



# Zoning & Planning Committee Budget Agenda

## City of Newton In City Council

Tuesday, April 30, 2024

**6:30 PM – PLEASE NOTE EARLY START TIME**

**Room 204**

The Zoning & Planning Committee will hold this meeting as a hybrid meeting on Tuesday, April 30, 2024 at 6:30 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/82706983816> or call 1-646-558-8656 and use the Meeting ID: 827 0698 3816.

### **Items scheduled for discussion:**

- #170-24 Reappointment of Brooke Lipsitt to the Zoning Board of Appeals**  
HER HONOR THE MAYOR reappointing Brooke Lipsitt, 54 Kirkstall Road, Newton as a full member of the Zoning Board of Appeals for a term of office set to expire on April 30, 2027. (60 Days: 05/31/2024)
- #171-24 Appointment of Edward J. Dailey to the Planning and Development Board**  
HER HONOR THE MAYOR appointing Edward J. Dailey, 67 Maplewood Avenue, Newton as a full member of the Planning & Development Board for a term of office set to expire on February 1, 2029. (60 Days: 05/31/2024)
- #183-24 Appointment of Terrence Brown to the Newton Upper Falls Historic District Commission**  
HER HONOR THE MAYOR appointing Terrence Brown, 183 Oka Street, Newton Upper Falls as an alternate member of the Newton Upper Falls Historic District Commission for a term of office to expire on May 20, 2025. (60 Days: 06/15/2024)

*Please Note: Budget materials can be found on the City's website at the following link:*

<https://www.newtonma.gov/government/comptroller/budget>

### **DEPARTMENT BUDGET & CIP DISCUSSIONS:**

**Inspectional Services**

**Planning**

**CPA Administration**

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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.

**Referred to Finance and Appropriate Committees**

- #8-24**      **Submittal of the FY 2025 to FY 2029 Capital Improvement Plan**  
HER HONOR THE MAYOR submitting the Fiscal Years 2025 to 2029 Capital Improvement Plan pursuant to section 5-3 of the Newton City Charter.
- #194-24**      **Submittal of the FY25 – FY29 Supplemental Capital Improvement Plan**  
HER HONOR THE MAYOR submitting the FY25 – FY29 Supplemental Capital Improvement Plan.
- #195-24**      **Submittal of the FY25 Municipal/School Operating Budget**  
HER HONOR THE MAYOR submitting in accordance with Section 5-1 of the City of Newton Charter the FY25 Municipal/School Operating Budget, passage of which shall be concurrent with the FY25-FY29 Capital Improvement Program (#8-24).  
**EFFECTIVE DATE OF SUBMISSION 04/16/24; LAST DATE TO PASS THE BUDGET 05/31/24**

Respectfully submitted,  
R. Lisle Baker, Chair



Ruthanne Fuller  
Mayor

City of Newton, Massachusetts  
Office of the Mayor

**#170-24**

Telephone  
(617) 796-1100

Fax  
(617) 796-1113

TDD/TTY  
(617) 796-1089

Email  
rfuller@newtonma.gov

March 25, 2024

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

To the Honorable City Councilors:

I am pleased to reappoint Brooke Lipsitt of 54 Kirkstall Road, Newtonville as a full member of the Zoning Board of Appeals. Brooke Lipsitt's term of office shall expire on April 30, 2024<sup>7</sup> and the appointment is subject to your confirmation.

Thank you for your attention to this matter.

Warmly,

Ruthanne Fuller  
Mayor

CITY CLERK  
NEWTON, MA, 02459

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# Application Form

## Profile

Brooke

First Name

Lipsitt

Last Name

Middle Initial

[Redacted]

Email Address

54 Kirkstall Road

Home Address

Suite or Apt

Newtonville

City

MA

State

02460

Postal Code

## What Ward do you live in?

Ward 2

[Redacted]

Primary Phone

Alternate Phone

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 a current member of the ZBA and am interested in continuing my service.

