act (CPA) is a program instituted in 127 communities across Massachusetts since its inception in 2001. Used for projects that help develop or acquire open space, increase the number of affordable housing units, and support historic preservation efforts, the CPA is funded through a property tax surcharge of no more than 3%. If adopted, 10% of the funds must go toward open space, 10% toward affordable housing, and 10% toward historic preservation. The remaining 70% can be divided as the city or town determines among these three categories. The CPA ensures that funds will always be available for preservation activities. Please see Chapter 6 (Open Space and Recreation) recommendations for more information about potential use of CPA funding for the Town of Charlton.

Properties receiving CPA funding for historic preservation projects must be listed in or eligible for the State Register of Historic Places, or deemed historic by the local

historical commission. Funded projects can be owned publicly, privately, or by a non-profit organization, as long as they provide a significant public benefit.

Funds can be used for a variety of project types. Examples of projects that could benefit the Town of Charlton include the purchase of preservation restrictions, preparation of NRHP nominations, or the installation of historic area signage. Charlton has not adopted the CPA, although past efforts have been made to adopt the act.

## **Preservation Restrictions**

A preservation restriction is a legal contract by which the property owner agrees the property will not be changed in a way that would compromise its historic and architectural integrity. Any proposed changes to the property are reviewed by the organization to which the preservation restriction is donated or sold. The preservation restriction runs in perpetuity with the land and is binding on both the owner who grants it as well as on all subsequent owners. A preservation restriction allows the owner of a historic property to retain title and use of a property and, at the same time, ensure its long-term preservation. The owner retains the major interest in the property and can sell or will it to whomever he or she wishes.

Preservation restrictions are specifically tailored to the individual building and the elements being sought to be preserved. Some agreements only protect a building's façade, while some include stipulations to protect elements of the interior, significant architectural details, or significant landscapes. The terms of the agreement are negotiated between the qualified organization and the property owner. The owner of the property subject to a preservation restriction must secure approval before undertaking significant changes to the property, such as altering the building's historic elements or constructing an addition. The owner also agrees to repair and maintain the property to an agreed-upon level of maintenance.

Significant federal income tax benefits can result from the donation of a preservation restriction. If the property is listed in the National Register of Historic Places, the value of the development restrictions imposed by the preservation restriction is normally considered a charitable donation. Often a preservation restriction-holding organization will require a fee or endowment to provide adequate resources to monitor the preservation restriction in the future. According to Massachusetts General Law Chapter 184, Section 31-33, all historic preservation restrictions must be reviewed and approved by the Massachusetts Historical Commission. If the preservation restriction-holding organization is a private non-profit, the preservation restriction must also be reviewed and approved by the local municipality. Currently two properties have preservation restrictions in Charlton – Northside School and Rider Tavern, both of which are listed in the State and National Registers of Historic Places.



## **Agricultural Preservation Restrictions**

Similar to Preservation Restrictions, Agricultural Preservation Restrictions (APR) are a specific type of conservation restriction designed to help farmers realize equity without being forced to sell their land for development purposes. The equity is often reinvested back into the protected farm by way of the purchase of more land, equipment, or buildings, and through the retirement of farm debt. Overall, the program is designed to protect productive agricultural lands by establishing permanent deed restrictions that would protect them from any use that might diminish the area's agricultural potential.

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## **Regulatory – Federal and State**

### **Section 106 of the National Historic Preservation Act**

Section 106 of the National Historic Preservation Act of 1966, as amended (NHPA), was originally enacted to address the widespread loss of historic properties during federally-sponsored urban renewal initiatives and highway construction projects during the 1960s. The law requires that any project that receives federal funds or is required to obtain permits or licenses from a federal agency is required to be reviewed for its effects on historic properties. Section 106 review is required for properties that are both listed or *determined eligible* for the National Register. This determination is part of the review process if the property has not been previously assessed for its eligibility.

Typical examples of federal undertakings that do and can take place in the Town of Charlton are the requirements of U.S. Army Corps of Engineers (ACOE) permits for development projects and Federal Highway Administration (FHWA) supported road improvement projects. If a property is determined eligible for the National Register or is already listed in the National Register, then the impact of the proposed project on the resource must be determined by the federal agency or its assignee and concurred upon by the Massachusetts Historical Commission. If the project is determined to have an adverse effect on the resource, the federal agency must consult with the Massachusetts Historical Commission (MHC) in order to determine mitigation options.

### **M.G.L. Chapter 254**

Chapter 254 of the Massachusetts General Laws (M.G.L., Chapter 9, Sec. 26-27C, as amended by Chapter 254 of the Acts of 1988), like Section 106 at the federal level, requires that any undertaking involving state funds or licenses be reviewed to determine whether the proposed project will have an adverse effect on a property listed in the State Register of Historic Places. If it is determined that the project will

have an adverse effect on a listed property, the state agency and/or the project proponent must consult with MHC to determine mitigation measures. Unlike Section 106, which considers NRHP listed and properties that have been determined eligible, Chapter 254 only considers properties or districts listed in the State Register of Historic Places. Chapter 254 could be relevant in the Town of Charlton if any area or individual property is listed in the State Register of Historic Places (this designation is automatic if the area were listed in the NRHP) and any state funds or licenses are used for projects such as road improvement, community development or residential and/or commercial development.

### **Massachusetts Environmental Policy Act (MEPA)**

The Massachusetts Environmental Policy Act (MEPA) is a comprehensive review process that requires state agencies to account for the potential environmental impacts of projects involving state licenses, permits or financial support. This public process requires a thorough study of potential environmental impacts and the development of feasible mitigation options designed to avoid or minimize those impacts. Historic resources, both above and below ground, are included in the list of environmental factors that must be considered in the MEPA process.

If the project has a connection to state funds permits, or licenses, certain thresholds must be met in order to initiate MEPA review. For historic resources, the threshold is met if the project involves the demolition of any part of a structure listed in the State Register of Historic Places, or (as of 1998) the property is listed in the *Inventory of Historic and Archaeological Assets of the Commonwealth*. A detailed project information statement, known as an Environmental Notification Form, must then be prepared to assess the impact of the project on the resource.

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## **Financial Programs and Incentives**

### **Federal Historic Preservation Tax Credit**

The Federal Historic Preservation Tax Credit program encourages preservation of historic structures by allowing favorable tax treatments for rehabilitation through a 20% tax credit for the rehabilitation of an income-producing NRHP-listed building. Since 1976, this investment incentive has proven to be one of the nation's most successful and cost-effective community development programs.

In order to be eligible for the credit, a building must be listed in the NRHP either individually or as a contributing structure in an historic district, or within a certified local historic district. The proposed project must also be a substantial rehabilitation costing more than \$5,000 or the adjusted basis of the property, whichever is greater. The building must be rehabilitated in a manner that meets the *Secretary of the*

*Interior's Standards for Rehabilitation* and is reviewed through a series of applications by the State Historic Preservation Office (MHC) and the National Park Service.

For the purposes of the tax credits, income-producing buildings include commercial, agricultural, retail, and rental properties, but do not include owner-occupied residences or most condominiums.

Federal tax credits have helped encourage economic development in areas similar to Charlton Center Historic District, which is listed in the National Register of Historic Places. In addition to the historic rehabilitation tax credits, a 10% Federal tax credit is also available to non-historic structures (buildings not listed in the NRHP) built before 1936. The requirements for the type of rehabilitation for these properties are not as stringent as those mandated for the historic tax credit.

### **Massachusetts Historic Rehabilitation Tax Credit**

The Massachusetts Historic Rehabilitation Tax Credit allows up to 20% of the cost of the qualified rehabilitation of an income-producing historic structure to be credited on state income taxes. Many owners / developers use the state credit in conjunction with the federal tax credit to reach up to a return of 40% of approved costs in tax credits. Unlike the Federal incentive, the Massachusetts Historic Tax Credit program has an allocation cap of \$50 million per year, and credits are awarded via a competitive process. General requirements for eligibility are the same as for the Federal historic tax credits.

### **Survey and Planning Grants and Massachusetts Preservation Projects Fund (MPPF)**

The Massachusetts Preservation Projects Fund (MPPF) and Survey and Planning Grants, administered by the Massachusetts Historical Commission, provide 50% reimbursable matching grants for preservation of properties, landscapes, and sites listed in the State Register of Historic Places. Grants can be used for feasibility studies, design assistance and plans, acquisition and construction activities including stabilization, protection, rehabilitation and restoration. Non-profit organizations and governmental agencies can apply for the grants, which typically range from \$5,000 to \$30,000 for pre-development projects, and \$7,500 to \$100,000 for development or acquisitions. Acceptance of the grant requires that the recipients place and abide by a preservation restriction on the property that will protect its significant features in perpetuity. The Massachusetts Historical Commission should be approached regarding funding status for these programs.

## **Historic Landscape Preservation Grant Program (HLGP)**

The Massachusetts Department of Conservation and Recreation (DCR) sponsors the Heritage Landscape Inventory Program, which documents and analyzes unprotected historic landscapes throughout the state. The Historic Landscape Preservation Grant Program provides matching grants to municipalities for preservation of public parklands. Properties must be listed in the National Register of Historic Places, with preference given to properties associated with friends' groups or citizen advisory councils. The Program supports inventory and planning projects, construction projects, preservation maintenance projects, and public education and stewardship activities. DCR is not currently awarding grants due to fiscal restrictions.

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## **Natural, Historic & Cultural Resources Recommendations**

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### **Goals for Natural, Historic & Cultural Resources Element**

- Protect Charlton's water resources by addressing pollution problems and avoiding new degradation.
- Preserve critical masses of wildlife habitat, to include greenway corridors.
- Preserve open land and scenic vistas.
- Emphasis on water resources and wildlife habitat, which got less attention in 2000 Plan.
- Integrate historic and archaeological resource identification and documentation into local preservation planning.

Objectives:

1. Support historic preservation initiatives within the Town of Charlton.
2. Nominate properties and historic districts to the National Register of Historic Places.

- Develop and strengthen local planning and protection measures for cultural resources.

Objectives:

1. Identify and document historic and archaeological resources throughout the Town of Charlton.
2. Seek funding opportunities through MHC's Survey and Planning Grant program to conduct a community-wide architectural survey.
3. Seek funding opportunities through MHC's Survey and Planning Grant program to conduct a community-wide archaeological survey.

4. Encourage zoning mechanisms such as a demolition delay ordinance, scenic road bylaw, and local historic districts to further preservation and community character objectives.
  5. Obtain local historic district status for both Charlton Center and the Town Depot Historic Districts
  6. Revise zoning to encourage more commercial/residential mixed use
- Incorporate specific historic preservation objectives in community revitalization and economic development efforts.
- Objectives:
1. Encourage rehabilitation of historic properties through financial incentives such as the Federal and State Historic Tax Credit programs
  2. Encourage the adaptive re-use of historic properties in Charlton Center as a sustainable development tool to offset sprawl.
- Strengthen efforts for the preservation of Charlton’s rural historic landscapes.
- Objectives:
1. Develop specific strategies for rural historic landscape preservation within existing open space programs.
  2. Incorporate historic and cultural resource preservation into broader conservation efforts.
- Heighten awareness, understanding, and appreciation of Charlton’s historic and archaeological resources and their preservation.
- Objectives:
1. Expand and develop illustrated individual brochures on historic, architectural, and archaeological characteristics of Charlton Center Historic District and Northside Village Historic District.
  2. Establish walking and/or driving tours of historic districts and notable historic areas within the Town of Charlton.
  3. Design and install outdoor interpretative signage.

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## Recommendations

This section of the Master Plan offers general recommendations relevant to preserving the character of the community that would be applicable to a wide range of Charlton’s historic and archaeological resources. Future preservation activities for the town need to focus on a combination of local programs that take into consideration planning and protection of these resources and the development of financial programs and incentives. The recommendations in this section of the Master Plan were devised by determining which of the available programs described in the section above were applicable and appropriate for the Town of Charlton.

Charlton’s residents highly value the community’s strong sense of place, which is created by its varied natural features and land use patterns that flow from the agricultural heritage. The town has already taken measures to document and

evaluate its most significant buildings and historic districts (such as Charlton Center and Northside Historic Districts). It is now looking beyond these resources to the landscapes, streetscapes, rural roads, 18<sup>th</sup> and 19<sup>th</sup> century neighborhoods, and other natural and cultural assets that define the overall fabric of the community. Like most municipalities, Charlton is facing multiple pressures for change that threaten historic land-based uses and natural resources. Special places within the community that were once taken for granted are now more vulnerable than ever to change.

Preservation planning is a three-step process: **identification**, **evaluation**, and **protection**. Three useful documents to consult before beginning to implement preservation strategies are:

- Massachusetts Historical Commission, *Survey Manual*
- Massachusetts Historical Commission, *Preservation through Bylaws and Ordinance*
- Department of Conservation and Recreation, *Reading the Land*

Recommendations that apply to a broad range of resources are discussed below.

### **Village and Rural Neighborhood Character**

As described above, thorough documentation on MHC inventory forms is an important first step in the preservation planning process, followed by National Register listing where appropriate. Several preservation planning strategies could be adopted by the town of Charlton:

- **Demolition Delay Bylaw** provides a time period in which the town can explore alternatives to demolition. Typical demolition delay bylaws provide a period of delay from 6 months to a year. Such protection measures, which provide time for both developers and the town to find alternatives to demolition, would require a majority vote of Town Meeting to accept the bylaw.
- **Local historic districts**, adopted through local initiative, recognize special areas within a community where the distinctive characteristics of buildings and places are preserved and protected by the designation. Local historic district designation and regulation is one of the strongest forms of protection for the preservation of historic resources.

### **Agricultural Landscapes**

Preservation of agricultural landscapes means preservation of the farming activities and associated rural character, which is integral to the community's past. It is important to know what the features of these agricultural landscapes are and which features the community treasures in order to make a case for preservation of these farms. Some preservation tools are available that can assist communities in preserving actual farming activities even if only a few farms remain. Others are tools to preserve the landscape when the farm is sold.

- Document additional farms that may not presently be included in Charlton's inventory of historic resources, using MHC survey forms.

- Develop partnerships with conservation and land trust organizations such as the Quinebaug-Shetucket National Heritage Corridor, the Charlton Heritage Preservation Trust, and The Trust for Public Land to raise funds to purchase development rights on farms or to assist farmers in the restoration of historic farm buildings for which the owner would be required to donate a conservation or preservation restriction (PR).
- Develop public-private partnerships (also with organizations such as the Charlton Heritage Preservation Trust) to preserve farm land through purchase of conservation restrictions (CRs) or agricultural preservation restrictions (APRs).

### **Scenic Roads**

Scenic roads are an integral part of the historic fabric of the community. They are highly valued by Charlton residents and were listed as a critical concern. Charlton has already adopted the Scenic Roads Bylaw, which requires review and approval for the removal of trees and stone walls that are within the right-of-way. Yet, in addition to roadway issues, much of what is valued about scenic roads – the stone walls, views across open fields – is not within the public right-of-way. The preservation and protection of scenic roads therefore requires more than one approach.

- Complete an inventory with descriptions and photo documentation of each of the roads in Charlton including the character defining features to assist in review under the Scenic Roads Bylaw.
- Amend the Scenic Roads Bylaw by adding design criteria to be considered when approving removal of trees and stone walls; such as a provision allowing only one driveway cut per property on scenic roads. Coordinate procedures between Highway Department and Planning Board.
- Consider a scenic overlay district which may provide a no-disturb buffer on private property bordering on scenic roads or adopt flexible zoning standards to protect certain views.
- Develop policies and implementation standards for road maintenance and reconstruction, including bridge reconstructions, which address scenic and historic characteristics while also addressing safety.

### **Funding of Preservation Projects**

Funding for preservation projects is an important aspect of implementing preservation strategies. The MHC and DCR have programs to assist communities in preservation-related issues including:

- **Federal and State Historic Tax Credit Programs**, administered by the National Park Service and the MHC
- **Survey and Planning Grants and Massachusetts Preservation Projects Fund (MPPF) Grants**, administered by the MHC, support survey, National Register, and preservation planning work.
- **The Massachusetts Preservation Projects Fund (MPPF)**, administered by the MHC, funds restoration and rehabilitation projects.

- The **Historic Landscape Preservation Grant Program (HLPGP)**, administered by DCR, funds planning, education, and stewardship projects focused on historic landscapes, including cemeteries.

Funding for state programs varies year to year. When planning any preservation planning programs, contact relevant agencies to determine whether funding is available.

The Town of Charlton and other preservation advocacy groups (such as the Charlton Heritage Preservation Trust) should also encourage the use of historic tax credits by providing more information on federal and state rehabilitation tax credits to the general public. Appropriate town staff should be aware of the tax credits and be able to direct citizens to the appropriate literature and agency officials, including links to more detailed information on the Town's website. This effort should be augmented by including a discussion and explanation of historic tax credits in any public education efforts about promoting preservation.

#### **NCH-1**

Adopt a local wetlands protection bylaw. This bylaw and implementing regulations would regulate development in wetland resource areas in a manner that is more stringent than the Wetlands Protection Act.

#### **NCH-2**

Identify, delineate and document wetland resources. Identify, evaluate and map potential wildlife corridors, including regional and local connections to core habitat areas. Continue to certify vernal pools.

#### **NCH-3**

Adopt a demolition delay bylaw. Such a bylaw would require that if a property owner wants to demolish a building that is historically significant, the Town would have the authority to delay the demolition for a set period of time (typically six months). It is hoped that during this time, some alternative arrangement can be made to preserve the structure.

#### **NCH-4**

Adopt a Transfer of Development Rights (TDR) bylaw. TDR is a system that assigns development rights to parcels of land and gives landowners the option of using those rights to develop or to sell their land. TDRs can be used to promote a couple of different important land use management goals. First, it can be used as a means to ensure that development is concentrated where it is appropriate to do so. Second, it can provide for conservation and protection of land by giving landowners the right to transfer the development rights of one parcel to another parcel.

#### **NCH-5**

Reconsider adoption of the Community Preservation Act (CPA). The CPA ensures that funds will always be available for preservation activities. Properties receiving

CPA funding for historic preservation projects must be listed in or eligible for the State Register of Historic Places, or deemed historic by the local historical commission. Funded projects can be owned publicly, privately, or by a non-profit organization, as long as they provide a significant public benefit.

**NCH-6**

Adopt policies to encourage green development practices and LEED<sup>2</sup> certifiable technologies by the Town and private developers, including cooperatively incorporating energy efficiency design and criteria in site plan, special permit and subdivision permit applications.

**NCH-7**

Encourage the use of historic tax credits by providing more information on federal and state rehabilitation tax credits to the general public.

**NCH-8**

Identify water resource watershed areas and consider ways to exclude or minimize development in those areas.

**NCH-9**

Consider ridgeline or elevation protection through development restrictions above a certain elevation.



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<sup>2</sup> LEED – Leadership in Energy and Environmental Design

## Open Space and Recreation

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### Introduction

- ▶ **Open Space** – land that is set aside for conservation, agricultural, forest, park, a green buffer, or any open area owned by a conservation agency/organization that is used for either passive or active recreation.
- ▶ **Recreation** - any activity, such as play, that diverts, amuses or stimulates<sup>1</sup>

Merge the above two things and the result is something that is very important to many people's quality of life. The Commonwealth recognizes this importance and encourages each community in the state has a current Open Space and Recreation Plan (OSRP) approved by the Executive Office of Environmental Affairs (EOEA) Division of Conservation Services (DCS) every five years. An OSRP is essential to sustaining a community's appeal, enhancing its quality of life, and maintaining its environmental stewardship.

When a completed OSRP has been approved by the DCS, the applicable community is eligible for grant programs administered by the Division. An OSRP is meant to be a living document, and the DCS makes sure of this by withholding potential grant funding to communities that lapse on the five year timeline.

At the time of this Master Plan's completion the Town of Charlton was in the process of updating its previous OSRP from 1996. Because of this, most of the following text is based on the 1996 OSRP and the 2000 Charlton Master Plan. This Master Plan incorporates the policies and goals statements put forth by the committee updating the OSRP and approved by the community at a public forum (separate from the Master Planning process) held on April 30, 2007.



