



# Zoning & Planning Committee Agenda

## City of Newton In City Council

Monday, February 26, 2024

7:00 pm

Room 207 (City Council Chambers)

The Zoning and Planning Committee will hold this meeting as a hybrid meeting on Monday, February 26, 2024 at 7:00 PM that the public may access in-person or virtually via Zoom. To attend this meeting via Zoom use this link: <https://newtonma-gov.zoom.us/j/88541087332> or call 1-646-558-8656 and use the following Meeting ID: 885 4108 7332.

### Item Scheduled for Discussion:

#### *Public Hearing*

**#49-24**

**Adoption of an ordinance requiring electrification of all new construction and substantial renovations**

HER HONOR THE MAYOR AND COUNCILORS ALBRIGHT, DANBERG, LEARY, HUMPHREY, KALIS, DOWNS, LIPOF, WRIGHT, MICLEY, BIXBY, AND GETZ requesting possible adoption of an Electrification Ordinance that would require all new construction and substantial renovations in Newton to be all-electric, effective January 1, 2025. This is in conjunction with the City's recent conditional approval by the State Department of Energy Resources (DOER) for participation in the Municipal Fossil Fuel Free Building Construction and Renovation Demonstration Project, also known as the Ten Communities Program.

**Zoning & Planning Held 8-0 on 01/22/24**

**#74-24**

**Discussion Regarding 40B Process Post 'Safe Harbor' Designation**

COUNCILORS OLIVER, BAKER, AND WRIGHT requesting a discussion with the Law and Planning departments regarding the process going forward for 40B projects since meeting the 10% 'Safe Harbor' designation. The discussion should address the different parameters that can or will be used to accept, deny and modify

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The location of this meeting is accessible and reasonable accommodations will be provided to persons with disabilities who require assistance. If you need a reasonable accommodation, please contact the city of Newton's ADA Coordinator, Jini Fairley, at least two business days in advance of the meeting: [jfairley@newtonma.gov](mailto:jfairley@newtonma.gov) or (617) 796-1253. The city's TTY/TDD direct line is: 617-796-1089. For the Telecommunications Relay Service (TRS), please dial 711.

projects and the criteria allowed to be used by ZBA or any other approving authority.

**Zoning & Planning Held 8-0 on 01/22/24**

**Referred to Zoning & Planning and Finance Committees**

**#87-24**

**Update Project Review Fees**

HER HONOR THE MAYOR requesting discussion and possible ordinance amendments to update fees related to special permit, zone change, and site plan review fees requested by the Planning Department, City Clerk's Office, and Law Department.

**#86-24**

**Request for a pre-budget planning discussion**

COUNCILORS BAKER, OLIVER, MALAKIE, KALIS, GETZ, LUCAS, LOBOVITS, AND WRIGHT requesting a preliminary discussion with the Planning Department, Inspectional Services Department and CPA Program Manager to prepare for the Committee's FY25 Budget Review of these Departments and Programs.

**#89-24**

**Reappointment of Denise Chicoine to the Zoning Board of Appeals**

HER HONOR THE MAYOR reappointing Denise Chicoine, 275 Islington Road, Newton as an associate member of the Zoning Board of Appeals for a term of office set to expire on January 10, 2025. (60 Days: 04/05/2024)

**#88-24**

**Reappointment of Lei Reilley to the Zoning Board of Appeals**

HER HONOR THE MAYOR reappointing Lei Reilley, 130 Pine Street, Newton as an associate member of the Zoning Board of Appeals for a term of office set to expire on January 10, 2025. (60 Days: 04/05/2024)

**Respectfully Submitted,**

**R. Lisle Baker, Chair**



To: Zoning & Planning Committee  
From: Councilor R. Lisle Baker, Chair; and Councilor John Oliver, Vice-Chair  
Re: Submitting Questions Re #49-24 Electrification of All New Construction and Substantial Renovations  
Date: February 23, 2024

## Memorandum

Dear Colleagues,

At the next ZAP meeting on Monday, February 26, 2024, we will be holding a public hearing regarding adoption of an ordinance requiring electrification of all new construction and substantial renovations. Ann Berwick, Co-Director of Sustainability, has prepared materials for the packet and a copy of her presentation that are attached to this agenda. To aid Ms. Berwick in her presentation of the item we are asking that Councilors submit questions in advance if possible. Questions should be submitted to Ms. Norton by 1pm on Monday, February 26 to allow Ms. Berwick time to prepare in advance of the meeting.

Sincerely,

R. Lisle Baker, Chair of Zoning & Planning Committee

John Oliver, Vice-Chair of Zoning & Planning Committee

To: Newton City Council Zoning and Planning Committee  
From: Ann Berwick, Co-Director of Sustainability  
Re: Proposed Electrification Ordinance  
Date: February 16, 2024, updated February 22, 2024

The Zoning and Planning Committee is holding a public hearing on Monday, February 26 on the proposed Electrification Ordinance. Here's a brief summary of the long history of this issue and of some of the implications.

More background is in the Friday packet for the Zoning and Planning Committee.

### **History/Relationship to the "Ten Communities Program"**

A number of cities and towns filed Home Rule Petitions with the Legislature over the last few years, seeking authority to require all new construction and major renovations to be all or mostly electric. Rather than acting on the Petitions, the Legislature enacted a statute that provides the requested authority to the first ten communities that filed such Petitions. Newton is one of the first ten.

Newton approved a proposed electrification ordinance for the purposes of filing a Home Rule Petition (by a 7-1 vote in Public Facilities) and, later, approved a revised proposed electrification ordinance in order to be a candidate for participation in the Ten Communities Program (by a 7-0 vote in Zoning and Planning). Since late 2019, the Public Facilities and Zoning and Planning (ZAP) Committees have held close to a dozen meetings in total, including two public hearings, to discuss why and how electrifying new construction and major renovations is a critical climate action, and to review the various drafts of an electrification ordinance.

Other communities have already been fully approved by DOER to participate in the Ten Communities Program, i.e., Acton, Aquinnah, Arlington, Brookline, Cambridge, Concord, Lexington, and Lincoln.

### **Why Electrify?**

We use electricity mostly for lighting and appliances, mostly natural gas and heating oil for heating, and mostly gasoline and diesel for transportation. Of these, only electricity can be made cleaner, through the use of renewable resources like solar and wind power. It's true that we use fossil fuels to generate electricity, but in decreasing amounts. New England's electricity is currently generated partly by fossil fuels, but approximately half comes from energy sources that do not emit greenhouse gases, like solar, wind, and nuclear. Even with the current mix of generating resources, using an electric air source heat pump to provide heating (and cooling) results in less than half the greenhouse gas emissions of an efficient gas boiler that produces the same amount of heat. In addition, over the next decade New England's electricity will be getting much cleaner as more renewables come online.

## Cost of Building All-Electric

Electrification is affordable, especially for new buildings. All-electric new construction is generally considered to be the “low-hanging fruit” in terms of reducing greenhouse gas emissions. There are a number of good resources that address the cost of all-electric construction, e.g.:

The February 2024 Report on New Construction and the Future of Gas in MA by Groundwork Data for ZeroCarbonMA concludes that “[C]oncerns about affordability are unfounded and that all-electric new construction offers pathways to more affordability than utility gas.... [F]or many building types, all-electric new residential construction has achieved effective cost-parity.... [And] the emergence of cold climate heat pump technology has lowered the operational cost of electric heating to well below the cost of oil, propane, and electric resistance and is approaching cost-parity with utility gas under current rates and energy prices. Further, all-electric new construction is poised to quickly become more cost-effective than gas under expected emissions regulations and increasing gas delivery costs.”

[https://drive.google.com/file/d/1Yf4TonWw0tO7V3tEmGS8JLS2w9X7\\_IS8/view](https://drive.google.com/file/d/1Yf4TonWw0tO7V3tEmGS8JLS2w9X7_IS8/view) (p. 2)

This conclusion is consistent with a presentation made to the Newton City Council by Ian Finlayson from the MA Department of Energy Resources, February 15, 2023.

See also:

<https://builtenvironmentplus.org/wp-content/uploads/2019/09/ZeroEnergyBldgMA2019.pdf>

<https://www.mass.gov/doc/summary-of-stretch-code-study-energy-efficiency-analysis-feb-2022/download> (residential savings)

## Relationship of the Proposed Electrification Ordinance to New “Specialized” Building Codes

The MA Stretch Energy Code became effective in January 2023 for all 301 Stretch Code communities (of which Newton is one and, indeed, in 2009 became the very first). And in Newton, the Specialized Energy Codes (two categories: low-rise residential and for all other building uses) became effective in January 2024. These codes apply to all new construction and major renovations.

The codes do not require electrification but, as noted above, electrification will likely be the preferred pathway for new construction for economic reasons, as well as for health and environmental concerns. Notably, the other code pathways allow fossil fuels, but complete pre-wiring of the building is required to enable easy conversion to all-electric construction in the future.

More concerns have been raised about the challenges and costs of electrification for major renovations covered by the codes and the proposed electrification ordinance<sup>1</sup>.

For renovations this large, the buildings codes themselves, even without requiring electrification, go a long way toward encouraging electrification even for renovations. For example, the codes require that the energy efficiency requirements for all-electric buildings be lower and, as noted above, that wiring be installed to prepare for electrification in buildings that use fossil fuels.

### **Waiver**

Additionally, because all-electric retrofits can be more challenging and expensive than all-electric new construction, Newton requested that DOER allow the City to consider waiver requests for any major renovation, if a building professional on the project certifies that compliance with the electrification requirement would increase the costs of the project by 50% or more, compared to the costs of complying only with the requirements of the applicable building code. DOER granted that request, and Newton has included that waiver provision in the proposed electrification ordinance.

### **Exemptions**

The Ten Communities statute itself exempts research laboratories, hospitals, and medical offices from any electrification requirement. Newton requested that DOER also allow the City to exempt certain other uses, including freestanding outdoor cooking and heating appliances that are not connected to the building's natural gas or propane infrastructure; emergency generators; and in certain circumstances, appliances to produce domestic hot water from centralized systems in large commercial buildings. DOER agreed to these exemptions.

### **Are Communities Outside of Massachusetts Requiring All-Electric Construction?**

Yes. Among others, San Francisco, Seattle, Oakland, Sacramento, as well as New York State.

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<sup>1</sup>Renovations that the codes and electrification ordinance address are (a) low-rise residential additions over 1,000 square feet and additions exceeding 100% of the conditioned floor area of the existing dwelling unit; (b) additions over 20,000 square feet and additions that exceed 100% of the conditioned floor areas of the existing building for all building use types except low-rise residential; (c) Level 3 Alterations (which exceed 50% of the existing conditioned floor area) exceeding 1,000 square feet for low-rise residential, or exceeding 20,000 square feet for all other building uses; or (d) Change of use of over 1,000 square feet or (e) change of use of over 20,000 square feet or change of use of 100% of the conditioned floor areas of the existing building for all building use types except low-rise residential.

## **Draft Newton Electrification Ordinance and Amendments to the Specialized Energy Code**

### **Purpose**

The City of Newton adopts this Ordinance in order to enable the City to participate in the State’s Fossil Fuel-Free Demonstration Project, 225 CMR 24.00. The purpose of the Fossil Fuel-Free Demonstration Project is to restrict and prohibit new building construction and Major Renovation Projects that are not fossil fuel-free in ten communities in Massachusetts. The Ordinance will protect the health and welfare of the City’s inhabitants and the environment by reducing greenhouse gases, which cause climate change, and by reducing other air pollutants.

The Ordinance requires new construction and Major Renovation Projects to use electricity instead of fossil fuels for heating and cooling systems and cooking and clothes drying appliances; and, for hot water, to use either electricity or thermal solar.

### **Definitions**

“Department” means The Massachusetts Department of Energy Resources, as established by MGL chapter 25A.

“Commissioner” means the Commissioner of Inspectional Services of the City of Newton, as established by Section 5-16 of the Ordinances of the City.

“Fossil Fuel-Free Demonstration Project” means the project codified by the entirety of 225 CMR 24.00, enabling ten communities designated by the Department to require new construction and Major Renovation Projects to be fossil-fuel free, notwithstanding MGL chapter 40A; MGL chapter 142, section 13; MGL chapter 164; or any other general or special law to the contrary.

“Hospitals or Medical Offices” means a facility licensed or approved by the Department of Public Health to provide health care, including clinics licensed as health care facilities and facilities that provide substance use disorder treatment

services, including outpatient withdrawal management, opioid treatment programs, office-based opioid treatment programs, acute treatment services (inpatient detoxification), and clinical stabilization services.

“Major Renovation Project” means (a) low-rise residential additions over 1,000 square feet and additions exceeding 100% of the conditioned floor area of the existing dwelling unit; (b) additions over 20,000 square feet and additions that exceed 100% of the conditioned floor areas of the existing building for all building use types except low-rise residential; (c) Level 3 Alterations as defined in the International Existing Building Code (IEBC 2021) (which exceed 50% of the existing conditioned floor area) exceeding 1,000 square feet for low-rise residential, or exceeding 20,000 square feet for all other building uses; or (d) Change of use of over 1,000 square feet per International Energy Conservation Code (IECC 2021) Sections R505; or (e) change of use of over 20,000 square feet or change of use of 100% of the conditioned floor areas of the existing building for all building use types except low-rise residential, International Energy Conservation Code (IECC 2021) Sections C505.

“Research Laboratories for Scientific or Medical Research” means a building in which a laboratory procedure or research activity occurs, and where the building has an average ventilation at full occupancy greater than 0.5 cfm/sf. Such buildings shall provide the ventilation design documentation described in 225 CMR 23.00, Section C103.2, at the time of building permitting.

“Specialized Energy Code” means the building code in 225 CMR 22.00 and 23.00; including Appendices RC and CC, which add residential and commercial appendices to the Massachusetts Stretch Energy Code.

### **Applicability**

The fossil fuel restriction applies to residential and commercial buildings located in the City that qualify as new construction or Major Renovation Projects, except as listed in the Section herein entitled “Exceptions.”

### **Exceptions**

The requirements of this Ordinance do not apply to any of the following:

- A. Research Laboratories for Scientific or Medical Research;



- B. Hospitals or Medical Offices;
- C. Freestanding outdoor cooking appliances that are not connected to the building's natural gas or propane infrastructure;
- D. Freestanding outdoor heating appliances that are not connected to the building's natural gas or propane infrastructure;
- E. Emergency generators;
- F. Appliances to produce potable or domestic hot water from centralized hot water systems in commercial buildings with a gross floor area of at least 10,000 square feet, provided that the architect, engineer, or general contractor on the project certifies by affidavit that no commercially available electric hot water heater exists that could meet the required hot water demand for less than 150% of installation costs, compared to the costs of complying only with the requirements of the applicable (i.e., residential or commercial) specialized building code.
- G. Fossil fuels for process loads for manufacturing, industrial, and commercial purposes.

### **Waivers**

The City will entertain waiver requests for Major Renovation Projects with respect to which an architect, engineer, or general contractor on the project certifies by affidavit that compliance with the requirements of the Ordinance will increase the costs of the project by 50% or more, compared to the costs of complying only with the requirements of the applicable (i.e., residential or commercial) specialized building code.

### **Application Requirements**

When applying for a building permit for new building construction or a Major Renovation Project the applicant must submit documents with the application that identify the heating and cooling and hot water systems and cooking and clothes drying appliances that will be installed and used in the building.

### **Compliance**

The Commissioner shall not issue any building permit for the construction of a new building or Major Renovation Project unless the applicant submits the

documentation set forth in the Section herein entitled “Application Requirements.” The Commissioner shall not issue a certificate of occupancy for any building subject to this Ordinance prior to inspection and confirmation that the heating and cooling and hot water systems and cooking and clothes drying appliances installed in the building comply with the applicant’s documents submitted pursuant to the Section herein entitled “Application Requirements.”

### **Effective Date**

This Ordinance shall apply to all building permits, special permits, and comprehensive permits issued **XXX** days after the approval by the Department of participation by the City in the Fossil Fuel Demonstration Project.

### **Amendments to the Specialized Energy Code**

With adoption of the Fossil Fuel-Free Demonstration Project by the City, and upon approval by the Department, the following amendments to the Specialized Energy Code are adopted. These changes are enforceable by the Commissioner and will go into effect for any project seeking a permit after the effective date of this Ordinance.

a. Low-rise Residential Code (225 CMR 22 Appendix RC)

1. Sections RC102 and RC101 “Zero Energy Pathway” and “Mixed Fuel Pathway” shall not be permitted for use for new construction or Major Renovations.

b. Commercial and All Other (225 CMR 23 Appendix CC)

i. Sections CC103 and CC105 “Zero Energy Pathway” and “Mixed-Fuel Pathway” shall not be permitted for new construction or Major Renovations, with the following exceptions:

1. Research Laboratories for Scientific or Medical Research;
2. Hospitals or Medical Offices;
3. Buildings heated with Clean Biomass Heating Systems as defined in 225 CMR 23, as the only combustion equipment;

4. Multi-family buildings over 12,000 square feet with permit application filed prior to January 1, 2027 may utilize gas or propane for domestic water heating as the only combustion equipment.

## **Frequently Asked Questions on Electrification**

### **Q. Why is electrification essential for addressing climate change?**

A. We use electricity mostly for lighting and appliances, mostly natural gas and heating oil for heating, and mostly gasoline and diesel for transportation. Of these, only electricity can be made cleaner, through the use of renewable resources like solar and wind power.

### **Q. Isn't most electricity in New England produced by fossil fuels?**

A. Slightly more than half of New England's electricity is generated by fossil fuels, and the rest comes from non-fossil energy sources, such as nuclear, hydro, wind, and solar. However, even with this current mix of electricity sources, using an electrically powered air source heat pump to provide heating (and cooling) results in less than half the greenhouse gas emissions compared with an efficient boiler powered by natural gas.

In 2050, electric heating is projected to reduce greenhouse gas emissions by 98 percent compared with gas heating because of the efficiency of electric appliances and the expected increased content of renewable electricity in the grid.

### **Q. How will the electric grid deal with the increased load if more heating, cooling, hot water, etc., are electrified?**

A. The bottom line is that for the foreseeable future, New England has sufficient generation, transmission, and local distribution capacity to meet the demands of increased electrification. Nonetheless, even in the near term there will undoubtedly be some situations in which a large electrification project will require reinforcement of the distribution system.

However, we in Newton are certainly not the only ones concerned about the challenges associated with increased electrification.... So are ISO-New England (the regional electric grid operator), the Federal Energy Regulatory Commission (FERC), the electric utilities, the State Department of Public Utilities (DPU), and the Governor and Legislature. All of these are planning for increased

electrification of the economy. In fact, ISO-New England just released a [report](#) outlining the need for the region to make significant investments in the electric grid as all six states increase their use of new electric technologies.

The ISO-NE report also says that the region can potentially lower the cost of needed grid investments by billions of dollars through energy efficiency measures, battery storage, and electric rates and technology that encourage consumers to use less energy during times of peak demand.

Here's some good news in this regard:

- As a result of progressive new building codes, new electric construction will add much less load to the electric grid than would have been the case under prior building codes.
- Peak demand on the grid has recently decreased due to increased energy efficiency.
- Modern electric heating and cooling equipment—heat pumps—are much more (3 to 4 times more) efficient than the fossil fuel appliances and inefficient electric equipment we have relied on in the past.
- New England is currently a summer-peaking system, but heat pumps used for cooling are not likely to increase the summer peak demand for electricity because they replace older inefficient air conditioning. (The growth in building electricity use will occur mainly in the winter, making New England a winter-peaking system, from the use of electric heat pumps for heating instead of fossil fuels.)

**Q. Is it true that heat pumps don't work in cold climates?**

A. No. New cold-weather heat pumps do fine in even the northern New England climate.

**Q. Are we more vulnerable to power outages by relying more on electricity?**

A. Even now, when the electric grid goes down in a storm, in most cases, gas-fired boilers don't operate, and even water supply is limited. That said, facilities like hospitals should have—and are required by federal law to have—backup and stand-by power to address emergencies. Moreover, hospitals and other medical facilities are exempted from Newton's proposed electrification ordinance.



# CITY OF NEWTON, MASSACHUSETTS

## PUBLIC BUILDINGS DEPARTMENT

52 ELLIOT STREET, NEWTON HIGHLANDS, MA 02461

Ruthanne Fuller, Mayor  
Josh Morse, Building Commissioner

Telephone (617) 796-1600  
Facsimile (617) 796-1601  
TDD/tty # (617) 796-1608

February 21, 2024

The Public Buildings Department began the conversion of our school and municipal buildings to fully electric heating, cooling, domestic hot water, and cooking more than six years ago.

We've already converted schools, Public Works buildings, branch libraries, and more. We're currently undertaking fully electric projects for the Lincoln-Eliot, Countryside, Franklin, and Horace Mann Schools. We're also converting the Newton Free Library, Fire Station #2, and the Police Facilities.

I could talk about all the reasons why building electrification is so important, but I'll let you read my take on that question [here](#).

Instead, I want to focus on the brass tacks.

The latest energy codes, which apply to all new construction or major renovation projects, require an extremely efficient building envelope. On every project the City has done since 2018, when coupled with constructing an energy efficient building envelope, electrifying the heating systems has proven to be more energy efficient, less expensive to install, and less expensive to operate. Our professional energy models have shown this, and our post-occupancy utility data has proven those models correct.

Design and construction teams throughout the country are now well-versed in creating efficient fully electric commercial, residential, and in some cases even industrial facilities. There are still some holdouts and that's understandable. However, the sales data speaks for itself. According to the U.S. Air Conditioning, Heating, and Refrigeration Institute, in 2023 there were 20.9%, or 627,116, more air source heat pumps sold in the US than gas furnaces. This is up from the 2022 numbers, when air source heat pumps outsold gas furnaces by 11.9% across the country.

The numbers speak for themselves. The building electrification movement has been underway for quite some time. While some of this is driven by a desire to get off fossil fuels, capitalism is really what's driving the conversion now. It's simply a better solution at a competitive price. Utility and federal incentives are being reduced on many systems for large scale projects because they are no longer needed, with capital and operating costs comparable to fossil fuel solutions.

In a new or renovated home, business, or nearly any other building, it simply no longer makes financial sense to install new fossil fuel burning equipment. Additionally, with the US following the lead of many European countries in the conversion to fully electric heating, the corresponding sharp decline in fossil fuel equipment sales will result in repair parts and services being harder to secure to keep those systems going in the not-too-distant future.

Conversion to electric domestic hot water and cooking is absolutely doable as well. For our buildings, we have installed electric domestic hot water systems from residential to commercial sizes and they have been comparable from a cost perspective to the natural gas systems of the past. Our fully electric kitchens are less expensive than kitchens equipped with natural gas appliances.

In closing, I support the electrification ordinance not only because it's a critical step towards reducing our carbon footprint, but because at this stage it's simply embracing the market change that is already happening around us.

Sincerely,



Josh Morse  
Public Buildings Commissioner

# Proposed Electrification Ordinance

Ann Berwick, Co-Director of Sustainability  
February 26, 2024



## Content of Proposed Ordinance



- New Construction and major renovation projects must electrify:
  - Heating and cooling systems
  - Cooking
  - Clothes-drying appliances
  - Hot water
- Defines major renovations
- Includes exemptions and waiver provision
- Proposed effective date January 2025





## History/Relationship to the “Ten Communities Program”

- From Home Rule Petitions to Ten Communities – a dozen meetings over 5 years
- Past approvals of the proposed ordinance by the City Council, including:
  - Vote in March 2022 to submit an electrification Home Rule Petition (approved 7-1 by Public Facilities; 23-0-1 by the Council)
  - Vote in June 2023 by ZAP to submit draft ordinance to participate in the Ten Communities Program (approved 7-0)
- DOER has fully approved for participation in Ten Communities: Acton, Aquinnah, Arlington, Brookline, Cambridge, Concord, Lexington, and Lincoln

3

## Why Electrify?



- The only way to clean our energy use
- Clean, safe, and highly efficient
- Fossil fuels in New England’s generation mix – about half, and decreasing
- Electrification required: San Francisco, Seattle, Oakland, Sacramento, New York State

4



## Cost of Building All-Electric

- Electrification is affordable, especially for new buildings
  - A [DOER study](#) found all-electric new residential construction costs less than gas new residential construction when incentives are included in the analysis, for all types of new residential construction
- Makes no sense for new construction to use fossil fuels
- Resources provided
  - Trainings and incentives from Mass Save

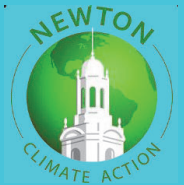
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## Proposed Electrification Ordinance vs. New “Specialized” Building Codes



- Specialized Buildings Codes effective in Newton in January 2024
  - Applies to all new construction and major renovations
- The Codes themselves encourage electrification
  - Health and environmental concerns encourage electrification as well
- If fossil fuels are used, the Codes require:
  - More stringent efficiency standards
  - Pre-wiring to provide infrastructure for fully electrifying the building

6



# Renovations

- More concerns raised
- Low Rise Residential Major Renovation:
  - Additions over 1,000 square feet
  - Additions exceeding 100% of the existing conditioned floor area
  - Renovations exceeding 50% of the existing conditioned floor area and 1,000 square feet
- All Other Building Types Major Renovation:
  - Additions over 20,000 square feet
  - Additions exceeding 100% of the existing conditioned floor area
  - Renovations exceeding 50% of the existing conditioned floor area and exceeding 20,000 square feet
- The same thresholds that trigger compliance with the Stretch and Specialized Building Codes

7

# Waivers



If a building professional on the project certifies that compliance with the electrification requirement would increase the costs of the project by 50% or more, compared to the costs of complying only with the requirements of the applicable building code.

8



# Exemptions

- By statute:
  - Research laboratories
  - Hospitals and medical offices
- By Newton request:
  - Freestanding outdoor cooking and heating appliances that are not connected to the building's natural gas or propane infrastructure
  - Emergency generators
  - In certain circumstances, appliances to produce domestic hot water from centralized systems in large commercial buildings

CITY OF NEWTON  
LAW DEPARTMENT  
INTEROFFICE MEMORANDUM

DATE: February 22, 2024  
TO: Zoning Board of Appeals  
FROM: Jonah Temple, Deputy City Solicitor  
RE: Chapter 40B Safe Harbor Status

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As Newton reached Chapter 40B safe harbor status for the first time on January 8, 2024, this memorandum sets forth initial guidance on the implications of this milestone for the Zoning Board of Appeals (ZBA) moving forward. More information on how the safe harbor is calculated can be found in the January 4, 2024 Safe Harbor Status memo [here](#). Additional guidance will be provided at the time of the next comprehensive permit application.