[BROOKE - CV March.2021.docx](#)

Upload a Resume

BROOKE K. LIPSITT  
54 Kirkstall Road  
Newtonville MA 02460  
[REDACTED]

Personal

60-year Newton resident  
Married to Paul Lipsitt, LL.B., Ph.D., a retired forensic  
psychologist  
Mother of Sarah Lipsitt, M.A., teacher, Newton Public  
Schools  
Graduate of Newton High School, 1959  
A.B. from Pembroke College, Brown University (major in  
International Relations), 1963  
2006 recipient (with husband, Paul D. Lipsitt) of the  
Community Service and Training Award, presented by the  
Massachusetts School of Professional Psychology  
2017 recipient of Unsung Heroine Award from Massachusetts  
Commission on the Status of Women

Newton Board of Aldermen

Alderman-at-Large, Ward 7, 1992-2003  
President, 1998-2003  
Chairman, Post Audit & Oversight Committee, 1994-95  
Vice Chairman, Land Use Committee, 1992-93; 1996-97

Current Community Involvement

Newton Center for Active Living, Executive Building  
Committee, 2018-  
Newton Zoning Board of Appeals, Associate Member, 2005-08;  
Member, 2008-; Chair, 40B Task Force, 2009-13; Vice  
Chairman, 2009-14; Chairman, 2014-  
Newton Historical Society, Strategic Planning Committee,  
2004; Chair, Durant Kenrick Transition/Construction  
Committee, 2010-2013; Board of Directors, 2005-  
2008, 2009-; Clerk, 2010-; Executive Committee, 2010-;  
Development Committee, 2019-; Marketing Committee,  
2021-  
Jewish Alliance for Law and Social Action, Board of  
Directors, 2007-2008; Advisory Committee, 2008-  
Green Decade Coalition/Newton, Founding Member; Steering  
Committee, 1990-2011; Clerk, 2008-2011; Advisory Board,  
2011-  
UCHAN (Uniting Citizens for Housing Affordability in  
Newton), Member, 2002-; Treasurer, 2004-05;  
Strategic Planning Committee, 2011

Social Science Club of Newton, 1993-; Auditor, 1995-96;  
 Chairman, Scholarship Committee, 1996-97;  
 Vice President, 2002-04; President, 2004-06;  
 Director, 2006-08; Treasurer, 2012-18; Chair, Finance  
 Committee, 2008-10, 2018-

#### Prior Community Involvement

High Performance Building Coalition, Founding  
 Co-Chairman, 2004-08; member, 2008-19  
 Newton Communications Access Center, Inc. (NewTV), Board of  
 Directors, 2004-15; Finance Committee, 2006-11; Vice  
 President, 2006-15; Executive Committee, 2006-15  
 Comprehensive Plan Mixed Use Task Force, 2010  
 Sustainable Newton Advisory Committee, 2003-09  
 REACH Beyond Domestic Violence, Advisory Committee, 2003-  
 2008  
 Newton Symphony Orchestra, Board of Trustees, 1996-2006  
 Newton Free Library, Policy & Planning Committee, 2004  
 Massachusetts Municipal Association, member, Environmental  
 Policy Committee, 2003  
 Brown University, National Alumni Schools Program volunteer,  
 1982-98; Alumnae President, Class of 1963, 1973-78;  
 Vice President, 1998-2003  
 Traveling Meals, volunteer, 1993-99  
 Cooperative Living of Newton, Advisory Board, 1995-98  
 Bicycle-Pedestrian Task Force, Founding Chairman, 1994-96  
 Day Junior High School PTA Board, 1992-3  
 Underwood Elementary School PTA, Board Member, 1985-91;  
 Treasurer, 1987-91  
 Chairman, Mayor's Steering Committee on the Peace Dividend,  
 1990  
 Watertown Cooperative Nursery School, Board of Directors,  
 1983-85; President, 1984-85  
 People's Theatre, Cambridge, Board of Directors, 1982-84;  
 Clerk, 1983-84

#### Political Involvement

Newton Democratic City Committee, Finance Chair, 2012-14  
 Ward 2 Committee, member, 2008-; Treasurer, 2011-2020  
 Ward 7 Committee, member, 1988-2008; Secretary, 1991-96;  
 Vice President, 1996-2006  
 Mass Equality, Board of Directors, 2005-08; Chair,  
 Nominating Committee, 2006-07  
 Newton Action for Nuclear Disarmament, 1981-92; Political  
 Action Coordinator, 1982-84; Treasurer, 1985-88;  
 President, 1986-91