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<sup>1</sup> <http://en.wiktionary.org>

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## Current Situation

Charlton is still very much a rural community. As shown in Chapter 2 *Land Use & Growth Management*, nearly half of Charlton's land area is forest, wetland, water and open space. The landscape of Charlton is one full of vistas, some often extending the whole of 80 miles from their vantage point. One of the most significant is the view off of Dresser Hill on Route 31. Along with these fantastic views Charlton reminds one of a lost means of living by way of Charlton Center and Charlton Depot. Up until the middle of the 20<sup>th</sup> century these small enclaves of activity nourished the Town with products, employment, and housing. A significant factor in the formation of these villages was the ability of workers to walk to and from their place of employment. These compact village centers preserved open space in Charlton as a trait, and were a significant factor in forming the rural aesthetic of present day Charlton. Now, because employment for Charlton residents is moving outside of Town, the village centers that were once drivers of preservation now serve less significant roles in shaping Charlton.

The need to live in an area within walking distance of the workplace is no longer the norm. With the advent of the automobile, regions shrunk and employment opportunities drastically altered in location. The 20<sup>th</sup> century produced a paradigm shift in the way Americans perceived space and time. Not only did this affect where industry and commercial facilities located, but it also meant residential development was no longer confined geographically. Whereas the former village centers constricted growth to a distinct area, the present form of auto-oriented growth tends to exaggerate the scale of communities. That is why importance should be placed on effective and sustainable open space planning in the Town. As Charlton increases in population, the need for a framework that balances development and preservation of open space in a creative, consistent, and innovative way intensifies.



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## Amenities

Charlton is full of amazing amenities such as trails, scenic drives, and a large inventory of existing open space.

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## Trails

Most of the trails that exist in Charlton are on private land. The Midstate Trail runs through the southeastern corner of Charlton, and is maintained by the Worcester Chapter of the Appalachian Mountain Club; this is the primary trail in Charlton and it connects to subsidiaries via side trails. These subsidiary trails include: Fay Mountain Farm, Charlton Orchard, Bement Camp, and the Engineers trails at Buffumville Lake among others. Much of the Midstate Trail in Charlton consists of off-road trails, although several local roads are also used. Additionally, an extensive

trail system can be found all around the Buffumville Reservoir recreation area. The U.S. Army Corps of Engineers (ACOE) manages the 488 acres of the Buffumville Reservoir and its trail network is used extensively for a variety of recreational activities. There is also an interior trail system within the Capen Hill Nature Sanctuary, a non-profit-managed open space system that provides educational and social programs and wildlife rehabilitation. .

Most property owners have historically accepted the use of their property to access a trail or open space parcel; however, increasing population and development has caused more strain between the user and the owner. With the instruction of groups like the AMC, cross country skiers and hikers have earned the respect of property owners by minimizing their impact on trails. However, these are typically low impact uses; other higher impact uses have faced more stringent restrictions in recent years, among these are: mountain biking, hunting, horse riding, fishing, and four wheeling.

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## Scenic Roads

In addition to Charlton's trails there are also quite a few scenic roadways that provide plenty of opportunity for both passive and active recreation. Whether it is a bike ride in the summer or a slow drive in the fall, the following roads provide remarkable serenity:

- Buteau Road
- Cemetery Road
- Gould Road
- Horne Homestead Road
- Jones Road
- McIntyre Road
- North Sturbridge Road
- Smith Road
- Tucker Road
- Wheelock Road

Under Massachusetts General Law Chapter 40, Section 15C (The Scenic Roads Act) Towns in Massachusetts can designate any road – other than a numbered route or state highway – as a scenic road and can adopt scenic road bylaws as a means of protecting the scenic character of an important roadway. Most towns use the scenic road bylaw to limit the cutting of trees, avoid the destruction of stone walls, and monitor road and driveway construction.



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## Open Space

The following tables provide an overview of the open space and recreation land in Charlton. Thirty (30) percent of the town's open space and recreation land is publicly owned, 12 percent is privately owned, 22 percent is owned by a non-profit group, 24 percent is owned under Chapter 61, 61A or 61B, and 13 percent is APR land. Table 6-1 inventories publicly-owned open space and recreation parcels in Charlton. The

following information is courtesy of the 2006 Open Space and Recreation Plan, with updates provide by the 2000 Master Plan, the Town Planner, the Open Space Committee and the Recreation Committee. Nearly half the land (1,900 acres) designated in Table 6-1 below is used for active or passive recreational purposes.

**Table 6-1  
Publicly Owned Land in Charlton**

Property	Owner	Size (acres)	Use	Protected	Access
Buffumville Reservoir	ACOE	221.0	Flood control; active and passive recreation	yes	public
Bennett Meadows Wildlife Management Area	DFW	211.0	Conservation	yes	public
Glen Echo Lake Access	DFW	1.1	Recreation; Conservation	yes	public
Charlton Elementary School	Town	6.5	School; Recreation – soccer and playground	no	public
Charlton Center / Memorial Field	Town	8.0	Active Recreation – softball, baseball, tennis, basketball	no	public
Charlton Recreation Land	Town	23.0	Active Recreation – soccer and football	no	public
Heritage School	Town	89.3	School; Recreation	no	public
Prindle Pond Recreation Area	Town	2.5	Recreation; Conservation	unknown	public
Stafford Street Conservation Area	Town	40.0	Passive Recreation – nature trails; Active Recreation – senior little league, basketball, tennis	Y	public
Town Common	Town	1.0	Passive Recreation	unknown	public
Bay Path Vocational School	RSD	190.7	School; Recreation – football, baseball, tennis, basketball	no	public
<b>TOTAL</b>		<b>794.1</b>			

Source: Charlton Open Space and Recreation Plan, 1996

Notes: ACOE = Army Corps of Engineers (Federal)

DFW = Division of Fish and Wildlife (State)

RSD = Dudley Charlton Regional School District

**Table 6-2  
Inventory of Open Space in Charlton Subdivisions**

Name	Preserved Open Space (acres)	Percent of Subdivision	Designated Open Space Owner
Tucker Farm	17.9	18.0%	Division of Fisheries and Wildlife
Cranberry Meadows*	57.0	84.0%	Charlton Heritage Preservation Trust (CHPT)
Dresser Hills*†	6.0	39.1%	n/a
Hammond Woods	27.4	39.9%	CHPT
Preservation Estates	1.6	30.0%	CHPT
Reindeer Estates* ††	10.7	50.0%	CHPT
Waters Edge* (3 parcels)	15	18.3%	CHPT
Manor Ridge	4.4	30.3%	CHPT
McKinstry Drive Extension*	9.0	35.0%	Homeowner's Association
Potter Village Estates*	13.9	44.0%	CHPT
Ponnakin Hill Estates*	27.7	29.5%	n/a
Scott Drive Extension	18.7	47.0%	n/a
Stonegate Estates	4.4	22.5%	n/a
The Reserve at Barton Hill East*	32.5	32.8%	n/a
The Reserve at Barton Hill West*	51.0	30.9%	n/a
Pike's Pond	15.7	28.8%	National Heritage Foundation (NHF)
Larned Hill Farm	4.6	18.7%	NHF
Angalie	21.8	61.0%	Town of Charlton
Applewood	46.3	32.7%	Town of Charlton
Henry Richards Circle*	6.4	30.0%	Town of Charlton
<b>TOTAL</b>	<b>392</b>	<b>-</b>	<b>-</b>

Source: Charlton Planning Board

Notes: These numbers are approximate

\* Subdivisions approved through Charlton's Flexible Design bylaw.

† The owner of the Conservation Restriction on this project has not yet been determined. The CR needs to be accepted.

†† Once official, the Town will own the open space but CHPT will hold the CR.

In addition to town-owned land inventoried above, the Charlton Heritage Preservation Trust (CHPT) also owns over 150 acres of protected open space in Charlton, as shown in Table 6-3 below. CHPT is a volunteer-based 501(c)3 non-profit land trust formed to protect the natural beauties and rural character within the town of Charlton. The Trust maintains all the land under its ownership. Although the CHPT's main goal is the preservation and conservation of land and water resources within Charlton, the organization also works with neighboring towns when the opportunity to link regional open space arises.

**Table 6-3  
Charlton Heritage Preservation Trust Property List**

Name	Size (acres)	Use	Protected	Access
Little River/Fulling Mill	6.7	open space	yes	public
Little River/Fulling Mill	7.4	open space	yes	public
Little River/Manor Forest	1.0	open space	yes	public
Great Blue Heron Cove/Daniels	18.9	open space	yes	public
Cranberry Meadow/N. Sturbridge	57.0	open space	yes	public
Preservation Estates/Stafford	1.6	open space	yes	public
Manor Ridge Estates/Sydney	4.4	open space	yes	public
Potter Village Estates/Lelandville	13.7	open space	yes	public
Ponnakin Hill/Pheasant	8.1	open space	yes	public
Ponnakin Hill/A Young	7.1	open space	yes	public
Ponnakin Hill/Meadow	3.3	open space	yes	public
Hammond Woods/Hyde	27.4	open space	yes	public
<b>TOTAL</b>	<b>156.6</b>			

Source: Charlton Heritage Preservation Trust

Open space and recreation resources owned by non-profits other than the Charlton Heritage Preservation Trust are inventoried below in Table 6-4. However, aside from the Capen Hill Nature Sanctuary, these are all private resources which require membership or homeownership for access.

**Table 6-4  
Other Non-Profit Owned Land**

Property Name	Owner	Size (acres)	Use	Protected	Access
Camp Foskett	YMCA	116.5	Recreation	yes	members
Capen Hill Nature Sanctuary	CHNA	72.0	Open Space	yes	public
Diocese of Western Mass.	DWM	220.4	Recreation	yes	members
Elliot Joslin Camp	JDF	102.6	Recreation	yes	members
Masonic Home	MHI	314.3	Housing; open space	yes	members
St. George Greek Camp	SGOGC	54.1	Recreation	unknown	members
<b>TOTAL</b>		<b>879.9</b>			

Source: Charlton Open Space and Recreation Plan, 1996

Notes: YMCA = YMCA of Southbridge  
DWN = Diocese of Western Mass.  
MHI = Masonic Home, Inc.

CHNA = Capen Hill Nature Association  
JDF = Joslin Diabetes Foundation  
SGOGC = St. George Orthodox Greek Church

Preserving and protecting undeveloped land is necessary for conserving biodiversity, preserving the character of the landscape, and protecting the drinking water supplies. One way to limit development is through land acquisition. Protected lands include land owned by certain state agencies that are preserved pursuant to

Article 97; land under the jurisdiction of the Charlton Conservation Commission or Water Department; and, some privately-owned land under a conservation restriction (also called conservation easement) approved by the state. The conservation restriction prevents development of the land for a specified time, usually in perpetuity.

However, not all town-owned land is protected from development. For example, land under the jurisdiction of other town departments can be sold or developed with very few restrictions. Land enrolled in various tax abatement programs such as Chapter 61, 61A and 61B, (“Chapter” land) which promote preservation of open space by providing tax benefits to maintain lands, are not permanently protected. Land held under Chapter 61, 61A, or 61B are managed for forestry, agricultural or recreational purposes, respectively. These lands are considered to be only temporarily protected – the landowner manages the land for those specific purposes and receives some tax benefit in exchange. However, the land can be converted to other uses, with the repayment of back taxes, and may no longer be characterized as open space.

All Chapter parcels are considered important unprotected parcels. Charlton has a remarkably high amount of land under the Chapter 61, 61A or 61B programs, as detailed below in Table 6-5.

**Table 6-5**  
**Chapter 61, 61A and 61B Land**

<b>Category</b>	<b>Size (acres)</b>
Chapter 61	4,508.6
Chapter 61A	107.9
Chapter 61B	1,452.7
<b>TOTAL</b>	<b>6,069.2</b>

Source: Town of Charlton Assessor’s Office, 2007




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## Recreation

For the most part, active and passive recreational facilities have been discussed above in the discussion of key open space parcels. A summary by ownership of those parcels identified as used for recreational use and other private recreational parcels is provided below in Table 6-6. The primary focus of this section is those public recreational facilities, for which the Town of Charlton has control, and future needs.

**Table 6-6  
Recreation in Charlton by Ownership**

<b>Ownership Type</b>	<b>Size (acres)</b>
Public	583
Chapter 61B	1,453
Non-Profit †	494
Other Private ††	136
<b>TOTAL</b>	<b>2,666</b>

Source: Town of Charlton, 2000 Master Plan, 1996 Open Space and Recreation Plan

Note: † All Non-profit owned recreational land limits access to members only.

†† This category includes two private campgrounds, presumably accessible for a fee.

The Town of Charlton’s active recreational facilities are overseen by the Charlton Recreation Committee. This committee is responsible for the maintenance of existing recreational facilities and the development of additional facilities.

All of Charlton’s fields – used for soccer, baseball, softball, football, etc. – are currently being used at full capacity. Charlton has a large and active youth sports program which uses the fields in the center of town. Saturday mornings when sports are occurring can be quite busy in town. While it is generally viewed as positive that the fields are located in the center of town and thus promote use of local retailers and restaurants, there are some concerns. In particular, the impacts of this level of field usage on parking and on traffic are significant.

Charlton is undertaking a field complex construction project; the Town acquired 40 acres of land at Flint Street. The fields to be constructed include soccer and football, among others. It is believed that the town’s recreational fields should be self-sufficient; that is maintenance and upkeep should be minimal. In order to best achieve this goal of self-sufficiency, the fields are best located proximate to each other. Additional recreational fields and courts are located at the Middle School.

Though the recreational space for spring, summer and fall activities on these fields will be considerably improved with the Flint Road project, the Town has no space for winter activities such as skating and sledding. Furthermore, the Town has very few playgrounds or tot lots for younger children not yet involved in competitive athletics. Each elementary school has a playground area. After the Flint Road project, a recreational facility on Stafford Street is the next priority parcel.



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## Recent Initiatives

Charlton's staff and volunteers and regional counterparts have pursued initiatives to expand the natural resources in Charlton and to better understand these resources. A few recent initiatives are described below:

### **Open Space Digitization**

The need for a map, guidebook, and signage system was mentioned in the 2000 Master Plan. In March of 2003, the Planning Board initiated the comprehensive planning effort to advance long-range open space, greenways & trails planning efforts. The established project goal, which was funded in part by a grant from the Quinebaug-Shetucket Heritage Corridor's *Partnership Program*, was to create a Geographic Information System (GIS)-based series of environmental data layers to be used in the creation of a multi-layered environmental information map of the Town, as discussed above. The final project product would serve as a critical tool for understanding and furthering local environmental planning efforts to preserve open space, foster greenways creation and implement a walking trails network as recommended by the Town of Charlton 2000 Master Plan. Significant locations incorporated into the data system and map product included the walking trail system implemented by the 2000 Master Plan Implementation Committee (MPIC) in the Town Common area, Mid-State Trail locations, Capon Hill Nature Sanctuary trails, subdivision open space walking trails and the ongoing trails efforts being implemented by the Charlton Heritage Preservation Trust.

The map was completed in June 2004 and public outreach was conducted that following summer. It is anticipated that this resource will be utilized by Town government and local community interests as a crucial reference source in furthering proactive open space preservation, greenways corridor protection and walking trail implementation efforts.

### **Trail Connection Feasibility Study**

In October 2001, the CMRPC conducted the *Southwest Subregion Inter-Community Trail Connection Feasibility Study* in which five potential trails were identified to link the seven communities and increase the viability of the regional trail system. One of the five trails proposed, the Dresser Hill Road Bicycle Route, extends from Dudley through Charlton and links up with the Mid-State Trail

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## Choices Confronting the Town

Charlton, like most communities in Massachusetts, is experiencing rapid population growth. The influx of more people into Charlton is predicted to continue and these newcomers will need housing. Concurrently, Charlton's population increase makes it a more desirable location for certain retailers and other commercial entities. This housing and commercial development will in turn threaten the preservation of open space. So the question that immediately surfaces is where is the balance between development and conservation? In public meetings held during the Master Plan process, residents of the Town pointed out that retention of Charlton's rural character is one of their most important concerns. It was also mentioned that one of Charlton's biggest weaknesses was lack of innovative zoning. In order for Charlton to preserve its rural charm, the use of innovative zoning bylaws, such as the flexible residential zoning or a transfer of development rights, should be encouraged to allow for development patterns that preserve contiguous open space. Building single-family homes on one acre lots does nothing in the way of conservation and will only exacerbate the problem of open space and recreational resource loss.

Charlton has neither a comprehensive management plan nor an acquisition plan to ensure that important Town lands are protected, that budget resources are in place and available to respond when an opportunity to purchase arises, and to provide maintenance and oversight of these properties.

As shown above in Table 6-2, most Town-owned properties are open to the public. However, most are unmarked. Internally, the Town maintains a listing of these sites, but does not promote their use. A map, guidebook, and/or standard signage program would inform townspeople about the resources already available to them, where to park, and how to enter the sites.

Charlton's open space resources are not well-connected. Connectivity of open space is important for two reasons. First, it allows human users to take advantage of the multiple open space resources in Charlton without having to leave one area, return to the public way, and drive to another area. Second, connectivity helps to restore corridors in which wild habitat can travel. Development of open land impacts the animals as well, by cutting off their natural travel corridors. As a result, animals, like deer and coyotes, are more frequently found in backyards and on the roads.

The growth of Charlton is likely to consume some valuable open space and recreation resources. However, intelligent planning can mitigate this reduction and still preserve Charlton's rural feel.

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## Open Space Preservation

In addition to rethinking the Town's zoning and building more dense developments, Charlton must continue to preserve important open space parcels by way of permanent protection. This can be accomplished with the help of both public and non-profit groups which support preservation. Charlton Heritage Preservation Trust is local non-profit organization whose purpose is to protect the natural beauty and rural character of the Town. Another similar organization that can help Charlton protect resources, albeit with a larger geographic reach, is the Trust for Public Land.

The 2000 Master Plan identified six resources to serve as the starting point for identifying sites worthy of preservation. These resources – determined to best contribute to the rural character of Charlton – are:

- Agricultural land,
- Rare wildlife habitats,
- Aquifers,
- Floodplains,
- Wetlands, and
- Scenic areas.

The second criteria established by the 2000 Master Plan was a related to the relative accessibility of open space resources. The Plan proposed a “10 minute walk” standard. This simply meant that a parcel proposed for acquisition would be weighted heavier if it were a ½ mile (10 minute walk) from residential properties in the Town. Through the Open Space and Recreation Plan process, the town should prioritize those key parcels for preservation and connectivity of open space resources.

A third criterion, added in this Plan, considers the connectivity of open space parcels. A potential open space acquisition will be rated higher if it connects previously connected resources for either humans or wildlife habitat.

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## Open Space and Recreation Recommendations

The following goals were derived through a process undertaken by the Conservation Commission for the 2007 update of the Open Space and Recreation Plan, which was ongoing during the writing of this Plan.

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### Goals from Draft Open Space and Recreation Plan

Expand and Protect Open Space Resources:

1. Look to expand and/or protect existing town-owned or land trust land by evaluating acquisition of adjacent parcels.
2. Develop new recreation facility on Flint Road property that has been designated for use by the Recreation Commission.
3. Develop recreation facility on Stafford Street property that has been designated for use by the Recreation Commission.
4. Look for opportunities to connect open space resources and create greenway corridors and trails.
5. Look to acquire land off of Richardson and Oxford Roads to link federal land up to Joslin property.
6. Establish a standard signage system, map and guidebook to identify Open Space and recreation facilities and spaces and their access points.

Policy:

7. Pass Community Preservation Act (CPA) as an open space funding source.
8. Continue to use recreation revolving fund to support new recreation programs.
9. Develop Open Space Preservation Zoning – emphasize land that will link open space resources.
10. Adopt Transfer of Development Rights (TDR) to develop and acquire Recreational and Open Space facilities.
11. Better integration with Quinebaug-Shetucket Corridor.

Protection:

12. Expand sewer system in areas to protect water resources
13. Establish mechanism for oversight and maintenance of open space resources (e.g. mapping, zoning).
14. Maintain the protection of the Bigelow property on Dresser Hill as a scenic area using 80A.
15. Assess all Chapter 61A properties that may be at risk for imminent development.

Other:

16. Construct a bandstand for community at one of the recreation facility sites.
17. Establish “Village Center” zoning in town center to help create “Sense of Place.”

18. Establish programs and facilities to help build “Community.”
19. Introduce diverse recreation winter activities such as cross country ski trails, skating and snow shoeing.
20. Relocate Skateboard Park to a more secure and accessible location.
21. Re-establish Tennis Courts in one or more locations.
22. Establish permanent easement along Mid-State Trail in Charlton.

General:

23. Maintain and upgrade existing facilities.
24. Maintain rural character and focus commercial development along Route 20.
25. Continue to enhance and reorganize Memorial Field and the Town Hall Annex Field.
26. Look to large developers and commercial developer to support Open Space and Recreation initiatives.
27. Maintain the fund that has been established for environmental management of lakes and watershed areas and also maintain town owned dams.