1. Chapter 40B and the “Housing Unit Minimum” Safe Harbor

Chapter 40B is a state law that facilitates the construction of affordable housing by removing obstacles and streamlining the permitting process for development projects that include a minimum amount of affordable housing. The law establishes a consolidated local review and approval process that authorizes the ZBA to issue a “comprehensive permit” encompassing all local ordinances and regulations. Chapter 40B gives the ZBA authority to waive zoning and other local permitting requirements for such projects. To qualify for a comprehensive permit, 25% of the units in a proposed project must be affordable up to 80% AMI or 20% of the units must be affordable up to 50% AMI.

Chapter 40B also allows municipalities to invoke various safe harbors if they are providing their fair share of affordable housing. Once a safe harbor has been met, it allows the ZBA to deny a comprehensive permit application as “consistent with local needs” and that decision will not be appealable to or overturned by the Housing Appeals Committee.

The City of Newton recently reached the Housing Unit Minimum safe harbor, achieved when a municipality’s housing units eligible for inclusion on the state’s Subsidized Housing Inventory (SHI) exceed 10% of its total housing units.

The City’s attainment of safe harbor status does not prohibit the filing of future comprehensive permit applications with the ZBA. Nor does it deprive the ZBA of the ability to grant additional comprehensive permits. Chapter 40B still requires that the ZBA deliberate about whether to impose or override local zoning laws regardless of whether the City has satisfied its minimum affordable housing obligation. Therefore, even if the City has met a safe harbor, comprehensive permit applications may still be submitted to the ZBA and the ZBA must determine whether to

invoke the safe harbor within 15 days of opening a public hearing and then proceed with the public hearing.

2. No Impact on Pending Applications

The City's attainment of safe harbor status is based on the City's calculation on the date that a comprehensive permit application is filed with the ZBA. Currently there are three comprehensive permit applications pending in front of the ZBA: 529 Boylston Street, 41 Washington Street, and 78 Crafts Street. Because the City had not reached the safe harbor at the time those applications were filed, the ZBA could not have and did not invoke safe harbor status. This means that the City's recent achievement of safe harbor status has no impact on the ZBA's ongoing review of those projects.

3. Recalculation of Safe Harbors for Next Application

The safe harbor calculations are not static and routinely fluctuate. Housing properties are routinely added and removed from the City's list of SHI eligible housing units in accordance with the regulations and guidelines issued by the Massachusetts Executive Office of Housing and Livable Communities (HLC)—previously known as the Department of Housing and Community Development (DHCD). Because the relevant inquiry is whether the City is at safe harbor status on the date an application is filed with the ZBA, the first step upon the filing of the next comprehensive permit application will be for staff to update the City's safe harbor calculation based on the current state of SHI eligible housing units at the time of filing. As that calculation fluctuates based on several factors, it is possible the City may not be at safe harbor status when the next comprehensive permit application is filed.

4. Procedure to Invoke the 40B Safe Harbor

When the next comprehensive permit application is filed, the ZBA will schedule and open a public hearing within thirty days as it normally does. Prior to the public hearing, staff will update the City's safe harbor calculations and present them in a memo to the ZBA. If a safe harbor has been reached, at the start of the first public hearing, the ZBA should vote on whether to invoke safe harbor status. The determination is up to the discretion of the ZBA. A vote to invoke the safe harbor means that the ZBA believes that denial of the comprehensive permit would be consistent with local needs because it has reached a safe harbor. However, this vote does not act as an actual denial of the comprehensive permit. Following this vote, the ZBA will continue its review of the proposed project. Continuing to review the project on the merits does not preclude the ZBA from ultimately denying the application on the basis of safe harbor status.

5. Appeal of Safe Harbor Status

If the ZBA votes to invoke safe harbor status, following the first public hearing staff will prepare and send written notice of that determination to the applicant. That notice will include the data used by the City to calculate the safe harbor and all supporting documentation. The applicant can challenge the ZBA's assertion of the safe harbor by filing an appeal with HLC within 15 days.

HLC will review the materials provided by both parties and issue a decision. During this process, the ZBA has the burden of proving that the City has met the safe harbor.

After HLC issues its decision, either the ZBA or the applicant can appeal the decision to the Housing Appeals Committee, the HLC's adjudicatory body. That appeal will be heard and determined through an evidentiary hearing in accordance with the Committee's procedural regulations. During this appeals process, the ZBA's hearing on the comprehensive permit is stayed until the conclusion of the appeal.

#### 6. Review of Application after Invoking Safe Harbor Status

If the applicant chooses not to appeal the ZBA's safe harbor determination, or if the safe harbor determination is upheld on appeal, the ZBA has significant discretion in reviewing the application. The ZBA may exercise its discretion to apply local zoning regulations and deny the comprehensive permit application without risk of the denial being overturned on appeal by the Housing Appeals Committee. At the same time, the ZBA also retains discretion to override or waive local zoning laws and issue the comprehensive permit after a safe harbor has been reached.

The review criteria for the ZBA does not change based on attainment of a safe harbor. The ZBA must still review the project to determine whether imposition of the City's local regulations is "consistent with local needs." This requires the ZBA to balance the regional need for affordable housing with the local concerns impacted by the proposed project.

Without safe harbor status, there is a presumption that the need for affordable housing outweighs local concerns—meaning there is a presumption that imposition of local zoning laws is *inconsistent* with local needs and should be waived through issuance of a comprehensive permit. After safe harbor status that presumption disappears. However, even after safe harbor status is reached, the ZBA may still decide that, based on the continued need for affordable housing, imposition of local zoning laws would still be inconsistent with local needs. Such a determination would allow the ZBA to grant a comprehensive permit after attainment of safe harbor status.

Therefore, the ZBA's review of a project after attaining safe harbor status will consider the same matters as it has under its traditional review: health and safety issues, site and building design, and preservation of open space. The practical difference is that review under safe harbor status gives the ZBA significant control over the project that it would not otherwise have under its review prior to safe harbor status. Because the ZBA has the discretion to deny the project based on safe harbor status, the ZBA has greater ability to require modifications or place conditions on the project if it decides to issue a comprehensive permit. If the ZBA ultimately decides to approve the project with conditions, it can do so without concern of whether those conditions make the project uneconomic. Even if the conditions make the project uneconomic, those conditions will be allowed because they will be conclusively presumed to be consistent with local needs.

Ultimately, regardless of safe harbor status, the ZBA retains discretion to decide whether or not to impose local zoning requirements.

7. Frequently Asked Questions

*Can the filing of a comprehensive permit application be timed to a period when the City briefly drops below safe harbor status?*

Technically, yes. If the City is below safe harbor status at the time the application is submitted, then the safe harbor does not apply to that project. However, prior to filing an application with the ZBA, applicants must first go through a month's long application and approval process with a subsidizing agency and be issued a determination of Project Eligibility. The subsidizing agency's approval of project eligibility expires after two years.

*What happens if a comprehensive permit application is filed when the City is below the safe harbor, but the proposed project has more units than is needed to reach the safe harbor?*

If the City has not achieved a safe harbor at the time of the application, then the ZBA cannot invoke safe harbor status and the project must be reviewed under the traditional standards for a comprehensive permit. The impact that project will have on future safe harbor calculations is irrelevant.

*Can a Chapter 40B comprehensive permit application go to the City Council for approval? Who decides if the City Council or the ZBA reviews a 40B project?*

Applications for comprehensive permits under Chapter 40B are within the exclusive jurisdiction of the ZBA. Chapter 40B gives the ZBA sole authority to issue a comprehensive permit for projects that contain the law's minimum required amount of affordable housing. This authority allows the ZBA to waive zoning requirements and other local regulations for such projects. Projects seeking a comprehensive permit under Chapter 40B cannot go before the City Council for approval.

It is up to landowners and developers to decide whether to seek approval of a multi-family project pursuant to a comprehensive permit issued by the ZBA or through a special permit issued by the City Council. There are many differences in project requirements and review process for comprehensive permits compared to special permits. For instance, comprehensive permit projects have greater affordability requirements and can request the waiver of zoning requirements, while special permit projects must comply with the City's zoning regulations and meet the affordable requirements set forth in the inclusionary housing provisions of the City's zoning ordinance.

*How often does the City need to recalculate the SHI?*

Every time a comprehensive permit application is filed with the ZBA.

*Does the State need to certify that the City has met the safe harbor designation?*



No, the state does not need to certify that the City has met the safe harbor designation in order for the ZBA to invoke the safe harbor. However, as set forth above, the state, either through HLC or the Housing Appeals Committee, will need to confirm the City's safe harbor calculation if it is challenged by an applicant.

*Are there specific timelines for the ZBA approval process for a 40B project?*

The ZBA is required to open the public hearing no later than 30 days from the date the comprehensive permit application is filed with the ZBA. If the ZBA believes it can deny the permit on safe harbor grounds, it must give written notice to the developer and HLC no later than 15 days from the opening of the public hearing. For this reason, the ZBA's decision whether to invoke safe harbor status and provide such written notice must be made at the first public hearing. Within 180 days from the opening of the public hearing, the ZBA must close the public hearing, and within 40 days from the close of the public hearing the ZBA must render a decision and file its written decision with the City Clerk. (In comparison, there is no time limit for the City Council to close a public hearing on a special permit application.)

Some of these 40B deadlines may be extended with the written agreement of the applicant. The same deadlines will apply regardless of safe harbor status, provided that an appeal of the ZBA's safe harbor determination will toll the 180-day deadline to close the public hearing.



Ruthanne Fuller  
Mayor

City of Newton, Massachusetts  
Office of the Mayor

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January 29, 2024

Honorable City Council  
Newton City Hall  
1000 Commonwealth Avenue  
Newton, MA 02459

Honorable City Councilors:

I respectfully submit this docket item to the Honorable Council requesting the review and possible updating of special permit, zone change, and site plan review fees related to the review of projects. The update of fees would require an ordinance amendment to Chapter 17. The Planning Department, City Clerk's Office and Law Department have been thinking about the legalities and conducting a preliminary review of internal expenditures related to special permits, such as public noticing requirements. They have also reviewed neighboring communities' fees. It has been over ten years since these fees have been adjusted (Sections 17-3 and 17-11 of the [Newton Ordinances](#)).

Thank you for your consideration of this matter.

Sincerely,

Mayor Ruthanne Fuller



Ruthanne Fuller  
Mayor

**City of Newton, Massachusetts**  
Department of Planning and Development  
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Barney Heath  
Director

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**MEMORANDUM**

**TO:** Mayor Ruthanne Fuller  
Jonathan Yeo, Chief Operating Officer

**FROM:** Barney Heath, Director, Department of Planning and Development  
Jennifer Caira, Deputy Director of Planning and Development  
Katie Whewell, Chief Planner for Current Planning  
Alyssa Sandoval, Deputy Chief Planner for Current Planning

**DATE:** January 29, 2024

**RE:** Docket Request to Consider Updates to the Special Permit, Zone Change, and Site Plan Review Fees—Chapter 17 of General Ordinances

**CC:** Alissa O. Giuliani, City Solicitor  
Jonah Temple, Deputy City Solicitor  
Andrew Lee, Assistant City Solicitor  
Carol Moore, City Clerk  
Cassidy Flynn, Deputy City Clerk  
Scott Matthews, Assistant Clerk of the Council

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The Planning, City Clerk, and Law Departments respectfully request that you docket this item to review and potentially update special permit, zone change, and site plan review fees related to the review of projects. The update of fees would require an ordinance amendment to Chapter 17. The Planning Department, City Clerk's Office and Law Department have been conducting a preliminary review of internal expenditures related to special permits, such as public noticing requirements as well as a review of neighboring communities' fees. The analysis indicates that permit and review fees may need further consideration as it has been over 10 years since these fees have been adjusted (Sections 17-3 and 17-11 of the [Newton Ordinances](#)). In addition, a new process implemented as a result of the new Village Center Overlay Zoning will now require a separate site plan review through the Planning Board and consideration of a fee should be done in a timely manner.<sup>1</sup>

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<sup>1</sup> For any construction or substantial reconstruction of one or more buildings in the VC2 or VC3 zones on a lot fifteen-thousand (15,000) square feet or larger but less than thirty-thousand (30,000) square feet.

**Background for Request**

Typically, the City of Newton regulates projects through the issuance of special permits for a project that requires relief from the Newton Zoning Ordinance (NZO). Special permits can be issued for projects of any size, from a driveway that may have a non-conforming setback or an oversized dormer to a very large residential and/or commercial project involving many residential units, commercial square footage, site development, and/or other transportation-related changes. Special permit applications are reviewed by the Land Use Committee of the Newton City Council and review is managed by the Planning and Development Department's Current Planning staff.

A new site plan review requirement has been recently adopted by the City Council through the Village Center Overlay Zoning (VCOD) district. While site plan review is expected to only be required for projects within a certain size, planning staff review/effort and Planning Board review will be required for projects meeting these criteria. At this time, there is no fee specified in the Newton Ordinances for the site plan review requirement under VCOD.

A detailed analysis of fees will be presented to the Council in advance of the committee meeting.



To: Zoning & Planning Committee  
From: Councilor R. Lisle Baker, Chair; and Councilor John Oliver, Vice-Chair  
Re: Submitting Questions Re #86-24 Pre-Budget Hearing  
Date: February 23, 2024

### Memorandum

Dear Colleagues,

At the next ZAP meeting on Monday, February 26, 2024, we will be conducting a pre-budget hearing for each Department that the Committee oversees the budget for. We have asked Ms. Norton to include materials of last years budget discussions along with the budget reports for each department to aid in your preparation. To aid staff in their presentation of the item we are asking that Councilors submit questions in advance if possible. Questions should be submitted to Ms. Norton by 1pm on Monday, February 26 to allow staff time to prepare in advance of the meeting.

Sincerely,

R. Lisle Baker, Chair of Zoning & Planning Committee

John Oliver, Vice-Chair of Zoning & Planning Committee

# Planning Department

## Mission

*To provide community-based planning that guides the future of the city while advancing efforts to preserve our historical roots, provide diverse and affordable housing options, promote a strong and resilient economy, pursue a climate friendly Newton environment, offer varied transportation options, and maintain a continued emphasis on the quality of the place that is Newton.*



MetroWest/Civico Development Proposal for West Newton Armory (43 units of affordable rental housing to be created)

The Department of Planning and Development is charged with both planning for Newton's future and undertaking actions today consistent with adopted policy as well as current rules and regulations. Members of the department provide professional expertise and guidance to the following boards and commissions: the Auburndale Historic District Commission, the Chestnut Hill Historic District Commission, the City Council, the Commission on Disability, the Conservation Commission, the Economic Development Commission, the Fair Housing Committee, the Newton Affordable Housing Trust, the Newton Historic Commission, the Newton Housing Partnership, the Newtonville Historic District Commission, the Planning and Development Board, the Upper Falls Historic District Commission, the Urban Design Commission, the WestMetro HOME Consortium, and the Zoning Board of Appeals.

The Planning Department staff provided technical expertise and guidance to help facilitate many important initiatives in Fiscal Year 2023:

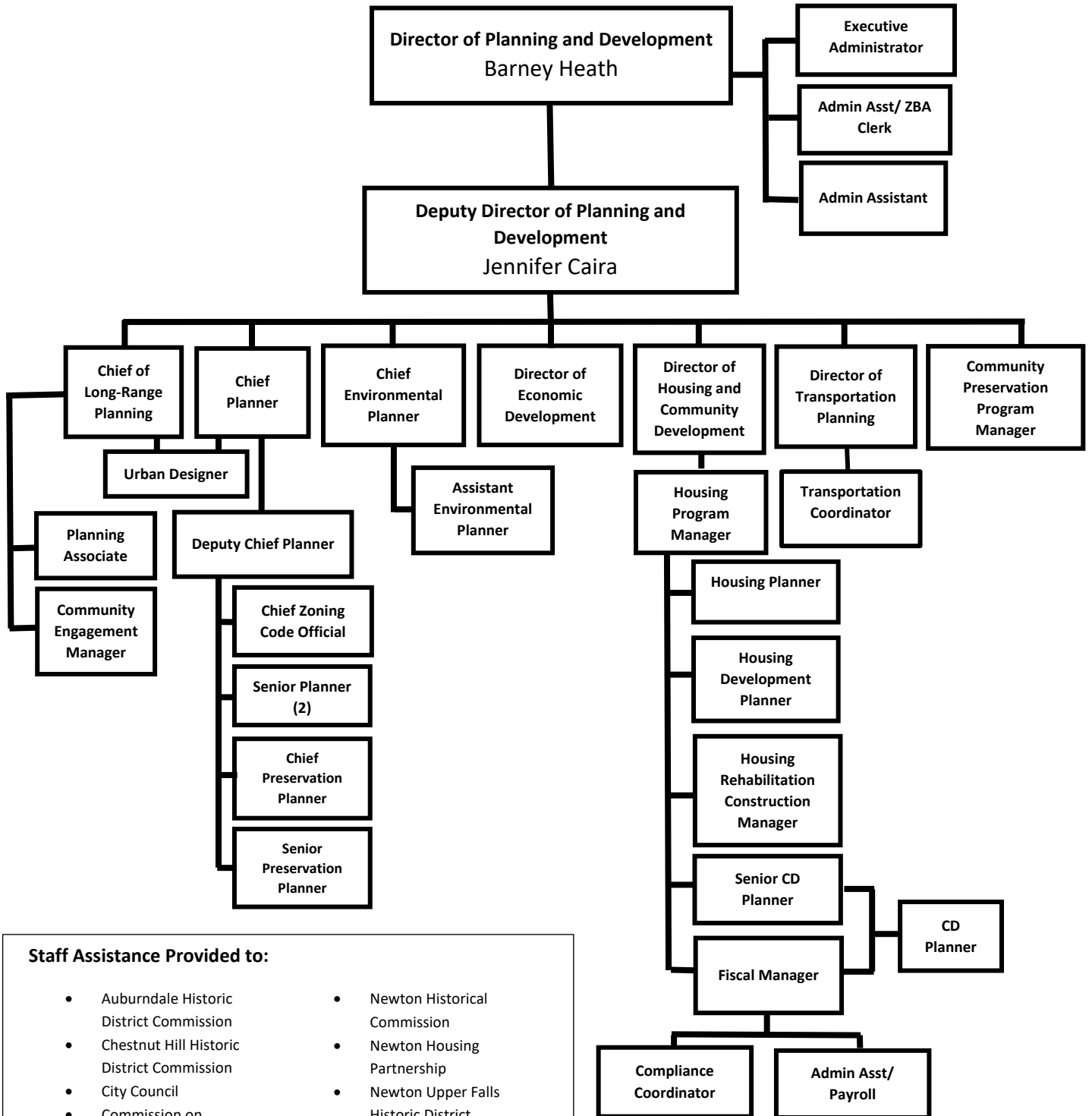
- Transitioned all 14 Planning Department development review applications to NewGov, creating an online permitting process integrated across city departments with streamlined workflow and improved public access to records.
- Completed an update to the City's accessory dwelling unit ordinance.
- Analyzed and presented recommendations on 100 special permit requests to the City Council Land Use Committee.
- Established the Newton Affordable Housing Trust.
- Produced an initial version 1.0 of proposed village center zoning.
- Moved forward with ordinance amendments to make outdoor on-street dining permanent.
- Successfully positioned the West Newton Armory affordable housing development to gain a comprehensive permit and apply for low-income housing tax credits.
- Continued our Planning Department's mission to endeavor to provide excellent customer service to the public and first-rate professional support to the following Boards and Commissions:
  - ❖ City Council
  - ❖ Auburndale, Chestnut Hill, Newtonville and Newton Upper Falls Historic District Commissions
  - ❖ Commission on Disability
  - ❖ Community Preservation Committee
  - ❖ Conservation Commission
  - ❖ Economic Development Commission
  - ❖ Fair Housing Commission
  - ❖ Farm Commission
  - ❖ Newton Affordable Housing Trust
  - ❖ Newton Historical Commission
  - ❖ Newton Housing Partnership

- ❖ Planning and Development Board
- ❖ Urban Design Commission
- ❖ WestMetro HOME Affordable Housing Consortium
- ❖ Zoning Board of Appeals

*Barney S. Heath*

Barney S. Heath, Director  
Newton Department of Planning and  
Development

**PLANNING AND DEVELOPMENT**



**Staff Assistance Provided to:**

- Auburndale Historic District Commission
- Chestnut Hill Historic District Commission
- City Council
- Commission on Disabilities
- Community Preservation Committee
- Conservation Commission
- Economic Development Commission
- Fair Housing Committee
- Farm Commission
- Newton Affordable Housing Trust
- Newton Historical Commission
- Newton Housing Partnership
- Newton Upper Falls Historic District Commission
- Newtonville Historic District Commission
- Planning & Development Board
- Urban Design Commission
- WestMetro HOME Consortium
- Zoning Board of Appeals



# Financial and Operating Highlights

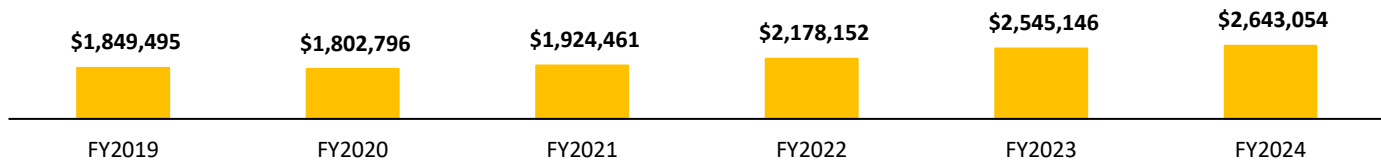
## Financial Highlights

	< -----Actual ----->				Original FY2023	Proposed FY2024
	FY2019	FY2020	FY2021	FY2022		
<b>Expenditure by Department</b>						
Conservation	\$ 133,960	\$ 183,991	\$ 210,147	\$ 166,975	\$ 208,424	\$ 215,449
Planning	\$ 1,439,623	\$ 1,352,393	\$ 1,423,311	\$ 1,703,864	\$ 1,999,916	\$ 2,062,786
ZBA	\$ 48,047	\$ 52,969	\$ 55,440	\$ 49,992	\$ 66,369	\$ 72,763
Econ Development	\$ 107,821	\$ 89,123	\$ 108,528	\$ 104,381	\$ 121,134	\$ 139,070
Historical	\$ 120,043	\$ 124,319	\$ 127,035	\$ 152,940	\$ 149,303	\$ 152,986
<b>Total</b>	<b>\$ 1,849,495</b>	<b>\$ 1,802,796</b>	<b>\$ 1,924,461</b>	<b>\$ 2,178,152</b>	<b>\$ 2,545,146</b>	<b>\$ 2,643,054</b>
<b>% Incr</b>	6.80%	-2.52%	6.75%	13.18%	16.85%	3.85%

## Personnel

Full-Time Employees	19	19	19	19	22	22
Part-Time Employees	3	3	3	3	2	3
<b>Total</b>	22	22	22	22	24	25

## Total Planning Expenditures



## Operating Highlights (January 1, 2022- December 31, 2022)

- 591 Historic Property Applications Reviewed
- 379 Highest One Day Ridership for NewMo Ride Service
- 115 Development Review Team Meetings
- 112 Formal Zoning Review Memorandum Provided
- 100 Special Permits Presented to Land Use Committee
- 38 Wetland Permits Issued
- 17 City Boards and Commissions Staffed
- 16 Transportation Granted Garnered
- 15 Restaurants with On-Street Dining

# Planning and Development

## Fiscal Year 2024 Outcomes and Strategies

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### Outcome 1

#### Plan for Newton's Future

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Newton has a well-deserved reputation as a great place to live because of its quality of life and its unique villages and neighborhoods. Much of our work in the Planning Department is focused on how

our City retains this quality of place and pro-actively plan for Newton's future and meet the challenges of our times, including traffic congestion, the high cost of housing, and climate change. Our goal is to provide the best possible guidance to our community's leaders to achieve the community's desired outcomes for the City.

Goals for Fiscal Year 2024 include:

- Continuing to develop zoning recommendations for village centers and commercial corridors to fulfill the City's housing, economic, transportation and climate goals.
- Streamlining further interdepartmental coordination and Special Permit condition tracking through NewGov.
- Providing technical analysis and recommendations for Special Permits and Comprehensive Permits so new development is consistent with City goals.
- Safeguarding and improving the City's Conservation Areas to ensure safe access and enjoyment of these special natural areas.

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The Planning Department will continue assessing strategies and provide professional input for the health and vibrancy of Newton's village centers:

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### Outcome 2

#### Strengthen Our Village Centers

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- Undertake an in-depth analysis of village center parking dynamics and provide actionable recommendations.
- Collaborate with stakeholders and Newton DPW to finalize Newton Highlands village center streetscape design.
- Update the commercial zoning use table to reflect 21<sup>st</sup> century use categories.
- Support our businesses and non-profits.

# Planning and Development

## Fiscal Year 2024 Outcomes and Strategies

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### Outcome 3

#### Improve Newton's Transportation Systems

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The Planning Department in partnership with fellow City departments and state agencies, will build on our progress in improving mobility options for Newton's residents and workforce:

- Develop a bicycle/pedestrian master plan to encourage safer mobility across Newton.
- Work with the MBTA to finalize the accessible design of our three commuter rail stations, while working with state and federal partners to advance construction; work with the T as construction begins on the new accessible Newton Highlands station.
- Collaborate with MassDOT on Commonwealth Avenue Carriageway project in Auburndale.
- Embark on long-term pilot design for stretch of Washington Street between Chestnut Street and Lowell Avenue.
- Complete a traffic calming project on Albemarle Road to improve safety conditions.
- Expand our electric vehicle charging infrastructure citywide.

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The Planning Department will continue seeking strategies to address inequities and challenges faced by people with low incomes.