Massachusetts Sane Freeze, Board of Directors, 1986-1990  
Massachusetts Freeze Voter Education Fund, President,  
1986-89  
Massachusetts Freeze Voter, Co-Founder; Executive  
Committee, 1983-88  
Disarmament Action Network, Steering Committee, 1985-88  
Arms Control Advisory Committee to Senator John F. Kerry,  
1985-87  
Peace Boutique, Newton, Steering Committee, 1974-75  
Campaign "junkie": volunteer or staff member on numerous  
local and national candidate and issues campaigns

Professional Experience

The First Years, Avon, MA  
Marketing Manager, 1978-80  
Product Manager, 1977-78

Committee to Elect U.S. Congressman Robert F. Drinan  
Assistant Campaign Manager, Administration, 1976  
Office Manager, 1974

Eve of Roma, Division of the Gillette Company, Boston  
Sales Promotion Coordinator, 1970-71  
Assistant Product Manager, 1968-70

Selame Associates, Newton  
Program Coordinator, 1967-68

Buyers Laboratory, Inc., New York, NY  
Assistant Director, 1966-67  
Director of Research, 1966-67  
Assistant Director of Research, 1964-66

Policy interests

Affordable housing, environment, civil liberties, education,  
transportation

March, 2021



Ruthanne Fuller  
Mayor

City of Newton, Massachusetts  
Office of the Mayor

**#171-24**  
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Email  
rfuller@newtonma.gov

March 25, 2024

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

To the Honorable City Councilors:

I am pleased to appoint Edward J. Dailey of 67 Maplewood Avenue, Newton as a full member of the Planning and Development Board. Edward Dailey's term of office shall expire on February 1, 2029 and the appointment is subject to your confirmation.

Thank you for your attention to this matter.

Warmly,

Ruthanne Fuller  
Mayor

NEWTON, MA 02459  
CITY CLERK

2024 MAR 25 PM 3:41

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Application Form

Profile

Edward

First Name

J

Middle Initial

Dailey

Last Name

[Redacted]

Email Address

67 Maplewood Avenue

Home Address

Suite or Apt

Newton

City

MA

State

02459

Postal Code

What Ward do you live in?

Ward 6

[Redacted]

Primary Phone

[Redacted]

Alternate Phone

NATIVITY PREPARATORY SCHOOL Boston

Employer

teacher

Job Title

Which Boards would you like to apply for?

Planning and Development Board: Submitted

Ethnicity

Caucasian/Non-Hispanic

Gender

Male

Interests & Experiences

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

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

Since I have long interest in fair housing in Newton, I believe that returning to the Planning Board (many years later) will offer an opportunity to bring my perspective to Zoning and Planning and the larger City Council.

[EJD\\_vita\\_2023.pdf](#)

Upload a Resume

**Edward J Dailey**

67 Maplewood Avenue Newton, Massachusetts 02459  
[REDACTED]

Education

AB Dartmouth College  
JD Boston University School of Law  
STM Boston College School of Theology and Ministry

Professional Associations

Faculty Member, NATIVITY PREPARATORY SCHOOL, Boston  
Retired Partner, SUNSTEIN LLP, Boston

Senior Vice President and General Counsel, Blue Cross Blue Shield  
Massachusetts

Director, Massachusetts Energy Facilities Siting Council  
Counsel, Massachusetts (health care) Rate Setting Commission  
Counsel, National Consumer Law Center  
Counsel, Boston Legal Assistance Project

Community

Robert B. Swett Award for leadership in Affordable Housing, City of  
Newton

Chair, Mayor's Committee on Inclusionary Zoning, City of Newton  
primary drafter, inclusionary zoning bylaw

Member, Newton Transitional Land Use Planning Committee

Member, Council of the Boston Bar Association

Member and chair, Planning and Development Board, City of Newton

Member and chair, Planning Board, Town of Wrentham

Racing sailor, gardener, United States Navy veteran



Ruthanne Fuller  
Mayor

City of Newton, Massachusetts  
Office of the Mayor

**#183-24**  
Telephone  
(617) 796-1100  
Fax  
(617) 796-1113  
TDD/TTY  
(617) 796-1089  
Email  
rfuller@newtonma.gov

April 8, 2024

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

To the Honorable City Councilors:

I am pleased to appoint Terrence Brown of 183 Oka Street, Unit G6, Newton Upper Falls as an Alternate member of the Newton Upper Falls Historic District Commission. Terrence Brown's term of office shall expire on May 20, 2025 and the appointment is subject to your confirmation. Terrence Brown's term has been changed to stagger the terms in accordance with Newton Historic District Commission ordinance.