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## Goals for Open Space and Recreation Element <sup>2</sup>

- Protect Charlton’s valuable open space resources for passive recreational and preservation purposes.
- Protect Charlton’s water resources for health and recreational purposes.
- Provide adequate active recreational facilities and programs for all residents of Charlton.
- Adopt and implement an Open Space & Recreation Acquisition and Management Plan to promote maintenance and use standards for town owned land, set usage goals for parcels with clear open space or recreational value, and strategically target for acquisition parcels, portions of parcels, development rights, and easements.
- Increase public access to and use of open space lands.
- Consider amending the zoning bylaws to create an Open Space Overlay Zoning District that restricts development activities within designated corridors to preserve wildlife habitats, greenway corridors, and other linkage of open space resources and recreational lands.
- Establish a standard signage system, map, and guide book to identify open space and recreation sites and their access points.
- Institute an assertive land acquisition program, seeking out funding sources other than the annual Town budget.
- Consider amending the zoning bylaw to include a provision for the Transfer of Development Rights to conserve open space resources as part of the development process.



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<sup>2</sup> These goals were carried forward from the 2000 Master Plan

- Strive for at least 25% of the Charlton land base to be permanently protected open space.

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## Recommendations

### OS-1

Complete and submit the Open Space and Recreation Plan to the Division of Conservation Services. This will make the Town eligible for Self-Help and Urban Self-Help grants. This plan will include a more specific Five-Year Action Plan for addressing open space and recreation needs.

### OS-2

Develop criteria to prioritize future open space acquisitions. When land becomes available, the Town should be able to determine whether any particular parcel meets its criteria for acquisition, since not all can be purchased. This is particularly important for Ch. 61 lands where the Town has the right of first refusal, but must act within a set period of time.

### OS-3

Foster greenway creation by permanently preserving significant parcels via the Open Space and Recreation Plan and the Master Plan. Charlton has an extensive network of trails that connect with adjacent towns and form a regional system.

### OS-4

Pursue new Agricultural Preservation Restrictions (APRs). Work with land trusts and establish public-private partnerships to preserve farm land through purchase of conservation restrictions (CRs) or agricultural preservation restrictions (APRs). There currently are a number of agriculturally active parcels in Charlton and APRs can be used to benefit land owners and give them additional resources to keep the land in agricultural use.

### OS-5

Reconsider adoption of the Community Preservation Act (CPA). CPA funding can be used to acquire new open spaces and develop additional recreation facilities.

### OS-6

Establish walking trails and bicycle paths to enhance the network that connects open space resources in Charlton with adjacent towns and federal and state land.

### OS-7

In the 2000 Plan, the Town recognized the need to commit resources to adequately plan for acquisition of important open space and recreational resources. The recommendation was to set aside at least \$25,000.00 for Charlton land trust purposes.

If the CPA is not the funding source supported by the citizens of the Town, an annual set aside could provide for some of the future acquisition needs in Charlton. The Town should also establish a Land Trust Committee to oversee this effort.

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## **Conclusion**

Open space and recreation are quality of life issues for all the citizens of Charlton. Based upon the input at public forums, the importance of open space and recreation resources Charlton residents cannot be understated. It is central to the identity of the community and should remain so for years to come. The sake of future generations enjoyment of Charlton's aesthetic depends on the choices that are being made now. Citizens and leaders of Charlton must work together to find a sustainable and sensible balance of preservation and development.

# Transportation and Circulation Element

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## Introduction

Charlton has experienced rapid residential growth, most notably during the last 30 years. The main reasons for this growth are the availability of land, the relatively low cost of house lots, and the proximity and access to major highways. Looking to the future, ever increasing numbers of vehicles on Charlton's transportation system will pose a challenge for the Town.

During the master planning process, Charlton residents repeatedly raised transportation-related issues and concerns. Traffic congestion is frequently cited as an important quality of life consideration. Residents fear that uncontrolled new growth will exacerbate traffic congestion and thus degrade the quality of life. Mitigation of potential impacts and alternatives to automobile-based transportation systems need to be evaluated as part of the planning process.

This Transportation and Circulation Element of the Charlton Master Plan Update will first describe the components that comprise the Town's existing transportation system. These components include a description of the roadway network, quantification of vehicular traffic demands, and an overview of the non-vehicular transportation infrastructure (transit, freight, pedestrians, bicyclists).

The major routes in Charlton are Route 20 and the Massachusetts Turnpike (I-90), both east-west roadways. Route 169 is a north-south roadway on the westerly side of town and Route 31 is a north-south roadway that bisects the Town. All other roadways are not state numbered routes. Stafford Street, Brookfield Road, Oxford Road, and Center Depot Road are connector roads that carry commuter traffic volumes.

A future conditions section follows, discussing potential transportation and pedestrian issues. Also discussed are planned developments and planned transportation improvement projects, and the impact projected on the transportation facilities throughout Charlton. The section concludes with the strategies, goals, and objectives developed to address the future growth in Charlton and its impact on the transportation network.

The future vision of Charlton's transportation infrastructure will depend upon decisions made with regard to other elements contained in this Master Plan Update. Decisions made regarding purchases of open space and development of commercial and residential sites will greatly influence the future of Charlton's transportation system.

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## Regional Planning Commission

Regional and sub-regional agencies play a role in the development and execution of a municipality's master plan. As overseers of a larger area, they help to coordinate activities, prevent conflicts, and ensure a smooth communication of the execution of the strategies, goals, and objectives from one municipality to another. The Central Massachusetts Regional Planning Commission (CMRPC) is Charlton's regional planning agency. The CMRPC represents 40 cities and towns in southern and central Worcester County.

Commission membership consists of community representatives, gubernatorial appointees and city and state agencies who collaborate to develop comprehensive plans and recommendations in areas of population and employment, transportation infrastructure, economic development, regional growth, and the environment. The Commission also provides technical assistance and advocacy to its member communities. CMRPC works with its 40 cities and towns through six sub-regional organizations. Charlton is a member of the Southwest sub-region (the applicable sub-region of the CMRPC)<sup>1</sup>.

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## Existing Conditions

Mobility in and around Charlton is the central theme of the Transportation and Circulation Element of the Master Plan Update. The sections below discuss the components that comprise the existing transportation network in Charlton.

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### Roadway Network

Vehicular traffic in Charlton is carried on several major roadways. The major east-west roadways in Charlton are the Massachusetts Turnpike (I-90) and Route 20. I-90 provides access between Boston and New York State. The nearest access point to I-90 is located approximately six miles from the center of Charlton. Even though there are two I-90 rest areas within Charlton, there is no I-90 interchange. Route 20 parallels



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<sup>1</sup> <http://www.cmrpc.org/Index.htm>

I-90 to the south and provides regional east-west access. A roadway widening project along Route 20 from Richardson's Corner to Route 169 was completed in 2005.

The major north-south roadways in Charlton are Route 169 located on the westerly side of town and Route 31 located in the center of town. Route 169 provides access to Route 20 to the north and Southbridge to the south. Wetlands limit development potential to the east of this roadway. Route 31 runs through the center of Charlton providing access to Spencer to the north and Dudley to the south. Despite Charlton's regional accessibility, the majority of Charlton's developable land is not directly accessible from its major access routes, specifically Route 20 and Route 169, which limits development potential.

In addition to the aforementioned numbered routes, Stafford Street, Brookfield Road, Oxford Road, and Center Depot Road, are connector roads that link the neighboring towns and carry significant commuter traffic. All other roadways in the town principally serve local traffic.

At a recent public meeting as part of the Master Planning process, the inconsistency of signage within Charlton was raised as an issue, particularly relating to Stop and Yield signs. Subsequently, the issue of confusing and/or inconsistent roadway signage was raised. Missing or outdated street signs around Charlton create navigation issues for non-residents and safety issues for emergency responders looking for street addresses.



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## **Roadway Jurisdiction/Functional Classification**

The jurisdiction of a roadway indicates the prevailing right-of-way ownership for that roadway and identifies who is responsible for maintenance, enhancements, and repairs. The majority of the roadway system is governed by the Town of Charlton with two roadways (Route 20 and Route 169) under MassHighway jurisdiction.

A roadways functional classification indicates its design function – to serve local demands with multiple driveways to maximize access; or to serve regional demands with limited access points to maximize mobility.

Functional classifications were obtained for segments of Route 20, Route 169, Route 31, Brookfield Road, Center Depot Road, Hammond Hill Road, Muggett Hill Road, Richardson Corner Road, and Stafford Street. All roadways are classified as urban minor arterials or rural major collectors. The majority of the roadways in Charlton are classified as local roadways.



## Vehicular Traffic

To gain an understanding of existing travel patterns and to provide a basis for recommendations, historical traffic data, trip distribution patterns, and mode choice data were obtained. This section discusses these data.

## Traffic Volumes and Functional Classification

Table 7-1 summarizes roadway jurisdiction and growth on various roadways throughout Charlton using MassHighway<sup>2</sup> and CMRPC<sup>3</sup> historical traffic volume data.

**Table 7-1**  
**Traffic Growth on Select Roadways in Charlton**

Route	Count Date		Average Daily Traffic Volume <sup>1</sup>		Annualized Growth Rate (average percent growth/year)
	First Year	Last Year	First Year	Last Year	
Route 20, east of Route 169	1996	2005	18,300	19,200	0.5%
Route 169, south of Route 20	1986	2002	9,000	11,400	1.5%
Brookfield Road north of Route 31	1996	2005	4,500	5,100	1.4%
Muggett Hill Rd, east of Route 31	1987	2006	3,500	3,900	0.6%
Stafford Street, east of Center Depot Road	1990	2005	3,200	3,800	1.2%
Route 31, north of N Main Street	1995	2005	2,600	5,900	8.5%
Route 31, at Spencer TL	1985	2002	2,200	2,600	1.0%
Center Depot Road, north of Route 20	1985	2002	1,900	3,600	3.8%
Hammond Hill Road, north of Oxbow Road	1986	2005	1,300	1,700	1.4%
Richardson Corner Road, south of Route 20	1985	2002	1,100	2,300	4.4%

Source: MassHighway and CMRPC traffic count data  
1 - Average daily traffic volumes expressed in vehicles per day (vpd).

The data indicate that traffic volumes along roadways providing access to Route 20, Route 169, and Route 31 are growing by 0.6 percent per year (Muggett Hill Road) and 4.4 percent per year (Richardson Corner Road). Along Route 31, traffic volume growth varies significantly between 1.0 and 8.5 percent per year. Along the state numbered routes, Route 20 and Route 169, traffic volumes have grown at lower rates between 0.5 and 1.5 percent per year, respectively. There were no roadways where traffic decreases were seen.

## Journey-to-Work

An evaluation of journey-to-work census data for employed Charlton residents indicates where residents work and how they get there. According to US Census

<sup>2</sup> <http://www.mhd.state.ma.us/default.asp?pgid=content/traffic01&sid=about>  
<sup>3</sup> CMRPC Traffic Counts, Town of Charlton, emailed June 19, 2007

data<sup>4</sup>, approximately 26 percent of Charlton residents were employed in Worcester in 2000. An additional 19 percent of Charlton residents were also employed in Charlton. The majority of the remaining locations of employment of Charlton residents are neighboring towns and employment centers near I-495. Approximately 1 percent of Charlton residents work in Boston. These residents would benefit from commuter shuttle or bus service to Worcester which has an MBTA commuter rail station providing service to Boston. Table 7-2 below illustrates this data.

**Table 7-2**  
**2000 Census Journey-to-Work Data for Charlton Residents**

Location of Employment	Percent of Employed Charlton Residential Population
Worcester	26%
Charlton	19%
Southbridge	5%
Auburn	5%
Webster	4%
Shrewsbury	3%
Westborough	3%
Sturbridge	3%
Oxford	2%
Dudley	2%
Marlborough	2%
Boston	1%
Leominster	1%
Leicester	1%
Other <sup>1</sup>	23%

source: US Census, 2000, Census Transportation Planning Package, Part 2, 2003

1 - Other towns and cities not listed comprise less than one percent each of employment locations of Charlton residents.

An evaluation of journey-to-work census data for employees of businesses in Charlton was also conducted. This assessment quantifies the locations of residence of people who commute to Charlton for work. According to US Census data<sup>5</sup>, approximately 34 percent of people who worked in Charlton also resided in Charlton in 2000. Approximately 7 percent of people employed in Charlton resided in Worcester. The majority of the remaining locations of residence of Charlton employees are neighboring towns, including two towns in Connecticut. Table 7-3 below illustrates this data.

<sup>4</sup> US Census, 2000, Census Transportation Planning Package, Part 2, 2003  
<sup>5</sup> US Census, 2000, Census Transportation Planning Package, Part 2, 2003

**Table 7-3  
2000 Census Journey-to-Work Data for Charlton Employees**

Location of Residence	Percent of Population Employed in Charlton
Charlton	34%
Southbridge	9%
Worcester	7%
Dudley	5%
Sturbridge	5%
Spencer	3%
Oxford	2%
Holland	2%
Webster	2%
Thompson, CT	1%
North Brookfield	1%
Auburn	1%
Leicester	1%
Brimfield	1%
Brookfield	1%
Woodstock, CT	1%
Holden	1%
Other <sup>1</sup>	23%

source: US Census, 2000, Census Transportation Planning Package, Part 2, 2003

1 - Other towns and cities not listed comprise less than one percent each of residence locations of Charlton employees.

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## Mode Choice

An evaluation of mode choice in the region was conducted for Charlton. According to US Census data, approximately 94 percent of Charlton residents reported 'car' as their travel mode to work in 2000. Of this 94 percent, approximately 86 percent were single-occupant vehicles and 8 percent were multiple-occupant vehicles. Approximately 3 percent of Charlton residents work from home. Transit and walk modes rounded out the survey results; approximately 1 percent of Charlton residents utilized transit and 2 percent walked. The low transit mode share for Charlton residents reflects the lack of public transportation options in the Town; this lack of commuter transportation options was cited as a weakness of the Town by residents at a visioning meeting. Table 7-4 below illustrates this data.

**Table 7-4  
Charlton Resident Mode Split**

<b>Mode</b>	<b>Percent</b>
Single-Occupant Automobile	86%
Multiple-Occupant Automobile	8%
Transit	1%
Walk	2%
<u>Work at Home</u>	<u>3%</u>
<i>Total</i>	<i>100%</i>

source: US Census, 2000, Census Transportation Planning Package, Part 3 – CT, MA, RI, May 2004  
 note: other modes of transportation not listed comprise less than one percent of trips by Charlton residents




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## Transit and Freight

Public transportation opportunities are limited in Charlton. Bus service to Southbridge and Worcester was terminated in the 1970s and the only form of public transportation that now serves the area is shuttle buses for physically and mentally challenged adults and the elderly. The two private shuttle services are Rehabilitative Resources, Inc. and South Central Mass Elderbus, Inc.

The Rehabilitative Resources, Inc. Transportation Department provides ambulatory and wheelchair transportation service to physically and mentally challenged adults in Charlton<sup>6</sup>. Elderbus is a private paratransit transportation company, under contract with the Worcester Regional Transit Authority (WRTA) that provides transportation to the elderly and disabled in Charlton<sup>7</sup>. In addition to the shuttle services, Charlton is a member of the Worcester Regional Transit Authority (WRTA) but does not receive services other than Elderbus.

Charlton’s passenger rail line service which traveled between Boston and Albany was terminated in the 1950’s. Freight service on the line is provided under extremely rare occurrences. However, there is potential for this to change in the future as an active rail system could be seen as an advantage to the economic development of the Town.




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## Pedestrians and Bicycles

The majority of roadways in Charlton are typical rural, narrow roadways that provide limited sight lines to drivers. Additionally, vehicular speeds have been cited as an area of concern. These conditions create an unsafe environment for pedestrians

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<sup>6</sup> <http://www.rehabresourcesinc.org/transport.htm>  
<sup>7</sup> <http://www.scmelderbus.org/>

and bicyclists. In order to address these issues, Charlton has adopted bylaws which require subdivision developers to include sidewalks in their site plans.

The Midstate Trail is an off-street trail system in Charlton. This trail passes through Charlton on its route from Ashby to Douglas and is maintained by the Worcester Chapter of the Appalachian Mountain Club. There are no existing statewide designated bicycle routes in Charlton, nor are any accommodations proposed<sup>8</sup>.

In 2003, the Town of Charlton initiated an effort to preserve open space, foster greenway creation, and implement a network of walking trails. These tools are Geographic Information System (GIS) based and were utilized to map existing and future walking trail networks throughout Charlton. This is an ongoing effort.



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## Existing Transportation Issues

A review of transportation issues that impact safety, mobility, and connectivity within the Town was conducted based on field observations, a review of transportation studies, and community input.

In the area of traffic operations, there are no recurring operational deficiencies at intersections in Charlton that result in unsafe conditions or unreasonable vehicular delays or queues. Although the major transportation facilities in Charlton (especially Route 20) experience greater traffic volumes during the commuter peak periods, intersections along these routes do not experience notable or chronic congestion.

Two transportation issues along Route 20 were identified by the community during a public forum. Given the route's limited access and locations with a concrete barrier in the median, there are few locations to cross Route 20 and, as such, the roadway acts as a north-south barrier that limits mobility and connectivity. Excessive speeds were also identified as an issue along Route 20, which presents a safety issue.

Several locations in Charlton have been demonstrated to experience high crash rates. Based on the Nichols Enterprises Industrial Park Traffic Impact Study<sup>9</sup>, the intersections of Route 20 at Route 169 and Route 20 at Stafford Street experienced crash rates higher than the MassHighway district-wide rates. Two locations in Charlton are included in the Top 1000 High Crash Locations Report: 1999-2001 compiled by MassHighway: Route 20 at Route 169 and Route 20 at Northside Road.



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<sup>8</sup> 2007 Massachusetts Bicycle Transportation Plan, Preliminary Bicycle Network Proposal May 21, 2007  
<sup>9</sup> Traffic Impact Study, Proposed Nichols Enterprises Industrial Park, prepared by AK Associates, March 2006.

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## Future Conditions

The next step in the planning process is to identify growth trends in the area (see Chapter 3 for population and housing forecasts). These trends are often based on previous traffic volume patterns (as described in Table 7-1), past and forecasted population growth, and major development projects. Other future events are discussed as well.



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## Future Challenges and Opportunities

Increases in population in the future will lead to increased vehicular traffic along both the minor and major roadways in Charlton. These increased traffic volumes will impact the ability of existing transportation infrastructure to handle the increased demand placed on it, particularly during the morning and evening peak hours. In order to avoid operational issues along roadways and at intersections in the Town, alternative modes of transportation should be investigated further. These alternatives could include expanded shuttle bus service, car pooling, public transportation, telecommuting, and improved pedestrian and bicycle accessibility.

The forecasted increases in traffic volumes may raise the prospect of enhancing existing or providing new east-west connections. These opportunities have been considered in the past. Due to the topography and the desire to maintain the rural character of the Town, the significant widening or construction of east-west roadways has been deemed undesirable.

Charlton's acceptance into the National Heritage Corridor may present additional opportunities and challenges. The Town will carefully consider how transportation projects and roadway modifications might impact the project and the existing scenic roads. As Federal funds become available, grants should be actively pursued to implement the National Heritage Corridor project.

Charlton's appointment of an Emergency Management Director may also factor into the Town's decisions in several ways. Prioritizing roadway widening and improvement projects in coordination with Emergency Management staff is imperative to identifying roadways that need improvement to accommodate emergency vehicles. Procedures should also be reviewed for traffic management during emergencies within Charlton Center and on I-90.



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## Planned Developments

Two major development areas have been identified in Chapter 4, Economic Development: the corridors (Route 20, Route 169, and Route 31) and Charlton Center. Currently, there are four development proposals in these areas that would have

significant impacts to traffic conditions on the Town's roadways. It should be noted that based on an analysis of the Route 169 corridor by the CMRPC, Route 169 does not provide significant opportunities for economic development and the focus for the Town should be on developing Route 20<sup>10</sup>. The development projects are described below.

**CVS Pharmacy** – This project was completed in 2007 and involved the construction of a new CVS Pharmacy at the intersection of Worcester Road (Route 20) and Center Depot Road/North Main Street. The site was occupied by several small businesses and service stations on approximately two acres of land. The project redeveloped the land into a 12,900 square foot CVS Pharmacy with access driveways on Route 20 and North Main Street. Based on the traffic study<sup>11</sup> completed for the project, the CVS will generate approximately 30 and 40 net new trips during the weekday evening and Saturday midday peak periods, respectively. Capacity analysis conducted for this project indicated that the existing roadway infrastructure is capable of accommodating traffic volumes associated with the CVS and mitigation measures were not recommended.