- Assess how to redevelop the city owned portion of the former Walker Center property into permanently affordable housing.
- Support the Newton Housing Partnership, Newton Affordable Housing Trust, and the Fair Housing Committee in our efforts to affirmatively further fair housing through production and preservation of housing, supportive services, and innovative policies.
- Continue to collaborate with Newton Health and Human Services and Boston-based Economic Mobility Pathways (EMPath) to implement Newton's Economic Stability/Mobility Initiative for 50 low-income families throughout Newton over two years.
- Oversee the implementation of the WestMetro HOME Consortium's Fair Housing Testing Program, in partnership with the Suffolk Law School's Housing Discrimination Testing Program.
- Initiate the funding allocation recommendations of the WestMetro HOME-ARP plan for new rental housing production, supportive services, Tenant Based Rental Assistance (TBRA), and non-congregate shelter for homeless individuals and families across the 13-community WestMetro HOME Consortium region.

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### Outcome 4

#### Address Challenges Faced by Low-Income Residents

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FUND: 0001 - GENERAL FUND  
DEPARTMENT: 114 - PLANNING

CITY OF NEWTON BUDGET  
DEPARTMENT LEGAL LEVEL OF CONTROL

	ACTUAL 2020	ACTUAL 2021	ACTUAL 2022	ORIGINAL 2023	RECOMMENDED 2024	CHANGE 2023 to 2024
<b>PLANNING SUMMARY</b>						
51 - PERSONNEL SERVICES	1,504,803	1,584,873	1,745,426	1,971,541	2,047,145	75,604
52 - EXPENSES	121,225	114,147	223,023	276,200	300,000	23,800
58 - CAPITAL EXPENSES	42,981	66,405	840	25,000	0	-25,000
57 - FRINGE BENEFITS	133,075	159,036	208,863	272,405	295,909	23,504
<b>TOTAL DEPARTMENT</b>	<b>1,802,085</b>	<b>1,924,461</b>	<b>2,178,152</b>	<b>2,545,146</b>	<b>2,643,054</b>	<b>97,908</b>
<b>CONSERVATION</b>						
51 - PERSONNEL SERVICES	137,664	141,251	141,363	155,517	162,333	6,816
52 - EXPENSES	429	247	22,562	25,450	50,550	25,100
58 - CAPITAL EXPENSES	42,981	66,405	840	25,000	0	-25,000
57 - FRINGE BENEFITS	2,210	2,244	2,209	2,457	2,566	109
<b>TOTAL CONSERVATION</b>	<b>183,284</b>	<b>210,147</b>	<b>166,975</b>	<b>208,424</b>	<b>215,449</b>	<b>7,025</b>
<b>PLANNING</b>						
51 - PERSONNEL SERVICES	1,118,553	1,176,299	1,332,697	1,535,338	1,596,959	61,621
52 - EXPENSES	117,207	105,127	186,345	235,950	230,000	-5,950
57 - FRINGE BENEFITS	116,634	141,885	184,823	228,628	235,827	7,199
<b>TOTAL PLANNING</b>	<b>1,352,393</b>	<b>1,423,311</b>	<b>1,703,864</b>	<b>1,999,916</b>	<b>2,062,786</b>	<b>62,870</b>
<b>ZONING BD OF APPEALS</b>						
51 - PERSONNEL SERVICES	50,889	52,849	42,807	53,864	56,896	3,032
52 - EXPENSES	1,376	1,839	3,716	2,000	4,750	2,750
57 - FRINGE BENEFITS	704	751	3,469	10,505	11,117	612
<b>TOTAL ZONING BD OF APPEALS</b>	<b>52,969</b>	<b>55,440</b>	<b>49,992</b>	<b>66,369</b>	<b>72,763</b>	<b>6,394</b>
<b>ECONOMIC DEVELOPMENT</b>						
51 - PERSONNEL SERVICES	87,318	101,739	95,878	101,718	101,328	-390
52 - EXPENSES	548	5,320	7,095	10,450	10,250	-200
57 - FRINGE BENEFITS	1,252	1,469	1,408	8,966	27,492	18,526
<b>TOTAL ECONOMIC DEVELOPMENT</b>	<b>89,119</b>	<b>108,528</b>	<b>104,381</b>	<b>121,134</b>	<b>139,070</b>	<b>17,936</b>
<b>HISTORICAL</b>						
51 - PERSONNEL SERVICES	110,380	112,735	132,681	125,104	129,629	4,525
52 - EXPENSES	1,665	1,614	3,305	2,350	4,450	2,100
57 - FRINGE BENEFITS	12,275	12,686	16,954	21,849	18,907	-2,942
<b>TOTAL HISTORICAL</b>	<b>124,319</b>	<b>127,035</b>	<b>152,940</b>	<b>149,303</b>	<b>152,986</b>	<b>3,683</b>

FUND: 0001 - GENERAL FUND  
DEPARTMENT: 114 - PLANNING

CITY OF NEWTON BUDGET  
DEPARTMENTAL DETAIL

	ACTUAL 2020	ACTUAL 2021	ACTUAL 2022	ORIGINAL 2023	RECOMMENDED 2024	CHANGE 2023 to 2024
<b>114 - PLANNING</b>						
<b>0111471 - CONSERVATION</b>						
<b>PERSONNEL SERVICES</b>						
511001 FULL TIME SALARIES	137,164	140,751	136,885	154,267	160,933	6,666
514001 LONGEVITY	0	0	3,000	750	900	150
515005 BONUSES	500	0	0	0	0	0
515006 VACATION BUY BACK			1,478	0	0	0
515102 CLEANING ALLOWANCE	500	500	0	500	500	0
<b>TOTAL PERSONNEL SERVICES</b>	<b>138,164</b>	<b>141,251</b>	<b>141,363</b>	<b>155,517</b>	<b>162,333</b>	<b>6,816</b>
<b>EXPENSES</b>						
534100 POSTAGE	250	222	279	250	250	0
534200 PRINTING	206	0	0	0	0	0
542000 OFFICE SUPPLIES	179	25	0	200	100	-100
546000 GROUNDS MAINT SUPPLIE	0	0	22,173	25,000	50,000	25,000
571000 VEHICLE USE REIMBURSE		0	110	0	200	200
<b>TOTAL EXPENSES</b>	<b>635</b>	<b>247</b>	<b>22,562</b>	<b>25,450</b>	<b>50,550</b>	<b>25,100</b>
<b>FRINGE BENEFITS</b>						
57DENT DENTAL INSURANCE	225	208	35	202	212	10
57HLTH HEALTH INSURANCE	0	0	139	0	0	0
57MEDA MEDICARE PAYROLL TAX	1,985	2,036	2,036	2,255	2,354	99
<b>TOTAL FRINGE BENEFITS</b>	<b>2,210</b>	<b>2,244</b>	<b>2,209</b>	<b>2,457</b>	<b>2,566</b>	<b>109</b>
<b>CAPITAL EXPENSES</b>						
584100 GROUNDS IMPROVEMENT	42,981	66,405	840	25,000	0	-25,000
<b>TOTAL CAPITAL EXPENSES</b>	<b>42,981</b>	<b>66,405</b>	<b>840</b>	<b>25,000</b>	<b>0</b>	<b>-25,000</b>
<b>TOTAL CONSERVATION</b>	<b>183,991</b>	<b>210,147</b>	<b>166,975</b>	<b>208,424</b>	<b>215,449</b>	<b>7,025</b>

<b>CITY OF NEWTON BUDGET DEPARTMENTAL DETAIL</b>
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		ACTUAL 2020	ACTUAL 2021	ACTUAL 2022	ORIGINAL 2023	RECOMMENDED 2024	CHANGE 2023 to 2024
<b>0111475 - PLANNING</b>							
<b>PERSONNEL SERVICES</b>							
511001	FULL TIME SALARIES	1,028,267	1,102,567	1,239,251	1,389,889	1,416,481	26,592
511101	PART TIME < 20 HRS/WK	1,403	0	0	0	99,325	99,325
511102	PART TIME > 20 HRS/WK	65,046	67,391	73,235	126,949	68,153	-58,796
513010	REGULAR OVERTIME	8,835	100	2,557	10,000	5,000	-5,000
514001	LONGEVITY	1,148	1,148	5,823	5,075	4,575	-500
515006	VACATION BUY BACK	10,354	1,594	8,330	0	0	0
515102	CLEANING ALLOWANCE	3,500	3,500	3,500	3,425	3,425	0
	<b>TOTAL PERSONNEL SERVICES</b>	<b>1,118,553</b>	<b>1,176,299</b>	<b>1,332,697</b>	<b>1,535,338</b>	<b>1,596,959</b>	<b>61,621</b>
<b>EXPENSES</b>							
527400	RENTAL - EQUIPMENT	2,935	2,446	2,935	3,000	3,000	0
527500	RENTAL/LEASE - PROPER	0	20,000	0	0	0	0
530100	CONSULTANTS	97,210	67,754	154,103	200,000	200,000	0
530209	PUBLIC MEETING EXPENS	269	2,280	250	2,500	2,500	0
531300	TEMP STAFFING SERVICE			13,972	0	0	0
531900	TRAINING EXPENSES	0	206	540	2,500	2,000	-500
534010	TELEPHONE	308	0	0	500	0	-500
534020	CELLULAR TELEPHONES	2,009	1,494	1,369	2,250	1,750	-500
534100	POSTAGE	916	1,543	1,076	2,500	2,000	-500
534200	PRINTING	6,731	2,110	4,286	7,000	5,000	-2,000
534300	ADVERTISING/PUBLICATIO	545	1,112	1,635	7,500	4,000	-3,500
542000	OFFICE SUPPLIES	1,589	3,308	2,554	2,500	2,500	0
558500	COMPUTER SUPPLIES	0	931	2,691	450	1,500	1,050
571000	VEHICLE USE REIMBURSE	430	0	25	750	750	0
571100	IN-STATE CONFERENCES	1,094	255	70	1,500	1,500	0
571200	REFRESHMENTS/MEALS	0	0	0	0	1,000	1,000
572000	OUT-OF-STATE TRAVEL	1,847	0	562	1,000	1,000	0
573000	DUES & SUBSCRIPTIONS	1,324	1,689	277	2,000	1,500	-500
	<b>TOTAL EXPENSES</b>	<b>117,207</b>	<b>105,127</b>	<b>186,345</b>	<b>235,950</b>	<b>230,000</b>	<b>-5,950</b>
<b>FRINGE BENEFITS</b>							
57DENT	DENTAL INSURANCE	2,609	2,906	3,226	4,118	4,550	432
57HLTH	HEALTH INSURANCE	77,657	92,660	123,174	161,767	172,223	10,456
57LIFE	BASIC LIFE INSURANCE	319	362	375	513	477	-36
57MEDA	MEDICARE PAYROLL TAX	15,197	16,073	18,166	22,117	23,172	1,055
57OPEB	OPEB CONTRIBUTION	20,851	29,885	39,881	40,113	35,405	-4,708
	<b>TOTAL FRINGE BENEFITS</b>	<b>116,634</b>	<b>141,885</b>	<b>184,823</b>	<b>228,628</b>	<b>235,827</b>	<b>7,199</b>
<b>TOTAL PLANNING</b>		<b>1,352,393</b>	<b>1,423,311</b>	<b>1,703,864</b>	<b>1,999,916</b>	<b>2,062,786</b>	<b>62,870</b>

CITY OF NEWTON BUDGET  
DEPARTMENTAL DETAIL

	ACTUAL 2020	ACTUAL 2021	ACTUAL 2022	ORIGINAL 2023	RECOMMENDED 2024	CHANGE 2023 to 2024
<b>0111476 - ZONING BD OF APPEALS</b>						
<b>PERSONNEL SERVICES</b>						
511001 FULL TIME SALARIES	50,889	52,219	39,474	53,364	56,396	3,032
513010 REGULAR OVERTIME	0	0	297	0	0	0
514001 LONGEVITY	0	630	0	0	0	0
515006 VACATION BUY BACK			3,036	0	0	0
515102 CLEANING ALLOWANCE	0	0	0	500	500	0
<b>TOTAL PERSONNEL SERVICES</b>	<b>50,889</b>	<b>52,849</b>	<b>42,807</b>	<b>53,864</b>	<b>56,896</b>	<b>3,032</b>
<b>EXPENSES</b>						
534100 POSTAGE	533	266	808	750	1,500	750
534300 ADVERTISING/PUBLICATIO	844	1,574	1,966	1,250	2,500	1,250
558500 COMPUTER SUPPLIES			942	0	750	750
<b>TOTAL EXPENSES</b>	<b>1,376</b>	<b>1,839</b>	<b>3,716</b>	<b>2,000</b>	<b>4,750</b>	<b>2,750</b>
<b>FRINGE BENEFITS</b>						
57DENT DENTAL INSURANCE	0	0	62	202	210	8
57HLTH HEALTH INSURANCE	0	0	2,216	7,491	7,896	405
57LIFE BASIC LIFE INSURANCE	0	0	14	57	60	3
57MEDA MEDICARE PAYROLL TAX	704	751	602	781	828	47
57OPEB OPEB CONTRIBUTION	0	0	574	1,974	2,123	149
<b>TOTAL FRINGE BENEFITS</b>	<b>704</b>	<b>751</b>	<b>3,469</b>	<b>10,505</b>	<b>11,117</b>	<b>612</b>
<b>TOTAL ZONING BD OF APPEALS</b>	<b>52,969</b>	<b>55,440</b>	<b>49,992</b>	<b>66,369</b>	<b>72,763</b>	<b>6,394</b>

CITY OF NEWTON BUDGET  
DEPARTMENTAL DETAIL

	ACTUAL 2020	ACTUAL 2021	ACTUAL 2022	ORIGINAL 2023	RECOMMENDED 2024	CHANGE 2023 to 2024
<b>0111482 - ECONOMIC DEVELOPMENT</b>						
<b>PERSONNEL SERVICES</b>						
511001 FULL TIME SALARIES	76,430	101,739	88,388	101,718	101,328	-390
511101 PART TIME < 20 HRS/WK	4,456	0	0	0	0	0
515006 VACATION BUY BACK	6,432	0	7,490	0	0	0
<b>TOTAL PERSONNEL SERVICES</b>	<b>87,318</b>	<b>101,739</b>	<b>95,878</b>	<b>101,718</b>	<b>101,328</b>	<b>-390</b>
<b>EXPENSES</b>						
534100 POSTAGE	0	0	0	200	200	0
534200 PRINTING	0	0	0	500	500	0
534300 ADVERTISING/PUBLICATIO	0	0	0	750	750	0
542000 OFFICE SUPPLIES	119	0	0	500	500	0
571100 IN-STATE CONFERENCES	238	0	0	500	500	0
571200 REFRESHMENTS/MEALS	0	0	0	500	500	0
573000 DUES & SUBSCRIPTIONS	190	5,320	7,095	7,500	7,300	-200
<b>TOTAL EXPENSES</b>	<b>548</b>	<b>5,320</b>	<b>7,095</b>	<b>10,450</b>	<b>10,250</b>	<b>-200</b>
<b>FRINGE BENEFITS</b>						
57DENT DENTAL INSURANCE	0	0	0	0	528	528
57HLTH HEALTH INSURANCE	0	0	0	7,491	21,675	14,184
57LIFE BASIC LIFE INSURANCE	5	0	0	0	0	0
57MEDA MEDICARE PAYROLL TAX	1,252	1,469	1,408	1,475	1,475	0
57OPEB OPEB CONTRIBUTION	0	0	0	0	3,814	3,814
<b>TOTAL FRINGE BENEFITS</b>	<b>1,257</b>	<b>1,469</b>	<b>1,408</b>	<b>8,966</b>	<b>27,492</b>	<b>18,526</b>
<b>TOTAL ECONOMIC DEVELOPMENT</b>	<b>89,123</b>	<b>108,528</b>	<b>104,381</b>	<b>121,134</b>	<b>139,070</b>	<b>17,936</b>



CITY OF NEWTON BUDGET  
DEPARTMENTAL DETAIL

	ACTUAL 2020	ACTUAL 2021	ACTUAL 2022	ORIGINAL 2023	RECOMMENDED 2024	CHANGE 2023 to 2024
<b>0111494 - HISTORICAL</b>						
<b>PERSONNEL SERVICES</b>						
511001 FULL TIME SALARIES	109,081	111,735	125,282	124,104	90,008	-34,096
511101 PART TIME < 20 HRS/WK	298	0	0	0	38,221	38,221
514001 LONGEVITY	500	500	500	500	900	400
515006 VACATION BUY BACK	0	0	6,399	0	0	0
515102 CLEANING ALLOWANCE	500	500	500	500	500	0
<b>TOTAL PERSONNEL SERVICES</b>	<b>110,380</b>	<b>112,735</b>	<b>132,681</b>	<b>125,104</b>	<b>129,629</b>	<b>4,525</b>
<b>EXPENSES</b>						
531400 REGIST/RECORDING FEES	0	0	0	100	100	0
534100 POSTAGE	1,428	1,486	2,764	1,600	3,500	1,900
534200 PRINTING	151	56	100	250	250	0
534300 ADVERTISING/PUBLICATIO	0	0	223	100	300	200
542000 OFFICE SUPPLIES	86	72	219	300	300	0
<b>TOTAL EXPENSES</b>	<b>1,665</b>	<b>1,614</b>	<b>3,305</b>	<b>2,350</b>	<b>4,450</b>	<b>2,100</b>
<b>FRINGE BENEFITS</b>						
57DENT DENTAL INSURANCE	225	208	289	403	319	-84
57HLTH HEALTH INSURANCE	6,660	6,926	10,302	14,983	11,844	-3,139
57LIFE BASIC LIFE INSURANCE	0	0	21	57	30	-27
57MEDA MEDICARE PAYROLL TAX	1,511	1,558	1,850	1,814	1,887	73
57OPEB OPEB CONTRIBUTION	3,879	3,994	4,492	4,592	4,827	235
<b>TOTAL FRINGE BENEFITS</b>	<b>12,275</b>	<b>12,686</b>	<b>16,954</b>	<b>21,849</b>	<b>18,907</b>	<b>-2,942</b>
<b>TOTAL HISTORICAL</b>	<b>124,319</b>	<b>127,035</b>	<b>152,940</b>	<b>149,303</b>	<b>152,986</b>	<b>3,683</b>
<b>TOTAL PLANNING</b>	<b>1,802,796</b>	<b>1,924,461</b>	<b>2,178,152</b>	<b>2,545,146</b>	<b>2,643,054</b>	<b>97,908</b>

# Housing and Community Development Division

## Mission

*To expand opportunity through the production and preservation of affordable housing, the rehabilitation of existing affordable housing, the expansion of equal access to housing, the provision of human services and homelessness prevention and support services, and the removal of architectural barriers for people with disabilities.*



Top: Childcare Program from the West Suburban YMCA



Right: Walker Center Historic Home – affordable housing feasibility study in FY24

The Housing & Community Development Division's primary functions are the allocation and management of the City's Community Development Block Grant (CDBG), HOME Investment Partnerships Program (HOME), and Emergency Solutions Grant (ESG) funds received on an annual basis from the U.S. Department of Housing & Urban Development (HUD).

- CDBG funds are used to support Affordable Housing, Human Services, Architectural Access, and Program Administration.
- The purpose of the HOME Program is to support a range of housing activities that expand affordable housing opportunities for low- and moderate-income households. As the lead entity for the WestMetro HOME Consortium, the City of Newton receives and administers HOME funds on behalf of the City and twelve other neighboring member communities.
- ESG funds are used to support Emergency Shelter Services and Homelessness Prevention and Rapid Rehousing Services.

## 114a- Housing & Community Development

Fiscal Year 2023 was a busy and productive one for Newton's Housing and Community Development Division within the Planning and Development Department. We received approximately \$4M in federal Community Development Block Grant (CDBG), HOME Investment Partnership and Emergency Solutions Grant (ESG) funds, including program income. We continued to utilize federal ARPA funds to support emergency assistance programs and launched a partnership with Economic Mobility Pathways (EMPath) to provide wrap-around services and cash incentives to low-income families in Newton most impacted by the pandemic for economic stability and mobility. We submitted to HUD the WestMetro HOME Consortium HOME-ARP Needs Assessment and Allocation Plan, identifying strategies for how the Consortium will utilize \$5.4 million in federal HOME-ARP funds to support homeless individuals and families and those at-risk of homelessness across the 13 communities. We used these annual entitlement funds and ARPA funds to support Newton's efforts to assist people most in need.

Highlights include professional and financial support for:

- The redevelopment of the West Newton Armory as 100% permanently affordable housing.
- The completion of CDBG-funded rehabilitation projects across the former CAN-DO affordable housing portfolio, now owned and operated by the Newton Housing Authority.
- The completion of constructions and occupancy of 2Life Communities' Golda Meir House Expansion Project and the Newton Housing Authority's Haywood House – affordable housing for extremely low-income to moderate-income seniors; and the ongoing substantial renovation of 2Life Communities' Coleman House – affordable units for extremely low-income seniors.
- The completion of construction of a new Winter Night Warming Center for homeless individuals, sponsored by the Community Day Center of Waltham, made possible through the allocation of approximately \$428,000 of ESG-CV funds.
- The completion of the WestMetro HOME Consortium / MAPC parking utilization study at housing locations and the launch of the two-year fair housing testing program in partnership with Suffolk Law School's Housing Discrimination Testing Program.
- The allocation of ~\$165,000 in ESG funding across agencies and projects serving homeless and at-risk of homelessness individuals throughout Newton, Brookline, Waltham, and Watertown.
- The allocation of ~\$310,000 in CDBG funding across human service agencies serving low-to-moderate income individuals, families, youth, adults with disabilities and seniors. Thousands of residents were served through a myriad of programs, including financial literacy, residential services, mental health services, and affordable childcare/youth programming.
- The removal of architectural barriers in public spaces and thoroughfares for people with disabilities through the creation of an accessible pathway along the perimeter of Richard McGrath Park and two accessible crossings at the three-way intersection of Langley Road, Warren Street and Chase Street.

## 114a- Housing & Community Development

We are proud to serve Newton's residents as we expand affordable housing and support economic diversity across the city, support the community's low-to-moderate income population across the lifespan, prevent homelessness, and promote access for persons of all abilities.

*Amanda Berman*

Amanda Berman, Director of Housing and  
Community Development

and

*Barney S. Heath*

Barney S. Heath, Director  
Newton Department of Planning and  
Development

# Newton Housing & Community Development Division Fiscal Year 2024 Outcomes and Strategies

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## Outcome 1

### Create and Preserve Affordable Rental and Homeownership Housing

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The Housing and Community Development Division will continue to utilize CDBG and HOME funds for a variety of programs and activities designed to create, rehabilitate, and preserve affordable housing opportunities across Newton, as well as expand the stock of accessible and visitable

housing. These will be consistent with the FY2022-FY2025 Consolidated Plan and FY2024 Annual Action Plan.

In FY2024, the City of Newton will support the redevelopment of the West Newton Armory as 100% affordable housing with supportive services through the allocation of Newton's CDBG, HOME, Inclusionary Zoning and Community Preservation Act funds, as well as WestMetro HOME Consortium Consolidated Pool and CHDO Set-Aside funds. After receiving seven development proposals in September 2021 in response to the City's RFP, Mayor Fuller awarded Metro West Collaborative Development / Civico Development as the redevelopment team for this exciting project. The project will provide 43 units of intergenerational housing and supportive services to households at or below 60% AMI and 30% AMI, community space and passive open space for residents, a historic exhibit for the public, and new office space for Metro West Collaborative Development. In early January 2023, the development team received its Comprehensive Permit from the Newton Zoning Board of Appeals and submitted its One Stop application to DHCD for LIHTC funds and other state subsidies. Construction is estimated to commence in the spring of 2025, with occupancy expected in the fall of 2026.

Division staff will also push forward efforts related to the Walker Center Housing Feasibility Study in FY2024. In FY23, the City was awarded a DHCD Community One Stop grant in the amount of \$235,500 to contract with a consultant to assess the feasibility of redeveloping the recently acquired Walker Center property (four historic homes) into permanently affordable housing. Staff will also work with the City Council's Real Property Reuse Committee on this important endeavor.

In early FY2024, construction will wrap on the CDBG-funded rehabilitation of the former CAN-DO portfolio, which is now owned by the Newton Housing Authority. In FY2021, CDBG funds were used to assist in the acquisition of the portfolio through the reduction of the portfolio's existing debt. Throughout FY23, CDBG funds assisted with capital needs improvements across the portfolio, which house some of Newton's most vulnerable populations. CDBG funds will continue to be used in FY24 to support some of the Newton Housing Authority's other management portfolio units (57 units in total, across 13 properties). A 2019 Capital Needs Assessment revealed \$2,924,044 in recommended Year 1 expenditures. At this time, City staff are working with the NHA on two CDBG-eligible rehab projects at two of these properties: 390 Newtonville Avenue (roof, windows, and kitchen) and 45 Pelham Street (project scope TBD).

# Newton Housing & Community Development Division

## Fiscal Year 2024 Outcomes and Strategies

Another important preservation project is 2Life Communities’ Coleman House Senior Preservation Project. The City is supporting the preservation of 146 affordable senior housing units with FY2021 CDBG funds and FY2022 HOME funds. In addition, the WestMetro HOME Consortium awarded the project a total of \$522,539 of combined FY19, FY20, and FY21 Consolidated Pool funds. The funds are being used to conduct a comprehensive rehabilitation to building mechanical systems and infrastructure, as well as accessibility design upgrades to each of the 146 units. The improvements will make the project more efficient and environmentally sustainable for the next several decades, as well as improving the quality of life for senior residents.

The Newton Housing and Community Development Division will also continue to administer the Housing Rehabilitation program for low- to moderate-income homeowners and nonprofit housing providers of affordable rental units. In FY2024, the Division anticipates serving 3 low- to moderate-income homeowners through the rehab program. The Division will continue to support the resale of existing affordable homeownership units, as well as its Downpayment/Closing Cost Assistance program, supporting and expanding sustainable homeownership in new and existing deed-restricted affordable units.

Additionally, as the lead entity of the WestMetro HOME Consortium, the Division will continue to bolster affordable housing activities across the 13-member communities. In particular, staff will shepherd approximately \$5.4 million of HOME-ARP funds throughout FY2024 and the years to come. HOME-ARP provides HOME consortiums across the country with critical dollars for housing and support services specifically for individuals and families who are homeless or at-risk of homelessness. The consortium will issue a series of Request for Proposals (RFP’s) to identify partners across the 13-communities who can successfully carry out the production of new rental housing units and/or a non-congregate shelter and the delivery of supportive services and Tenant-Based Rental Assistance (TBRA) programs.