Thank you for your attention to this matter.

Warmly,

Ruthanne Fuller  
Mayor

### Application Form

#### Profile

Terrence D Brown  
First Name Middle Initial Last Name

[Redacted] Email Address

183 Oak Street, Unit G6 Home Address Suite or Apt

Newton Upper Falls MA 02464  
City State Postal Code

#### What Ward do you live in?

Ward 5

[Redacted] Primary Phone [Redacted] Alternate Phone

Coldwell Banker - Newton Realtor Sales Associate  
Employer Job Title

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

Newton Upper Falls Historic District Commission: Submitted

#### Ethnicity

Caucasian/Non-Hispanic

#### Gender

Male

#### Interests & Experiences

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

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

Have lived in Newton Upper Falls since 1988 but in Newton since 1979 and long to be part of the Upper Falls Historic Commission as am in favor of common sense development and holding historic properties in high regard.

[Résumé Terrence Brown\\_incl\\_medical.pdf](#)

Upload a Resume

## TERRENCE D. BROWN

183 Oak Street, Unit G6 • Newton, MA 02464 • [REDACTED]

ADMINISTRATIVE MANAGEMENT PROFESSIONAL WITH EXCELLENT COMMUNICATION SKILLS AND  
A SUCCESSFUL RECORD OF PROJECT MANAGEMENT IN THE REAL ESTATE, EDUCATION AND MEDICAL SECTORS  
SUPERVISORY EXPERIENCE OF AN 11 PERSON STAFF AND SUPPORT EXPERIENCE FOR A 100+ PERSON STAFF  
STRONG ORGANIZATIONAL, BUDGETARY AND TECHNICAL SKILLS

[www.linkedin.com/in/terrydylanbrown](http://www.linkedin.com/in/terrydylanbrown)

### PROFESSIONAL EXPERIENCE

**Coldwell Banker** (Newton Centre, MA) | *Sales Associate* | 2010—Present

- Market residential real estate properties as part of the 160-agent sales team at the #1 brokerage in Newton
- Source exclusive listings for properties valued from \$400K to \$3 million
- Ascertain value, determine market conditions, and negotiate contracts
- Apply presentation and interior design skills to stage and show properties

**Hammond Residential** (Chestnut Hill, MA) | *Administrative Assistant & Sales Associate* | 1999—2010

- Supported three senior executives (including the founder) and 120+ associates for the #1 real estate brokerage in the entire state of Massachusetts, generating over \$730 million in annual sales volume
- Served as one of the principal architects of marketing proposals to secure high-end property listings
- Managed office publications and performed daily website updates
- Researched real estate market data, competing properties, market share, and property marketing strategy
- Consistently received outstanding annual reviews; identified as one of three go-to administrative specialists (out of a total support staff of 16) for critical projects
- Awarded the only financial bonus for exemplary administrative performance in Massachusetts (conferred by the CEO when the agency was under the ownership of GMAC); also selected by the owner after only one year of employment to receive a discretionary performance bonus reserved for employees with 10+ years of experience when the company was sold to GMAC

### TEACHING AND MEDICAL EXPERIENCE

- **Education:** recognized as an “imaginative” teacher with 14 years’ teaching and administrative experience; taught English (writing and reading) and Language Arts in grades 7-12; served as a School Principal for an elementary school (grades 1-8) with over 300 students, managing school staff and activities, collaborating with the Superintendent of Schools and attending School Board meetings
- **Medical:** Nurse’s Assistant at a hospital and assisted living facility. Hospital volunteer.