**Nichols Enterprises Industrial Park** – This development consists of the construction of a new industrial park with five buildings totaling approximately 45,000 square feet with 140 parking spaces in the northeast corner of the intersection of Worcester Road (Route 20) and Griffin Road. Access to the site will be provided on Griffin Road and South Sturbridge Road. Based on the traffic study<sup>12</sup> completed for the project, the project will generate approximately 120 and 125 new trips during the weekday morning and evening peak periods, respectively. Capacity analysis conducted for this project indicated that the existing roadway infrastructure is capable of accommodating traffic volumes associated with the proposed project and mitigation measures are not recommended.

**Route 20 Commercial Development** – Town Meeting in the Spring of 2007 approved zoning changes that enable a new commercial development along Route 20. The site is now being designed for a major shopping center consisting of approximately 670,000 square feet of retail building space. It is likely to include a small strip development, a restaurant, a grocery store and a big box home improvement store. It is anticipated that this development will be a significant generator of new traffic.

**Charlton Center** – Specific interest has been expressed regarding the development of a Village Center in Charlton. The Center would provide mixed-use, small scale development with appropriate pedestrian accommodations (see Chapter 9 for a complete description). As with development along Route 20, transportation impacts are of significant concern in the Village Center. As specific projects come on line, particular attention should be paid to maintaining the quality of traffic flow



<sup>10</sup> Economic Development Analysis of the Route 169 Corridor, Charlton, Massachusetts, prepared by the CMRPC, June 2004.

<sup>11</sup> Traffic Impact and Access Study, Proposed CVS Pharmacy, prepared by VHB, May 2006.

<sup>12</sup> Traffic Impact Study, Proposed Nichols Enterprises Industrial Park, prepared by AK Associates, March 2006.

throughout the Village Center and to emergency management strategies. Based on a field review, constrained right-of-way in the Village Center area may present an obstacle to roadway improvements. Additionally, it is desirable to strike a balance between vehicular and pedestrian accommodations and the desired character of the Village Center. To achieve this, the following access management tools should be considered as the Village Center is developed:

- Limit the number of curb cuts and require curb cut consolidation where possible. Doing so will better define vehicle and pedestrian space;
- Provide internal driveways between parcels; and
- Keep parking hidden or to the back side of buildings. Doing so will enhance the building edges and draw attention to the building architecture and not the parking facility.

**Route 20/Stafford Street/Maple Street Commercial Redevelopment** – Town Meeting in the Spring of 2005 approved a zoning map amendment that re-zoned two blocks of existing mixed use buildings located northerly off of Route 20 (bounded by Route 20, Stafford Street and Maple Street) from residential Small Enterprise (R-SE) to Community Business (CB). The property owner anticipates an eventual redevelopment that would demolish the existing mix of residential units and small commercial establishments and replace them with a multi-tenant commercial plaza design. As the future project is planned and designed, particular attention should be paid to traffic engineering review and maintaining the quality of traffic flow along this heavily-traveled segment of Route 20.

**Southbridge Industrial Road Project** – During the past year, the Town of Southbridge has proceeded with the planning, design and eventual implementation of an access road westerly between Route 169 and land in the vicinity of the Southbridge airport to provide access for future economic development in Southbridge. While this effort is located in Southbridge, its proximity to the Charlton town line warrants consideration of this project as it develops for potential traffic impacts due to project traffic flow along Route 169 in Charlton.



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## Potential Transportation Improvements

The Transportation Improvement Program (TIP) is an intermodal program of transportation improvements produced annually by the CMRPC. The TIP is a planning document that lists all transportation related projects in the Central Massachusetts planning region that are programmed to receive federal-aid funding. Non federal-aid (NFA), or state-funded, projects are included as well. Bearing in mind the limited statewide transportation funding resources, the annual program of

projects must demonstrate financial constraint within the federal-aid funding targets and NFA funding estimates.<sup>18</sup>

The only project of note in the recent TIP is safety improvements along Route 20 in Charlton and Oxford. Charlton is not noted in any other significant projects in the 2007-2010 TIP.

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## **Transportation and Circulation Recommendations**

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### **Goals for Transportation and Circulation Element**

- Maintain or enhance vehicular mobility in town while striking a balance between roadway safety improvements and scenic, rural roadway character.
- Control or regulate the amount of new traffic added to the Town roads by clustering heavy traffic generators where they can be served by existing major roadways, such as Route 20.
- Enhance non-vehicular transportation opportunities and increase opportunities for residents to walk and bicycle safely around Charlton.
- Continue to preserve open space, foster greenway creation, and enhance the network of walking trails
- Develop access management and traffic impact study guidelines
- Consider traffic calming elements where appropriate to regulate high rates of speeds
- Improve emergency management strategies related to I-90 crisis management and mobility for emergency response vehicles (fire, police, etc.), particularly in the Village Center
- Improve consistency of street signage throughout Town to be compliant with published Manual on Uniform Traffic Control Devices (MUTCD) guidelines

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### **Recommendations**

#### **T-1**

Adhere to proper Institute of Transportation Engineers (ITE) trip generation level of service criteria via case-by-case Planning Board project permit review in order to maintain and enhance vehicular mobility while keeping a balance between roadway safety improvements and scenic rural roadway character.

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<sup>18</sup> <http://www.cmrpc.org/Transportation/TIP.htm>



**T-2**

Control or regulate the amount of new traffic added to Town roads by clustering heavy traffic generators where they can be served by existing major roadways, such as Rt. 20.

**T-3**

Enhance non-vehicular transportation opportunities by establishing safe walking and bicycling paths and trails around Charlton.

**T-4**

Develop access management and traffic impact study guidelines and incorporate them into the zoning bylaw and subdivision regulations. Minimizing curb cuts and greater separation between driveways improve safety, appearance, and the viability of roadways and villages. Consider driveway permits for new construction.

**T-5**

Consider traffic calming elements where appropriate to regulate high rates of speed.

**T-6**

Consider an east-west connector in the southern part of town.

**T-7**

Place limitations on new cul-de-sac development and look for ways to increase street connectivity by creating through roadways where feasible.

**T-8**

To facilitate use of the existing rail line, consider redesignating Center Depot Road as Rt. 31A to provide direct access from the Depot to Rt. 20. This will likely involve improving some connector roads, with the need to set aside land before the potential routes are developed.

## Community Facilities and Services

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### Introduction

Community facilities are publicly owned buildings, lands, and infrastructure that serve the public, including sewer and water service, roads, schools, parks, police and fire stations, and other town-operated buildings. The availability and quality of community facilities and services is a major factor in many residents (or future residents) decision to live in Charlton. The quality of life is largely dependent upon the quality of the Town's public safety, infrastructure and general public services.

As Charlton prepares for the future increases in population, predicted in Chapter 2, Land Use and Growth Management, the Town must continue to plan to maintain the town services and facilities and to plan to expand them when necessary. This chapter details the current state of town services and facilities, including any improvements currently underway or in the pipeline and identifies possible future needs.

The Town's public services and facilities have continued to be outpaced by the requirements of a rapidly growing population. Financial constraints caused in large part by the Town's share of the educational systems have delayed the Town's ability to fund construction of new roads, sidewalks, expansion of the water and sewer systems and to renovate key town buildings. A large part of this dilemma had historically been a lack of advance planning, as reported in the 2000 Master Plan. However, the town has begun to better plan for these needed upgrades; current projects, such as the library expansion and the relocation of the highway barn, will be discussed in this chapter. However, Charlton should undertake a Capital Improvement Planning process to fully understand the Town's needs.

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### Public Safety

The following sections discuss the public safety elements of Charlton's service provision, including police, fire and emergency.



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## Police Department

The Charlton Police Department currently consists of 19 officers, including the Chief of Police. The FBI's Annual Uniform Crime Report recommends that police departments in the Northeast have 1.8 officers per 1,000 people, as reported by the Chief. Assuming a 2007 population of approximately 14,000, Charlton should employ a minimum of 25 officers. The Police Chief estimated that the cost of adding one officer would be approximately \$52,000, not including health and retirement benefits, educational incentives, overtime, shift differential, or the costs of a weapon, holster, protective vest and other required equipment (or approximately \$65,000 all inclusive).

It is a constant goal of the Department to work towards satisfying – and exceeding – the suggested requirements. Absences, including health, vacation, training, and military duty, reduce the staff available for shifts. Working with at least a full complement of officers would allow the Department to be fully staffed during unanticipated absences and to provide more proactive services to the community instead of only being able to respond to calls. Although overall staff numbers are lower than desired, the Chief is comfortable with the number of staff in command positions, recently adding a fifth sergeant and one Lieutenant.

The department currently has 11 vehicles, which the Chief deems sufficient for the foreseeable future. Vehicles are rotated out of use on an annual basis, due to age and wear (excessive mileage). As the Department grows, there will be a need for additional cruisers. However, parking will become a more pressing concern. With 30 parking spaces (including one handicap space), the Department is near parking capacity at its current facility. When you consider the need to park staff's personal vehicles in addition to the Department-owned vehicles, snow storage, and confiscated vehicles, there leaves little room for public parking. When the Department is hosting a community event, the public often parks down the street and walks. The Chief has been discussing the possibility of acquiring additional property abutting the Station, owned by the Masonic Home, to convert to additional parking.

The existing station, located on Masonic Home Road, was built in 1991 and has some space constraints due to a growing force and changing needs. Office space was added in the basement to accommodate additional officers; however the locker room for males is at capacity. Two bathrooms were added in the basement, which helps address some access concerns; these were added at cost by students at the Bay Path School at a cost of \$7,000 (a savings of \$23,000 compared with private contractors). The Day Room, which would have hosted community education events, was converted into a Squad Room for the staff. Thus there is a need for a community space to run public programs, hold meetings and other events. The Chief would like

to add a wing onto the Station to accommodate additional staff space and a community training room.

The Charlton Police Department recently upgraded their dispatch center to include a tower, radio and equipment upgrade in 2006, with the added equipment supplied by \$250,000 from the State Emergency Telecommunications Board (SETB) and \$110,000 approved at the Annual Town Meeting. This significantly improves the Station's communication ability. The Department's Capital Plans include a new Base Radio in FY 2008 (which will allow the Department to switch from analog to digital); two new Voter Stations over the next two years (which are needed to allow handheld communication in two known radio dead spots) and 16 portable radios. The Chief looks into grants on a regular basis to offset costs to the taxpayers of Charlton and will continue to do so. The Chief anticipates that the Station roof will need to be repaired within the next five years, at an estimated cost of \$45,000. The results of the Americans with Disabilities Act (ADA) study currently underway on town-owned property may indicate that the Station requires an elevator or other upgrades.

Two new pieces of equipment were recently purchased. The Department purchased an Electronic Fingerprint Scanner (\$14,000) through a technology grant. This piece of equipment registers the fingerprints of people in Federal and State databases for comparison and other purposes. By the publication of this report, the Department will also have Reverse 911 (\$30,000) which was acquired with the remaining funds from the Cops-More 2002 Grant. Through the Town's technology program, the Department is slated to receive a new server in 2008 and to rotate out five or six PCs.

In FY2006, the School Resource Officer Program was eliminated due to the inability to fund the position. The Police Chief expressed disappointment at losing this position, as the officer provided policing and educational services, such as D.A.R.E., to the schools. The Chief hopes to see this program restored. Since the 2000 Master Plan, the chief cut the K-9 Unit from the Department's service offerings. With the cost of training and maintaining (feeding, housing, providing shots), the K-9 Unit was deemed to be not cost-effective at the time, although a growing population and increased diversity of uses may necessitate reinstating a K-9 program in the near future.

The Department has been policing Charlton's lakes using loaned personal watercraft (SeaDoo) donated annually by Bombardier Corporation. However, the program was recently discontinued by Bombardier. The Chief seeks to restore this program in the future through the purchase of a personal watercraft. The Department also owns one 2-wheel Alternative Terrain Vehicle (ATV). In order to effectively enforce the use of recreational vehicles in off-road locations, the Department requires a 4-wheel ATV.

The Chief also serves on the Telecommunications Committee, which advanced the linkage of the Town Hall, Police Department and Fire Departments communications system. Servers are housed in the Town Hall that control the internal communication between departments and access to the internet. The

Telecommunications Committee is now pursuing the linkage of these buildings through their own dark fiber to provide higher speed connections through a dedicated cable accessible to only these three buildings.

The Chief continues to work with the local Emergency Planning Committee and the newly formed Regional Emergency Planning Committee to prepare for any hazard. The Committee has prepared an emergency plan, including the purchase of cots, blankets, food, and storage space.

As the town is growing, especially with the increase of retail uses on Route 20, the Chief expects the calls for services to increase. The Police Department will feel the impact within the next 2 to 5 years.

Police Chief supports development fees, encourages public input, and recommends multi-town procurement of supplies. In fact, the Chief is involved in three regional task forces through which he shares equipment and personnel with other communities. As society becomes more mobile, he stresses the need to act regionally.



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## **Fire Department and Ambulance**

The Town of Charlton Fire Department was established in 1925; it was an entirely on-call department until April 10, 1989 upon the hiring of the first three full time firefighter/EMTs. The first full time Fire Chief was appointed at a Special Town Meeting in 1998. In 1999, the Ambulance Service joined the Fire Department. The department currently employs 14 full time firefighter/EMTs including the Chief (increased from nine in the 2000 Plan), one Administrative Assistant and 28 on-call fire fighters and EMTs (increased from 22 in the 2000 Plan).

As stated in the 2000 Master Plan, manpower recommendations are one firefighter/EMT per 1,000 residents. The current population of approximately 14,000 would indicate that the Department needs 14 firefighter/EMTs on each shift to meet this recommendation. With approximately 4 firefighter/EMTs on each shift, the Department is currently understaffed. .

Charlton has two fire stations. The primary station (the Main Station), on Power Station Road, was constructed in the 1950's. When built, the facility was expected to last approximately 30 years. The second building, located on Main Street, does not contain running water and serves mainly as a garage for four vehicles/pieces of equipment. Both facilities are out of date and have been unable to meet the present needs of Charlton's expanding Fire Department since at least the 2000 Plan.

A Fire Station Study Committee was formed in May 1995, indicating that the need for upgraded and centralized facilities has long been recognized. The new fire station has been a priority project for Charlton. At a 1999 Annual Town Meeting, \$250,000 was approved for the purchase of the land; however, that site became too costly due

to conservation and construction related issues and was deemed unsuitable. As discussed later in this chapter under Town Priorities, the new site for this project will be Four Dresser Hill Road.

The Main Street substation should also be replaced with a modernized facility. The 2000 Plan also identified the need for a suitable additional manned substation in the Richardson Corner Road and Oxford Road area by 2005-2010. These substation projects will not likely progress before the new Main Station is constructed and operating; however, finding a suitable site for these substations should be an ongoing process

The Fire Department operates four Engines, two Tankers, three Forestry units, two ambulances, one Heavy Rescue, and one Aerial Scope. The Department replaced one Engine, one rescue and one ambulance since 2000. It is anticipated that additional Engine and Rescue vehicles will need replacement in the near future. The department also has two ice rescue sleds for water and ice rescues, and other water related emergencies as well as two Emergency Medical Services Bicycles.

The Fire Department also has several specialized units that handle situations, which require advanced or specialized training. These include: Fire Prevention Unit (SAFE programs), Training Division, Fire Investigation Unit, Tactical Rescue Team, Rapid Intervention Team, and Chaplains Unit.

As of July 7, 2007, the Main Station increased its staffing to 24 hours per day every day. The Department maintains three firefighter/EMTs on duty throughout this period; a fourth firefighter/EMT is scheduled between 8:00 AM and 4:40 PM. The Fire Chief anticipates requesting additional personnel for the FY09 budget cycle. Approximately 1,800 calls for service were responded in the last calendar year; this number includes fire and EMS runs only.<sup>1</sup> As of September 2007, the Fire Department has responded to 1,624 calls, an increase of 114% compared to the previous time last year. In addition to their emergency response services, the Chief and his designees are responsible for issuing a variety of permits, for blasting to oil burner insulation; these duties are not included in the calls for service listed above.



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## **Emergency Management Services**

The Board of Selectmen appoints an Emergency Management Director to head up the Charlton Emergency Management Agency (C.E.M.A.). The Director is responsible for working with several Town Departments (Police, Fire, and Highway Departments, and the Hazardous Waste Committee Chairman) and volunteers to establish an effective emergency response team. A Telecommunications Committee was formed prior to the 2000 Plan to evaluate networking these entities using various



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<sup>1</sup> Fire Chief Charles Cloutier, email correspondence September 28, 2007.

telecommunications technology. The new role of the C.E.M.A. should be considered when choosing sites for the new Fire and Highway Departments.

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## Infrastructure Services



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### Highway

The Highway Department is responsible for town owned properties, maintenance and repair of streets and roads, including repaving, drainage, snow and ice removal, sanding, street sweeping, roadside and right-of-way brush clearing, town parking lots, storm sewers, town sidewalks, and the reviewing of complete work. This department is also responsible for all town highway work scheduling and coordinating with other town departments and local public utilities.

Located on Flint Road and North Main Street, the Department has two barns which are used for salt and sand storage, and some equipment storage. In addition to maintaining Highway Department equipment, the mechanic services the Fire and Cemetery Departments' equipment.

A site plan for the new Highway Barn is in the process of being prepared; it will be submitted to the Planning Board for review and approval. The new facility is to be located at the former landfill site on Flint Road, across the street from the present salt shed. The proposed 15,000 square foot building will contain offices for employees, buildings to store equipment, and a service station area. A high priority for the Town, a Building Committee was formed in 2007 to advance this project. There is \$500,000 available earmarked for the new highway barn. The balance of funding needed for the project will be requested at the May 2008 Town Meeting.



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### Water

#### Existing Conditions

Charlton's water needs are primarily served by private wells. There are 20 registered public water supplies and 45 registered non-community public water supplies. An existing water distribution system located in Charlton City, constructed in the late 1800s by the Charlton Woolen Company, consists of about one mile of 6" main along parts of Stafford Street, Maple Street, Power Station Road, Sturbridge Road and Brookfield Road. Some portions along Stafford Street were replaced in 1955. This system is currently available for fire protection only.

The Town of Southbridge owns and operates distribution lines originating in Southbridge, running up Route 169, and ending at Route 20 in Charlton. These lines

then extend up Route 20 between Route 169 and the Mass Turnpike Authority service facility 5 East and the Mass State Police barracks on Route 20. Another line runs on Stafford Street between Route 20 to J. Hammond Road and on J. Hammond Road between Stafford St. and the Mass Turnpike Authority service area 6 West. These lines service the Mass State Police Barracks, Turnpike service areas and several residences with contaminated wells (Timber Valley Subdivision and the adjoining properties). Because of the water connection through Charlton to the Mass Turnpike Authority facilities, Southbridge provides some water to Charlton City residences.

There is evidence of groundwater contamination in several areas of town. Road salt contamination has been found in wells along the Route 20 and Mass Turnpike corridors, and naturally occurring arsenic has been detected in eastern and southeastern parts of town. Several wells in the Charlton City area have shown levels of trichloroethylene (an industrial solvent) in excess of regulatory levels. The source of this contamination is not known. Benzene, a gasoline additive, has been detected in some wells in the vicinities of the Mass Turnpike 6W and 5E service facilities. The Mass Turnpike Authority and several oil companies were identified by the Department of Environmental Protection (DEP) as potentially responsible parties. According to the DEP the benzene plume seems to be moving in a southeasterly direction. Relief from this contamination is necessary.

A vote of the March 1, 1999 Special Town Meeting established a water enterprise fund and authorized the Water-Sewer Commissioners or Board of Selectmen acting as water commissioners to obtain funding and to enter into contracts for the purposes of establishing a water system. The system design included the installation of 12" pipe along Route 20 from the Oxford line to the intersection of Route 169, various fire hydrants, 8" pipe crossings for roads and hydrants, 750,000 gallon stand pipe, and pump station. Service to the Charlton City area was also installed. Installation of the system along Route 20 was completed in 2005 at a cost of approximately four million dollars. The Water-Sewer Commission submitted a request for proposal for a source of water supply, contract operations, maintenance and management of the town's water distribution system in 1999. While the water system was expected to reach full operation by December 2001, the Town was not able to obtain a source of water and the lines lay dry. The town was denied a water connection to Oxford by the state because the interbasin transfer required a lengthy study.