The Newton Housing and Community Development Division will continue to support the provision of essential services for low-to-moderate income individuals and households, especially children, families, seniors, survivors of domestic violence, persons with disabilities, homeless persons and those at-risk of homelessness, and at-risk youth.

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### Outcome 2

Provide Support Services

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Approximately \$308,000 in CDBG Human Service grants will be distributed to public service and non-profit organizations during FY2024. Newton’s Human Service Program funds services and/or interventions that

# Newton Housing & Community Development Division

## Fiscal Year 2024 Outcomes and Strategies

focus on supporting and enhancing the lives of vulnerable low- and moderate-income Newton residents across the lifespan. We will support a variety of programs and services including access to affordable childcare, financial literacy, resident services and case management and vocational training for severely disabled adults.

Additionally, approximately \$165,000 in Emergency Solutions Grant (ESG) funds will be distributed to non-profit agencies serving homeless and at-risk individuals and families throughout Brookline, Newton, Waltham and Watertown. These funds will provide for emergency shelter, case management, homelessness prevention and rapid rehousing services.

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### Outcome 3

#### Remove Architectural Barriers

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Housing and Community Development Division staff are committed to increasing access for persons with disabilities to public thoroughfares, public buildings, parks and recreational facilities, and non-profit agencies throughout Newton. The citywide

removal of architectural and material barriers is often performed in partnership with the Departments of Public Works, Public Buildings, Parks, Recreation and Culture, and the City’s ADA/504 Coordinator.

In addition to a significant amount of work done by DPW and other City departments, Division staff, in coordination with the Commission on Disability, will allocate approximately \$42,000 of FY2024 CDBG funds towards accessibility improvements at the City Hall campus. Specifically, two curb cuts will be added to connect users to the accessible elevator entrance near the Department Head parking lot off Homer Street. Other accessibility projects underway that are supported by CDBG funds include improvements at the Langley Road, Warren Street, and Chase Street intersections, and the creation of an accessible pathway along the perimeter of Richard McGrath Park.

The Newton Housing and Community Development Division will continue to collaborate with the Fair Housing Committee (FHC) to increase knowledge about fair housing laws and obligations, identify and address discriminatory actions, and increase the capacity of the City and WestMetro HOME Consortium to affirmatively further fair housing and advance access to housing opportunity for all.

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### Outcome 4

#### Affirmatively Further Fair Housing

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In FY2021, the City of Newton and WestMetro HOME Consortium completed its work on the development of the Consortium’s new [FY2022-2025 Regional Analysis of Impediments to Fair Housing Choice \(AI\)](#). The

# Newton Housing & Community Development Division

## Fiscal Year 2024 Outcomes and Strategies

AI was created in partnership with a fair housing consultant team and identifies and addresses fair housing barriers throughout the thirteen member communities. The AI identifies actions, policies, and decisions that have restricted (or may restrict) an individual's housing choice on account of race, color, religion, gender, gender identity and expression, disability, familial status, national origin, ancestry, age, marital status, source of income, sexual orientation, veteran/military status or genetic information. The AI will culminate in meaningful action steps the Consortium can take to overcome identified fair housing barriers in order to facilitate inclusive, equitable communities that provide free and open access to housing and opportunity.

The Analysis of Impediments identified fair housing testing as an important strategy for the WestMetro HOME Consortium to undertake to work towards affirmatively furthering fair housing and addressing discriminatory practices. During FY2024, staff will work with the WestMetro HOME Consortium and the Suffolk Law School's Housing Discrimination Testing Program (HDTP) to implement a two-year fair housing testing program across the thirteen-community HOME consortium. This program, funded by the WestMetro HOME Consortium administrative funds, will conduct traceable audit testing to enable enforcement actions across the consortium region. Additionally, interim and final reporting will summarize testing results and provide the consortium with best practices for addressing housing discrimination and fair housing enforcement, as well as targeted educational efforts.



# 114a- Housing & Community Development

## Newton Community Development Block Grant Program - FY24 Budget

PROJECT #	IDIS #	Env. Review	Key Org	Obj Code	Projects	Letter-of-Credit (LOC) Budget	FY24 Program Income (Estimated)	Prior Year(s) Program Income (FY23)	Total Budget
<b>HOUSING PROGRAM</b>									
CD24-01A		Exempt	15002024	Various	Housing Program Delivery	\$277,965.00			\$277,965.00
CD24-01B		project by project	15002024	579600	Housing Rehabilitation and Development Program Fund	\$617,725.00			\$617,725.00
CD24-01C		project by project	15002024	579600	West Newton Armory Affordable Housing Development	\$230,000.00			\$230,000.00
CD24-01D		project by project	15002024	579601	Housing Program Income Pool (estimated rehab loan repayments)		\$132,000.00		\$132,000.00
<b>HOUSING PROGRAM TOTAL</b>						<b>\$1,125,690.00</b>	<b>\$132,000.00</b>	<b>\$0.00</b>	<b>\$1,257,690.00</b>
<b>ARCHITECTURAL ACCESS</b>									
CD24-03A		project by project	15002024	586001	City Hall Campus Exterior Pedestrian Access Improvements	\$42,000.00			\$42,000.00
CD24-03B		project by project	15002024	586001	FY24 Architectural Access Project	\$48,210.00			\$48,210.00
<b>ARCHITECTURAL ACCESS TOTAL</b>						<b>\$90,210.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$90,210.00</b>
<b>HUMAN SERVICES</b>									
CD24-05A		Exempt	15002024	579700	The Carroll Center for the Blind / Career and Vocational Rehab Services	\$ 13,000.00			\$13,000.00
CD24-05B		Exempt	15002024	579700	Boys & Girls Club of Newton / Financial Aid for Teens and Families	\$ 24,900.00			\$24,900.00
CD24-05C		Exempt	15002024	579700	West Suburban YMCA / Childcare Financial Aid Program	\$ 24,900.00			\$24,900.00
CD24-05D		Exempt	15002024	579700	Family ACCESS of Newton / Sustaining access to childcare for low-income families	\$ 15,000.00			\$15,000.00
CD24-05E		Exempt	15002024	579700	Jewish Big Brothers & Big Sisters / Mentoring Initiatives	\$ 10,000.00			\$10,000.00
CD24-05F		Exempt	15002024	579700	2Life Communities / Caring Choices and Wellness Nursing for Low-Income Seniors	\$ 15,000.00			\$15,000.00
CD24-05G		Exempt	15002024	579700	Jewish Family & Children's Service/ Stabilization & Recovery Services	\$ 15,300.00			\$15,300.00
CD24-05H		Exempt	15002024	579700	Newton Community Development Foundation / Resident Services Program	\$ 35,000.00			\$35,000.00
CD24-05I		Exempt	15002024	579700	Newton Housing Authority / Resident Services Program	\$ 35,000.00			\$35,000.00
CD24-05J		Exempt	15002024	579700	Plowshares Education Development Center / Tuition Assistance for Childcare	\$ 11,000.00			\$11,000.00
CD24-05K		Exempt	15002024	579700	Pathway to Possible / Clinical Social Worker	\$ 10,000.00			\$10,000.00
CD24-05L		Exempt	15002024	579700	Horace Cousens Industrial Fund / Emergency Payment for Families in Financial Crisis	\$ 24,900.00			\$24,900.00
CD24-05M		Exempt	15002024	579700	The Second Step /Community Programs for Survivors of Domestic Violence	\$ 4,943.00		\$30,057	\$35,000.00
CD24-05N		Exempt	15002024	579700	Dept. of Parks & Rec. / Financial Aid for Youth Summer Camp	\$ 14,900.00			\$14,900.00
CD24-05O		Exempt	15002024	579700	Riverside Community Care/Mental Health Services Promoting Health, Well-Being, and Self-Sufficiency	\$ 21,700.00			\$21,700.00
CD24-98D		Exempt	15002024	579700	Human Service Program Income Reserve**** (for FY25 projects- do not include in FY24 budget totals)		\$30,000		\$30,000.00
<b>HUMAN SERVICES TOTAL (Cannot exceed 15% of current year LOC + 15% of prior year program income)</b>						<b>\$275,543.00</b>	<b>\$30,000.00</b>	<b>\$30,057.00</b>	<b>\$305,600.00</b>
<b>PROGRAM ADMINISTRATION</b>									
CD24-09A		Exempt	15002024	Various	Program Administration	\$371,860.00	\$40,000.00		\$411,860.00
CD24-09B		Exempt	15002024	Various	Citizen Participation	\$1,000.00			\$1,000.00
CD24-99		Exempt	15002024	579700	Contingencies				\$0.00
<b>PROGM ADMIN TOTAL (Cannot exceed 20% of current year LOC + 20% of current year program income- must also include Planning activities)</b>						<b>\$372,860.00</b>	<b>\$40,000.00</b>	<b>\$0.00</b>	<b>\$412,860.00</b>
<b>GRAND TOTAL ALL PROGRAM AREAS</b>						<b>\$1,864,303.00</b>	<b>\$202,000.00</b>	<b>\$30,057.00</b>	<b>\$2,066,360.00</b>
<b>FY24 CDBG Letter of Credit Funds from HUD B-23-MC-25-0019</b>						<b>\$1,864,303.00</b>			

\* FY24 CDBG allocation was a .326% decrease from FY23

\*\*\*\* FY24 Program Income for Human Services is not included in total as it is reserved for FY25 programs

# 114a- Housing & Community Development

## Newton Emergency Solutions Grants Program - FY24 Budget

Project Number	Env. Review	IDIS #	ESG PROJECTS	KEY ORG	OBJ CODE	ACCOUNT TITLE	FY23 ESG Funds
ES23-01C	Exempt		Integrated Day and Seasonal Night Programs -- Community Day Center of Waltham	21012024	579700	Grants	\$ 43,180.00
ES23-01D	Exempt		Shelter Operations -- REACH	21012024	579700	Grants	\$ 25,060.00
ES23-01B	Exempt		Residential Shelter Program --The Second Step	21012024	579700	Grants	\$ 30,070.00
ES23-02A	Exempt		Homelessness Prevention -- Brookline Community Mental Health Center	21012024	579700	Grants	\$ 27,290.00
ES23-03A	Exempt		Rapid Re-housing -- Brookline Community Mental Health Center	21012024	579700	Grants	\$ 26,460.00
ES24-05A	Exempt		ESG Administration	21012024	579700	Grants	\$ 12,328.00
							<b>\$ 164,388.00</b>
<b>FY24 ESG Letter of Credit Funds E-23-MC-25-0019</b>							

\* FY24 ESG was a .4065% decrease in funding from FY23

WestMetro HOME Partnerships Program FY24 Projects

114a Housing & Community Development

Project #	PROJECT NAME/TYPE	FY24 Budget	Prior Yr(s) Program Income	Uncommitted Prior Yr(s) Funds	Anticipated FY24 Program Income	Totals
<b>BEDFORD</b>						
HM24-01A/HM23-01A	Bedford HOME Administration	\$ 1,322.00		\$ 1,700.00		\$ 3,022.00
	HM24-99* Fair Housing Testing Program	\$ 418.00				\$ 418.00
HM24-01B/HM23-01B/HM22-01B	Bedford TBRA	\$ 17,400.00		\$ 26,813.00		\$ 44,213.00
	<b>TOTAL</b>	<b>\$ 19,140.00</b>	<b>\$ -</b>	<b>\$ 28,513.00</b>	<b>\$ -</b>	<b>\$ 47,653.00</b>
<b>BELMONT</b>						
HM23-02A/HM21-02A	Belmont HOME Administration	\$ 4,127.00		\$ 5,320.00		\$ 9,447.00
	HM24-99* Fair Housing Testing Program	\$ 1,303.00				\$ 1,303.00
HM24-02B	Belmont Projects / Programs	\$ 54,310.00				\$ 54,310.00
HM23-02B/HM22-02B	Sherman Gardens			\$ 102,160.00		\$ 102,160.00
	<b>TOTAL</b>	<b>\$ 59,740.00</b>	<b>\$ -</b>	<b>\$ 107,480.00</b>	<b>\$ -</b>	<b>\$ 167,220.00</b>
<b>BROOKLINE</b>						
HM24-03A	Brookline HOME Administration	\$ 18,111.00				\$ 18,111.00
	HM24-99* Fair Housing Testing Program	\$ 5,364.00				\$ 5,364.00
HM24-03C	Hebrew SeniorLife 108 Centre Street	\$ 234,740.00				\$ 234,740.00
	<b>TOTAL</b>	<b>\$ 258,215.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 258,215.00</b>
<b>CONCORD</b>						
HM24-13A/HM23-13A	Concord HOME Administration	\$ 2,358.00		\$ 3,040.00		\$ 5,398.00
	HM24-99* Fair Housing Testing Program	\$ 744.00				\$ 744.00
HM24-13B	WestMetro HOME Consolidated Pool	\$ 31,025.00				\$ 31,025.00
	<b>TOTAL</b>	<b>\$ 34,127.00</b>	<b>\$ -</b>	<b>\$ 3,040.00</b>	<b>\$ -</b>	<b>\$ 37,167.00</b>
<b>FRAMINGHAM</b>						
HM24-09A	Framingham HOME Administration	\$ 19,646.00				\$ 19,646.00
	HM24-99* Fair Housing Testing Program	\$ 6,204.00				\$ 6,204.00
HM24-09C/HM23-09C/HM22-09C	Framingham TBRA Program	\$ 258,500.00		\$ 183,411.86		\$ 441,911.86
HM24-09P/HM23-09P/HM22-09P	Framingham Program Income- reserved for TBRA		\$ 12,390.02		\$ 2,000.00	\$ 14,390.02
HM23-09D/HM22-09D/HM21-09D/HM20-09F	Framingham Carlson Crossing East			\$ 257,426.17		\$ 257,426.17
	<b>TOTAL</b>	<b>\$ 284,350.00</b>	<b>\$ 12,390.02</b>	<b>\$ 440,838.03</b>	<b>\$ 2,000.00</b>	<b>\$ 739,578.05</b>
<b>LEXINGTON</b>						
HM24-12A/HM23-12A	Lexington HOME Administration	\$ 2,497.00		\$ 3,215.00		\$ 5,712.00
	HM24-99* Fair Housing Testing Program	\$ 788.00				\$ 788.00
HM24-12B/HM23-12B/HM22-12B	Lexington Housing Authority - Wynebrook	\$ 32,850.00		\$ 61,820.00		\$ 94,670.00
	<b>TOTAL</b>	<b>\$ 36,135.00</b>	<b>\$ -</b>	<b>\$ 65,035.00</b>	<b>\$ -</b>	<b>\$ 101,170.00</b>
<b>NATICK</b>						
HM24-11A/HM23-11A	Natick HOME Administration	\$ 3,709.00		\$ 4,780.00		\$ 8,489.00
	HM24-99* Fair Housing Testing Program	\$ 1,171.00				\$ 1,171.00
HM24-11B/HM23-11B/HM20-11B	Natick TBRA Program	\$ 48,820.00		\$ 55,465.00		\$ 104,285.00
HM21-11P	Natick Program Income		\$ 10,000.00			\$ 10,000.00
	<b>TOTAL</b>	<b>\$ 53,700.00</b>	<b>\$ 10,000.00</b>	<b>\$ 60,245.00</b>	<b>\$ -</b>	<b>\$ 123,945.00</b>
<b>NEEDHAM</b>						
HM24-05A/HM23-05A	Needham HOME Administration	\$ 2,335.00		\$ 3,010.00		\$ 5,345.00
	HM24-99* Fair Housing Testing Program	\$ 738.00				\$ 738.00
HM24-05B/HM23-05B	Needham Projects / Programs	\$ 30,725.00		\$ 30,090.00		\$ 60,815.00
	<b>TOTAL</b>	<b>\$ 33,798.00</b>	<b>\$ -</b>	<b>\$ 33,100.00</b>	<b>\$ -</b>	<b>\$ 66,898.00</b>
<b>NEWTON</b>						
HM24-06A	Newton HOME Administration	\$ 10,033.35				\$ 10,033.35
	HM24-99* Fair Housing Testing Program	\$ 3,169.00				\$ 3,169.00
HM24-06B	Newton West Armory Affordable Housing Dev	\$ 132,023.50				\$ 132,023.50
HM23-06B	Newton Projects/Programs			\$ 129,286.60		\$ 129,286.60
	<b>TOTAL</b>	<b>\$ 145,225.85</b>	<b>\$ -</b>	<b>\$ 129,286.60</b>	<b>\$ -</b>	<b>\$ 274,512.45</b>
<b>SUDBURY</b>						
HM24-10A/HM23-10A	Sudbury HOME Administration	\$ 631.00		\$ 810.00		\$ 1,441.00
	HM24-99* Fair Housing Testing Program	\$ 199.00				\$ 199.00
HM24-10B/HM23-10B	Sudbury Projects / Programs	\$ 8,290.00		\$ 8,110.00		\$ 16,400.00
	<b>TOTAL</b>	<b>\$ 9,120.00</b>	<b>\$ -</b>	<b>\$ 8,920.00</b>	<b>\$ -</b>	<b>\$ 18,040.00</b>
<b>WALTHAM</b>						
HM24-07A	Waltham HOME Administration	\$ 14,925.00				\$ 14,925.00
	HM24-99* Fair Housing Testing Program	\$ 4,713.00				\$ 4,713.00
HM24-07B/HM23-07B/HM22-07B	Waltham TBRA Program	\$ 196,380.00		\$ 272,882.04		\$ 469,262.04
HM22-07C/HM21-07C	Waltham Beaverbrook Apts		\$ 319,578.00	\$ 80,422.00		\$ 400,000.00
HM24-7P/HM23-7P	Waltham Program Income - reserved for TBRA		\$ 25,000.00		\$ 10,000.00	\$ 35,000.00
	<b>TOTAL</b>	<b>\$ 216,018.00</b>	<b>\$ 344,578.00</b>	<b>\$ 353,304.04</b>	<b>\$ 10,000.00</b>	<b>\$ 923,900.04</b>
<b>WATERTOWN</b>						
HM24-08A	Watertown HOME Administration	\$ 7,780.00				\$ 7,780.00
	HM24-99* Fair Housing Testing Program	\$ 2,457.00				\$ 2,457.00
HM24-08B/HM23-09B	Watertown Projects / Programs	\$ 102,375.00		\$ 100,250.00		\$ 202,625.00
HM22-08P	Watertown Program Income		\$ 119,155.50			\$ 119,155.50
	<b>TOTAL</b>	<b>\$ 112,612.00</b>	<b>\$ 119,155.50</b>	<b>\$ 100,250.00</b>	<b>\$ -</b>	<b>\$ 332,017.50</b>
<b>WAYLAND</b>						
HM24-14A/HM23-14A	Wayland HOME Administration	\$ 714.00		\$ 920.00		\$ 1,634.00
	HM24-99* Fair Housing Testing Program	\$ 226.00				\$ 226.00
HM24-14B/HM23-14B	Wayland TBRA Program	\$ 9,385.00		\$ 9,190.00		\$ 18,575.00
HM22-14C	Wayland 12 Hammond Way			\$ 50,000.00		\$ 50,000.00
	<b>TOTAL</b>	<b>\$ 10,325.00</b>	<b>\$ -</b>	<b>\$ 60,110.00</b>	<b>\$ -</b>	<b>\$ 70,435.00</b>
<b>CONSORTIUM ADMINISTRATION</b>						
HM24-99	Consortium HOME Administration	\$ 48,228.14				\$ 48,228.14
	HM24-99* Fair Housing Testing Program	\$ 1,350.01				\$ 1,350.01
HM24-15A/HM23-15A/HM22-15A/HM19-1	Competitive Funding Pool	\$ -		\$ 465,955.10		\$ 465,955.10
HM24-15B	CHDO Operating Expenses Funding Pool	\$ 82,630.25				\$ 82,630.25
HM23-15B1	CHDO Operating Expenses- MetroWest CD			\$ 50,000.00		\$ 50,000.00
HM24-15C	CHDO Set Aside Funding Pool	\$ 247,890.75				\$ 247,890.75
HM23-15C	CHDO Set Aside- MetroWest CD: West Newton Armory			\$ 242,750.70		\$ 242,750.70
	<b>TOTAL</b>	<b>\$ 380,099.15</b>	<b>\$ -</b>	<b>\$ 758,705.80</b>	<b>\$ -</b>	<b>\$ 1,138,804.95</b>

\*HM24-99 Consortium members agreed to contribute up to 25% of their HM24 admin. to the Consortium's Fair Housing Testing Program. Actual figures show each community contributing approximately 24% of HM24 admin. to this program.

**TOTAL FY24 HOME CONSORTIUM BUDGET** \$ 1,652,605.00 \$ 486,123.52 \$ 2,148,827.47 \$ 12,000.00 \$ 4,299,555.99  
**HOME Consortium Letter of Credit Funds M22-DC25-0213** \$ 1,652,605.00  
 FY24 HOME is a 2.117% increase from FY23

CITY OF NEWTON BUDGET  
PERSONNEL DETAIL

Account	Position Title Employee Name	Hire Date	Years of Service	Longevity	Holiday Addl Comp	Grade	Fund Year	FTE	Base Salary	Total Compensation
<b>114 - PLANNING</b>										
<b>0111471 - CONSERVATION</b>										
511001	<b>CHIEF ENVIRONMENTAL PLANN</b>				0	HY10-10,10	2023	1.00	88,340	
	STEEL, JENNIFER	9/3/2013	9.83	900	0	HY10-12,12	2024	1.00	90,641	91,541
	<b>ASSISTANT ENVIRONMENTAL P</b>				0	AF8-03,04	2023	1.00	65,931	
	MENOUNOS, ELLEN	12/14/2021	1.55	0	500	AF8-04,05	2024	1.00	69,675	70,175
<b>Account Totals:</b>					<b>0</b>			<b>2023</b>	<b>2.00</b>	<b>154,271</b>
					<b>900</b>	<b>500</b>		<b>2024</b>	<b>2.00</b>	<b>160,317</b>
<b>TOTAL CONSERVATION</b>					<b>0</b>			<b>2023</b>	<b>2.00</b>	<b>154,271</b>
					<b>900</b>	<b>500</b>		<b>2024</b>	<b>2.00</b>	<b>160,317</b>
<b>0111475 - PLANNING</b>										
511001	<b>DIRECTOR</b>				0	HY14-27,27	2023	1.00	146,663	
	HEATH, BARNEY	6/6/2016	7.07	750	0	HY14-29,29	2024	1.00	150,517	151,267
	<b>DEPUTY DIRECTOR</b>				0	HY13-18,18	2023	1.00	119,376	
	CAIRA, JENNIFER	9/25/2017	5.77	750	0	HY13-20,20	2024	1.00	122,513	123,263
	<b>DIRECTOR OF HOUSING &amp; COM</b>				0	HY12-15,15	2023	1.00	108,278	
	BERMAN, AMANDA		0	750	0	HY12-17,17	2024	1.00	111,104	111,854
	<b>DIRECTOR OF TRANSPORTATIO</b>				0	HY11-13,15	2023	1.00	100,225	
	OSTROFF, JOSHUA	1/3/2023	0.49	0	0	HY11-15,17	2024	1.00	102,833	102,833
	<b>CHIEF PLANNER</b>				0	HY11-06,08	2023	1.00	90,372	
	WHEWELL, KATIE	9/4/2020	2.83	0	0	HY11-08,10	2024	1.00	92,721	92,721
	<b>DEPUTY CHIEF PLANNER</b>				0	HY10-06,08	2023	1.00	84,512	
	SANDOVAL, ALYSSA	2/21/2023	0.36	0	0	HY10-08,10	2024	1.00	86,707	86,707
	<b>HOUSING PROGRAM MANAGER</b>				0	HY10-01,02	2023	1.00	77,920	
	DAVIS, SHAYLYN	10/7/2020	2.73	0	0	HY10-02,04	2024	1.00	79,359	79,359
	<b>CHIEF LONG RANGE PLANNER</b>				0	HY10-10,10	2023	1.00	88,340	
	LEMEL, ZACHERY	11/12/2019	3.64	0	0	HY10-10,12	2024	1.00	90,641	90,641
	<b>CHIEF ZONING CODE OFFICIA</b>				0	HY10-10,10	2023	0.75	66,255	
	SANTOSUOSSO, JANE	1/22/2013	10.44	900	0	HY10-16,16	2024	1.00	96,162	97,062
	<b>CHIEF PRESERVATION PLANNE</b>				0	HY9-03,03	2023	0.50	37,253	
	HUTCHINGS, MOLLIE	7/25/2022	0.93	0	0	HY9-05,05	2024	0.50	38,221	38,221
	<b>COMMUNITY ENGAGEMENT MA</b>				0	HY7-01,03	2023	1.00	63,056	
	OLIVIA, JAMES	3/13/2023	0.3	0	0	HY7-03,05	2024	1.00	64,692	64,692
	<b>FISCAL MANAGER</b>				0	HY7-05,07	2023	0.30	20,066	
	LANTION, RHODORA	6/13/2022	1.05	0	0	HY7-07,09	2024	0.30	20,586	20,586
	<b>SENIOR PLANNER</b>				0	AF9-09,10	2023	1.00	85,480	
	GLEBA, MICHAEL	2/22/2016	7.36	500	500	AF9-10,11	2024	1.00	90,332	91,332
	<b>SENIOR PLANNER</b>				0	AF9-01,01	2023	1.00	66,769	
	KEMMETT, CATHERINE	6/15/2020	3.04	0	500	AF9-01,02	2024	1.00	70,467	70,967