The townwide goal remains to provide water to the Route 20 water line and bring it into the center of town. The lack of water has not limited growth of the residential sector because they can drill to put in private wells; however, it has limited growth in the Route 20 corridor. An August 20, 2007 article in the *Worcester Telegram & Gazette* reported progress on this front:

*"Water-Sewer Commissioners recently approved plans presented by Weston and Sampson for connecting the Charlton and Southbridge water systems at Stafford Street. Work is expected to begin in spring 2008 and*

*last six months. Charlton will purchase 100,000 gallons per day (GPD) from Southbridge to start its water system and provide relief to property owners with contaminated wells." (summarized)*

While a start, this is a very minimal supply. This arrangement is expected to cost approximately \$2,100 to \$2,500 per year per household, for approximately 100 households.<sup>2</sup> While Charlton has entered into a five year contract with Southbridge, the town continues the search within town for its own water source. While Southbridge has the capacity to provide more water to Charlton, this would require infrastructure improvements and Southbridge would inevitably require some control over the water's destination. Southbridge has expressed interest in a large access road to their industrial areas in exchange for the water.

The Water-Sewer Commission has hired Tighe & Bond to look within Charlton for an adequate supplemental water source. Constraints that have impacted the Town's ability to find a water source inside Charlton include the arsenic vein on one side of town and the gas stations located at the Mass Turnpike service stations.

Concurrent with this Master Plan, the Water-Sewer Commissioners are drafting a Comprehensive Water Resources Management Plan for the town.

### **Choices Confronting the Town**

The Economic Development Commission and the Water Study Committee have stated that water along the Route 20 corridor will facilitate development of the industrial and commercially zoned areas along that highway. The Fire Department has also expressed a great need for municipal water for fire protection purposes. Continued expansion of water lines should be strongly encouraged.

In light the recent rezoning by the EDC and Planning Board, of the majority of the westerly side of Route 20 to Business Enterprise Park (BEP), it can be expected that there will be a desire to extend the water lines from Route 169 to the Sturbridge line to service new development. Prism Environmental, the engineering firm hired by the Water-Sewer Commission to design Charlton's water system, estimated maximum daily industrial/commercial use along Routes 20 and 169 in the year 2010 will be 661,500 GPD and residential demand will be 378,000 GPD. Of 95 responses to the Business Survey conducted by the Master Plan Committee, 22 listed water expansion as a priority. This ranked third after sewer expansion and improved roadways.

The Board of Health adopted well regulations in January, 1999 requiring new wells to meet Safe Drinking Water Act standards for volatile organic compounds, arsenic and radon. This testing will likely identify more contaminated areas of town.



<sup>2</sup> Charlton approves water contract, Worcester Telegram & Gazette, September 13, 2006.

139 respondents to the residential survey conducted for the 2000 Plan indicated that cleaning up groundwater and contaminated wells should receive priority in town funded projects. Overall, this ranked third as most important after building additions to schools and acquiring open space and conservation land. Another question on the survey asked residents to rank the types of land that should be preserved; water supply areas received the highest number of first priority responses.

As reported in the 2000 Plan, there had been discussion over using Buffumville Reservoir as a possible future supply to develop a regional water system with the surrounding towns of Dudley, Leister and Sturbridge. SEA Consultants, Inc. was hired by the town to conduct a feasibility study for the future development of potable water infrastructure for commercial and industrial development along the corridors of Routes 20 and 169. Their 1997 report identifies this area as well as others for possible surface and groundwater supplies. All areas indicated in this report should be promptly prioritized for water supply protection.

In 2003, Charlton initiated a comprehensive municipal water search undertaken by Tighe & Bond. The consultants found a viable source of water on U.S. Army Corps of Engineers (ACOE) land at Buffumville Lake but the selected site was abandoned when the DEP denies the application to site a well on federal land, noting the frequency of flooding and the inability to safely control the area around the site.<sup>3</sup> The consultant is now searching for possible sites on private land near Buffumville Lake.



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## Sewer

A portion of the Town – primarily Charlton City – is sewered. Sewer extensions connect to the two Mass Turnpike Service (MTA) areas. The Water and Sewer Commission is responsible for the oversight of the operation and maintenance of Charlton’s wastewater facilities. Several privately operated wastewater treatment facilities exist in Town, including one at Bay Path Regional Vocational School and one at the Masonic Home. In 1989, Charlton received an Administrative Order from the Environmental Protection Agency (EPA) requiring that the Town’s wastewater facilities be designed and constructed to comply with effluent limits in the National Pollution Discharge Elimination System (NPDES) permit. Since 1994, the Town implemented has an upgrade to the wastewater treatment facilities, as described in the 2000 Master Plan.

A Comprehensive Wastewater Management Plan was completed to update areas of need in response to changes made to Title 5 (in March of 1995). These changes were made to update wastewater flow projections based on the Town's growth and to



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<sup>3</sup> *Charlton renews hunt for water near Buffumville*, Worcester Telegram & Gazette, February 1, 2007.

develop wastewater facilities to accommodate potential future commercial and industrial growth along Route 20.

The Phase 1 wastewater facilities plan included the replacement of original sewers in the center of Town, extension of sewers to two MTA service areas, and construction of a new advanced wastewater treatment plant. The Phase 1 project included sewers on Route 20, Carpenter Hill Road, Power Station Road, Brookfield Road, Maple Street, Spencer Street, J. Hammond Road, and Stafford Street. The Phase 1 sewer system also included three pumping stations, one on J. Hammond Road, one on Route 20 and one off of Route 20.

The MTA paid to extend the sewers to their services areas, while the Town paid for replacing the sewers in Charlton City. After evaluating Town-operated versus contract-operated wastewater treatment plant, the Town decided it was more cost effective to staff with Town personnel. The treatment facility has a design capacity of 150,000 GPD with discharge to Cady Brook. The expense of the new facility was also shared by the Town (40 percent) and the MTA (60 percent). Completed in March 1997, the wastewater treatment plant (WWTP) began operating in September 1997.

After the first vote failed, a second March 1998 vote approved a revised Phase 2 sewer project. Phase 2 Areas to be sewerred include Glen Echo Lake & Charlton Center (Route 20, North Main, Old Worcester, Muggert Hill, and Burlingame), New Middle School, Heritage School, Burlingame School, Masonic Home, and Bay Path Vocational High School. Completed in December 2000, Phase 2 expanded the Wastewater Treatment Plant from 150,000 to 450,000 GPD, added 8 pumping stations and extended the sewer 90,000 feet. The total project cost for Phase 2 was \$14 million and it was funded by:

- DEP State Revolving Fund (SRF) zero percent interest loans
- U. S. Generating Co. Pilot Funding - \$8 million
- Town taxpayers
- Sewer system abutters

Wastewater disposal problems beyond the Phase 2 area have been identified. However, there is no projected date for the beginning of Phase 3, primarily because it is expected to cost \$33,886,000. Phase 3 consists of sewers to service a number of needs areas including South Charlton Reservoir, Little Nugget Lake, Prindle Pond, Little River, Cranberry Meadow and miscellaneous streets in the Charlton City area. It also includes the extension of sewers eastward on Route 20 to the intersection with Hammond Hill Road. The Route 20 sewer is included in Phase 3 should the Town decide to construct it to accommodate future commercial and industrial development. Phase 3 areas are not prioritized relative to each other; the Town may choose to implement one, several, or all of these areas. The intent in splitting Phase 3 into multiple areas is to allow the Town the flexibility to choose when and where they will construct sewers in the future.

On a present worth basis, the most cost effective alternative is conveying all of the flow from the Phase 3 areas to a central wastewater treatment plant with a discharge to Cady Brook. The Cady Brook waste-load allocation evaluation conducted during the Comprehensive Wastewater Management Planning indicates that it is technically viable to discharge 900,000 GPD from the Central WWTP. There is also adequate land area at the Central WWTP that could be acquired by the Town to accommodate the facility's expansion. The implementation of this alternative is dependent on gaining DEP/EPA approval to modify the Town's NPDES permit. Should DEP/EPA approval not be acquired for the permit modification, it is recommended that the Town initiate negotiations with neighboring communities of Dudley and Oxford to update the buy-in and user costs and to determine if inter-municipal connections are viable. The construction of satellite wastewater treatment plants is the least favorable of the wastewater management alternatives based on cost, citing issues, and permitting. It should be considered only in the event that the central wastewater treatment plant and inter-municipal connection options are not implementable.

Cady Brook drains an area of 13.04 square miles and originates at the outlet of Glen Echo Lake. The brook then flows in a southerly direction for approximately 5.7 miles until it confluences with the Quinebaug River in Southbridge, MA. The well-defined channel of this brook has a streambed consisting primarily of sand and gravel, which combined with an elevation drop of 330 feet from its headwaters to the confluence with the Quinebaug River, contributes a high degree of aeration.

The NPDES permit issued in September 1996 permitted a monthly average daily discharge of 320,000 GPD and specified effluent concentrations for contaminants such as BOD, TSS, phosphorus and ammonia. With the addition of Phase 3 flows, the projected required plant capacity will increase to 640,000 GPD. The Town conducted a waste-load allocation study for Cady Brook and determined that water quality standards in the Brook could be maintained with increased treatment plant discharge provided that the mass loading rates specified in the NPDES permit be preserved.

Currently, the Town has a permit to discharge 450,000 GPD to their WWTP, which would allow all Charlton residents to be served. However, the current treatment capacity is 250,000 gallons. Charlton needs to upgrade facility so that treatment is equal to the permitted level of discharge.

I-90 waste accounts for more than double the total household waste from Charlton residents at the WWTP; it generates 60 percent of the sewer demand in Charlton. The Overlook, and other new developments, has also increased the sewer load. The two MTA service areas each discharge 88,000 gallons GPD to Charlton. According to Sandy Dam, former Chair of the Water-Sewer Commission, the MassPike rest stop(s) in Charlton is the highest cost rest stop in the nation because the Charlton treatment facility has few customers and higher standards (as a result of 90 percent of the brooks flowing in the summer).

A moratorium on sewer connections was passed in April 2005. At the March 2007 Town Meeting, the moratorium was extended until May 2008.

The Water Sewer Commission has published articles in the Charlton Gazette and on the Town website communicating the recent sewer rate change and meters.

## **Future**

The wastewater facilities plan recommends further phases of sewerage, but review of its cost data shows that many of the areas recommended for sewerage are not cost-effective. The Water Sewer Commission, the Board of Health, and the Town must focus on affordable solutions for wastewater problems at existing and approved structures. Title 5 is complex, but allows a range of options for repairs, including composting toilets, gray water systems, and sand filters. Charlton's overwhelming preference to control growth, as indicated by Planning Board surveys, is consistent with the limited assimilative capacity for treated wastewater by the Town's soils and streams. The sewer commission focuses on the funded phases, postponing further phases.

## **Challenges and Opportunities**

1. Because of the cost of Phase 3, more affordable wastewater solutions should be considered by the Sewer Commission and the Town as well as funding solutions for this Phase.
2. Water quality at Cady Brook should be a priority. Phase 3 would double the discharge into Cady Brook. The DEP determined that the increased flow would be permissible if effluent concentrations were reduced proportionally. However, the feasibility of meeting such concentrations has not been proven. This needs further study by the Sewer Commission.
3. Where sewers are built, development will follow. Coordination is needed between the Sewer Commission and the Town on implementing Phase 3.
4. Research the potential of installing composting toilets at the I-90 rest area to alleviate some of the sizable pressure placed upon the sewage infrastructure from these two locations alone. Already to address this issue, the Planning Board has proposed the use of green technology in its rest stops to the town Water & Sewer Commissioner for their work with the MTA.

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## **General Public Services**



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### **Schools**

Charlton's public school enrollment, capacity and staffing are provided below in Table 8-1.

**Table 8-1  
Educational Facilities**

School	Grades Served	Location	Public or Private	Enrollment †	Capacity	Remaining Space	Full-Time Faculty	Staff
Charlton Elementary School	K – 1	Burlingame Road	Public	433	495	62	30	31
Mason Road Elementary School ††	K – 1	Mason Road (Dudley)	Public	382	309	(73)	31	20
Heritage School	2 – 4	Oxford Road	Public	570	675	105	41	21
Dudley Elementary ††	2 – 4	School Street (Dudley)	Public	411	389	(21)	37	14
Charlton Middle School	5 – 8	Oxford Road	Public	801	930	129	65	22
Dudley Middle School ††	5 – 8	Dudley-Oxford Road (Dudley)	Public	578	600	22	55	19
Shepherd Hill Regional High School ††	9 – 12	Dudley-Oxford Road (Dudley)	Public	1,206	1,302	96	77	30
Bay Path Regional Vocational Technical High School	9 – 12	Burlingame Road	Public	1,115	1,120	5	125	50

Source: Town of Charlton at [www.townofcharlton.net](http://www.townofcharlton.net), Education and Dudley-Charlton Regional School District at <http://www.dc-regional.k12.ma.us>, Shepherd Hill Regional High.

Notes: † Enrollment numbers are for the 2006-2007 academic year.

†† These schools are actually located in Dudley, but are listed here as part of the Regional School System.

## Dudley-Charlton Regional School District

The Dudley-Charlton Regional School District (DCRSD) has earned accreditation from the National Association for the Education of Young Children, the nation’s leading organization of early childhood professionals. In addition, Shepherd Hill Regional High School is accredited by the New England Association of Schools and Colleges, Inc., a non-governmental, nationally recognized organization whose affiliated institutions include elementary schools through collegiate institutions offering post-graduate instruction. Approximately 87 percent of DCRSD’s 264 graduates (Class of 2007) are continuing their education beyond high school, attending four-year colleges, two-year junior and technical colleges, and other post graduation institutions. MCAS results from May 2006 testing placed DCRSD 61<sup>st</sup> out of 328 districts statewide.

### Programs

DCRSD provides the following programs to help all students experience success:

- Full-day Kindergarten.
- Remediation programs at the middle and high schools to help those students who have not demonstrated proficiency on the MCAS tests.
- Title I (or similar) programs for those students considered “at risk” in grades K-6
- District-wide tutoring programs.

- Math coaches to provide additional learning opportunities for struggling students and professional development support for elementary staff.
- Summer school classes to provide both enrichment and remediation.
- Teacher Reading Academies to provide staff with current information about effective reading instruction.
- District-sponsored before- and after-school programs in grades 2 -8 to provide support, challenge, and enrichment.

Programs impacted by facility constraints include the following:

- Special needs services, including occupational therapy, physical therapy, speech, tutoring, individual remediation, etc. have increased substantially, requiring additional space.
- Lack of physical space limits the DCRSD's ability to create additional special education programs as needed. DCRSD's philosophy is to keep special education students in our school district, whenever possible.
- Lack of adequate conference area. There is no conference area within 150 feet of administration or guidance offices at Shepherd Hill Regional High School.
- Lack of specific areas for a District Administration building.
- Classroom space continues to be an issue as student enrollment increases throughout the school year.

## **Facilities**

Shepherd Hill Regional High School (SHRHS) was designed in the early 1970s using criteria established for the education requirements of that time. Since then, educational needs have been established that replace original configurations of classrooms.

- Instructional and non-instructional space has been reapportioned for the following uses: Special needs instruction and services, computer laboratories, administrative technology needs, and ELL services. The Library and Media Center has facilitated directed study halls for as many as 35 students in a single period and 200 students per day.
- Lack of space is a significant issue facing SHRHS. Most classrooms are too small by today's education standards; some are smaller by as much as 30 to 40 percent.
- The present school enrollment of just over 1,200 students warrants approximately 223,000 gross square feet (GSF) per Massachusetts School Building Association (MSBA) standards. The conservative, projected enrollment in two years will exceed 1,300 students, increasing the need to approximately 240,500 GSF, or a full 25 percent beyond the present 192,247 GSF.<sup>4</sup> Instead of the recommended standard of 185 GSF per student, the SHRHS will have only 148 GSF per student.



<sup>4</sup> According to the space standards contained in 963 CMR 2.00 and in the MSBA Educational Program Space Standards and guidelines

- SHRHS was built with 77 classrooms. With the inclusion of special education, computer labs, etc., the number of classrooms for regular education classes has been reduced to 68.
- The average core classroom contains between 590-775 SF. Today's standards demand 950 SF per classroom.
- SHRHS science laboratories contain between 900-1,055 SF, far below the current standard of 1,200 SF.
- Innovative special education programs have been difficult to implement due to unavailable classrooms and inadequate space.
- Physical education classes are too large for gyms and available lockers. There are not enough fields or gyms for athletics. Off campus facilities within the district are used which necessitate the busing of student athletes.
- The class schedule was modified to accommodate four lunches.
- Population and Enrollment - 10-year History:
  - SHRHS, based on October 1<sup>st</sup> enrollment in grades 9-12. The 1996-2006 grades 9-12 historic growth increased by 404 pupils, or 5.04 percent per year. The projected growth over the next two years shows 122 additional students (to a total of 1,327) or a continued annual growth rate of 5.06 percent.
- The above projected figures represent students presently enrolled in the system and do not account for any new growth. The towns of Dudley and Charlton have issued over 750 building permits during the past five years with additional single-family home subdivision projects in the preliminary or definitive design and application stage.

Charlton's schools are interconnected with many elements of the Master Plan, including infrastructure, sewer and water for schools; road improvements for busing; population and housing; and open space. As indicated by the Charlton Planning Board survey, a large number of residents (41 percent) favored funding school additions or new schools. We are fortunate to have this community support for our schools. However, the reality is that our tax base must be able to support our schools. What can we do now to facilitate the potential growth in enrollment? Some solutions to consider are:

- Preserve a site now for future school building.
- Increase enrollment and business in Charlton, thus increasing tax base without increasing student enrollment.
- Increase open space as a means of controlling development.
- Limit residential growth by increasing lot size and restricting the number of residential building permits issued per year.

## **Budget**

The FY 2008 budget, approved by the Dudley-Charlton Regional School Committee, is \$43,109,235. The assessment to the Town of Charlton for the 2007-2008 school year is \$9,219,632 for both operating and capital assessments. The school district received

\$23,069,087 in state education aid to support the FY 2008 budget, while the DCRSD committed over \$1,000,000 of its reserves to reduce the assessment to both towns.

## **Technology**

The district currently houses more than 1,600 personal computers (PCs), consisting mainly of WINTEL PCs running various versions of Window OS. The majority of the network hardware is over seven years old. Most are capable of operating at 100MB or better. Units are identified as needing replacement and upgraded as necessary. All schools are connected through fiber optic cable provided by Charter Communications at 100MB throughput. Internal wiring closets in the schools are connected through either fiber or CAT5 copper, with most operating at 100MB.

Over the last 18 months, the DCRSD has implemented the following projects:

- Initiated an online helpdesk system for staff.
- Revamped the District-wide backup strategy.
- Arranged email archiving for compliance with the public information law.
- Installed a security certificate to encrypt student data available from outside the district.

Future technology needs include:

- Formal 'technology' line in the operating budget.
- Formal upgrade/replacement plan for CDRSD technology assets.
- Centralized system for storage/deployment of technology supplies/expendables.
- Increased staffing in the IT department.

## **Future**

Future needs could include:

- Renovation and expansion of existing schools.
- Staff increases to accommodate additional students and programs.
- Expanding sports facilities to facilitate town- and school-wide needs.

In addition, the DCRSD community will participate in a comprehensive effort to revise the district's Strategic Plan, outlining the educational needs and direction of the school community for the next three years. Goals and corresponding objectives will be designed to improve a wide range of programs and services in core areas:

- Curriculum and Instruction
- Staffing
- Funding
- Communication, and

➤ Environment.

Action Planning Committees are slated to author specific activities to address community expectations for continuous improvement, as well as state and federal mandates for school accountability. The plan will establish a long-range direction for the district.

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## **Bay Path Regional Vocational Technical High School**

Charlton is also a member of the Southern Worcester County Regional Vocational School District, which operates Bay Path Regional Vocational Technical High School (“Bay Path”). Bay Path is a multifunctional educational facility, also located in Charlton, established to serve the needs of a diverse population in the Southern Worcester County Regional Vocational District. It is the mission of the school, in cooperation with the District, to provide an integrated academic and vocational technical education. Students are prepared with a broad range of knowledge and job skills necessary to function effectively as productive and contributing members of multicultural communities.

Opened in 1972 on top of Muggett Hill, Bay Path serves students from its member Worcester County communities of Auburn, Charlton, Dudley, North Brookfield, Oxford, Paxton, Rutland, Spencer, Southbridge, and Webster. The school’s programs are also available to pupils outside these areas on a tuition basis. Bay Path has been a visible part of the Charlton community by providing services to nonprofit organizations in the town.

### **Students & Enrollment**

Bay Path graduated 245 students June 2007; 40 of these students were from Charlton. This is a significant increase from June 1998 when 26 Charlton students graduated. Currently 118 students from Charlton are enrolled in one of the 21 vocational areas. Approximately 15 students from Charlton are receiving extra services from the Special Education Department. The assessment cost per student for the Town of Charlton is \$4,559. Towns that do not belong to the District pay \$12,087 per student in tuition for regular education students and \$13,839 for special education students. The acceptance of out of District students to fill available vocational space allows lower assessments for member towns. Out of District towns also pay all transportation costs for their students.

The Bay Path Adult Evening School had a 10 percent increase in participation in the 2006-2007 academic year. Total enrollment for the Fall and Spring sessions was 3,350 participants compared to 412 participants in 1998-1999. The programs ranged from Career & Licensing, Computer & Technology, Health & Fitness, Language & Art, Hobbie & Crafts, Business & Finance, Sports & Leisure and over 350 on-line courses. Bay Path Administrators see a strong opportunity to partner with local business and

industry in Charlton and offer job training courses through the Adult Evening School.

## **Facilities**

The Southern Worcester County Regional Vocational School District recognizes the academic and fiscal needs of its school and is planning for expansion. With the academic demands and the advancements in technology, it is imperative that the District expand and modernize its facility. The District is working closely with the Massachusetts School Building Authority to develop a plan for the future.

## **Programs & Services**

Bay Path has added both academic and vocational staff to meet the demands of the state and to continue the academic success and vocational achievement of our students. With expansion and growth, staff adjustments will be made accordingly.

It is the practice of Bay Path Regional Vocational High School to utilize the occupational programs to complete projects for the town. In the 2006-2007 school year, 315 projects were completed for the Town of Charlton and its residents. These projects must be of educational value to the students.

## **Budget**

The proposed budget for the 2006-2007 school year is \$14.08 million. This is a 6.5 percent increase since 2005 and includes loan repayments and operating cost increases.

Assessment figures for Charlton decreased to \$775,997 for the 2006-2007 school year, which is a 10 percent decrease from the previous year.

In the 2006-2007 school year, Bay Path received \$703,256 in Federal and State grants. These grants help to lower the tuition costs to District towns, but come with stringent requirements and reporting responsibilities.

## **Future**

The Southern Worcester County Regional Vocational School District now consists of 10 towns. The newest towns to join the district are North Brookfield, Paxton, and Spencer. David Papagni, the Superintendent of Bay Path, noted that progress has been made at the school but there is more work to be done.

1. Bay Path recently completed a sewer project and is now tied into the Charlton Sewer system. An 1,800-foot sewer line was run from the school to Old Worcester Road, at a cost of approximately \$300,000.

2. The school continues to formulate plans for the expansion of the building. Under the new Massachusetts School Building Authority regulations, a Statement of Interest was submitted and the school is presently being evaluated for its educational and architectural needs.
3. Bay Path is looking to expand its vocational programs to include post secondary students in the areas of Dental Hygiene and License Practical Nursing.
4. Bay Path Administrators see a strong opportunity to partner with local business and industry in Charlton and offer job training courses through the Adult Evening School.

Bay Path Regional Vocational Technical High School is a great resource to the Town of Charlton, both for the education it provides Charlton residents and for the services students give back to the community. Bay Path is committed to continuing to serve Charlton with the finest vocational education program available for high school students and adults and will use its skills and facilities to further town projects as they add to the students' education.



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## **Charlton Housing Authority**

The Charlton Housing Authority is overseen by five members and one staff person. The Authority presently manages 30 one-bedroom units for elderly/handicapped persons under the State's Chapter 667 program and six 3-bedroom units for families under the State's Chapter 705 program. All of these units are located on the Authority's property at Meadowview Drive. The Authority also administers certificates for the Alternative Housing Voucher Program (AHVP) which provides rental assistance on a temporary basis to non-elderly handicapped persons. More detailed information on the Authority's property and future plans is described in Chapter 3, Population and Housing.

The Charlton Housing Authority processes applications for state-aided elderly housing from persons who are sixty years of age and older. Handicapped persons continue to be eligible for state-aided housing for the elderly regardless of age. The Authority also processes applications for state-aided family housing from persons who qualify.



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## **Services for the Elderly**

Most programs for elderly services in Charlton are under the auspices of the Council on Aging (COA), which is responsible for representing and serving all the elders in the community. The goal is to provide a safe and friendly environment for socialization and recreation as well as outreach services to homebound elders and to

allow seniors to remain in their homes as long as possible. Charlton currently has a senior population of 2,051, an increase of 71 percent since 1996 (1,200 seniors). The COA is staffed by a Director, an Outreach Coordinator, a Kitchen Site Manager and a Kitchen Assistant. The COA also works closely with private agencies, Municipal Departments and Public Officials in an effort to serve as many seniors as possible. The COA is assisted by 52 volunteers (in 2006).

The Outreach Coordinator works in the community to identify unmet needs, explain/introduce services, connect seniors to the appropriate agencies, and provide referrals. The full-time position is funded by the Town. The Outreach Worker coordinates with the Fire and Police Departments, as well as, churches, hospitals, nursing homes and Tri-Valley to make sure that Charlton's elderly population is well cared for. The formation of this position fulfills a primary goal of the Council on Aging to expand and improve its outreach program to better serve the senior population of Charlton.

**Golden Age Club**

The Golden Age Club is a group of concerned citizens working to supplement funds not provided by local and/or state government. The Club raises money through events, membership donations and private donations.

**Blood Pressure Clinic**

A monthly blood pressure clinic is provided at the Center and open to all seniors.

**S.H.I.N.E Counselor**

SHINE stands for Serving the Health Information Needs of Elders. By appointment only, a nurse is available at the Senior Center to meet with seniors and discuss their health concerns and needs. Through the SHINE Counselor, the Center provides seniors with some tests, including blood pressure, and makes referrals to primary care physicians when necessary.

**S.A.L.T. Council**

Standing for Seniors & Law Enforcement Together, SALT is a council made up of the Charlton and Southbridge Police Departments, the Charlton and Southbridge Councils on Aging and participating seniors. Seniors are encouraged to attend the meetings. By attending, it gives them a chance to meet local police officers, to hear what's happening in town, to voice concerns and make suggestions.

**Friendly Friends of Charlton Seniors Inc.**

Friendly Friends of Charlton Seniors Inc. was formed in 2006 to help raise money for the new Senior Center facility.

Other services provided by the COA include:

- Organized Trips
- Daily Lunch
- Cards & Pool
- Exercise

- Line Dancing
- Monthly Newsletter
- Monthly Birthday Party
- Monthly Programs on Senior Issues

Volunteer services include:

- Friendly Visitors
- Telephone Reassurance
- Transportation to appointments, shopping, etc...
- Eucharistic Minister
- Errands
- Respite
- Handyman Service
- S.H.I.N.E. Counselor

## **Facilities**

The Senior Center, located in the Town Hall, is open five days a week. It serves the senior population as a resource for information and offers educational programs, social activities and a lunch program five days a week. A computer system was installed in 1998 and a monthly newsletter is sent out to seniors (approximately 500).

In 1999 many improvements were made to the physical appearance of the Senior Center including a new back entrance and back doors and interior painting. New ceilings were installed with the help of students from Bay Path Vocational High School. Financial support for these projects was provided by the Golden Age Club and a donation from US Gen. Office space. A computer was added for the Outreach Coordinator. Seniors now have access to four computers with internet access. However, the space is not configured appropriately for the Senior Center's current needs and a new facility is desired (see later discussion on Four Dresser Hill Road).

## **Budget**

The Council on Aging budget has increased from \$10,000 in 1996 to \$37,000 in 1999 and to \$108,000 in FY2008.

## **Future Needs**

The Council on Aging has several future needs:

Short-Term:

- Improve coordination between the Council on Aging, the Housing Authority, Masonic Home and other resources.
- Identify location and secure site for new Senior Center.
- Acquire grant funding for new senior center.
- Add an Administrative Assistant as part-time position, funded initially by an Incentive Grant from the Executive Office of Elder Affairs.

Long-Term:

- Provide transportation for all seniors, such as an elder bus service. Look to possible coordination with the Masonic Home.
- Install RUOK Communication System, housed in the Police Department, to check on elderly who are living alone and are at risk.
- Advocate for more senior housing in Charlton.
- Through a recently awarded Priority Development Fund (PDF) Grant, continue to study opportunities to develop property at Charlton Housing Authority for affordable housing (restricted to anyone over 60 years of age and any disabled person).



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## Library

In 1905 William Henry Dexter of Charlton presented a Memorial Hall to the community, which included a library room and space for all town offices. Charlton's population then was approximately 2,000 residents. This historic building served the Town for almost 100 years in those capacities. In 1998 a Town Meeting vote transferred the control of the Dexter Memorial Hall to the Trustees of the Charlton Public Library, an elected six-member board. This action began the migration of Charlton Town offices across the street and enabled the Library to apply for state aid for a renovation project.

In July 2007, the Charlton Public Library moved into its newly renovated facility at 40 Main Street, in the center of town. For the past year, the library has been housed temporarily down the street as the building was renovated and added to for the modernized library. A dedicated group of volunteers planned the library renovation. At 1,000 square feet, the previous library was appropriate for a community of 1,500 people;<sup>5</sup> the increase to 23,300 square feet is anticipated to meet the community needs for the next 20 years.

This increase in size enabled Charlton to pursue State grants to fund this five million-dollar project. The project took approximately two years to complete and was funded by the State, the town and a local fundraising drive. The renovation will correct the many basic problems associated with a century old building such as electricity, plumbing, water and the handling of hazardous building materials; increase accessibility to all floors; and, provide floors capable of supporting the 150 pounds per square foot needed for book stacks. The third floor meeting hall, once used for dances, theater and recreation activities has been restored for community use.

The Charlton Public Library is a member of the Central Massachusetts Regional Library System (CMRLS) and the Central/Western Massachusetts Automated Resource Sharing System (C/WMARS). The Library is administered by an elected



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<sup>5</sup> American Library Association from Charlton Master Plan, 2000.

Board of Library Trustees. Standards for library service are set by the Trustees and the Massachusetts Board of Library Commissioners, the state agency that supports, improves and promotes library services throughout the Commonwealth.




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## **Animal Control Officer**

Continued residential, commercial and industrial development forces wildlife habitat into smaller areas or into populated areas; this has led to more wild animals interacting with the public in a search for food and thus a greater need for this expanded position. Furthermore, increased population adds to the number of domestic animals that reside in Charlton.

The 2000 Master Plan recommended adding the position of Animal Control Officer in the Town of Charlton. Effective FY2008, the Town has now expanded the Dog Officer position to an Animal Control Officer. There is one full-time animal control officer and two part-time assistants, with a dedicated vehicle and communications system. The vehicle is used to transport all injured domestic animals and stray animals. The Animal Control Officer will address issues not only with domestic animals, but also wild animals. With the Police Chief, the Animal Control Officer plans to work with the Town to upgrade the temporary board and shelter for canines and felines. This plan could include a renovation at the current location at the Town Highway Facility on Old Town Road. However, site constraints introduce the possibility of building an entirely new facility at a different location in order to be able to accommodate more than just canines.

Charlton also has an Animal Inspector whose primary duty is rabies control in the domestic animal population. Municipal Animal Inspectors, who are appointed annually by the state Bureau of Animal Health are also responsible for barn inspections and may be called to assist with domestic animal disease quarantines in the event of an outbreak. In 2006, the Animal Inspector conducted an animal inspection of 101 barns in Charlton with the following results:

Horses: 270	Ponies: 18	Baby Equines: 4	Mules: 1
Donkeys: 9	Llamas: 27	Baby Llamas: 2	Alpacas: 10
Dairy Cows: 2	Beef Cows: 47	Baby Calves: 13	Rabbits: 284
Goats: 367	Baby Goats: 30	Sheep: 110	Baby Sheep: 79
Pigs: 43	Baby Pigs: 2	Pot Belly Pigs: 2	Chickens: 383
Turkeys: 10	Guinea Hens: 37	Waterfowl: 36	

Source: Town of Charlton ([www.townofcharlton.net](http://www.townofcharlton.net)), Government/Animal Inspector.




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## **Town Administration**

The Town of Charlton currently utilizes the Town Meeting form of government. Its structure is made up of elected and appointed officials. The Board of Selectmen

appoints a Town Administrator to run basic day to day activities. The Annual Meeting of 1999 voted to increase the Board of Selectmen from 3 to 5 members. This change went into effect in May, 2000.

A number of recommendations related to Town Administration in the 2000 Master Plan have been implemented:

- A town-wide website was implemented in 2001 and has been an effective means for distributing information to the community.
- Through the website, the roles of town departments and boards have been clearly defined and differentiated to the public.
- Interdepartmental coordination and financial planning required improvement. In 2006 the Town adopted a seamless accounting system, putting the offices of Assessor, Accounting and Treasurer all on one unified software for managing the town's financials.
- With its consultant, CMRPC, the Town is in the final phases of the digitization of all Assessors' Maps and all of the datalayers, including zoning and parcels. Anticipated completion is in late 2007.

If the town continues to grow it could choose to change its form of government. A question on the residential survey for the 2000 Master Plan asked respondents to indicate what things could help improve town government. The answers indicated that there could be a desire for change but it was not clear what kind of change was desired. Two of the suggestions (appointing a town administrator and increasing the board of Selectmen to five members) were both accomplished at the 1999 annual Town Meeting. A very large majority of respondents felt that finding more ways to involve more citizens in town government would improve it. The Town should consider forming a Welcoming Committee. This group could visit new townspeople with a package of information including a mail in voter registration form to help increase voters. A majority felt the town should adopt a charter, but a majority was not in favor of a town council form of government.

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## Other Challenges and Opportunities



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### Gas

Although maps of Charlton show several natural gas transmission lines, none of these lines provide gas to the Town. Instead, these interregional transmission lines serve to distribute gas to holding tanks outside of Charlton. An NStar Representative visited the Planning Board a few years back with the message that service is not currently available (the closest connection is currently on the opposite of Oxford) and the provision of gas in Charlton is still a few years down the road.

Ease of distribution, lower combustion emissions, and lesser impacts of spills and leaks would seem to favor gas service over continued reliance on fuel oil. When establishing gas service in Charlton, negotiation and implementation must respect safety and environmental requirements, interrupt-ability and peak usage pricing, and demand issues related to the ongoing development of fuel cell technology for various fuels and power unit sizes.



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## Electricity

With ongoing deregulation and vendor selection, it is unclear to what extent the community will benefit from local generation of power. In any case, decisions should be based on total impacts and benefits. Presumptions of reduced power costs may be short-sighted. An Aggregation Committee is being formed to investigate the feasibility of purchasing and using electricity from PG&E at discounted cost.



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## Bridges and Dams

Repairs are planned at Little Nugget Lake, South Charlton reservoir, and Glen Echo Lake using state grant assistance. Several dams are on the Department of Environmental Management's list of high-risk dams. Owners are bound to implement repairs required by State inspectors. Developers and Boards also must prove that projects would not jeopardize dams and bridges by increasing storm flows.



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## Solid Waste/Recycling

Recycling in Charlton lapsed in 1992 when the landfill was closed. The capping of this landfill is required by the DEP and will be a major expense for the Town. Since the 2000 Master Plan, efforts to restore a recycling program have been unsuccessful. Currently, there are many private solid waste/recycling companies that service Charlton. The 2000 plan recommended that Town consider hiring one company for waste removal and recycling.

The Recycling Committee was appointed by the Board of Health in November of 2004 to gather information about the possibility of starting a town wide recycling program. In May 2006, there was a Town Meeting vote concerning a Pay-As-You-Throw, single-handler solid waste and recycling program. Advantages of a Pay-As-You-Throw program could include monetary savings on volume discount, preserving roadways, safety, and decreased traffic. This vote was defeated and the Recycling Committee is not pursuing it at this time. However, the Recycling Committee is working with the Board of Health to require the haulers working in

Charlton to provide recycling data to determine the town's true recycling rate. Other efforts of the Recycling Committee including:

- All haulers to offer recycling.
- Schools to establish recycling.
- Continued public education about the importance of recycling.

It is important to also note, since the 2006 Pay-As-You-Throw vote was defeated the number of haulers operating in Charlton has doubled. This is in direct contrast to the goal of securing a single hauler for the Town. Charlton has 9 licensed haulers. According to Linda Davis of the Recycling Committee, there is a general perception that this is redundant and increases wear on the roads and traffic. Additionally, a single hauler system has the potential to reduce truck emissions, provide a consistent recycling program for the Town, and incorporate other green practices. Therefore, the goal in the 2000 Master Plan to move toward a single hauler system remains valid.



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## Hazardous Waste

The Town has held very successful Household Hazardous Waste Days from 1999-2005, and 2007 at the old landfill site on Flint Road; these events cost approximately \$8,000 and are organized by the Household Hazardous Waste Days Committee. These events were quite successful and popular with Charlton residents. A second hazardous waste day is planned for this fall; the Town will continue to hold them twice per year, if feasible.

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## Town Priorities



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### Four Dresser Hill Road

The purchase of the site at Four Dresser Hill Road was approved by Town Meeting in 2006 and purchased in December 2006. Shortly thereafter, the Town discovered soil contamination which is presumed to be from a leaking fuel storage tank. An Order of Conditions was issued by the DEP and the site is currently being cleaned. Proposed uses to be located on this site include a senior center, a main fire station, an additional access road and additional parking for the school fields (the last two uses listed are still under consideration). A garage located on the site was demolished. The Senior Center could be located in the existing residence on the site, the historic Blood House, which is listed on the National Register of Historic Places and the last structure before exiting Charlton's National Register Historic District.



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### Highway Barn at Flint Road

The Highway Barn is a priority project and is currently underway, as discussed above in the section on the Highway Department.



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### Fay Mountain Farm

Located north of Stafford Street off of Cemetery Road, a Town designated Scenic Road, the 65 acre Fay Mountain Farm was purchased by the Town of Charlton in 2002 with a grant provided by the Mass. Division of Conservation Services (DCS) and funding provided by the Masonic Home through a state agricultural mitigation fund requirement. The Town preserves this unique property as an active farm resource via leasing for continued apple orchard production. The on-site open space also offers passive recreational opportunities via a segment of the Midstate Trail that passes through the site. In addition to the 32 acre on site orchard, the property includes a historical barn, Snow Pond, blueberry and raspberry plantings and over 28 acres of natural wooded and field open space. According to the Town Administrator, determining the highest and best use for this property is a significant priority.



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### Water

The first step in improving Charlton's water supply system is obtaining the 100,000 GPD referenced earlier. The town has to consider the next steps which could be finding water within town or working out an arrangement with Southbridge to increase the 100,000 GPD. The April 2004 Town Meeting approved two warrant articles. The first authorized the town to negotiate with Southbridge. The second authorized the Town to continue to negotiate with Southbridge for an additional 400,000 to 500,000 GPD beyond the initial 100,000 GPD.

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## Community Facilities and Services Recommendations

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### Goals for Community Facilities and Services Element

- Maintain, expand and improve town buildings so as to provide quality services in accessible, safe, efficient, and well-maintained facilities.
- Improve and expand town services and government to keep pace with Charlton's growing population. (e.g. Fire)
- Continue to improve and expand sewer and water systems in ways that support the goals and strategies of other elements of the master plan.
- Provide communication links throughout town departments including: police, fire, town hall, highway, library, elderly services, and emergency management services (also cell coverage).
- Maintain Charlton's high standards for education; provide adult education courses to meet future employment requirements.

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### Recommendations

#### CF-1

Maintain, expand and improve to keep pace with Charlton's growing population

- Town buildings (including fire station, highway barn, schools, senior center, animal shelter)
- Town services and government
- Sewer and water systems

#### CF-2

Construct new community facilities deemed necessary by various Town departments. As the Town addresses service and capital improvement needs, new community facilities may be required. Once identified, the Town should move forward with planning for and implementing those recommendations.

#### CF-3

Provide communication links throughout Town departments including police, fire, Town Hall, highway, library, elderly services, and emergency management services.

#### CF-4

Make use of alternative sewage treatment technologies in order to broaden economic development opportunities where sewage constraints exist.

#### CF-5

Adopt green technology in current and future facilities.