CITY OF NEWTON BUDGET  
PERSONNEL DETAIL

Account	Position Title Employee Name	Hire Date	Years of Service	Longevity	Holiday Addl Comp	Grade	Fund Year	FTE	Base Salary	Total Compensation
511001	EXEC ASST/DSA SUPV				0	AF8-04,04	2023	1.00	66,815	
	ZARING, HEATHER	9/19/2016	6.78	500	500	AF8-05,05	2024	1.00	70,614	71,614
	SENIOR DEVELOPMENT SERVI				0	AF6-02,03	2023	1.00	53,853	
	CULLINS, SHARON	3/10/2021	2.31	0	500	AF6-03,04	2024	1.00	56,911	57,411
	PLANNING ASSOCIATE				0	AF8-02,03	2023	1.00	63,694	
IADONISI, JOSEPH		2/13/2023	0.38	0	500	AF8-03,04	2024	1.00	67,311	67,811
	HOUSING DEVELOPMENT PLAN				0	AF9-01,01	2023	1.00	66,769	
MCINTYRE, ALLISON		3/13/2023	0.3	0	500	AF9-01,02	2024	1.00	69,118	69,618
	<b>Account Totals:</b>				<b>0</b>		<b>2023</b>	<b>16.55</b>	<b>1,405,696</b>	
				<b>4,150</b>	<b>3,000</b>		<b>2024</b>	<b>16.80</b>	<b>1,480,809</b>	<b>1,487,959</b>
511101	TRANSPORTATION PLANNING C				0	HY11-30,30	2023	0.32	40,674	
	FREEDMAN, NICOLE	9/12/2016	6.8	0	0	HY11-30,30	2024	0.32	40,519	40,519
<b>Account Totals:</b>					<b>0</b>		<b>2023</b>	<b>0.32</b>	<b>40,674</b>	
				<b>0</b>	<b>0</b>		<b>2024</b>	<b>0.32</b>	<b>40,519</b>	<b>40,519</b>
511102	URBAN DESIGNER				0	AF9-05,06	2023	0.85	64,492	
	SIKKA, SHUBEE	3/6/2017	6.32	425	425	AF9-06,07	2024	0.85	68,153	69,003
<b>Account Totals:</b>					<b>0</b>		<b>2023</b>	<b>0.85</b>	<b>64,492</b>	
				<b>425</b>	<b>425</b>		<b>2024</b>	<b>0.85</b>	<b>68,153</b>	<b>69,003</b>
<b>TOTAL PLANNING</b>					<b>0</b>		<b>2023</b>	<b>17.72</b>	<b>1,510,863</b>	
				<b>4,575</b>	<b>3,425</b>		<b>2024</b>	<b>17.97</b>	<b>1,589,480</b>	<b>1,597,480</b>
<b>0111476 - ZONING BD OF APPEALS</b>										
511001	ZBA CLERK				0	AF6-02,03	2023	1.00	53,367	
	BELSANTI, BRENDA	2/28/2022	1.34	0	500	AF6-03,04	2024	1.00	56,396	56,896
<b>Account Totals:</b>					<b>0</b>		<b>2023</b>	<b>1.00</b>	<b>53,367</b>	
				<b>0</b>	<b>500</b>		<b>2024</b>	<b>1.00</b>	<b>56,396</b>	<b>56,896</b>
<b>TOTAL ZONING BD OF APPEALS</b>					<b>0</b>		<b>2023</b>	<b>1.00</b>	<b>53,367</b>	
				<b>0</b>	<b>500</b>		<b>2024</b>	<b>1.00</b>	<b>56,396</b>	<b>56,896</b>
<b>0111482 - ECONOMIC DEVELOPMENT</b>										
511001	DIRECTOR, ECONOMIC DEVELO				0	HY11-15,15	2023	1.00	101,718	
	SISSON, JOHN	7/27/2022	0.93	0	0	HY11-15,15	2024	1.00	101,328	101,328
<b>Account Totals:</b>					<b>0</b>		<b>2023</b>	<b>1.00</b>	<b>101,718</b>	
				<b>0</b>	<b>0</b>		<b>2024</b>	<b>1.00</b>	<b>101,328</b>	<b>101,328</b>
<b>TOTAL ECONOMIC DEVELOPMENT</b>					<b>0</b>		<b>2023</b>	<b>1.00</b>	<b>101,718</b>	
				<b>0</b>	<b>0</b>		<b>2024</b>	<b>1.00</b>	<b>101,328</b>	<b>101,328</b>
<b>0111494 - HISTORICAL</b>										
511001	CHIEF PRESERVATION PLANNE				0	HY9-03,03	2023	0.50	37,253	
	HUTCHINGS, MOLLIE	7/25/2022	0.93	0	0	HY9-05,05	2024	0.50	38,221	38,221
SENIOR PRESERVATION PLANN				0	AF9-09,10	2023	1.00	85,174		
KURZE, BARBARA	4/7/2014	9.23	900	500	AF9-10,11	2024	1.00	90,008	91,408	

<b>CITY OF NEWTON BUDGET          PERSONNEL DETAIL</b>
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Account	Position Title Employee Name	Hire Date	Years of Service	Longevity	Holiday Addl Comp	Grade	Fund Year	FTE	Base Salary	Total Compensation
<b>Account Totals:</b>					0		2023	1.50	122,427	
				900	500		2024	1.50	128,229	129,629
<b>TOTAL HISTORICAL</b>					0		2023	1.50	122,427	
				900	500		2024	1.50	128,229	129,629
<b>TOTAL PLANNING</b>					0		2023	23.22	1,942,646	
				6,375	4,925		2024	23.47	2,035,750	2,047,050

FUND: 5800 - CPA FUND RESERVE AND ADMIN  
DEPARTMENT: ALL DEPARTMENTS

CITY OF NEWTON BUDGET  
PERSONNEL DETAIL

Account	Position Title Employee Name	Hire Date	Years of Service	Longevity	Holiday Addl Comp	Grade	Fund Year	FTE	Base Salary	Total Compensation
<b>114 - PLANNING</b>										
<b>58Z11400 - CPA ADMINISTRATION</b>										
511001	<b>PROGRAM MANAGER</b> KRITZER, LARA	3/23/1999	24.27	2,500	0	HY9-08,10 HY9-10,12	2023 2024	1.00 1.00	81,403 83,516	86,016
<b>Account Totals:</b>					<b>0</b>		<b>2023</b>	<b>1.00</b>	<b>81,403</b>	
					<b>2,500</b>	<b>0</b>	<b>2024</b>	<b>1.00</b>	<b>83,516</b>	<b>86,016</b>
<b>TOTAL CPA ADMINISTRATION</b>					<b>0</b>		<b>2023</b>	<b>1.00</b>	<b>81,403</b>	
					<b>2,500</b>	<b>0</b>	<b>2024</b>	<b>1.00</b>	<b>83,516</b>	<b>86,016</b>
<b>TOTAL PLANNING</b>					<b>0</b>		<b>2023</b>	<b>1.00</b>	<b>81,403</b>	
					<b>2,500</b>	<b>0</b>	<b>2024</b>	<b>1.00</b>	<b>83,516</b>	<b>86,016</b>

FUND: 1500 - CDBG GRANT PROGRAM  
DEPARTMENT: ALL DEPARTMENTS

CITY OF NEWTON BUDGET  
PERSONNEL DETAIL

Account	Position Title Employee Name	Hire Date	Years of Service	Longevity	Holiday Addl Comp	Grade	Fund Year	FTE	Base Salary	Total Compensation
<b>114 - PLANNING</b>										
<b>15002024 - 24 CDBG GRANT PROGRAM</b>										
<b>511001</b>	<b>HOUSING REHABILITATION &amp;</b>				0	HY8-22,22	2023	1.00	92,262	
	DESMARAIS, DOUGLAS	9/2/2012	10.83	900	0	HY8-24,24	2024	1.00	94,686	95,586
	<b>SENIOR COMMUNITY DEVELOP</b>				0	HY7-04,06	2023	1.00	66,886	
	VACANT		0	0	0	HY7-06,08	2024	1.00	68,622	68,622
	<b>HOUSING PLANNER</b>				0	AF8-09,09	2023	1.00	77,456	
	LUCAS, MALCOLM	4/27/2015	8.18	750	0	AF8-10,10	2024	1.00	81,859	82,609
	<b>ADMIN ASST</b>				0	AF6-11,11	2023	1.00	68,934	
	ANTONELLIS, JANET	5/1/1984	39.17	2,500	500	AF6-11,11	2024	1.00	70,730	73,730
	<b>COMMUNITY DEVELOPMENT PL</b>				0	AF8-01,02	2023	1.00	62,431	
	SANDAL, NICOLE	10/18/2021	1.7	0	500	AF8-02,03	2024	1.00	65,978	66,478
	<b>COMPLIANCE &amp; ACCOUNT COO</b>				0	HY6-05,07	2023	0.53	32,557	
	NOWLAN, LAUREN	3/1/2022	1.33	0	0	HY6-05,07	2024	0.53	32,431	32,431
	<b>FISCAL MANAGER</b>				0	HY7-07,09	2023	0.70	48,220	
	LANTION, RHODORA	6/13/2022	1.05	0	0	HY7-07,09	2024	0.70	48,033	48,033
	<b>Account Totals:</b>				<b>0</b>		<b>2023</b>	<b>6.23</b>	<b>448,746</b>	
				<b>4,150</b>	<b>1,000</b>		<b>2024</b>	<b>6.23</b>	<b>462,339</b>	<b>467,489</b>
<b>TOTAL 24 CDBG GRANT PROGRAM</b>										
					<b>0</b>		<b>2023</b>	<b>6.23</b>	<b>448,746</b>	
				<b>4,150</b>	<b>1,000</b>		<b>2024</b>	<b>6.23</b>	<b>462,339</b>	<b>467,489</b>
<b>TOTAL PLANNING</b>										
					<b>0</b>		<b>2023</b>	<b>6.23</b>	<b>448,746</b>	
				<b>4,150</b>	<b>1,000</b>		<b>2024</b>	<b>6.23</b>	<b>462,339</b>	<b>467,489</b>



NEWTON PLANNING &  
DEVELOPMENT DEPARTMENT

FY24 BUDGET

ZONING AND PLANNING  
COMMITTEE

May 22, 2023

## Select FY24 Planning Initiatives

- ▶ **Continue Rezoning Work with Zoning & Planning Committee around:**
  - ▶ The City's commercial corridors (Needham St, Route 9, Washington St)
  - ▶ Legacy industrial zoning (i.e. California St)
  - ▶ Residential site and grading requirements
  - ▶ The incorporation of potentially desirable new use categories (i.e. brewing/bottling)

## Select FY24 Planning Initiatives

- ▶ **Advance Transportation Initiatives including:**
  - ▶ Commuter Rail Upgrades
  - ▶ Washington St Pilot
  - ▶ Albemarle Traffic Calming Implementation
  - ▶ Bike/Pedestrian Master Plan
  - ▶ MassDOT Commonwealth Ave Carriageway project
  - ▶ Christina St Bridge Crossing

## Select FY24 Planning Initiatives

- ▶ **Progress Affordable Housing and Societal Inequity Work:**
  - ▶ Walker Center Affordable Housing Feasibility
  - ▶ Affordable Housing Energy Retrofits
  - ▶ Partnership with Empath on the Newton Economic Mobility program
  
- ▶ **Continue Work to Maintain and Improve Conservation Lands**
  - ▶ Increase Accessibility (e.g., Kennard)
  - ▶ Improve Infrastructure (e.g., Norumbega)
  - ▶ Improve Signage and Maps (all parcels)



## Zoning & Planning Committee Budget Report

### City of Newton In City Council

**Monday, May 22, 2023**

Present: Councilors Crossley (Chair), Danberg, Albright, Leary, Krintzman, Wright, Baker, and Ryan

Also Present: Councilors Greenberg, Gentile, Humphrey, Norton, Bowman, Lucas, Oliver, Malakie, Laredo, and Downs

City staff present: Maureen Lemieux, Chief Financial Officer; Perry Rosenfield FP&A Manager; Jonathan Yeo, Chief Operating Officer; John Lojek, Commissioner of Inspectional Services; Anthony Ciccariello, Deputy Commissioner of Inspectional Services; Lara Kritzer, CPA Program Manager; Amalia Timbers, Citizen Assistance Officer; Andrew Lee, Assistant City Solicitor; Ann Berwick, Co-Director of Sustainability; Josh Ostroff, Director of Transportation Planning; Barney Heath, Director of Planning; Jennifer Caira, Deputy Director of Planning; Deb Finamore, Inspectional Services Administrative Assistant; Jaclyn Norton, Committee Clerk

### **Planning Department**

**Note:** The proposed budget for all divisions of the Planning Department is \$2,643,054., representing a 3.85% increase over FY23. Director Barney Heath began the presentation stating that he is joined by Jennifer Caira, Deputy Director of Planning; and Josh Ostroff, Director of Transportation Planning. The Planning Department will continue ongoing zoning redesign efforts relating to completing the Village Center Overlay District (VCOD) and MBTA Communities compliance. In FY24 the Department will also begin looking at updating zoning along the City's commercial corridors (Needham, Boylston, and Washington Streets outside of village centers), and will continue work on updating the former industrial /manufacturing zone in Nonantum. Other updates to Chapter 30 Zoning would include revising residential site and grading requirements, revising parking requirements and considering adding desirable new use categories. Advances to transportation initiatives are also goals for FY24, including continued advocacy for commuter rail upgrades, continued development of the Carriageway project, completing development of a Bike/Pedestrian Master Plan, and implementation of the Albemarle Traffic Calming Pilot.

The Housing Division will also be continuing its work to expand affordable housing opportunities. Relevant projects include completion of a feasibility study of the city-owned housing at the Walker Center to become deed-restricted affordable housing, a program to retrofit existing large housing projects to become more energy efficient seeking available grants, and partnering with EMPATH on the Newton Economic Mobility program. Regarding conservation lands, the Department plans to increase accessibility and improve infrastructure, signage, and maps. It was pointed out that the \$50,000 in the

conservation grounds maintenance budget is augmented by \$25,000 from the Commonwealth Golf Course, and that there is about \$62,000. In unspent funds for small capital projects.

Multiple Councilors expressed appreciation for the expansive work of the Planning Department. Councilors also encouraged greater coordination with the Parks, Recreation and Culture Department and various Friends Groups for work on conservation lands, noting that this part of the budget is not sufficient for the amount of maintenance the city should provide.

## Q&A

Q: Are the increased funds for Conservation enough to accomplish goals?

A: The increase in the maintenance line item was intentional according to Director Heath, and would allow the Department to perform more maintenance on an as needed basis. The same amount of money was subtracted from the capital projects line, which has gone unused, and there are unspent funds and ARPA funds allocated to such work. When asked if this is sufficient to help the City get ahead of problems, Jonathan Yeo, Chief Operating Officer, stated that this budget cannot be increased further due to the failure of the operating override.

Q: Has the Newton Affordable Housing Trust been consulted on the Walker Center project and what is the timeline of the project?

A: Director Heath explained that the Trust has not been consulted yet but will be in the future. Regarding the timeline the current phase is to be completed in early 2024.

Q: Is the City partnering with a consultant regarding the assessment of the Walker Center?

A: For the Walker Center project the Department will be partnering with Weston & Sampson, in ways similar to the City's partnership with them regarding the West Newton Armory project.

Q: What is the full cost that the Department will spend on consultants?

A: The department generally underspends this line item and routinely submits a request to carry over a portion of the unspent money each fiscal year. This carryover helps reduce additional requests and is also done for other departments. The FY24 budgeted amount with no carryover is \$200,000 which has remained steady over previous years. Director Heath noted that in FY2023 the Department is set to spend \$216,000 on consultants which is possible due to the previous underspending for this line item.

Q: Could the Department explain the role of the part time position added?

A: The addition of one part time position is to have Nicole Friedman staying on with the City as a Transportation Coordinator. Ms. Friedman was previously the Director of Transportation Planning and

was very successful at acquiring alternative funding sources for projects; she will continue to write grant requests to that end.

Q: Why did the refreshment line item increase?

A: Director Heath noted that this line item increased as the Department previously provided refreshments at community events prior to the pandemic and would like to return to that practice in FY24.

Q: What projects are the energy retrofits for?

A: The intention is to retrofit older large affordable housing developments. Director Heath stated that part of the ARPA funds were set aside for affordable housing and these retrofits. The Department is in consultation with Bill Ferguson, Co-Director of Sustainability, who will guide the work.

Q: Does the Department have a 5 year goal for the number of bike lanes?

A: Mr. Ostroff stated that the Department will finalize metrics after the upcoming public meeting on the bike/pedestrian master plan is conducted.

The Committee took a straw vote to accept the Planning Department's proposed Budget of \$2,643,054, which passed 7-0 (Councilor Ryan Not Voting).

**Respectfully submitted,**

**Deborah J. Crossley, Chair**

# Community Preservation Program

## Mission

*To preserve and renew Newton's cultural, economic, and environmental diversity*

In 2001, Newton voters adopted the Massachusetts Community Preservation Act (CPA) by accepting a 1% surcharge on City real estate taxes to fund projects that further the City's affordable housing, historic resource, open space, and recreation goals. This local funding qualifies Newton for state matching funds generated from fees collected by the Registry of Deeds.

The CPA state statute allows the funding to be used for projects that:

- Acquire, create, preserve, rehabilitate/restore, and/or support community housing (including affordable housing for families, residents with disabilities or special needs, seniors, etc.)
- Acquire, preserve, and/or rehabilitate/restore historic resources (including archives, art, buildings, structures, objects, or landscapes)
- Acquire, create, preserve, and/or rehabilitate/restore open space (including land for trails, wildlife habitat, watershed protection, etc.)
- Acquire, create, preserve, and/or rehabilitate/restore land for recreational uses (including parks, playgrounds, playing fields, etc.)

CPA funding comes with specific requirements as to how and when it can be used. For example, real estate acquired with CPA funds must be restricted to its CPA-eligible use in perpetuity. CPA funds may be used for capital improvements but not for maintenance or operations, may augment regular public funds but not replace them, and may be bonded or saved and combined over multiple years for major projects.

While the City Council approves the use of any CPA funds, those decisions are based on recommendations made by the all-volunteer Community Preservation Committee (CPC). This nine-member Committee includes five members appointed from other existing City boards and commissions and four non-statutory members appointed by the Mayor. Newton's CPA ordinance aims to ensure that the CPC represents all CPA-eligible resources, and Newton's CPC strives to make its recommendations to the City Council unanimous whenever possible.

These requirements and practices allow Newton's CPA program to take a collaborative approach to addressing the community's goals and needs.

The Community Preservation Committee (CPC) and the City Council have approved funding for a number of important new CPA projects in Fiscal 2023 (as of early March 2023):

- \$75,000 to Historic Newton and the Public Buildings Department for the first phase of the Jackson Homestead Basement Rehabilitation Project which will stabilize and protect the historic ca. 1809 structure, provide suitable gallery space, and preserve the collections and artifacts. Phase I funding will hire a consultant to develop a plan and design options for dealing with the current water infiltration and humidity issues in the building's basement.
- \$486,500 to the City of Newton's Parks, Recreation, and Culture Department for Phase II of the Gath Memorial Pool Renovation Project which will complete the design work, permitting, and construction documents necessary to begin construction in Fall 2023.
- \$133,002 in additional funding to the Planning and Development Department for the Commonwealth Avenue Carriageway Redesign Project to complete the 100% designs for the new pedestrian walkway, bike lanes and greenspace to be constructed in place of the northern carriageway of Commonwealth Avenue between Lyons Field and the Charles River Bridge.
- \$1,948,056 to the Newton Affordable Housing Trust to provide initial funding for the Trust's work to preserve, restore and rehabilitate the City's existing affordable housing stock and create and acquire new units that are affordable to low and moderate income households.
- \$5,834,362 in CPA Recreation funds to be bonded for the construction of the restored and renovated Gath Memorial Pool facility by the Parks, Recreation and Culture Department. This project will be sent to the

City Council for its review and approval in April 2023.

The CPC is also reviewing two new proposals submitted this spring. In April, the CPC will hold a public hearing on the Parks, Recreation and Culture Department's proposal for \$9,163,911.52 in Recreation funds for construction funding of the City's Athletic Fields Improvement Project work at Albemarle Park, McGrath Park, and the Burr School Fields. And in May, the CPC is anticipated to have a full proposal submitted for \$2.1 in Historic Resource funds to complete the exterior restoration work needed on the Warren House, an historic former school building which includes affordable housing units.

At present, the Newton's Community Preservation Fund is anticipated to have approximately \$8 million in forwarded fund balances available at the close of the fiscal year. However, if all of the currently proposed and anticipated projects are received and funded in FY23, then it is possible that the CPC will have more requests for funds than funds available for the first time in recent history, depending on financial decisions about bonding.

In either case, the program will have over \$5.56 million in new CPA funding available for use at the start of Fiscal 2024.

*Lara Kritzer*

Community Preservation Program Manager

*Barney S. Heath*

Director, Newton Department of Planning & Development

# Draft FY24 Community Preservation Program Budget

## 114b- Community Preservation

City of Newton COMMUNITY PRESERVATION FUND	Fiscal 2023	Fiscal 2024 Provisional
Program Budget	<i>Approved June 2022</i>	<i>Draft February 8, 2023</i>
<b>REVENUE</b>		
Local CPA surcharge	\$3,922,024	\$4,120,278
State Matching Funds <i>(For FY24, currently estimating 20% match)</i>	\$771,569	\$796,154
Unrestricted Fund Balance	\$714,416	\$703,910
Fund Balance <i>(assume \$0 in budget)</i>		
Interest <i>(assume \$0 in budget)</i>		
<b>TOTAL REVENUE</b>	<b>\$5,408,009</b>	<b>\$5,620,342</b>
<b>EXPENDITURES</b>		
<b>PROGRAM ADMINISTRATION &amp; DEBT SERVICE</b>		
Program Administration <i>(max. 5% of annual new funds)</i>	\$179,376.00	\$182,907.00
Debt Service: Webster Woods <i>(in addition to Open Space Budget Reserve)</i>	\$154,052.10	\$132,818.80
<b>BUDGETED RESERVES</b>		
Community Housing Reserve <i>(min. 10% of annual new funds)</i>	\$540,801	\$562,034
Historic Resources Reserve <i>(min. 10% of annual new funds)</i>	\$540,801	\$562,034
Open Space Reserve <i>(min. 10% of annual new funds)</i>	\$540,801	\$562,034
General Reserve (unrestricted, any CPA purpose)	\$3,406,181	\$3,618,514
<b>TOTAL EXPENDITURES</b>	<b>\$5,362,011</b>	<b>\$5,620,342</b>



**Draft FY24 Community Preservation  
Program Administrative Budget Detail**

Newton, Massachusetts			
COMMUNITY PRESERVATION PROGRAM			
Budget Detail for Program Administration	MUNIS Accounts (58Z11400 unless shown otherwise)	Fiscal 2023 Final	Fiscal 2024 Provisional
		Approved June 2022	As of January 25, 2023
<b>PERSONNEL</b>			
Prog Mgr: FULL TIME SALARIES (Grade H-9)	511001	\$82,297	\$84,763
Prog Mgr: CONTRIBUTORY RETIREMENT	58Z10491-570700	\$29,269	\$32,834
Prog Mgr: DENTAL INSURANCE	57DENT	\$600	\$600
Prog Mgr: HEALTH INSURANCE	57HLTH	\$20,000	\$21,000
Prog Mgr: BASIC LIFE INSURANCE	57LIFE	\$60	\$60
Prog Mgr: MEDICARE PAYROLL TAX	57MEDA	\$1,500	\$1,500
Prog Mgr: LONGEVITY	514001	\$0	\$0
<b>Program Manager(s) total</b> (salary plus benefits)		\$133,726	\$140,757
Work by Other Depts.	513040	\$5,000	\$5,000
<b>SUBTOTAL Personnel</b>		<b>\$138,726</b>	<b>\$145,757</b>
<b>OTHER</b>			
Consultants	530100	\$20,000	\$20,000
Advertising/ Publications	534300	\$3,000	\$3,000
Audiovisual Equipment	585130	\$500	\$500
Computer Software	585121	\$500	\$500
Computer Supplies	558500	\$500	\$500
Dues & Subscriptions	573000	\$8,150	\$8,150
In-State Conferences	571100	\$1,000	\$1,000
Office Supplies	542000	\$1,000	\$1,000
Postage	534100	\$500	\$500
Printing	534200	\$2,000	\$1,000
Signs	554800	\$1,500	\$1,000
<b>SUBTOTAL Other Expenses</b>		<b>\$38,650</b>	<b>\$37,150</b>
<b>TOTAL All Expenses</b>		<b>\$177,376</b>	<b>\$182,907</b>

# Community Preservation Program

## Fiscal Year 2024 Outcomes and Strategies

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### Outcome 1

#### Promote Awareness of the Newton CPA Program

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In 2001, Newton became an early adopter of the Community Preservation Program which has since raised nearly \$83 million for projects that have accomplished the community's goals in community housing, historic resources, open space and recreation. Over the life of the program, the

City has invested the largest portion of our funding (46%) on Affordable Housing projects which have acquired, created, preserved, supported, restored and rehabilitated new and existing affordable housing units throughout Newton. The remaining funds have been almost equally divided between the eligible CPA funding categories of Historic Resources (19%), Open Space (16%), and Recreation (17%).

In FY23, the Committee worked with students in the Newton North High School's Graphic Design Program to create a new logo for the Community Preservation Program as well as new signage to advertise existing and ongoing projects. The CPC will continue to work in FY24 to increase awareness in the community about the Community Preservation Program's possibilities and the positive impacts it has had on neighborhoods across the City. These initiatives will complement the CPC's webpage ([www.newtonma.gov/government/planning/community-preservation-program](http://www.newtonma.gov/government/planning/community-preservation-program)) which is regularly updated with the latest information on the City's current funding proposals as well as past projects and the CPA funding process, including a [new Interactive Online Map](#) showing all the CPA projects completed to date.

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### Outcome 2

#### Establish New Community Preservation Program Information Sessions and Workshops for Prospective Applicants

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Although Newton's CPA program has completed hundreds of projects throughout the City over twenty years, many organizations in the City are still not aware of the program and its possibilities and neighborhoods that have not yet benefited from it. The CPC is actively working to develop new outreach and engagement programs to create a wider

and more diverse network of connections between the CPC and the City's local organizations. The CPC also seeks to encourage neighborhoods and organizations that have not previously worked with the CPC to consider what projects or community needs they have that might be eligible for CPA funding. The CPC will continue to work with the City's community engagement planner to design and implement this new community outreach and engagement program which will include annual information sessions followed by regular project workshops for applicants who are interested in receiving assistance in thinking through potential projects. The CPC will begin this work in Spring FY23 with its first scheduled information session on Monday, March 27, 2023. At that time, the Committee will provide interested community members with information on the CPA program and its possible funding uses and review new materials designed to assist applicants who are developing funding proposals and applications. The CPC will follow up these information sessions with small group workshops to help potential applicants work through the application process. The CPC anticipates that these meetings will be held on an annual or bi-annual basis in the future based on community demand.