# Charlton Center

## Introduction

Charlton Center is the historic heart of the Town and exemplifies some of the characteristics of the traditional, compact New England village. Within close proximity to the center lie the Town’s municipal offices, classic white churches, a beautiful Town Common, small-scale commercial uses, and distinctive homes. The area’s historic significance has been recognized by its acceptance on the National Register of Historic Places as the Charlton Center Historic District. However, the commercial development in the Center has not been compatible with the unique qualities of the area. Several newer structures have been built without regard to historical or architectural context and have detracted from the New England village ambience that is still present to a large degree.

*This development in Charlton does not typify traditional New England.*



In 2005, the CMRPC undertook a project on Charlton Center. The project is discussed in detail in this chapter. That study inspired the town to explore in further detail the potential of Charlton Center to become a Village Center.

During interviews and research for the Town of Charlton Master Plan Update, it became apparent to the Town that the future of Charlton Center would play a prominent role in this Master Plan. As a result, two tools were developed to help derive a clearer vision for Charlton Center.

*A picture from Shrewsbury derived from a study of surrounding Town centers.*



The first tool was to undertake a study of town centers in and around Charlton that might serve as models—both for what could be done and perhaps also what should not be done in Charlton. In addition to Charlton, the four other communities identified with the assistance of the Charlton Town Planner were: Grafton, Millbury, Shrewsbury and Sturbridge. The characteristics of each center were documented in aerial and site photographs, and commentary included in this chapter.

The second tool was the second public forum, which focused specifically on Charlton Center. On June 7, 2007, this forum was held and residents, business owners and government employees gathered to discuss their visions for Charlton Center. The participants were first asked to suggest reasonable boundaries for village. They were also asked to identify the goals – or a vision – for the villages. The chapter that follows is largely based on the CMRPC study and the public meeting.

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## CMRPC Study

The ultimate aim of the CMRPC project was to set standards for Charlton Center that promote a compact, pedestrian-scale environment, with a mix of residences, institutions, and commercial services that provide a pleasant alternative to large, single purpose, highway-oriented shopping plazas.

During the creation of Charlton’s Community Development Plan, the Central Massachusetts Regional Planning Council (CMRPC) undertook a project on Charlton Center, photographed the positive and negative attributes of Charlton Center, and prepared a PowerPoint presentation for viewing at a public meeting. The session was well attended and helped to achieve consensus regarding how to prevent newer development from further harming the established village pattern. The CMRPC prepared a policy paper for discussion with the Planning Board that summarized the strategy for changing zoning requirements that had contributed to inappropriate development. CMRPC prepared a new Village zoning district to replace the Neighborhood Business district currently in place.

The proposed new district modifies the table of uses and dimensional requirements, and sets design standards for new development to achieve harmony with historic structures. In addition, CMRPC, the EDC and the Planning Board identified several locations that offer opportunities for new commercial development. The Planning Board reviewed several drafts of the Zoning Bylaw and Map amendments until achieving consensus, and a final draft should be ready for consideration at a future Town Meeting.

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## Zoning

The following is a description of the existing zoning for Charlton Center.

### District Purpose

*Compact, friendly, and traditional developments are the intentions of Charlton’s NB district.*



Neighborhood Business (NB): To provide sites for small scale business development for local and transient services compatible with low and medium density residential development within village settings which through landscaping and design or through preservation, enhance the natural landscaping and historic environs; at the same time protecting any existing views, minimizing the visibility of parked cars, avoiding

the appearance of commercial strips as well as congestion in the abutting streets and ways, and retaining the character and the quality of life in the rural New England village.

### **Dimensional Standards**

- Minimum Lot Size: 20,000 sq. ft.
- Minimum Frontage: 100'
- 2-Family Dwelling
  - Minimum Lot Size: 40,000 sq. ft.
  - Minimum Frontage: 150'
- Front Yard: 40'
- Side Yard: 15'
- Rear Yard: 15'
- Maximum Building Coverage: 30%

### **Storage and Disposal Areas**

Outside bulk storage, contractor's yards, disposal areas or areas of open storage related to manufacturing, processing, warehousing, wholesale trade or a public utility facility shall be screened from an adjacent residential use, a residential district, or street by a solid stockade fence at least six (6) feet in height or densely planted trees or shrubs at least six (6) feet or more in height, or be equivalently obscured by natural vegetation on a year-round basis. No more than fifty percent (50%) of a lot may be used for outdoor storage.

### **Special Parking Regulations**

No parking or loading area shall be located within ten (10) feet of a public right-of-way line. ... No parking area or garage containing more than two (2) spaces or loading area shall be located in a front yard in an NB District.

A parking area containing more than six (6) spaces or a required loading area shall be designed so that no vehicle need back onto or off a street or stand on a street while parking, loading, unloading or waiting to do so.

Minimum distance of 50' between access drives in NB.

Parking areas containing more than 25 spaces shall include or be bordered within 5' of the spaces by at least 1 tree of 2" in caliper for each 5 spaces. Trees within parking areas shall be in curb or berm protective plots of at least 60 square feet per tree.

No less than 25 percent of any lot area shall be retained as unoccupied space free of all buildings, parking, pavement including street access drives and walks or other conditions, precluding landscaping; such unoccupied area shall be landscaped or stabilized with plant material.

All commercial site plans shall show all proposed lighting on said site for exits and entrances and said lighting shall be erected and maintained by the owner of the property.

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## Comparable Village Study

The consultant to the Planning Board undertook a study of towns comparable and/or proximately located to Charlton to better understand the characteristics of a village center. The four comparison towns were selected because they were identified as having a town or village center that Charlton could emulate. As shown in Table 9-1, the study looked at the fundamental dimensional construction of the town (e.g. population, land area, density).

**Table 9-1  
Comparison of Town Statistics**

	Land Area (mi <sup>2</sup> )	Population (people)	Population Density (people/mi <sup>2</sup> )	Housing Units (units)	Housing Density (units/acre)
Charlton	42.53	13,714	322	4,008	0.15
Grafton	22.74	16,297	717	5,828	0.40
Millbury	15.73	13,376	850	5,109	0.51
Shrewsbury	20.73	31,658	1,525	12,704	0.96
Sturbridge	37.41	8,692	232	3,335	0.14

More importantly, the study qualitatively analyzed the characteristics of these town's centers or villages. The findings of these results are listed below and accompanied by site photos from these villages. The results show there is an array of possible outcomes for a village center that would work in Charlton. The communities studied were noted as either a destination catering to tourists or outsiders or a working center that provides the goods and services desired by town residents. The results of the public forum discussed in the next section of this chapter indicate that the Town of Charlton leans toward the latter interpretation.

**Figure 9-1  
Comparable Village Study Datasheets**

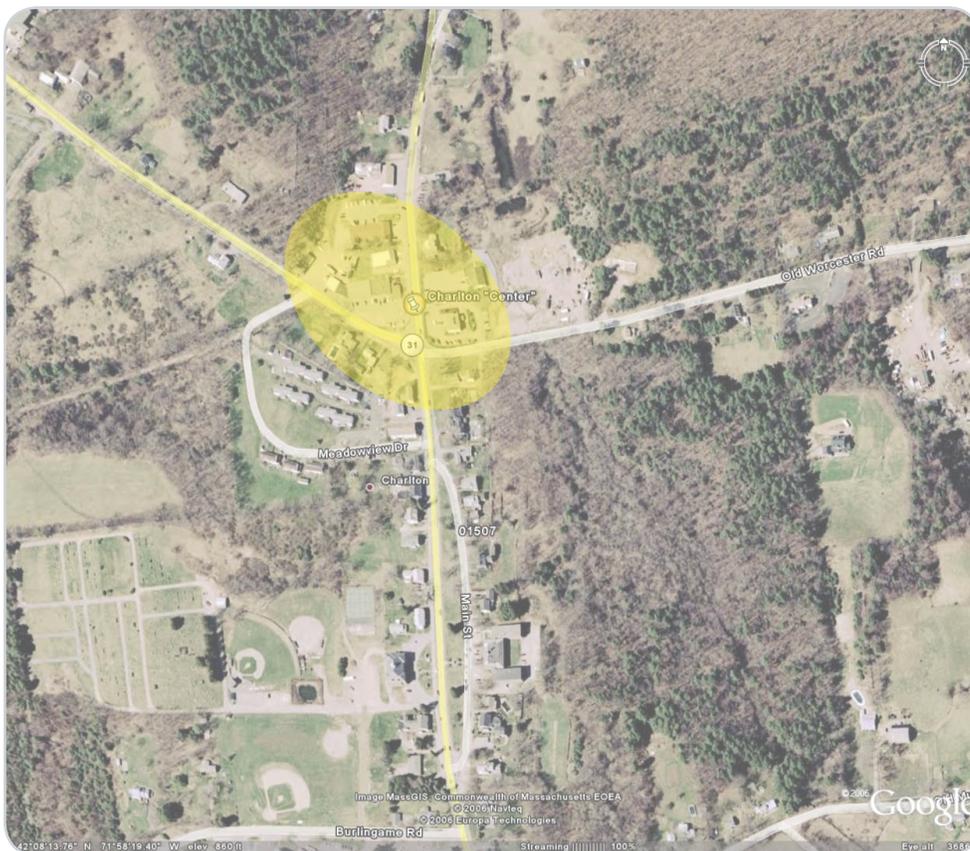
*Please see following pages.*

# Charlton

Charlton is a town of **42.53 sq miles**. The population stands at approximately **12,300 people**. That means that there are about **290 people per square mile**. The 2000 census put the number of **housing units in Charlton** at **4,008**. That equals an overall density of **0.15 units/acre**.

## NOTES

- \* Charlton Center has some elements of a traditional New England village, but some buildings lack the design qualities associated with similar places.
- \* Charlton Center is not compactly developed.
- \* The only recognition that the Center is an historic area is the small sign noting Charlton is on the National Register.
- \* Numerous parking areas set at the street edge result in lots of asphalt fronting the road instead of buildings.
- \* There is generally a smooth transition from the village center to adjacent residential areas.

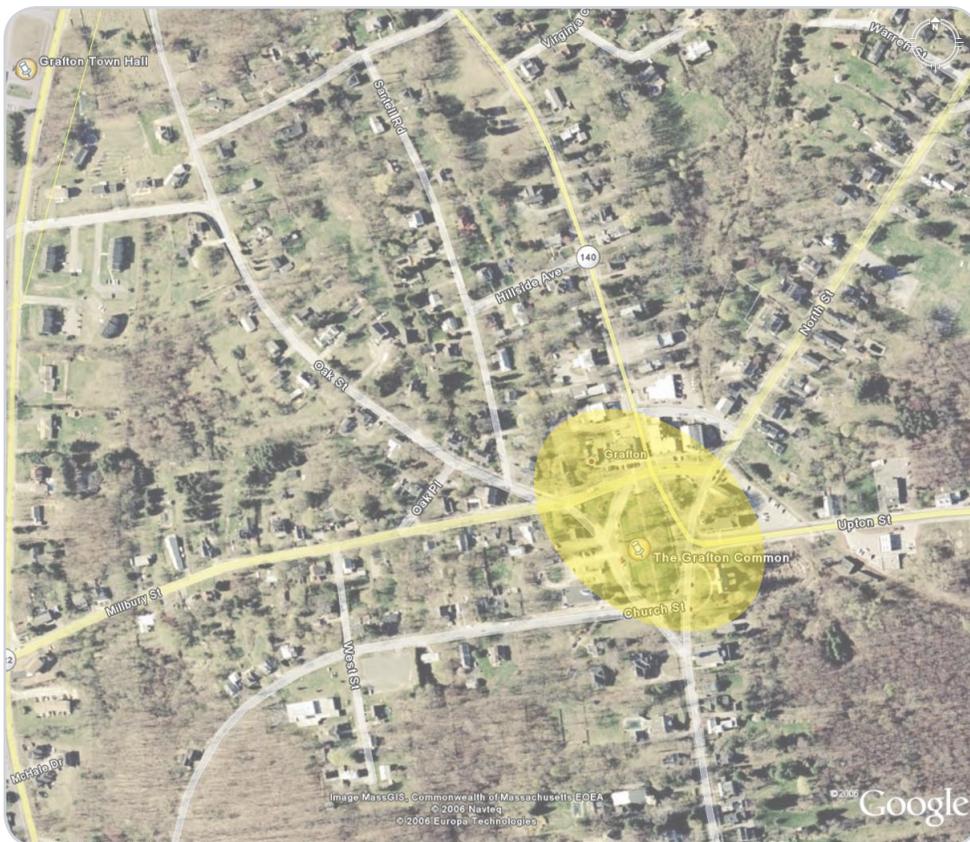


# Grafton

Grafton is a town of **22.74 sq miles**. The population stands at approximately **16,297 people**. That means that there are about **717 people per square mile**. The 2000 census put the number of **housing units in Grafton** at **5,828**. That equals an overall density of **0.40 units/acre**.

## NOTES

- \* Has a “boutique” historic feel to it.
- \* There are many uses lining the common. They include: coffee shops, a wine store, a small boutique, an architect’s office, and a lawyer’s office.
- \* Grafton gives the impression of a “vacation destination.”
- \* The transition from village center to adjacent neighborhoods was abrupt.

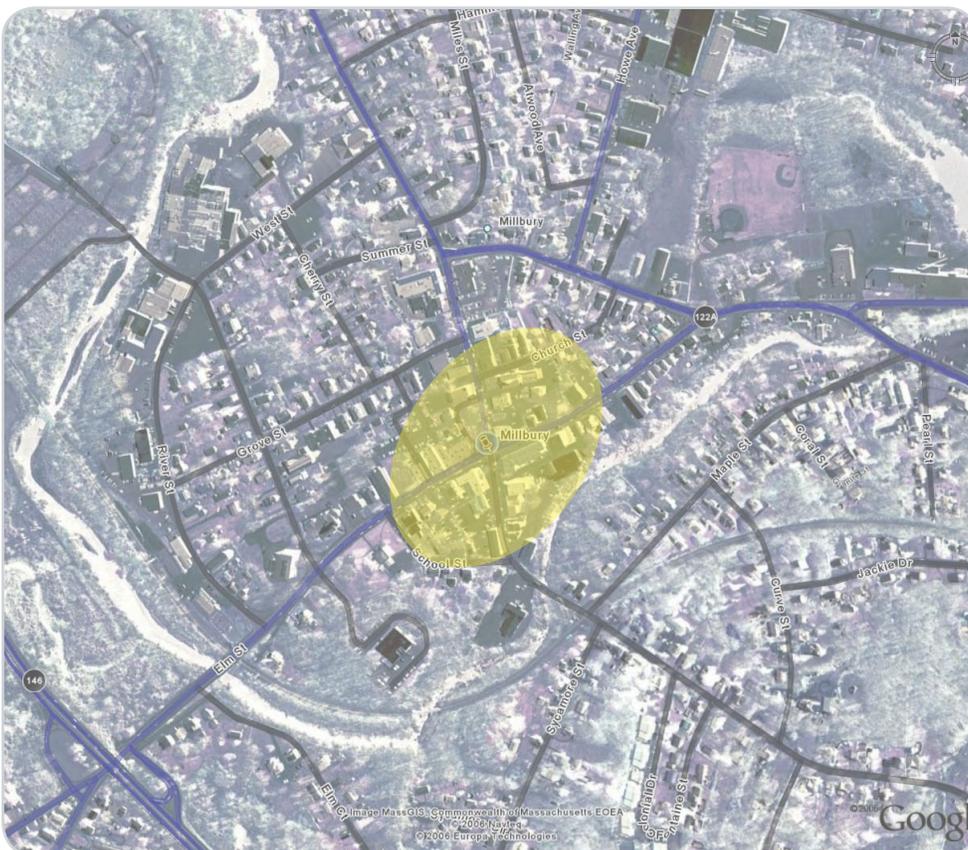


# Millbury

Millbury is a town of **15.73 sq miles**. The population stands at approximately **13,376 people**. That means that there are about **850 people per square mile**. The 2000 census put the number of **housing units in Millbury** at **5,109**. That equals an overall density of **0.51 units/acre**.

## NOTES

- \* Millbury feels like a working town center.
- \* Good signage exists in Millbury (e.g. the sign for the mansion and the presence of cohesive street signs).
- \* There appears to be no sense of order to the village center.
- \* Many of the facades and signs on the main street are inconsistent in design.
- \* The village center transitions naturally to adjacent neighborhoods.



# Shrewsbury

Shrewsbury is a town of **20.73 sq miles**. The population stands at approximately **31,658 people**. That means that there are about **1,525 people per square mile**. The 2000 census put the number of **housing units in Shrewsbury** at **12,704**. That equals an overall density of **0.96 units/acre**.

## NOTES

- \* Shrewsbury has a suburban feel. The housing stock is a mix of historic buildings with newer structures that look like they were built within the last 25 years.
- \* A nice park exists adjacent to the shops on Main Street.
- \* There are examples of attractive design in the appearance of the buildings.
- \* There is also evidence of autocratic design.
- \* The transition from village center to residential was very natural.

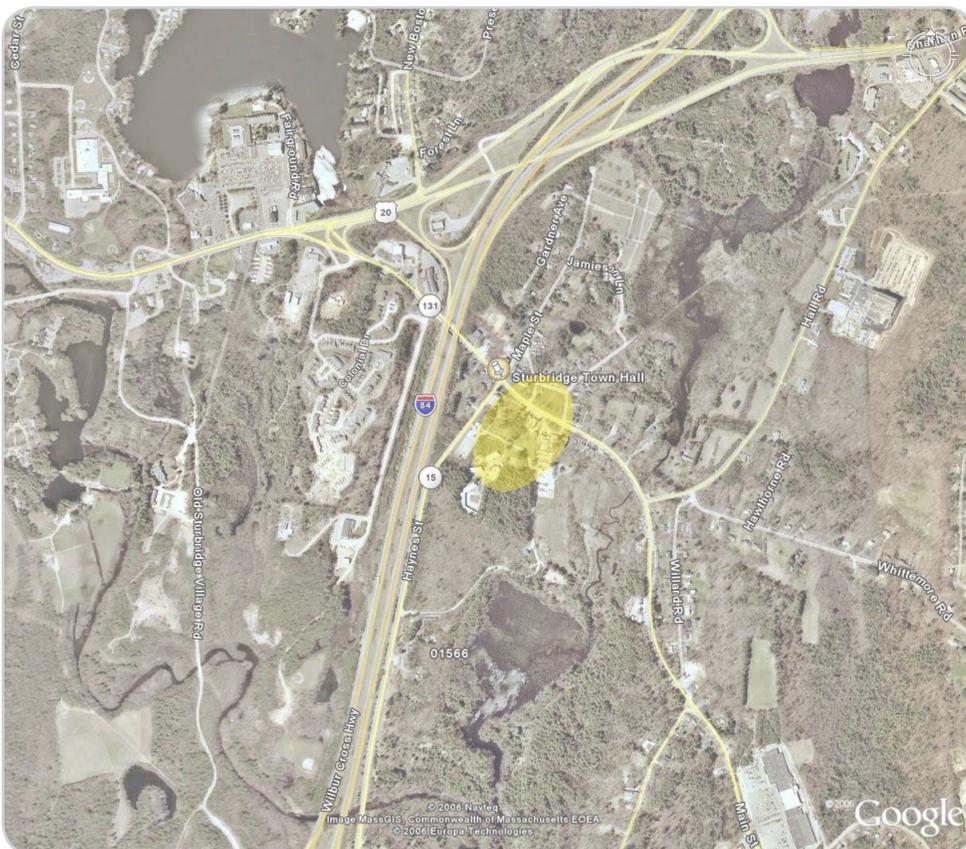


# Sturbridge

Sturbridge is a town of **37.41 sq miles**. The population stands at approximately **8,692 people**. That means that there are about **232 people per square mile**. The 2000 census put the number of **housing units in Sturbridge** at **3,335**. That equals an overall density of **0.14 units/acre**.

## NOTES

- \* The town center occurs along route 131 and as such has a very linear feel. Because of this, the village center seemed to blend with the rest of the town.
- \* The village center has a touristy feel to it.
- \* Most of the parking is situated around the back of buildings; there is minimal asphalt frontage.



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## Public Forum

As discussed above, the Charlton Center Village was deemed an integral part of this Master Plan. Thus, one of the two public forums held was dedicated to this issue.

During this June 2007 public forum, a Strengths Weaknesses Opportunities and Threats (“SWOT”) analysis of Charlton Center was conducted. As is stated in the title, this exercise serves to cull out the observations of participants – typically residents and employees with first hand knowledge of the town – in an unrestrained and open manner.

The following is a summary of the points raised by forum participants. Note that some observations can fit in more than category. For example, the Common can be seen as a strength as well as a weakness, depending on a person’s point of view and interests.

### Strengths

- Nucleus of the town
- Attractive collection of buildings
- Restoration of historic houses
- Uniform development pattern
- Lack of blight
- Charlton Housing Authority property
- The Common
- Community-wide awareness that it is the Center and is high quality (represents the town)
- Small, compact and walkable
- The Masonic Home

### Weaknesses

- Speeding
- Too much traffic
- Not enough sidewalks
- Common is not adequate for community events
- Traffic flow is rated a Level of Service (LOS) F at all times
- Parking along the Common (for residents; for aesthetics)
- Heavy vehicle traffic
- No control of junk
- Old-style zoning
- Houses not kept up
- Lack of parking / traffic lights (e.g. Burlingame Road)
- Skateboard park
- Water and sewer

### Opportunities

- Moving of town barn – prime real estate becomes available
- Zoning bylaw revisions
- Dresser Hill Farm – senior center?

### Threats

- Commercial development not compatible with historic character
- Impact of new residential development (e.g. congestion,

- Undeveloped land behind bank (schools, playing fields)
- Foster sense of community
- Façade improvements – financial incentives
- Façade review – zoning bylaw
- Limits to commercial traffic in center
- Tree replacement over time / phased-in
- Expanding the boundary
- Miller property (50-70 acres along Stevens)
- Applying corridor zoning to center
- Resistance to zoning changes
- Defining the boundary
- Water and sewer issues

The general consensus that followed from this public forum was the desire for a village center that functioned for the Townspeople as a working town center. Although residents are interested in some boutiques and other shops to serve their needs, in addition to the operational services such as town hall, post office, etc., it is not the Town's ultimate goal to become a tourist destination or vacation hot spot.

Also of primary importance to the town is the aesthetics of the Charlton Center. The layout of Charlton Center – with the Common as the focal point framed by nodes of potential activity at both ends of the center – is ideally suited for a traditional New England village. Building on the existing well-designed and well-maintained buildings in Charlton Center, this plan will suggest instituting design guidelines to illustrate and frame future development or redevelopment of key parcels in Charlton Center.

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## Design Guidelines

Design guidelines address aesthetic issues in planning improvements or new development and are used to clarify the urban design objectives of the zoning bylaw. In general, they are intended to provide ideas, stimulate thinking and promote good design. Design guidelines are used by architects, professional planners and others in making more informed decisions related to the urban design framework; provide a context for coordination of development; and assist the municipality in evaluating development applications.

It is important to note that design guidelines are not regulatory or mandatory. Rather, they are written to assist in the permitting process described the zoning bylaw.

Design guidelines provide the framework to encourage the following public and private objectives:

- Provide a coordinated approach to design.
- Ensure a consistent and high level of design.

- Improve the quality of physical alterations and new construction.
- Enhance the quality of the pedestrian experience along a commercial corridor.
- Enhance the character and quality of public spaces such as streets, parks and open spaces.
- Enhance economic investment for business and property owners.
- Protect and conserve neighborhood architectural character.
- Promote community awareness of the physical environment.
- Encourage flexible and individual creativity rather than anonymous uniformity.
- Protect existing property values and the natural environment.

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## Goals and Objectives for Charlton Center

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### Goal

To establish development policies that result in a compact village setting with commercial and residential uses co-existing harmoniously as in a traditional New England town center. Zoning policies should promote a strong retail component, complemented with professional, financial, and personal services to meet neighborhood needs.

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### Objectives

- Revise use schedule to ensure new land uses are compatible with a small-scale, mixed-use village environment. Encourage business that generates continuous activity throughout the day. Eliminate uses that require large expanses of land or operate only sporadically.
- Revise dimensional requirements to ensure that new development maintains the scale and pacing of existing buildings.
- Encourage pedestrian connections to encourage walking within the village. Reinforce sidewalk connections to public uses on the Common, and develop a trail network to link adjacent residential areas to commercial, recreational, and institutional uses.
- Adjust zoning boundaries to promote commercial opportunities where most appropriate.
- Incorporate design standards to ensure that new development respects the district's village character and is compatible with residential uses. New construction should be compatible with the height, proportions, and exterior materials of significant buildings.

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## Recommendations for Charlton Center

The recommendations made by CMRPC in 2004 are still valid and should be implemented. Many of the specific zoning changes suggested by CMRPC are reiterated and elaborated upon below.

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## Uses and Dimensional Standards

### Changes to Use Schedule

- General: Consider requiring site plan review (that includes design standards such as those described below) for all commercial development above a minimum threshold.
- Residential: Delete hotel, motel or motor court. Allow multi-family development on upper floors of commercial property. Allow mixed residential and commercial uses in a property. (Currently Section 3.2.3.4. include a limit of no more than 2 non-resident employees in a home occupation). Allowing and encouraging mixed uses is a key element to the success of any village center. The combination of residents and business help the area become more vibrant and not just an errand.
- Recreational: Delete standard golf and par-3 golf courses; golf driving ranges and miniature golf courses; and campgrounds.
- Business: Delete auction galleries and flea markets.
- Communications, Transportation and Public Utility Uses: delete electric distribution station or sub-station; natural gas distribution stations, and independent storage area or parking area (allow parking garage for 5 or more autos).

### Changes to Dimensional Requirements

- Reduce front setback from 40' to 15' to be consistent with pattern of existing buildings.
- Reduce side and rear yard setbacks from 15' to 10'.

## Changes to District Boundaries

- Re-align boundaries to follow property lines to avoid split lot situations.
- Extend the NB district north along North Main Street, Masonic Home Road (Rt. 31), and Trolley Crossing road to expand opportunities for commercial development (see Figure 9-2 at end of the chapter).
- Consider retracting the district along Old Worcester Road where the predominant land use pattern is residential.

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## Development Standards

### Landscaping

- Require planting strips between the edge of pavement and buildable area of the lot. Allow for planters to be placed along the sidewalks.
- Require curbing and sidewalks to enhance safety of pedestrians. Install bike racks to encourage bicycle use.
- Require landscaped buffers along side and rear yards between residential and nonresidential uses.
- Require landscaped screening for dumpsters and exposed storage areas.

### Parking

- Allow for a reduction of required parking spaces or shared parking arrangements by special permit if the Planning Board finds that sufficient parking is available to meet the needs of the business. For example, there may be public parking lots, on-street spaces, or legal arrangements between owners to share spaces when uses have different hours of operation.
- Allow common driveways for commercial properties to minimize individual curb cuts.

### Signage

- Examine sign standards for the NB district with an eye to promoting signs architecturally compatible with building design and appropriate for slowly moving vehicles and a pedestrian environment.

## **Fenestration**

- Require each structure to maintain a percentage of the front façade as window space to promote visual interest and pedestrian activity.

## **Lighting**

- Adopt lighting provisions that require cutoffs to prevent light trespass into the night sky and specify illumination standards for safety and visibility.

### **CC-1**

Adopt zoning bylaw amendment drafted by Central Massachusetts Regional Planning Commission (CMRPC) in 2004 that changes the Neighborhood Business zoning classification to a new Village Center Zoning District. The geographic extent of this new district should be expanded as shown on Figure 9-2 on the following page.

### **CC-2**

Revise use and dimensional regulations to encourage traditional village center character and feel.

### **CC-3**

Establish landscaping requirements for buffering and screening adjacent or incompatible land uses.

### **CC-4**

Require curbing and sidewalks to enhance the safety of pedestrians.

### **CC-5**

Install bike racks to encourage bicycle use.

### **CC-6**

Allow for a reduction of required parking spaces or shared parking arrangements to encourage business investment.

### **CC-7**

Allow common driveways for commercial properties to minimize individual curb cuts.

### **CC-8**

Promote signs that are architecturally compatible with building design and appropriate for a pedestrian environment.

### **CC-9**

Require each structure to maintain a percentage of the front façade as window space to promote visual interest and pedestrian activity.

# 10

## Implementation Element

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### Introduction

This element is arguably the most important in the entire master plan. The implementation element is based on the goals and objectives of this Master Plan and the data that was collected and analyzed. To ensure the implementation on a year-to-year basis of these actions, the Town of Charlton should clearly identify some entity comprised of representatives from Town staff and existing boards and commissions and other key stakeholders that will be charged with ensuring that this plan is used and followed. In the past it has been the responsibility of the Planning Board and it is assumed that the Board will continue serving in that capacity. It will be responsible not only for coordinating overall implementation of the plan, but would also work to ensure that public outreach and education is achieved.

The implementation element is often the most difficult component of a Master Plan. Unlike the lofty goals and objectives of the previous sections, here is where the rubber meets the road, where the planning ideals are translated into concrete actions. The following recommendations can sometimes be difficult to commit to and be problematic to review over time. Items that have been accomplished fade from view, while the more intractable problems linger for years. Financial and political trends may change, advancing some items while leaving others untouched. For these reasons alone, many communities are hesitant to put in writing the full scope of their intentions.

One of the most important overarching recommendations is to update the Plan periodically, ideally on a five-year basis. Such an effort will keep the Plan and the data current, and will provide an opportunity to revisit this implementation program to acknowledge progress and accomplishments, and to re-order priorities where appropriate.

The following implementation plan intends to deliver on the promise of the goals and objectives expressed throughout this process, with a program of tangible steps for the Town to take over the next ten years and beyond. There is a high level of activity on these issues, based upon the input received during the planning process.

These actions are targeted to address the physical as well as the organizational issues confronting the Town, as described and analyzed throughout this plan. The recommendations described below work to correct these “process” problems, while still maintaining a focus on the substantive issues of land use; housing; economic development; open space and recreation; natural, cultural and historic resources; transportation and circulation; community facilities and services; and Charlton Center.

In order to ensure follow-through on the recommendations of this plan, the Town should consider some mechanism for reporting on progress on a regular basis. Some communities require annual reports to Town Meeting. Another community has developed a follow-up evaluation form that specifically lists each action item and asks for responses. It is important to note that planning is a dynamic process and priorities can shift over time. A consistent review process allows for these issues to be acknowledged while keeping each specific recommendation on the table unless a situation dictates that it be reconsidered. A regular evaluation or follow-up procedure will at least indicate how a particular action item was ultimately addressed, or it calls out those that still need attention.

The table below summarizes the specific recommendations found at the end of each of the plan’s elements. The department, board or commission responsible for implementing each recommendation is identified. Levels of priority are assigned to assist in determining the timeframe in which each item is to be considered. Finally, if funding is required to achieve success, the potential sources for the funds are listed.

## Implementation Plan

Key:

Responsible parties –

- BOH – Board of Health
- BOS – Board of Selectmen
- CHA – Charlton Housing Authority
- Con. Comm. – Conservation Commission
- EDC – Economic Development Commission
- Hist. Comm. – Historical Commission
- Highway – Highway Department
- MHD – Massachusetts Highway Department
- PB – Planning Board
- Rec. Comm. – Recreation Commission
- W/SC – Water/Sewer Commission

	Recommendation	Responsibility	Priority/ Timing	Funding
<b>LAND USE &amp; ZONING</b>				
LU - 1	Encourage the use of Flexible Development zoning to preserve the rural character of Charlton	PB	Ongoing	
LU - 2	Use enhanced zoning tools and techniques to protect Charlton’s natural resource base (i.e. Flexible Development zoning, transfer of development rights, hilltop/slope protection bylaw, and a minimum upland requirement)	PB; Con. Comm.	2009 - 2010	
LU - 3	Achieve consistent, coordinated planning and administration among Town Boards	All Boards and Commissions	2008	
LU - 4	Consider requirements for a local environmental impact assessment for larger projects	PB	2009 - 2010	
LU - 5	Conduct thorough review of zoning bylaw and subdivision regulations <ul style="list-style-type: none"> <li>▪ Formatting</li> <li>▪ Update definitions</li> <li>▪ Conformance with master plan</li> <li>▪ Legal consistency</li> <li>▪ Update use regulations</li> <li>▪ Revise parking standards</li> <li>▪ Smart growth techniques</li> </ul>	PB	2009 - 2010	Town funding

LU - 6	Incorporate “green” building and design standards for new buildings and site improvements into the zoning bylaw	PB	2009 - 2010	Town funding
LU - 7	Reconsider adoption of the Community Preservation Act (CPA)	BOS	2008	
LU - 8	Improve regulation of “major residential developments” through a more complete review and permitting process under site plan review and coordinate with Flexible Development standards (also see LU - 4 and 5 above)	PB	2009 - 2010	
<b>POPULATION &amp; HOUSING</b>				
H - 1	Revise and update demographic and land use data after 2010 Census	PB	2011 - 2014	Town funding
H - 2	Use inventory of town-owned land to look for opportunities to provide affordable housing	CHA	2009 - 2010	
H - 3	Provide a wide range of housing choices and opportunities to meet the needs identified in this plan	CHA	Ongoing	HOME American Dream Downpayment Initiative
H - 4	Reconsider adoption of the Community Preservation Act (CPA)	BOS in partnership with CHA	2008	
H - 5	Revise zoning to expand housing choices by <ul style="list-style-type: none"> <li>▪ allowing multi-family dwellings, mixed-use development, duplexes, etc. in a variety of zoning districts</li> <li>▪ allow duplexes by special permit</li> <li>▪ allow accessory apartments through site plan review by the Planning Board</li> </ul>	PB; CHA	2009 - 2010	
<b>ECONOMIC DEVELOPMENT</b>				
ED - 1	Encourage properly planned rezoning for commercial and industrial land use activities in order to increase the Town’s tax base along major thoroughfares such as Rts. 20, 169 and 31	EDC; Business Community	Ongoing	
ED - 2	Work with local businesses to promote Charlton as a place of business. Establish a local business directory on the town’s website, or create links to local business and non-profit organization websites.	EDC; Business Community	Ongoing	
ED - 3	Update and revise land use designations in the zoning bylaw along the Rt. 20 and Rt. 169 corridors for commercial, office, and industrial uses to better reflect the land use types expected along these	EDC; PB	2009 - 2010	

	economic development corridors			
ED - 4	Explore opportunities for shared wastewater disposal or small package treatments plants to meet the needs of multiple commercial properties, and assure that local regulations do not impede shared systems	BOH; PB; W/SC	2009 - 2010	
ED - 5	Consult with a variety of stakeholders, including developers, engineers and attorneys with working knowledge of Charlton's zoning, to define and identify bottlenecks, conflicts and redundancy	BOS; PB; EDC; Business Community	2008	
ED - 6	Prepare a development permitting guidebook for use by developers and town boards	BOS; PB; EDC; Business Community	2009 - 2010	M.G.L. 43D
ED - 7	Overhaul and update the existing use regulations in the business and industrial districts to foster multi-use development and encourage clusters of compatible businesses	PB	2009 - 2010	
<b>OPEN SPACE &amp; RECREATION</b>				
OS - 1	Complete and submit the Open Space and Recreation Plan to the Division of Conservation Services	Con. Comm.; Rec. Comm.	2008	
OS - 2	Develop criteria to prioritize future open space acquisitions. Create process for addressing right of first refusal for Chapter 61 lands that become available	Rec. Comm.; PB; Con. Comm.; BOS	2009 - 2010	
OS - 3	Foster greenway creation by permanently preserving significant parcels via the Open Space and Recreation Plan and the Master Plan	Con. Comm.; Rec. Comm.	2009 - 2010	Self-Help
OS - 4	Work with land trusts and establish public-private partnerships to preserve farm land through purchase of conservation restrictions (CRs) or agricultural preservation restrictions (APRs)	Con. Comm.; BOS; PB	Ongoing	Private funding; APR program; Self-Help
OS - 5	Reconsider adoption of the Community Preservation Act (CPA)	BOS in partnership with Con. Comm.	2008	
OS - 6	Establish walking trails and bicycle paths to enhance network that connects open space resources in Charlton with adjacent towns and state land	Con. Comm.; Rec. Comm.	2011 - 2015	Self- Help; Urban Self-Help
OS - 7	If the CPA is not the funding source supported by the citizens of the Town, an annual set aside could provide for some of the future acquisition needs in Charlton	Con. Comm.; Rec. Comm.; BOS	Ongoing	Town funds

NATURAL, CULTURAL & HISTORIC RESOURCES <sup>1</sup>				
NCH - 1	Adopt a local wetlands protection bylaw	Con. Comm.	2009 - 2010	
NCH - 2	Identify, delineate and document wetland resources. Identify, evaluate and map potential wildlife corridors, including regional and local connections to core habitat areas. Continue to certify vernal pools	Con. Comm.;	Ongoing	
NCH - 3	Adopt a demolition delay bylaw	Hist. Comm.	2009 - 2010	
NCH - 4	Adopt a Transfer of Development Rights (TDR) bylaw	PB	2009 - 2010	
NCH - 5	Reconsider adoption of the Community Preservation Act (CPA)	BOS in partnership with Hist. Comm.	2008	
NCH - 6	Adopt policies to encourage green development practices and LEED <sup>2</sup> certifiable technologies by the Town and private developers, including cooperatively incorporating energy efficiency design and criteria in site plan, special permit and subdivision permit applications	BOS; PB	2009 - 2010	
NCH - 7	Encourage the use of historic tax credits by providing more information on federal and state rehabilitation tax credits to the general public	Hist. Comm.	Ongoing	
NCH - 8	Identify water resource watershed areas and consider ways to exclude or minimize development in those areas	W/SC	Ongoing	
NCH - 9	Consider ridgeline or elevation protection through development restrictions above a certain elevation	PB	2009 - 2010	
TRANSPORTATION, TRANSIT & CIRCULATION				
T - 1	Adhere to proper Institute of Transportation Engineers (ITE) trip generation level of service criteria via case-by-case Planning Board project permit review in order to maintain and enhance vehicular mobility while keeping a balance between roadway safety improvements and scenic rural roadway character	Highway	Ongoing	Ch. 90
T - 2	Control or regulate the amount of new traffic added to Town roads by clustering heavy traffic generators where they can be served by existing major roadways, such as Rt. 20	PB; Highway	Ongoing	
T - 3	Enhance non-vehicular transportation opportunities by establishing safe	PB	Ongoing	

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<sup>1</sup> See Chapter 5 for a detailed list of funding sources for historic preservation initiatives.  
<sup>2</sup> LEED – Leadership in Energy and Environmental Design

	walking and bicycling paths and trails around Charlton			
T - 4	Develop access management and traffic impact study guidelines and incorporate them into the zoning bylaw and subdivision regulations	Highway; PB	2009 - 2010	
T - 5	Consider traffic calming elements where appropriate to regulate high rates of speed	PB; Highway	Ongoing	
T - 6	Consider an east-west connector in the southern part of town	PB; Highway	2011 - 2015	Ch. 90
T - 7	Place limitations on new cul-de-sac development and look for ways to increase street connectivity by creating through roadways where feasible	PB	Ongoing	
T - 8	To facilitate use of the existing rail line, consider redesignating Center Depot Road as Rt. 31A to provide direct access from the Depot to Rt. 20	BOS; Highway; MHD		
<b>COMMUNITY FACILITIES</b>				
CF - 1	Maintain, expand and improve town buildings (fire station, highway barn, schools, senior center, animal shelter), town services, and the water and sewer services to keep pace with Charlton's growing population	BOS	Ongoing	
CF - 2	Construct new community facilities deemed necessary by various Town departments	BOS	Ongoing	
CF - 3	Provide communication links throughout Town departments including police, fire, Town Hall, highway, library, elderly services, and emergency management services	BOS	Ongoing	
CF - 4	Make use of alternative sewage treatment technologies in order to broaden economic development opportunities where sewage constraints exist	BOH; W/SC	Ongoing	
CF - 5	Adopt green technology in current and future facilities	BOS		
<b>CHARLTON CENTER</b>				
CC - 1	Adopt zoning bylaw amendment drafted by Central Massachusetts Regional Planning Commission (CMRPC)	PB	2008	Town funding
CC - 2	Revise use and dimensional regulations to encourage traditional village center character and feel	PB	2008	
CC - 3	Establish landscaping requirements for buffering and screening adjacent or	PB	2008	

	incompatible land uses			
CC - 4	Require curbing and sidewalks to enhance the safety of pedestrians	PB	Ongoing	Developer
CC - 5	Install bike racks to encourage bicycle use	Highway	Ongoing	Developer
CC - 6	Allow for a reduction of required parking spaces or shared parking arrangements to encourage business investment	PB	2008	
CC - 7	Allow common driveways for commercial properties to minimize individual curb cuts	PB	2008	
CC - 8	Promote signs that are architecturally compatible with building design and appropriate for a pedestrian environment	PB	2008	
CC - 9	Require each structure to maintain a percentage of the front façade as window space to promote visual interest and pedestrian activity	PB	2008	