# Community Preservation Program Fiscal Year 2024 Outcomes and Strategies

## Outcome 3

Use Community Feedback on CPA Funding Priorities and Continue to Work with Newton Affordable Housing Trustees to Fund Affordable Housing Projects and Initiatives

The Community Preservation Act requires that the CPC “study the needs, possibilities and resources of the city or town regarding community preservation.” These studies provide the CPC with direction on the community’s goals for how the City’s CPA funds should be spent. In FY23, the CPC expanded the uses of the reports and informational materials created in FY22 to provide the public with more detailed financial information and updates on the program and

its projects. After spending considerable time in FY22 reviewing its existing materials and funding targets, the CPC reaffirmed those goals in FY23 and continued to be guided by the category spending targets listed below.

Newton CPA Allocation Targets: Balancing Funds Across Resources	
Community Housing (statutory minimum 10%)	35%
Historic Resources (statutory minimum 10%)	20%
Open Space (statutory minimum 10%)	20%
Recreation	20%
<b>Total</b>	<b>100%</b>

In FY23, the CPC reviewed its first funding proposal from the newly established Newton Affordable Housing Trust (NAHT) for the program’s annual target funding goal for Community Housing of 35%, which in FY23 came to \$1,948,056. The CPC unanimously voted to recommend this funding which was subsequently approved by the City Council. The CPC will continue to work with the NAHT in FY24 to review its annual program funding requests.

## Outcome 4

Develop Additional Tools for Monitoring Existing and Ongoing CPA Funded Projects

Each of the CPA funding categories has specific requirements and standards that are applied to any projects which receive those funds. The CPC continues to develop processes and tools to monitor new, existing, and ongoing CPA funded projects to ensure their compliance with the CPA funding statute

and requirements and continuously improve the CPA’s processes and outcomes. In FY24, this work will include working with the NAHT to develop cooperative processes for reviewing and managing any affordable housing developments and initiatives which they choose to fund with future CPA funding.

# #86-24 114b- Community Preservation

FUND: 5800 - CPA FUND RESERVE AND ADMIN  
DEPARTMENT: ALL DEPARTMENTS

CITY OF NEWTON BUDGET  
DEPARTMENT LEGAL LEVEL OF CONTROL

	ACTUAL 2020	ACTUAL 2021	ACTUAL 2022	ORIGINAL 2023	RECOMMENDED 2024	CHANGE 2023 to 2024
<b>COMPTROLLER SUMMARY</b>						
52 - EXPENSES	0	0	0	4,692,147	4,180,548	-511,599
59 - TRANS TO OTHER FUND	4,398,915	7,954,781	6,407,787	0	0	0
57 - FRINGE BENEFITS	20,492	21,827	25,058	29,269	32,834	3,565
<b>TOTAL DEPARTMENT</b>	<b>4,419,407</b>	<b>7,976,608</b>	<b>6,432,845</b>	<b>4,721,416</b>	<b>4,213,382</b>	<b>-508,034</b>
<b>BUDGETED RESERVES</b>						
52 - EXPENSES	0	0	0	4,692,147	4,180,548	-511,599
<b>TOTAL BUDGETED RESERVES</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>4,692,147</b>	<b>4,180,548</b>	<b>-511,599</b>
<b>CONTRIBUTORY RETIREMENT</b>						
57 - FRINGE BENEFITS	20,492	21,827	25,058	29,269	32,834	3,565
<b>TOTAL CONTRIBUTORY RETIREMENT</b>	<b>20,492</b>	<b>21,827</b>	<b>25,058</b>	<b>29,269</b>	<b>32,834</b>	<b>3,565</b>
<b>TRANSFER TO OTHER FUNDS</b>						
59 - TRANS TO OTHER FUND	4,398,915	7,954,781	6,407,787	0	0	0
<b>TOTAL TRANSFER TO OTHER FUNDS</b>	<b>4,398,915</b>	<b>7,954,781</b>	<b>6,407,787</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>PLANNING SUMMARY</b>						
51 - PERSONNEL SERVICES	104,743	75,608	78,453	89,296	89,763	467
52 - EXPENSES	15,061	8,809	8,437	37,650	36,150	-1,500
58 - CAPITAL EXPENSES	0	0	0	1,000	1,000	0
57 - FRINGE BENEFITS	5,686	19,328	19,351	22,160	23,160	1,000
<b>TOTAL DEPARTMENT</b>	<b>125,490</b>	<b>103,745</b>	<b>106,241</b>	<b>150,106</b>	<b>150,073</b>	<b>-33</b>
<b>CPA ADMINISTRATION</b>						
51 - PERSONNEL SERVICES	104,743	75,608	78,453	89,296	89,763	467
52 - EXPENSES	15,061	8,809	8,437	37,650	36,150	-1,500
58 - CAPITAL EXPENSES	0	0	0	1,000	1,000	0
57 - FRINGE BENEFITS	5,686	19,328	19,351	22,160	23,160	1,000
<b>TOTAL CPA ADMINISTRATION</b>	<b>125,490</b>	<b>103,745</b>	<b>106,241</b>	<b>150,106</b>	<b>150,073</b>	<b>-33</b>

# #86-24 114b- Community Preservation

FUND: 5800 - CPA FUND RESERVE AND ADMIN  
DEPARTMENT: ALL DEPARTMENTS

CITY OF NEWTON BUDGET  
DEPARTMENTAL DETAIL

	ACTUAL 2020	ACTUAL 2021	ACTUAL 2022	ORIGINAL 2023	RECOMMENDED 2024	CHANGE 2023 to 2024	
<b>104 - COMPTROLLER</b>							
<b>58R10498 - BUDGETED RESERVES</b>							
<b>EXPENSES</b>							
579000	CURRENT YEAR RESERVE	0	0	0	3,578,971	3,618,514	39,543
57900B	HISTORIC RESERVE	0	0	0	556,588	562,034	5,446
57900C	COMMTY HOUSING RESER	0	0	0	556,588	0	-556,588
	<b>TOTAL EXPENSES</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>4,692,147</b>	<b>4,180,548</b>	<b>-511,599</b>
	<b>TOTAL BUDGETED RESERVES</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>4,692,147</b>	<b>4,180,548</b>	<b>-511,599</b>
<b>58Z10491 - CONTRIBUTORY RETIREMENT</b>							
<b>FRINGE BENEFITS</b>							
570700	NCRS PENSION CONTB	20,492	21,827	25,058	29,269	32,834	3,565
	<b>TOTAL FRINGE BENEFITS</b>	<b>20,492</b>	<b>21,827</b>	<b>25,058</b>	<b>29,269</b>	<b>32,834</b>	<b>3,565</b>
	<b>TOTAL CONTRIBUTORY RETIREMENT</b>	<b>20,492</b>	<b>21,827</b>	<b>25,058</b>	<b>29,269</b>	<b>32,834</b>	<b>3,565</b>
<b>58Z10499 - TRANSFER TO OTHER FUNDS</b>							
<b>TRANS TO OTHER FUND</b>							
595810	TRANS TO-CPA FUND- HIS	431,305	479,737	642,409	0	0	0
595820	TRANS TO-CPA FUND- CO	3,536,305	6,327,344	3,500,000	0	0	0
595830	TRANS TO-CPA FUND_ CO		450,000	420,000	0	0	0
595840	TRANS TO- CPA OPEN SP	431,305	697,700	1,845,378	0	0	0
	<b>TOTAL TRANS TO OTHER FUND</b>	<b>4,398,915</b>	<b>7,954,781</b>	<b>6,407,787</b>	<b>0</b>	<b>0</b>	<b>0</b>
	<b>TOTAL TRANSFER TO OTHER FUNDS</b>	<b>4,398,915</b>	<b>7,954,781</b>	<b>6,407,787</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>TOTAL COMPTROLLER</b>		<b>4,419,407</b>	<b>7,976,608</b>	<b>6,432,845</b>	<b>4,721,416</b>	<b>4,213,382</b>	<b>-508,034</b>

# #86-24 114b- Community Preservation

<b>CITY OF NEWTON BUDGET DEPARTMENTAL DETAIL</b>
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		ACTUAL 2020	ACTUAL 2021	ACTUAL 2022	ORIGINAL 2023	RECOMMENDED 2024	CHANGE 2023 to 2024
<b>114 - PLANNING</b>							
<b>58Z11400 - CPA ADMINISTRATION</b>							
<b>PERSONNEL SERVICES</b>							
511001	FULL TIME SALARIES	102,641	75,608	78,453	82,296	84,763	2,467
513040	WORK BY OTHER DEPTS.	1,427	0	0	5,000	5,000	0
514001	LONGEVITY	675	0	0	2,000	0	-2,000
	<b>TOTAL PERSONNEL SERVICES</b>	<b>104,743</b>	<b>75,608</b>	<b>78,453</b>	<b>89,296</b>	<b>89,763</b>	<b>467</b>
<b>EXPENSES</b>							
530100	CONSULTANTS	4,696	572	0	20,000	20,000	0
534100	POSTAGE	31	46	0	500	500	0
534200	PRINTING	629	42	0	2,000	1,000	-1,000
534300	ADVERTISING/PUBLICATIO	225	0	0	3,000	3,000	0
542000	OFFICE SUPPLIES	521	249	0	1,000	1,000	0
554800	SIGNS & SIGN PARTS	0	0	37	1,500	1,000	-500
558500	COMPUTER SUPPLIES	1,058	0	0	500	500	0
571100	IN-STATE CONFERENCES	0	0	250	1,000	1,000	0
573000	DUES & SUBSCRIPTIONS	7,900	7,900	8,150	8,150	8,150	0
	<b>TOTAL EXPENSES</b>	<b>15,061</b>	<b>8,809</b>	<b>8,437</b>	<b>37,650</b>	<b>36,150</b>	<b>-1,500</b>
<b>FRINGE BENEFITS</b>							
57DENT	DENTAL INSURANCE	227	516	501	600	600	0
57HLTH	HEALTH INSURANCE	3,962	17,856	17,857	20,000	21,000	1,000
57LIFE	BASIC LIFE INSURANCE	61	57	52	60	60	0
57MEDA	MEDICARE PAYROLL TAX	1,435	899	941	1,500	1,500	0
	<b>TOTAL FRINGE BENEFITS</b>	<b>5,686</b>	<b>19,328</b>	<b>19,351</b>	<b>22,160</b>	<b>23,160</b>	<b>1,000</b>
<b>CAPITAL EXPENSES</b>							
585121	PC SOFTWARE-ADMIN	0	0	0	500	500	0
585130	AUDIO-VISUAL EQUIPMEN	0	0	0	500	500	0
	<b>TOTAL CAPITAL EXPENSES</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1,000</b>	<b>1,000</b>	<b>0</b>
	<b>TOTAL CPA ADMINISTRATION</b>	<b>125,490</b>	<b>103,745</b>	<b>106,241</b>	<b>150,106</b>	<b>150,073</b>	<b>-33</b>
<b>TOTAL PLANNING</b>		<b>125,490</b>	<b>103,745</b>	<b>106,241</b>	<b>150,106</b>	<b>150,073</b>	<b>-33</b>

# #86-24 114b- Community Preservation

FUND: 5800 - CPA FUND RESERVE AND ADMIN  
DEPARTMENT: ALL DEPARTMENTS

CITY OF NEWTON BUDGET  
FUNCTIONAL ELEMENT SUMMARY

	ACTUAL 2020	ACTUAL 2021	ACTUAL 2022	ORIGINAL 2023	PROPOSED 2024	CHANGE 2023 to 2024	% CHANGE
<b>104 - COMPTROLLER</b>							
58R10498 - BUDGETED RESERVES	0	0	0	4,692,147	4,180,548	-511,599	-11%
58Z10491 - CONTRIBUTORY RETIREMEN	20,492	21,827	25,058	29,269	32,834	3,565	12%
58Z10499 - TRANSFER TO OTHER FUNDS	4,398,915	7,954,781	6,407,787	0	0	0	0%
<b>TOTAL DEPARTMENT 104</b>	<b>4,419,407</b>	<b>7,976,608</b>	<b>6,432,845</b>	<b>4,721,416</b>	<b>4,213,382</b>	<b>-508,034</b>	<b>-11%</b>
<b>114 - PLANNING</b>							
58Z11400 - CPA ADMINISTRATION	125,490	103,745	106,241	150,106	150,073	-33	0%
<b>TOTAL DEPARTMENT 114</b>	<b>125,490</b>	<b>103,745</b>	<b>106,241</b>	<b>150,106</b>	<b>150,073</b>	<b>-33</b>	<b>0%</b>
<b>TOTAL FUND 5800</b>	<b>4,544,897</b>	<b>8,080,353</b>	<b>6,539,086</b>	<b>4,871,522</b>	<b>4,363,455</b>	<b>-508,067</b>	<b>-10%</b>

# NEWTON COMMUNITY PRESERVATION PROGRAM FY2024 BUDGET

Presentation to Zoning and Planning Committee

May 22, 2023



Open Space

Community Housing

Recreation

Historic Resources

## How does CPA Funding Work?

Newton's CPA Funding comes primarily from:

- Local revenue surcharge of 1% on property taxes
- State CPA Trust Fund match on the **prior fiscal year** local surcharge. For example, in FY23 Newton received a match of 38.5% of its FY22 CPA surcharge

CPA Funding can be used in the year that it becomes available **OR** saved for future projects.



**114b- Community Preservation**

City of Newton COMMUNITY PRESERVATION FUND	Fiscal 2023 FINAL	Fiscal 2024 PROVISIONAL
<b>Program Budget - Revenue</b>		Approved by CPC April 11, 2023
Local CPA Surcharge	\$3,980,772	\$4,120,278
State Matching Funds - Estimated at 20% (In FY23 actual match received was 38.5%; FY24 Figures to date more consistent with FY20/21, which had 28% match)	\$771,569	\$796,154
Unrestricted Fund Balance (Difference between Prior Year Estimated State Match and Actual Funds Received)	\$714,416	\$703,910
Additional Local Revenue: (assume \$0 in budget)		
<b>TOTAL REVENUE</b>	<b>\$5,466,757</b>	<b>\$5,620,342</b>

City of Newton, Massachusetts COMMUNITY PRESERVATION FUND	Fiscal 2023 FINAL	Fiscal 2024 PROVISIONAL
<b>Program Budget - Expenditures</b>		Approved by CPC April 11, 2023
Program Administration (max. 5% of annual new funds)	\$179,376.00	\$182,907.00
Debt Service: Webster Woods (in addition to Open Space Budget Reserve)	\$154,052.10	\$132,818.80
<b>BUDGETED RESERVES</b>		
Community Housing Reserve (10% minimum of Total Revenue)	\$540,801	\$562,034
Historic Resources Reserve (10% minimum of Total Revenue)	\$540,801	\$562,034
Open Space Reserve (10% minimum of Total Revenue)	\$540,801	\$562,034
General Reserve (unrestricted, any CPA purpose)	\$3,406,181	\$3,618,514
<b>TOTAL EXPENDITURES</b>	<b>\$4,853,417</b>	<b>\$5,565,875</b>

114b- Community Preservation

City of Newton, Massachusetts COMMUNITY PRESERVATION FUND	Fiscal 2023 FINAL	Fiscal 2024 PROVISIONAL
<b>Program Administration Budget</b>		
Program Manager (salary plus benefits)	\$133,726	\$140,757
Work by Other Depts.	\$5,000	\$5,000
Consultants	\$20,000	\$20,000
Advertising/ Publications	\$3,000	\$3,000
Audiovisual Equipment	\$500	\$500
Computer Software	\$500	\$500
Computer Supplies	\$500	\$500
Dues & Subscriptions	\$8,150	\$8,150
In-State Conferences	\$2,100	\$1,000
Office Supplies & Equipment	\$1,000	\$1,000
Postage	\$500	\$500
Printing	\$2,000	\$1,000
Signs	\$1,500	\$1,000
<b>TOTAL EXPENSES</b>	<b>\$177,376</b>	<b>\$182,907</b>

# CPA Fund Finances at a Glance Report

Available on CPA Program's Reports and Presentations Page

City of Newton Community Preservation Committee

## Finances At a Glance

As of May 18, 2023

Expenses as %  
of total current  
year revenue

### Fiscal Year 2023

#### Revenue

Beginning balance	6,309,217
Local CPA surcharge	3,980,772
State match	
Budget for this FY	771,569
Additional from prior FY	714,416
<b>Total Available Resources</b>	<b>11,775,974</b>

Actual FY22 State Match 43.8%, 20% Budgeted

#### Expenses

Bond repayment obligations	694,353	13%
New funding authorizations	6,742,345	123%
Administrative costs	179,376	3%
<b>Total Expenses</b>	<b>7,616,074</b>	<b>139%</b>
<b>Current Fund Balance</b>	<b>4,159,900</b>	

Webster Woods  
Includes funding recommended by CPC

### Fiscal Year 2024

#### Revenue

Beginning balance	4,159,900
Local CPA surcharge	4,120,278
State match	
Budget for this FY	796,154
Additional from prior FY	703,910
<b>Total Available Resources</b>	<b>9,780,243</b>

#### Expenses

Bond repayment obligations	694,853	12%
New funding authorizations	-	0%
Administrative costs	182,907	3%
<b>Total Expenses</b>	<b>877,760</b>	<b>16%</b>
<b>Projected Fund Balance</b>	<b>8,902,484</b>	

Webster Woods (Gath Pool and athletic fields debt begins in FY25)  
Includes funding recommended by CPC



## Zoning & Planning Committee Budget Report

### City of Newton In City Council

**Monday, May 22, 2023**

Present: Councilors Crossley (Chair), Danberg, Albright, Leary, Krintzman, Wright, Baker, and Ryan

Also Present: Councilors Greenberg, Gentile, Humphrey, Norton, Bowman, Lucas, Oliver, Malakie, Laredo, and Downs

City staff present: Maureen Lemieux, Chief Financial Officer; Perry Rosenfield FP&A Manager; Jonathan Yeo, Chief Operating Officer; John Lojek, Commissioner of Inspectional Services; Anthony Ciccariello, Deputy Commissioner of Inspectional Services; Lara Kritzer, CPA Program Manager; Amalia Timbers, Citizen Assistance Officer; Andrew Lee, Assistant City Solicitor; Ann Berwick, Co-Director of Sustainability; Josh Ostroff, Director of Transportation Planning; Barney Heath, Director of Planning; Jennifer Caira, Deputy Director of Planning; Deb Finamore, Inspectional Services Administrative Assistant; Jaclyn Norton, Committee Clerk

### **CPA Administration**

**Note:** The CPA's proposed Budget is \$5,620,342. Lara Kritzer, CPA Program Manager, detailed that Community Preservation Act (CPA) Funding primarily comes from a local revenue surcharge of 1% on property taxes and there is a State CPA Trust Fund match on the prior fiscal year. This funding can be used in the year it becomes available, or for future projects. For the FY24 Budget, the local CPA surcharge is \$4,120,278, the state matching funds are estimated at 20% or \$796,154, and the unrestricted fund balance is \$703,910., for a total FY24 budget of \$5,620,342. This proposed budget was approved by the Community Preservation Committee (CPC) on April 11, 2023.

The proposed FY24 expenditures include \$182,907 allocated to program administration, and \$132,818.80 for debt service for Webster Woods. In addition, required reserves for the fund include \$562,034 each for the Community Housing Reserve, Historic Resources Reserve, and Open Space Reserve; leaving \$3,618,514. In the general reserve. The general reserve is unrestricted and may be used for any CPA-allowed purpose. Ms. Kritzer also outlined the breakdown of the administration budget for the CPA which propose a slight decrease in the printing and signs line items. The CPA Program Reports and Presentations Page includes finance at a glance report which is updated monthly. An example of this report can be found in the attached presentation.

Multiple Councilors expressed support for the work of Ms. Kritzer and the CPA Administration and urged that a larger percentage of these funds be used for non-City projects. The Chair also urged that the Department look into a complete assessment of the repairs needed to Warren House (former school) housing project, to understand the full scope of work prior to approving another \$2 million.

**Q&A**

Q: What dues does the Department pay?

A: Ms. Kritzer stated that the City is a member of the Community Preservation Coalition, which is a statewide organization that bases the dues on size of the municipality and CPA program. This Coalition is a vital resource for the Department and has helped advocate for additional state funding into the program.

Q: Could the Department explain the decrease in the debt service for Webster Woods?

A: The decrease in debt service is attributed to greater CPA funds being received for FY24 which increases the open space reserve and decreases the amount needed from the general reserve.

Q: What does the Department use consultants for?

A: Consultants have only been used for larger projects, or independent studies, and this has been a rare occurrence for the Department.

Q: What is the Department working to increase awareness of the CPA?

A: The Department is working with the new Community Engagement Coordinator to strengthen outreach efforts.

Q: Have you looked into participatory budgeting for the CPA Administration?

A: Ms. Kritzer stated that she had begun discussing this with the previous Community Engagement Coordinator and will look into it for smaller projects.

The Committee took a straw vote to accept the CPA's proposed Budget of \$5,620,342, which passed unanimously.

**Respectfully submitted,  
Deborah J. Crossley, Chair**

# Inspectional Services Department

## Mission

*To keep the record for all real property in the City, so that homeowners, developers, contractors, property owners, attorneys, architects, engineers, and researchers can access the property records of the City on-line and at our windows.*

*We also act as the portal for all new businesses in the City. When someone decides to pursue a new venture in Newton, they are encouraged to visit ISD to get a complete read on whether their idea, in a proposed location, is allowed, if it conforms to zoning code regulations and what is their best path forward.*

Newton ISD is and has been an incredibly busy place. ISD issues building, mechanical, plumbing, gas, and electrical permits for all manner of work to be done in the City. ISD is open for 53 hours per week to serve the public, opening at 7:00 AM. ISD is staffed by Development Service Assistants, Administrative personnel, inspectors, and managers, who all provide service and answer questions concerning building and zoning in Newton.

ISD has many functions including: periodic inspections, code enforcement, building, plumbing, gas, and electrical inspections for the +/- 10,000 permits issued annually. Additionally, ISD supervises the enforcement of the leaf blower ordinance and the operation of the Weights and Measures inspector. Overall ISD performs many thousands of inspections per year. ISD also responds to various other complaints, such as: property line disputes, fence and sign regulations, tree removal complaints, illegal units and parking, overcrowding, work without permits, abandoned buildings, noise, and vibration complaints.

Periodic inspections are intended to ensure that all schools, camps, day care centers, restaurants, places of assembly and multi-unit housing are safe and code compliant. 800+ inspections are completed annually and then are re-inspected as necessary.

The Code Enforcement Officer responds to complaints of zoning and building code violations as well as Special Permit conditions, work hour and noise violations. A great deal of the Officer's time is spent in negotiations and the suppression of noise, historic and conservation complaints.

ISD has multiple interdepartmental interactions daily. Much of what ISD does is reliant on the cooperation of other departments. Engineering, Fire, City Clerk, Law, Planning, DPW, Health, Assessing, Treasury and IT are all vital to the daily functioning of ISD. ISD has spearheaded the use of the NewGov software as we pursue the consolidation of all property information in the City as well as making all property records and files transparent for the citizens of Newton.

FY 2023 was an exciting year with many new beginnings. ISD returned to many of the pre-covid practices with one notable, positive exception. Counter service at ISD changed forever due to the introduction of the NewGov permitting and municipal management system that the city introduced. Building permits came onto the on-line system, joining the Plumbing, Gas and Electric permits that were initiated in the fall of 2021. Due to this change, most of the people who used to come to the counter to apply, shifted to the on-line portal so we saw a fraction of the previous numbers. This has been a dramatic change for the department. Because of these changes, the way that ISD personnel process permits, complaints and requests is almost totally done within the system. Rather than speaking to customers at the counter and discussing their application, the DSA's are assessing the application on-line and responding to customers on-line for basic permit information. The application is then forwarded to the local inspectors for plan review and workflow as other departments may be involved. As a result, we are more responsive and customers are served more efficiently.

Field personnel responsibilities are also changing as all inspections are now done and entered on an iPad. This allows for inspections and access to the inspection report to be available in real time. These processes are still a work in progress but we are improving all the time as we delve into complex areas of the NewGov system. Scheduling and planning are also greatly advanced in the new system with improvements being added all the time. The most challenging areas of field work are resident complaints, including job site misbehavior, illegal rentals, unkept property and noise.

Code enforcement has made significant progress as the coordination between ISD and Law becomes even more consistent. Our goal is to ensure that all complaints are recorded and followed up and prior complaints are resolved. There has been an uptick in the number of cases that will be resolved in the courts as the

Code Enforcement Officer and Law lay out limits and time frames. Violation letters and Stop Work orders are now being standardized in NewGov, saving time and effort. All Code enforcement issues will soon be available in NewGov, including the tracking of accessory units, illegal units and occupancies, Special Permits, and conditions as well as Historic and Conservation concerns. In the spring of 2023, the Joint Code Enforcement Taskforce (ISD, Fire, Health, Police, Law, and others as necessary) is meeting regularly to coordinate efforts.

The leaf blower enforcement agent will be in the field again in the spring 2023 to follow on to a very successful 2022. The city registered over 200 companies and issued over 1,000 vehicle stickers in 2022. Over 500 tickets were written for leaf blower warnings and violations. The agent reported that he saw a significant increase in the use of electric blowers, with some companies advertising that they were all electric. The data collected in this enforcement effort are now being entered into the NewGov system which provides transparency and real time availability.

The Periodic Inspection program has now completely entered NewGov. This makes renewal, tracking of violations and notifications easily accessible. Because of the efficiency of the new system, we have discovered multiple properties that had "fallen off the radar" as it were and are now in the system. Periodic Inspection involves more than 800 annual inspections and follow-up to those inspections. The School Safety Program is still a top priority, and the Periodic Inspector works closely with the Newton Public Schools and Public Buildings to correct deficiencies as they are identified.

The Weights and Measures Inspector will be part of the Phase III of NewGov as we work with the OpenGov team to identify all the opportunities. Again, this will enable the W&M Inspector to streamline our processes.

I have referred several times to the NewGov/ OpenGov system that we are now employing extensively in ISD and across many City departments. We have completed Phases I & II of the program and are entering into Phase

III. Phase III involves the City Clerk's office and a clean-up and re-analysis of current users. Our project leaders, Deb Finamore (ISD) and Sherri Lougee (HHS), were awarded this year with the Mayor's Innovators of the Year Award for their work in implementing, installing, and advancing this initiative. We are forever grateful for their diligence and hard work to make this all happen so smoothly. We also continue to identify other ways that NewGov can be used, and the project leaders are in constant contact with OpenGov to discover new ways and features that we may want to employ.

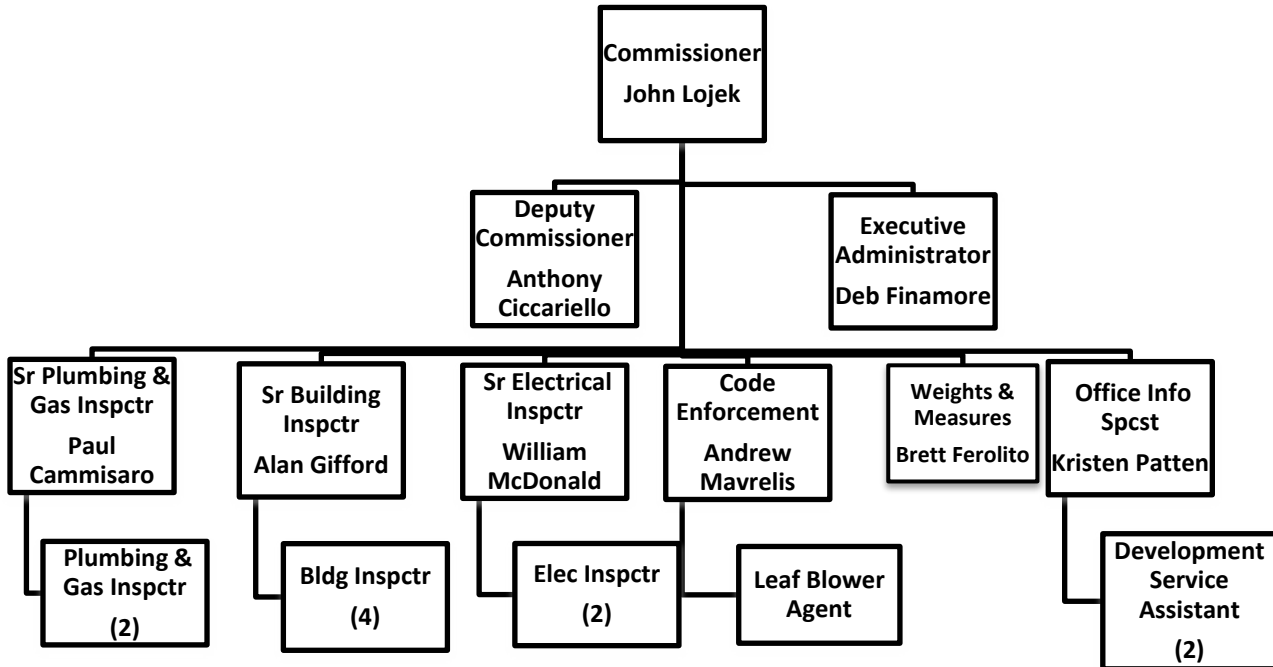
At this point in time, we have settled into a very productive use of our DSA's (Development Service Assistants). They continue to be the first point of contact at the ISD counter and the first to open new applications for permit. Their use of NewGov has allowed them the time to work on multiple other initiatives within the department, including scanning and cleaning of older files.

ISD continues to be dedicated to efficiency and the advancement of all our employees, many of whom are and have moved forward with more advanced certifications and educational points.

*John D. Lojek*

John D. Lojek, Commissioner

# INSPECTIONAL SERVICES





# Financial and Operating Highlights

## Financial Highlights

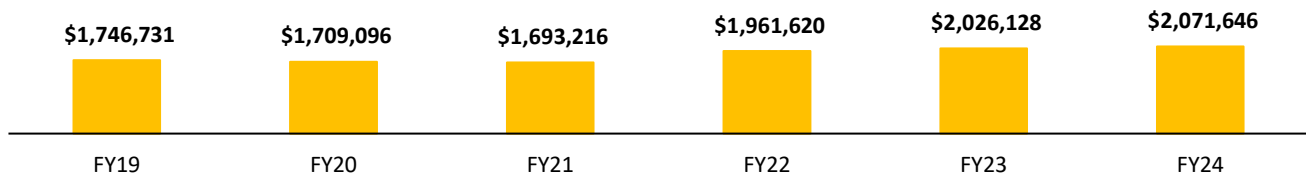
	< -----Actual ----->				Original	Proposed
	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024
<b>Expenditure by Department</b>						
Admin	\$ 640,658	\$ 623,323	\$ 576,075	\$ 675,551	\$ 771,024	\$ <b>762,846</b>
Bldg Code Enf.	\$ 465,000	\$ 469,165	\$ 473,957	\$ 559,678	\$ 542,397	\$ <b>557,449</b>
Weights & Measures	\$ 92,005	\$ 94,689	\$ 98,592	\$ 75,512	\$ 72,120	\$ <b>97,267</b>
Mech Inspections	\$ 549,068	\$ 521,919	\$ 544,593	\$ 650,879	\$ 640,587	\$ <b>654,084</b>
<b>Total</b>	\$ <b>1,746,731</b>	\$ <b>1,709,096</b>	\$ <b>1,693,216</b>	\$ <b>1,961,620</b>	\$ <b>2,026,128</b>	\$ <b>2,071,646</b>
<b>% Incr</b>	<b>9.51%</b>	<b>-2.15%</b>	<b>-0.93%</b>	<b>15.85%</b>	<b>3.29%</b>	<b>2.25%</b>

## Personnel

Full-Time Employees	17	18	19	19	19	<b>18*</b>
Part-Time Employees	0	0	0	1	1	<b>1</b>
<b>Total</b>	<b>17</b>	<b>18</b>	<b>19</b>	<b>20</b>	<b>20</b>	<b>19</b>

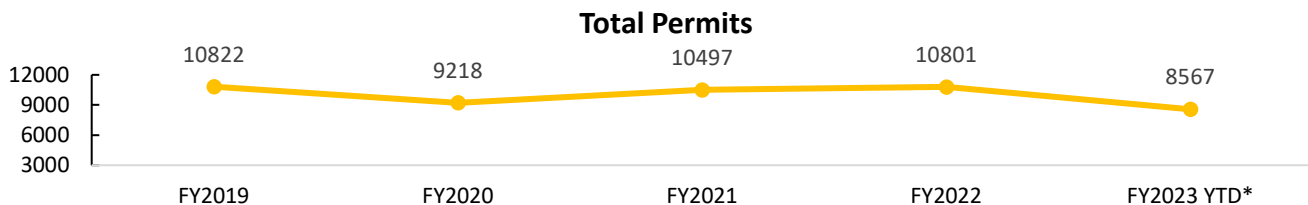
\*Deferred Development Services Associate for FY24

## Total Inspectional Services Expenditures



## Operating Highlights

	FY2019	FY2020	FY2021	FY2022	FY2023 YTD*
Building Permits	3,968	3,534	4,266	4,431	3,329
Electrical Permits	3,017	2,422	2,712	2,788	2,407
Plumbing Permits	2,083	1,781	2,009	1,523	1,697
Gas Permits	1,754	1,481	1,510	2,059	1,134



\*FY2023 is as of April 25th, 2023

## Enforcement Requests (Mar 2022-Feb 2023)

New	Open	Closed	Closed 30 days
238	224	64	53

## FY 2023 Building Permit Breakdowns to Date

Residential Construction (new)	53	Solar	156
Commercial (new)	2	Charging Stations	59
Demolition	59		

# Inspectional Services Department

## Fiscal Year 2024 Outcomes and Strategies

There has been a quantum leap in the past year in the way ISD provides service to our customers. There have been many adjustments to everyday work within and outside of the office. It is still true that long before Newton City Hall is open to the general public, ISD is already at work. ISD opens for business at 7:00 a.m., every day, and remains open for 53 hours a week to serve the residents of Newton. However, much of how the staff helps our customer has changed. It had been standard practice at ISD to issue 90% of permits the day they are submitted, with many clients choosing to visit the counter and wait briefly so that they could walk away with their permit. We still provide that fast turnaround but make it even easier for customers. At present all building, plumbing, gas and electric permits are being applied for on-line in NewGov with few being submitted on paper. This new permitting software system allows clients to avoid visiting City Hall and they are issued permits electronically. Problems or issues with their application are resolved through email and system notifications. Customers, therefore, can apply 24/7/365. Soon almost all transactions will be enabled through NewGov.

We have far fewer ISD counter conversations and the nature of the one’s we do have are more substantive, generally concerning resident’s property, contractor’s questions, the review of “what if’s?,” and persons looking to review their property folders. For example, because of banking regulations, property owners want to find out how to close old open permits, as they have been told by their finance company or realtor that selling their property depends on closing open permits, often from many years ago. ISD has made a conscientious effort to aid these people in getting older permits closed so they can sell or refinance their property. At present, we are working on a more comprehensive system for closing these old permits, which is painstaking, time consuming work.

As Zoning Code, building code and energy codes continue to evolve, ISD needs to provide explanations. Changes to the retail and building environment leads to many questions as to new uses, many of which are not provided for in the current code.

ISD staff is required to be updated and trained in the nuances of the Building and Zoning Code and the current interpretations. We regularly train staff on the ongoing changes.

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### Outcome 1

Provide 1<sup>st</sup> Class Customer Service

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### Outcome 2

Ensure Code Enforcement, School Safety, and Periodic Inspections

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Code enforcement, periodic inspections and school safety inspections are important, nuanced parts of the ISD responsibilities. ISD enforces the provisions of the 780 Code of Massachusetts Regulations (CMR), State Building Code, the City of Newton Zoning Code, and various City Ordinances. “Strict

code enforcement makes the city safer” is a longstanding motto of Newton ISD. All the codes that ISD is responsible for enforcing lead to a safer and more livable Newton.

# Inspectional Services Department

## Fiscal Year 2024 Outcomes and Strategies

The Periodic Inspection program includes all the properties and buildings in the city that involve a public assembly component. Restaurants, theaters, licensed establishments, churches, synagogues, private schools, daycares, meeting halls, and more are all inspected under this program. ISD devotes a full-time inspector to just this program as it involves approximately 825 separate inspections plus follow-up inspections over the course of the year. This program is now fully recorded and tracked in the NewGov system for up-to-date current and future access.

The full time Zoning and Code Enforcement Inspector is making significant progress in following through on complaints and violations. Code violations are now integrated into the NewGov system. Because of the Code Enforcement Officer's ability to dedicate full attention to these issues, many, if not most, violators choose to comply rather than be fined or go to court. There are always challenges to achieving compliance and we have faced our share. This past year we have had to demolish one building and STOP Work on another large project because of lack of compliance with regulations. Our code enforcement program is proving to be quite successful.

While the leaf blower noise law is challenging to enforce, we have seen a significant change in behavior over the course of the year. While still challenging, tens of thousands of dollars in fines have been issued in 2022 and we will continue in 2023 to actively pursue violators.

ISD also manages the City Weights and Measures Department as well. In the past year, we have transitioned from a long-term employee to a new inspector. This has been a very smooth transition and we are in very good shape now and well positioned for the future.

The City of Newton is fully emersed in a transition to a new permitting and municipal information management system called NewGov. The program was selected from numerous software applicants. The program began implementation in late 2021 with plumbing, gas, and electrical permits as well as the Health Department and Engineering. The OpenGov system is a comprehensive suite of applications that enables departments of the city to issue and track permits, property information, licensing information and more. We have been engaged with OpenGov for more than a year in the creation of record types, workflows, permissions, data transferring and information to the new cloud-based system.

ISD started on November 1, 2021 issuing all electric, plumbing and gas permits on the new platform. The inspectors enter and approve permits in real time, enabling follow-on inspectors to know the status of the project. ISD has implemented on-line building permits, a very large undertaking that became active in May 2022. Additionally, ISD aided in the entry into NewGov of the Planning Department, including Conservation, Historic, and Special Permits as well as the Engineering and Fire Departments. We are turning soon to the Clerk's Office.

ISD issues more than 10,000 permits each year for building, plumbing, gas and electric. We are also in the process of creating a "zoning permit" to cover fences, signs, sheds as well as other zoning related matters

### Outcome 3

Expand the Permitting and Information Management System, NewGov

# Inspectional Services Department

## Fiscal Year 2024 Outcomes and Strategies

that come to our office. The time saving of a fully implemented NewGov system is already enormous. Other City departments are also benefiting from time saving issuance of permits and approvals. More importantly, the City of Newton has become far more transparent with public information and disseminating that information passively.

Now that record types have been developed and are running smoothly, we are turning our focus to reporting. NewGov has a separate module for reporting. We are now working on understanding and training with setting up frequently requested information and determining how to create and make available reports that the public will be able to drill down and get more information than just the number of permits issued. We will be able to see time periods, addresses, costs, permit fees and more. These reports will be different from the ones that we previously listed on our website monthly. We are consistently looking for new ways to take advantage of all that NewGov has to offer.

The next Department in the schedule to assist with setting up on NewGov will be the City Clerk. The City Clerk is currently using NewGov in a limited way as the Special Permit process has this Department in the workflow and we are looking to expand their use further to other records and requests that they receive. We are also speaking with Parks, Recreation and Culture to start the gathering process to get them integrated in NewGov.

**220- Inspectional Services**

FUND: 0001 - GENERAL FUND  
DEPARTMENT: 220 - INSPECTIONAL SERVICES

CITY OF NEWTON BUDGET  
DEPARTMENT LEGAL LEVEL OF CONTROL

	ACTUAL 2020	ACTUAL 2021	ACTUAL 2022	ORIGINAL 2023	RECOMMENDED 2024	CHANGE 2023 to 2024
<b>INSPECTIONAL SERVICES SUMMARY</b>						
51 - PERSONNEL SERVICES	1,397,403	1,434,298	1,684,528	1,699,502	1,724,138	24,636
52 - EXPENSES	30,398	27,076	42,653	69,584	49,800	-19,784
57 - FRINGE BENEFITS	234,250	231,842	234,441	257,042	297,708	40,666
<b>TOTAL DEPARTMENT</b>	<b>1,662,051</b>	<b>1,693,216</b>	<b>1,961,621</b>	<b>2,026,128</b>	<b>2,071,646</b>	<b>45,518</b>
<b>INSPECTIONAL SVS ADMIN</b>						
51 - PERSONNEL SERVICES	477,109	475,126	557,879	620,541	613,875	-6,666
52 - EXPENSES	23,378	23,775	32,809	48,850	36,800	-12,050
57 - FRINGE BENEFITS	82,620	77,174	84,863	101,633	112,171	10,538
<b>TOTAL INSPECTIONAL SVS ADMIN</b>	<b>583,106</b>	<b>576,075</b>	<b>675,551</b>	<b>771,024</b>	<b>762,846</b>	<b>-8,178</b>
<b>BLDG CODE/ZONING ENFMT</b>						
51 - PERSONNEL SERVICES	392,205	399,341	487,122	463,573	477,908	14,335
52 - EXPENSES	603	580	1,990	5,591	3,050	-2,541
57 - FRINGE BENEFITS	70,342	74,036	70,567	73,233	76,491	3,258
<b>TOTAL BLDG CODE/ZONING ENFMT</b>	<b>463,151</b>	<b>473,957</b>	<b>559,678</b>	<b>542,397</b>	<b>557,449</b>	<b>15,052</b>
<b>WEIGHTS &amp; MEASURES</b>						
51 - PERSONNEL SERVICES	84,172	90,070	71,496	67,875	69,637	1,762
52 - EXPENSES	1,449	1,558	2,934	3,204	3,250	46
57 - FRINGE BENEFITS	9,068	6,963	1,082	1,041	24,380	23,339
<b>TOTAL WEIGHTS &amp; MEASURES</b>	<b>94,689</b>	<b>98,592</b>	<b>75,512</b>	<b>72,120</b>	<b>97,267</b>	<b>25,147</b>
<b>MECHANICAL INSPECTIONS</b>						
51 - PERSONNEL SERVICES	443,917	469,760	568,031	547,513	562,718	15,205
52 - EXPENSES	4,968	1,164	4,919	11,939	6,700	-5,239
57 - FRINGE BENEFITS	72,220	73,668	77,928	81,135	84,666	3,531
<b>TOTAL MECHANICAL INSPECTIONS</b>	<b>521,105</b>	<b>544,593</b>	<b>650,879</b>	<b>640,587</b>	<b>654,084</b>	<b>13,497</b>

220- Inspectional Services

FUND: 0001 - GENERAL FUND  
DEPARTMENT: 220 - INSPECTIONAL SERVICES

CITY OF NEWTON BUDGET  
DEPARTMENTAL DETAIL

	ACTUAL 2020	ACTUAL 2021	ACTUAL 2022	ORIGINAL 2023	RECOMMENDED 2024	CHANGE 2023 to 2024
<b>220 - INSPECTIONAL SERVICES</b>						
<b>0122040 - INSPECTIONAL SVS ADMIN</b>						
<b>PERSONNEL SERVICES</b>						
511001 FULL TIME SALARIES	462,239	448,982	498,588	560,241	554,075	-6,166
511101 PART TIME < 20 HRS/WK	0	0	0	30,000	30,000	0
512001 SEASONAL WAGES	1,566	0	10,720	0	0	0
513010 REGULAR OVERTIME	4,815	10,274	44,921	25,000	25,000	0
51301B OVERTIME/SPEC PROJEC	34,990	0	0	0	0	0
514001 LONGEVITY	2,250	3,317	2,650	3,300	3,300	0
515006 VACATION BUY BACK	4,739	11,053	0	0	0	0
515102 CLEANING ALLOWANCE	1,500	1,500	1,000	2,000	1,500	-500
<b>TOTAL PERSONNEL SERVICES</b>	<b>512,099</b>	<b>475,126</b>	<b>557,879</b>	<b>620,541</b>	<b>613,875</b>	<b>-6,666</b>
<b>EXPENSES</b>						
524010 OFFICE EQUIPMENT R-M	200	0	200	200	200	0
524030 MOTOR VEHICLE R-M	0	100	141	0	0	0
527400 RENTAL - EQUIPMENT	1,723	2,297	3,594	7,000	7,000	0
530100 CONSULTANTS	0	0	0	10,000	0	-10,000
530400 DOCUMENT PRESERVATI	5,227	0	0	0	0	0
531900 TRAINING EXPENSES	0	0	40	0	0	0
534010 TELEPHONE	1,042	1,126	1,043	1,200	1,100	-100
534020 CELLULAR TELEPHONES	12,915	12,694	14,290	16,000	15,500	-500
534100 POSTAGE	1,043	1,023	1,134	1,500	1,500	0
534200 PRINTING	1,029	2,072	3,997	1,500	1,500	0
542000 OFFICE SUPPLIES	4,441	2,974	4,753	3,500	3,500	0
548000 GASOLINE	0	0	0	1,050	0	-1,050
548400 VEHICLE REPAIR PARTS	744	979	1,808	2,500	2,500	0
558100 UNIFORMS/PROTECTIVE	0	0	500	500	500	0
558500 COMPUTER SUPPLIES	0	0	727	2,500	2,500	0
559200 BOOKS/MANUALS/PERIODI	0	0	0	500	500	0
571000 VEHICLE USE REIMBURSE	0	0	0	150	0	-150
571100 IN-STATE CONFERENCES			332	0	0	0
573000 DUES & SUBSCRIPTIONS	240	510	250	750	500	-250
<b>TOTAL EXPENSES</b>	<b>28,605</b>	<b>23,775</b>	<b>32,809</b>	<b>48,850</b>	<b>36,800</b>	<b>-12,050</b>
<b>FRINGE BENEFITS</b>						
57DENT DENTAL INSURANCE	2,341	1,664	1,670	1,607	1,888	281
57HLTH HEALTH INSURANCE	65,689	60,610	68,555	78,810	89,391	10,581
57LIFE BASIC LIFE INSURANCE	113	123	71	57	118	61
57MEDA MEDICARE PAYROLL TAX	6,962	6,468	7,478	8,635	8,570	-65
57OPEB OPEB CONTRIBUTION	7,514	8,309	7,089	12,524	12,204	-320
<b>TOTAL FRINGE BENEFITS</b>	<b>82,620</b>	<b>77,174</b>	<b>84,863</b>	<b>101,633</b>	<b>112,171</b>	<b>10,538</b>
<b>TOTAL INSPECTIONAL SVS ADMIN</b>	<b>623,323</b>	<b>576,075</b>	<b>675,551</b>	<b>771,024</b>	<b>762,846</b>	<b>-8,178</b>

# #86-24 220- Inspectional Services

**CITY OF NEWTON BUDGET  
DEPARTMENTAL DETAIL**

		ACTUAL 2020	ACTUAL 2021	ACTUAL 2022	ORIGINAL 2023	RECOMMENDED 2024	CHANGE 2023 to 2024
<b>0122041 - BLDG CODE/ZONING ENFMT</b>							
<b>PERSONNEL SERVICES</b>							
511001	FULL TIME SALARIES	378,712	389,819	472,694	452,073	466,408	14,335
513010	REGULAR OVERTIME	0	317	353	0	0	0
514001	LONGEVITY	3,917	3,500	5,000	5,000	5,000	0
515003	SPECIAL LEAVE BUY BACK	6,000	0	0	0	0	0
515006	VACATION BUY BACK	7,452	3,206	6,575	4,000	4,000	0
515101	CLOTHING ALLOWANCE	2,000	2,500	0	2,500	0	-2,500
515102	CLEANING ALLOWANCE	125	0	2,500	0	2,500	2,500
<b>TOTAL PERSONNEL SERVICES</b>		<b>398,205</b>	<b>399,341</b>	<b>487,122</b>	<b>463,573</b>	<b>477,908</b>	<b>14,335</b>
<b>EXPENSES</b>							
531900	TRAINING EXPENSES	72	0	150	1,500	1,250	-250
548000	GASOLINE	25	0	0	2,291	0	-2,291
558000	PUBLIC SAFETY SUPPLIES	0	0	615	750	750	0
558100	UNIFORMS/PROTECTIVE	506	580	1,000	600	600	0
573000	DUES & SUBSCRIPTIONS	0	0	225	250	250	0
577100	PROFESSIONAL LICENSES	0	0	0	200	200	0
<b>TOTAL EXPENSES</b>		<b>603</b>	<b>580</b>	<b>1,990</b>	<b>5,591</b>	<b>3,050</b>	<b>-2,541</b>
<b>FRINGE BENEFITS</b>							
57DENT	DENTAL INSURANCE	1,734	1,624	1,406	1,405	1,467	62
57HLTH	HEALTH INSURANCE	59,219	61,702	56,500	58,759	61,345	2,586
57LIFE	BASIC LIFE INSURANCE	14	0	0	0	0	0
57MEDA	MEDICARE PAYROLL TAX	5,437	5,458	6,745	6,664	6,898	234
57OPEB	OPEB CONTRIBUTION	3,952	5,252	5,916	6,404	6,781	377
<b>TOTAL FRINGE BENEFITS</b>		<b>70,356</b>	<b>74,036</b>	<b>70,567</b>	<b>73,233</b>	<b>76,491</b>	<b>3,258</b>
<b>TOTAL BLDG CODE/ZONING ENFMT</b>		<b>469,165</b>	<b>473,957</b>	<b>559,678</b>	<b>542,397</b>	<b>557,449</b>	<b>15,052</b>

# #86-24 220- Inspectional Services

**CITY OF NEWTON BUDGET  
DEPARTMENTAL DETAIL**

		ACTUAL 2020	ACTUAL 2021	ACTUAL 2022	ORIGINAL 2023	RECOMMENDED 2024	CHANGE 2023 to 2024
<b>0122044 - WEIGHTS &amp; MEASURES</b>							
<b>PERSONNEL SERVICES</b>							
511001	FULL TIME SALARIES	81,672	81,006	71,496	67,875	69,637	1,762
514001	LONGEVITY	0	1,333	0	0	0	0
514308	SPECIALIST PAY		481	0	0	0	0
514399	ADMIN SUPPORT STIPEND	2,500	1,250	0	0	0	0
515003	SPECIAL LEAVE BUY BACK		6,000	0	0	0	0
	<b>TOTAL PERSONNEL SERVICES</b>	<b>84,172</b>	<b>90,070</b>	<b>71,496</b>	<b>67,875</b>	<b>69,637</b>	<b>1,762</b>
<b>EXPENSES</b>							
524030	MOTOR VEHICLE R-M	0	68	0	0	0	0
531900	TRAINING EXPENSES	50	0	0	100	100	0
534010	TELEPHONE	45	49	42	100	100	0
542000	OFFICE SUPPLIES	0	0	162	250	250	0
543200	SMALL TOOLS	0	911	1,710	0	0	0
548000	GASOLINE	569	501	766	1,354	900	-454
548200	TIRES & TIRE SUPPLIES	0	0	0	500	1,000	500
548400	VEHICLE REPAIR PARTS	555	29	0	0	0	0
558000	PUBLIC SAFETY SUPPLIES	170	0	254	300	300	0
558100	UNIFORMS/PROTECTIVE	0	0	0	300	300	0
571100	IN-STATE CONFERENCES	0	0	0	100	100	0
573000	DUES & SUBSCRIPTIONS	60	0	0	200	200	0
	<b>TOTAL EXPENSES</b>	<b>1,449</b>	<b>1,558</b>	<b>2,934</b>	<b>3,204</b>	<b>3,250</b>	<b>46</b>
<b>FRINGE BENEFITS</b>							
57DENT	DENTAL INSURANCE	225	144	0	0	523	523
57HLTH	HEALTH INSURANCE	7,611	5,480	0	0	20,163	20,163
57LIFE	BASIC LIFE INSURANCE	57	61	52	57	59	2
57MEDA	MEDICARE PAYROLL TAX	1,175	1,278	1,030	984	1,014	30
57OPEB	OPEB CONTRIBUTION		0	0	0	2,621	2,621
	<b>TOTAL FRINGE BENEFITS</b>	<b>9,068</b>	<b>6,963</b>	<b>1,082</b>	<b>1,041</b>	<b>24,380</b>	<b>23,339</b>
	<b>TOTAL WEIGHTS &amp; MEASURES</b>	<b>94,689</b>	<b>98,592</b>	<b>75,512</b>	<b>72,120</b>	<b>97,267</b>	<b>25,147</b>



# #86-24 220- Inspectional Services

<b>CITY OF NEWTON BUDGET DEPARTMENTAL DETAIL</b>
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		ACTUAL 2020	ACTUAL 2021	ACTUAL 2022	ORIGINAL 2023	RECOMMENDED 2024	CHANGE 2023 to 2024
<b>0122049 - MECHANICAL INSPECTIONS</b>							
<b>PERSONNEL SERVICES</b>							
511001	FULL TIME SALARIES	426,563	457,863	555,807	536,513	555,318	18,805
513010	REGULAR OVERTIME	6,340	1,616	4,368	0	0	0
514001	LONGEVITY	4,000	4,000	3,000	4,000	4,400	400
515006	VACATION BUY BACK	4,514	3,282	1,856	4,000	0	-4,000
515101	CLOTHING ALLOWANCE	2,500	3,000	0	3,000	0	-3,000
515102	CLEANING ALLOWANCE	0	0	3,000	0	3,000	3,000
515401	PRIVATE DUTY DETAILS	760	0	0	0	0	0
	<b>TOTAL PERSONNEL SERVICES</b>	<b>444,677</b>	<b>469,760</b>	<b>568,031</b>	<b>547,513</b>	<b>562,718</b>	<b>15,205</b>
<b>EXPENSES</b>							
531900	TRAINING EXPENSES	2,589	150	2,085	2,500	3,000	500
543200	SMALL TOOLS	461	44	803	1,000	900	-100
548000	GASOLINE	138	0	0	5,339	0	-5,339
558000	PUBLIC SAFETY SUPPLIES	0	0	0	500	500	0
558100	UNIFORMS/PROTECTIVE	686	525	1,137	1,500	1,300	-200
571000	VEHICLE USE REIMBURSE	54	0	0	0	0	0
573000	DUES & SUBSCRIPTIONS	295	445	295	600	500	-100
577100	PROFESSIONAL LICENSES	798	0	599	500	500	0
	<b>TOTAL EXPENSES</b>	<b>5,021</b>	<b>1,164</b>	<b>4,919</b>	<b>11,939</b>	<b>6,700</b>	<b>-5,239</b>
<b>FRINGE BENEFITS</b>							
57DENT	DENTAL INSURANCE	1,722	1,548	1,504	1,503	1,570	67
57HLTH	HEALTH INSURANCE	58,509	59,754	62,144	64,629	67,473	2,844
57LIFE	BASIC LIFE INSURANCE	113	113	104	114	118	4
57MEDA	MEDICARE PAYROLL TAX	6,003	6,390	7,785	7,881	8,190	309
57OPEB	OPEB CONTRIBUTION	5,873	5,863	6,392	7,007	7,315	308
	<b>TOTAL FRINGE BENEFITS</b>	<b>72,220</b>	<b>73,668</b>	<b>77,928</b>	<b>81,135</b>	<b>84,666</b>	<b>3,531</b>
	<b>TOTAL MECHANICAL INSPECTIONS</b>	<b>521,919</b>	<b>544,593</b>	<b>650,879</b>	<b>640,587</b>	<b>654,084</b>	<b>13,497</b>
<b>TOTAL INSPECTIONAL SERVICES</b>		<b>1,709,096</b>	<b>1,693,216</b>	<b>1,961,621</b>	<b>2,026,128</b>	<b>2,071,646</b>	<b>45,518</b>

CITY OF NEWTON BUDGET  
PERSONNEL DETAIL

Account	Position Title Employee Name	Hire Date	Years of Service	Longevity	Holiday Addl Comp	Grade	Fund Year	FTE	Base Salary	Total Compensation
<b>220 - INSPECTIONAL SERVICES</b>										
<b>0122040 - INSPECTIONAL SVS ADMIN</b>										
511001	<b>COMMISSIONER</b>				0	HY13-32,32	2023	1.00	147,010	
	LOJEK, JOHN	6/21/2005	18.03	1,000	0	HY13-34,34	2024	1.00	150,873	151,873
	<b>DEPUTY COMMISSIONER</b>				0	HY11-26,26	2023	1.00	119,759	
	CICCARIELLO, ANTHONY	6/17/2013	10.04	900	0	HY11-28,28	2024	1.00	122,906	123,806
	<b>ZONING ENFORCEMENT AGENT</b>				0	HY8-06,08	2023	1.00	73,916	
	MAVRELIS, ANDREW	3/9/2021	2.31	0	0	HY8-08,10	2024	1.00	75,833	75,833
	<b>OFFICE INFO COORDINATOR</b>				0	AF8-07,08	2023	1.00	74,752	
	PATTEN, KRISTEN	8/16/2010	12.88	900	500	AF8-08,09	2024	1.00	78,997	80,397
	<b>EXECUTIVE ADMIN</b>				0	AF8-05,05	2023	1.00	68,821	
	FINAMORE, DEB	6/28/2017	6.01	500	500	AF8-06,06	2024	1.00	72,731	73,731
<b>DEVELOPMENT SERVICES ASS</b>				0	AF5-03,04	2023	1.00	49,900		
RADULOV, JULIE	11/18/2019	3.62	0	500	AF5-04,05	2024	1.00	52,732	53,232	
<b>DEVELOPMENT SERVICES ASS</b>				0	AF5-03,04	2023	1.00	1		
DEFERRED	7/1/2022	1	0	0	AF5-03,04	2024	0.00	1	1	
<b>Account Totals:</b>					<b>0</b>			<b>2023</b>	<b>7.00</b>	<b>534,158</b>
					<b>3,300</b>	<b>1,500</b>		<b>2024</b>	<b>6.00</b>	<b>554,074</b>
										<b>558,874</b>
511101	<b>ASSISTANT ZONING ENFORCE</b>				0	QQQ	2023	0.49	30,000	
	EDREHI, CHARLES	12/6/2021	1.57	0	0	QQQ	2024	0.49	30,000	30,000
	<b>Account Totals:</b>					<b>0</b>			<b>2023</b>	<b>0.49</b>
					<b>0</b>	<b>0</b>		<b>2024</b>	<b>0.49</b>	<b>30,000</b>
										<b>30,000</b>
<b>TOTAL INSPECTIONAL SVS ADMIN</b>					<b>0</b>			<b>2023</b>	<b>7.49</b>	<b>564,158</b>
					<b>3,300</b>	<b>1,500</b>		<b>2024</b>	<b>6.49</b>	<b>584,074</b>
										<b>588,874</b>
<b>0122041 - BLDG CODE/ZONING ENFMT</b>										
511001	<b>SENIOR BUILDING INSPECTOR</b>				0	IN2-11,11	2023	1.00	99,765	
	GIFFORD, ALAN	11/1/1999	23.67	2,000	500	IN2-11,11	2024	1.00	102,364	104,864
	<b>BUILDING INSPECTOR</b>				0	IN1-11,11	2023	1.00	89,615	
	LAMPLOUGH, CHARLES	3/11/2002	21.31	2,000	500	IN1-11,11	2024	1.00	91,950	94,450
	<b>BUILDING INSPECTOR</b>				0	IN1-08,09	2023	1.00	83,470	
	JOHNSON, JEFFREY	12/2/2019	3.58	0	500	IN1-09,10	2024	1.00	88,194	88,694
	<b>BUILDING INSPECTOR</b>				0	IN1-11,11	2023	1.00	89,615	
	GILBERT, PAUL	11/21/2016	6.61	500	500	IN1-11,11	2024	1.00	91,950	92,950
	<b>BUILDING INSPECTOR</b>				0	IN1-11,11	2023	1.00	89,615	
	NELSON, PAUL	6/6/2016	7.07	500	500	IN1-11,11	2024	1.00	91,950	92,950
<b>Account Totals:</b>					<b>0</b>			<b>2023</b>	<b>5.00</b>	<b>452,081</b>
					<b>5,000</b>	<b>2,500</b>		<b>2024</b>	<b>5.00</b>	<b>466,408</b>
										<b>473,908</b>
<b>TOTAL BLDG CODE/ZONING ENFMT</b>					<b>0</b>			<b>2023</b>	<b>5.00</b>	<b>452,081</b>
					<b>5,000</b>	<b>2,500</b>		<b>2024</b>	<b>5.00</b>	<b>466,408</b>
										<b>473,908</b>

# #86-24 220- Inspectional Services

<b>CITY OF NEWTON BUDGET PERSONNEL DETAIL</b>
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Account	Position Title Employee Name	Hire Date	Years of Service	Longevity	Holiday Addl Comp	Grade	Fund Year	FTE	Base Salary	Total Compensation
<b>0122044 - WEIGHTS &amp; MEASURES</b>										
511001	<b>INSPECTOR, WEIGHTS &amp; MEAS</b>				0	HY7-06,08	2023	1.00	67,879	
	FEROLITO, BRETT	3/1/2021	2.33	0	0	HY7-08,10	2024	1.00	69,637	69,637
	<b>Account Totals:</b>				<b>0</b>		<b>2023</b>	<b>1.00</b>	<b>67,879</b>	
					<b>0</b>		<b>2024</b>	<b>1.00</b>	<b>69,637</b>	<b>69,637</b>
<b>TOTAL WEIGHTS &amp; MEASURES</b>					<b>0</b>		<b>2023</b>	<b>1.00</b>	<b>67,879</b>	
					<b>0</b>		<b>2024</b>	<b>1.00</b>	<b>69,637</b>	<b>69,637</b>
<b>0122049 - MECHANICAL INSPECTIONS</b>										
511001	<b>SENIOR WIRE INSPECTOR</b>				0	IN2-11,11	2023	1.00	99,765	
	MCDONALD, WILLIAM	2/22/1988	35.36	2,500	500	IN2-11,11	2024	1.00	102,364	105,364
	<b>SENIOR PLUMBING/GAS FITTI</b>				0	IN2-11,11	2023	1.00	99,765	
	CAMMISARO, PAUL	7/15/2014	8.96	500	500	IN2-11,11	2024	1.00	102,364	103,364
	<b>PLUMBING/GAS FITTINGS</b>				0	IN1-06,07	2023	1.00	79,099	
	IVESTER, DONALD	10/1/2018	4.75	0	500	IN1-07,08	2024	1.00	83,576	84,076
	<b>PLUMBING/GAS FITTINGS</b>				0	IN1-11,11	2023	1.00	89,615	
	LALLY, JAMES	5/16/2016	7.13	500	500	IN1-11,11	2024	1.00	91,950	92,950
	<b>WIRE INSPECTOR</b>				0	IN1-11,11	2023	1.00	89,615	
	CERONE, DAVID	7/2/2013	10	900	500	IN1-11,11	2024	1.00	91,950	93,350
	<b>WIRE INSPECTOR</b>				0	IN1-06,07	2023	1.00	78,664	
	MCGOURTY, JOHN	12/9/2019	3.56	0	500	IN1-07,08	2024	1.00	83,114	83,614
	<b>Account Totals:</b>				<b>0</b>		<b>2023</b>	<b>6.00</b>	<b>536,524</b>	
					<b>4,400</b>	<b>3,000</b>	<b>2024</b>	<b>6.00</b>	<b>555,318</b>	<b>562,718</b>
<b>TOTAL MECHANICAL INSPECTIONS</b>					<b>0</b>		<b>2023</b>	<b>6.00</b>	<b>536,524</b>	
					<b>4,400</b>	<b>3,000</b>	<b>2024</b>	<b>6.00</b>	<b>555,318</b>	<b>562,718</b>
<b>TOTAL INSPECTIONAL SERVICES</b>					<b>0</b>		<b>2023</b>	<b>19.49</b>	<b>1,620,642</b>	
					<b>12,700</b>	<b>7,000</b>	<b>2024</b>	<b>18.49</b>	<b>1,675,437</b>	<b>1,695,137</b>



## Zoning & Planning Committee Budget Report

### City of Newton In City Council

Monday, May 22, 2023

Present: Councilors Crossley (Chair), Danberg, Albright, Leary, Krintzman, Wright, Baker, and Ryan

Also Present: Councilors Greenberg, Gentile, Humphrey, Norton, Bowman, Lucas, Oliver, Malakie, Laredo, and Downs

City staff present: Maureen Lemieux, Chief Financial Officer; Perry Rosenfield FP&A Manager; Jonathan Yeo, Chief Operating Officer; John Lojek, Commissioner of Inspectional Services; Anthony Ciccariello, Deputy Commissioner of Inspectional Services; Lara Kritzer, CPA Program Manager; Amalia Timbers, Citizen Assistance Officer; Andrew Lee, Assistant City Solicitor; Ann Berwick, Co-Director of Sustainability; Josh Ostroff, Director of Transportation Planning; Barney Heath, Director of Planning; Jennifer Caira, Deputy Director of Planning; Deb Finamore, Inspectional Services Administrative Assistant; Jaclyn Norton, Committee Clerk

### **Inspectional Services**

**Note:** The proposed budget for ISD is \$2,071,646., representing a 2.5% increase over FY23. John Lojek, Commissioner of Inspectional Services, described that in FY23 the Inspectional Services Department saw many things return to pre-pandemic conditions, except that the way the Department conducts business has changed forever, due to the creation and implementation of NewGov. NewGov has allowed the Department to streamline permitting and inspection reporting processes and helps achieve consistency and communication across the Department. Commissioner Lojek further noted that staff is available to instruct members of the public on how to use the system and have a kiosk available for the public to use. Complaints or requests for zoning enforcement are also managed through this system and it was affirmed that the person who files the complaint will remain anonymous. The department also provides periodic inspections of all public buildings, restaurants, and places of assembly in the city, every year, which the Commissioner described as possibly the most comprehensive such system in the state, requiring a full time inspector to conduct the 825 inspections per year. A most challenging aspect of ISD work is dealing with citizens' complaints, which rose sharply during COVID, with many more people working from home. In recent years, the Department has also incorporated providing leafblower enforcement and weights and measures. Commissioner Lojek also stated that the Department is working with other Departments on how the NewGov system can be implemented.

Multiple Councilors thanked Commissioner Lojek for his 18 years of excellent work with the City in light of his planned retirement on June 30, 2023.

## Q&A

Q: Why was a Development Service Assistant position eliminated?

A: Commissioner Lojek stated that this is an administrative position that was deferred in FY23 and found to be unnecessary due to NewGov streamlining processes and a decreased amount of work available for that position.

Q: Does the Department have the capacity to cover when positions are vacant, or staff are out of the office?

A: It was noted by Commissioner Lojek that in the past staff have always been willing to fill in where necessary to ensure smooth operation of the Department.

Q: How could the Department make dealing with resident complaints easier for staff?

A: Commissioner Lojek commended the work of the Code Enforcement Officer who is very responsive and tries to respond to complaints within 48 hours of them being submitted on NewGov.

Q: How many demolitions are conducted annually?

A: Anthony Ciccariello, Deputy Commissioner of Inspectional Services, stated that about 100 to 120 demolitions take place per year in the City.

Q: Could previous special permit conditions be entered into NewGov and how far back do records go on the system?

A: The Department policy is to upload all previous documents when a property interacts with the office according to Commissioner Lojek and Jonathan Yeo, Chief Operating Officer. Property records in the NewGov system currently are complete back to 2005.

Q: Has the Department seen other aspects of the office get busier with the number of permits decreasing?

A: The Department has seen an increase in complaints filed since the beginning of the pandemic. When asked what could be the cause, Commissioner Lojek noted that with people being home more (working from home), they are noticing things, such as noise related to construction activity, that they previously were not present to witness.

Q: What is the status of short term rental ordinance enforcement?

A: Currently, the Department responds to complaints as they come in. Commissioner Lojek noted that these complaints abated with reduced rentals during the pandemic, but stated that the Department could look into the creation of an enforcement program.

Q: Has the Department created an updated list of energy requirements, in the form of what was previously a checklist, that reflect updates to the Stretch Code?

A: According to Mr. Ciccariello an updated list has not been developed yet and currently the information on updated requirements is being done through comments on NewGov. He noted that he will look into how the Department can add the checklist to NewGov.

The Committee took a straw vote to accept the Inspectional Services Department's proposed Budget of \$2,071,646, which passed unanimously.

**Respectfully submitted,  
Deborah J. Crossley, Chair**



Ruthanne Fuller  
Mayor

City of Newton, Massachusetts  
Office of the Mayor

**#89-24**

Telephone  
(617) 796-1100  
Fax  
(617) 796-1113  
TDD/TTY  
(617) 796-1089  
Email  
rfuller@newtonma.gov

January 29, 2024

Honorable City Council  
Newton City Hall  
1000 Commonwealth Avenue  
Newton, MA 02459

To the Honorable City Councilors:

I am pleased to reappoint Denise Chicoine of 275 Islington Road, Newton 02466 as an associate member of the Zoning Board of Appeals. Denise Chicoine's term of office shall expire on January 10, 2025 and the appointment is subject to your confirmation.

Thank you for your attention to this matter.

Warmly,

Ruthanne Fuller  
Mayor

RECEIVED

2024 JAN 29 PM 3:39

CITY CLERK  
NEWTON, MA 02459

### Application Form

#### Profile

Denise \_\_\_\_\_ A. \_\_\_\_\_ Chicoine \_\_\_\_\_  
 First Name Middle Initial Last Name

\_\_\_\_\_  
 Email Address

275 Islington Road \_\_\_\_\_  
 Home Address Suite or Apt

Newton \_\_\_\_\_ MA \_\_\_\_\_ 02466 \_\_\_\_\_  
 City State Postal Code

#### What Ward do you live in?

Ward 4

\_\_\_\_\_  
 Primary Phone

\_\_\_\_\_  
 Alternate Phone

Englander & Chicoine P.C. \_\_\_\_\_ Managing Partner \_\_\_\_\_  
 Employer Job Title

#### Which Boards would you like to apply for?

Zoning Board of Appeals: Submitted

#### Ethnicity

Caucasian/Non-Hispanic

#### Gender

Female

#### Interests & Experiences

Please tell us about yourself and why you want to serve.

#### Why are you interested in serving on a board or commission?

I am an attorney that has specialized in land use law for 30 years. I have followed the City's re-zoning and development plans since I moved to Newton in 2004. Now that our children are older, I am ready to commit my time to the ZBA if the Board has a need.

[DAC\\_resume.doc](#) \_\_\_\_\_  
 Upload a Resume



## Denise A. Chicoine

**Englander & Chicoine, P.C.**  
 225 Franklin Street, 26<sup>th</sup> Floor, Boston, MA 02110

### EXPERIENCE

#### Managing Partner

**Englander & Chicoine P.C.**, Boston, Massachusetts 2016-present  
*(formerly Englander, Leggett & Chicoine, PC 2008-2016, Englander & Chicoine, PC 1999-2008, Englander & Associates P.C. 1993 – 1999, Englander & Sooho 1991-1993)*

Expertise in land use issues, including rights in the intertidal zone, zoning and permitting, Chapter 91, and affordable housing issues. Experience litigating in Land Court, easements, adverse possession claims, and construction disputes. Represents banks and individuals in all aspects of conveyancing, including title examinations and certifications, review and resolution of title issues, and preparation of condominium documents and conveyancing documents. Authorized title agent for CATIC.

**Boston College Graduate School of Social Work** 2000-2017

Adjunct legal professor

### SIGNIFICANT CASES

*Marchese v. Boston Redevelopment Authority* (2019) prevailed at the Supreme Judicial Court on behalf of the Boston Redevelopment Authority regarding the agency's statutory power to engage in a demonstration plan granting rights to the Red Sox in Yawkey Way in Boston.

*Nantasket Beachfront Condominiums LLC v. Hull Redevelopment Authority* (2015) prevailed in the Court of Appeals on behalf of Hull Redevelopment Authority in a contractual dispute with a re-developer under a Land Disposition Agreement.

*Mahajan v. Boston Redevelopment Authority et al.* (2013) successfully argued to the Supreme Judicial Court that Long Wharf in Boston may be developed in accordance with the Boston Redevelopment Authority's urban renewal plan, and is not a park subject to a two-thirds legislative vote under Article 97 for changes to lands taken for conservation purposes.

### EDUCATION

**Boston College Law School**, Newton, Massachusetts *Juris Doctor, May 1993*  
*Boston College International and Comparative Law Review*, executive editor 1992-93  
**Trinity College**, Hartford, Connecticut *May 1990*  
 Bachelor of Arts in Economics, magna cum laude, Phi Beta Kappa

**BAR ADMISSIONS** Massachusetts Bar 1993; Connecticut Bar 1994

### PROFESSIONAL ASSOCIATIONS

Commercial Real Estate Women, Provisors  
 Massachusetts Bar Association, Boston Bar Association, Real Estate Bar Association  
 Lecturer for MCLE and Massachusetts Association of Land Surveyors and Civil Engineers

### INTERESTS

Appalachia Service Project, running, skiing, hiking



Ruthanne Fuller  
Mayor

City of Newton, Massachusetts  
Office of the Mayor

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Email  
rfuller@newtonma.gov

January 29, 2024

Honorable City Council  
Newton City Hall  
1000 Commonwealth Avenue  
Newton, MA 02459

To the Honorable City Councilors:

I am pleased to reappoint Lei Reilly of 130 Pine Street, Newton 02466 as an associate member of the Zoning Board of Appeals. Lei Reilly's term of office shall expire on January 10, 2025 and the appointment is subject to your confirmation.

Thank you for your attention to this matter.

Warmly,

Ruthanne Fuller  
Mayor

RECEIVED  
2024 JAN 29 PM 3:28  
CITY CLERK  
NEWTON, MA, 02459

### Application Form

#### Profile

LEI \_\_\_\_\_ Z \_\_\_\_\_ REILLEY \_\_\_\_\_  
First Name Middle Initial Last Name

\_\_\_\_\_  
Email Address

130 PINE STREET \_\_\_\_\_  
Home Address Suite or Apt

NEWTON \_\_\_\_\_ MA \_\_\_\_\_ 02466 \_\_\_\_\_  
City State Postal Code

#### What Ward do you live in?

Ward 4

\_\_\_\_\_  
Primary Phone

\_\_\_\_\_  
Alternate Phone

Reilley Chang Law, PLLC \_\_\_\_\_ Attorney \_\_\_\_\_  
Employer Job Title

#### Which Boards would you like to apply for?

Zoning Board of Appeals: Submitted

#### Ethnicity

Asian or Pacific islander

#### Gender

Female

#### Interests & Experiences

Please tell us about yourself and why you want to serve.

#### Why are you interested in serving on a board or commission?

I have been a Newton resident since 2003 and love this city. Over the years I have been involved in promoting and organizing cultural activities with the Newton Mayor's Office for Cultural Affairs, such as Chinese Cultural Festival, Asian Cultural Festival, Oodles of Noodles, etc. I had been on the Advisory Board of Newton Community Pride and an member of the last Newton Police Chief Search Committee. As an attorney with knowledge of Massachusetts law and experience dealing with homeowners' various issues regarding zoning, I feel that I will bring skills and unique perspectives to the board.

[Lei\\_Reilley\\_resume.pdf](#)

Upload a Resume

**LEI ZHAO REILLEY**

**ATTORNEY AT LAW**



**RESUME**

**EDUCATION**

**J.D.** Suffolk University Law School (Boston, Massachusetts)  
*(Attended evenings while working full-time during the first year)* 2007  
Honor: Dean's List (summer 2005, and 2005 - 2006)

**M.S. in Finance** Northeastern University (Boston, Massachusetts)  
*(Attended while working full-time)* 1999  
Honor: Nominated and elected by the faculty into *Beta Gamma Sigma*, the international honor society of business school students, for outstanding scholastic achievement and leadership potential.

**M.S. in Computer Science** State University of New York at Stony Brook  
(Stony Brook, New York) 1996

**Ph.D Candidate** Chinese Academy of Sciences, Software Institute  
(Beijing, China) 1992-1994

**PROFESSIONAL EXPERIENCE**

**Reilley Chang Law** Newton/Needham, Massachusetts  
*Attorney (General Practice)* 1/2013 - date  
Main practice areas include civil/business litigation including family law, business law (business formation, contract draft and negotiation, and other business operation related legal issues), and estate planning (wills and trusts).

**Volunteer Lawyers Project** Boston, Massachusetts  
*Volunteer Attorney* 7/2009 - Present  
Providing pro bono legal representation for low income residents of Greater Boston in civil litigations.

**Jones Day** Beijing, China  
*Associate Attorney* 1/2008 – 12/2008  
*Summer Associate* Shanghai/Beijing, China  
6/2006 – 9/2006

- Represented a Hong Kong based company in its initial public offering, with primary responsibilities including due diligence, senior management counseling, drafting the IPO prospectus, and providing legal support for

advertising and sales literature as well as filing of the security issuance according to the regulatory calendars and standards;

- Provided legal advice for a U.S. company's joint-venture investment and merger & acquisition activities;
- Represented an European company in drafting its sponsorship agreement;
- Participated in drafting sponsorship agreements for the 2010 Shanghai World Expo.

**Bank of Tokyo-Mitsubishi Capital Corporation** Boston, Massachusetts  
1998 – 2004

*Financial Analyst (2002 – 2004)*

Conducted financial analysis on the existing and prospective companies in the BTMCC investment portfolio, monitored the portfolio performance, and presented recommended structured financing transactions to the Board.

*Senior Systems Analyst/Technical Consultant (1998 – 2002)*

Worked with finance, accounting, and sales departments to build software applications and networking infrastructures, while provided technical support.

**Thomson Financial Services** Boston, Massachusetts  
*Software Developer* 1996 – 1998

- Designed and programmed software and web applications for external corporate clients to monitor and manage their municipal bond investment portfolios;
- Provided 24/7 internal and external technical support.

#### BAR

- Massachusetts (2008)
- United State District Court in Massachusetts (2014)

#### CIVIL ACTIVITIES

- Member of Newton Police Chief Search Committee. 2015.
- Board of Advisors, Newton Community Pride, the umbrella nonprofit organization in City of Newton, Massachusetts. 2013 – 2017.
- Organizer of Chinese Cultural Festival, Oodles of Noodles, Asian Cultural Festival, Asian Film Festival, Newton, Massachusetts. 2012, 2013, and 2014.
- Education Committee Chair, District 31 Toastmasters International Spring Conference. 2015.
- Immediate Past President, President, VP of Education, VP of Public Relations, and VP of Membership at Sales and Marketing Toastmaster Club in Waltham, Massachusetts. 2009 - 2015.