### EDUCATION

University of Maine, *B.S. in Education*

### TECHNICAL SKILLS

Mac and PC proficient; Microsoft Office Suite (Word, Excel, PowerPoint, etc.); type 80 wpm; experience with updating website content; excellent writing, organizational and leadership skills



Ruthanne Fuller  
Mayor

**City of Newton, Massachusetts**  
Department of Planning and Development  
1000 Commonwealth Avenue Newton, Massachusetts 02459

**#195-24**

Telephone  
(617) 796-1120  
Telefax  
(617) 796-1142  
TDD/TTY  
(617) 796-1089

[www.newtonma.gov](http://www.newtonma.gov)

Barney Heath  
Director

---

MEMORANDUM

To: Councilor Baker, Chair, Zoning & Planning Committee  
Zoning & Planning Committee Members

From: Barney Heath, Director of Planning & Development  
Jennifer Caira, Deputy Director of Planning & Development

Date: April 25, 2024

Subject: FY25 Departmental Budget Presentation

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Please find attached the Planning & Development Department FY25 budget presentation.

**City of Newton  
Department of Planning & Development  
FY2025 Budget Presentation**

1

**APRIL 30, 2024**

**Department of Planning & Development  
Division Structure**

2

- Conservation
- Long-Range Planning
- Current Planning
- Urban Design
- Historic Preservation
- Housing & Community Development
- Transportation Planning
- Economic Development
- Community Preservation (separate presentation)

## Conservation Division

### Jennifer Steel, Chief Environmental Planner

3

- Key Functions

- Wetland protection via implementation of the State Wetlands Protection Act and the City's Floodplain Ordinance
- Land Management of over 300 acres of Conservation land
- Land acquisition and trails development projects, as opportunities arise
- Consultation with City departments regarding wetlands, stormwater, and green infrastructure
- Plan creation and implementation: Open Space and Recreation, Climate Action, Climate Resiliency, and Hazard Mitigation Plans

- FY25 Projects

- Craft a new Floodplain Ordinance
- Undertake major infrastructure improvement projects at Norumbega Conservation Area, Kessler Woods Conservation Area, and Kennard Conservation Area
- Update Climate Action Plan
- Assist with the Christina Street Bridge project

## Long-Range Planning Division

### Zack LeMel, Chief of Long-Range Planning

4

- Key Functions:

- Lead policy, planning, and development studies to implement and achieve Citywide goals.  
ex. Village Center Zoning, California Street Manufacturing District
- Provide technical assistance on data collection and analysis at the local and regional level.  
ex. Census information, housing trends
- Oversee community engagement and outreach for department.  
e.x. Washington Street Pilot, Walk/Ride/Roll Master Plan
- Staff the Zoning and Planning Committee (City Council) & Planning & Development Board.

- FY25 Projects:

- Technical/tactical zoning amendments to achieve Citywide goals and objectives.  
ex. grading/siteworks, promoting the preservation and creation of starter homes, and incentivizing small businesses
- Grant application for Phase II of updates to Newton's manufacturing district zoning.  
ex. zoning for California Street (Nonantum), new study areas outside of Nonantum village center and across the City
- Track and review Village Center Overlay District applications.



## Current Planning Division

### Katie Whewell, Chief Planner

5

- Key Functions:

- Provide customer service to stakeholders, residents, interested parties on items related to zoning, land use, and development within the city (counter, email, phone).
- Development Review at preapplication stage and taking the following applications and reviews through their respective processes: Special Permits, Comprehensive Permits, 5-58 Reviews for Public Buildings, and Administrative Site Plan Review. Additionally, zoning review is needed for all variance applications, but current planning staff do not provide the same level of support as they do for special permits. For larger special permit and comprehensive permit projects this includes identifying mitigation payments, attending community meetings and site visits, and providing support to the appropriate Board/Council.
- Building Permit and Occupancy Review for all approved special permit and comprehensive permits. This includes adherence to any unique conditions, requesting documentation ensuring compliance with conditions, collecting and directing payments to the appropriate departments and accounts, and providing support to rectify any issues via consistency and insubstantial change.

## Urban Design Division

Shubee Sikka, Urban Design Planner

6

- Key Functions:

- Staff the Urban Design Commission
  - Review sign applications
  - Provide guidance on design reviews
  - Review and make decisions on fence appeals
  - Provide input on street enhancement projects
- FY25 Projects:
    - Assist with Special Permit/Comprehensive Permit Design Reviews
    - Newton Highlands street enhancement project
    - City seal design

## Historic Preservation Division

### David Lewis, Chief Preservation Planner

7

- Key Functions:

- Staff the five Historic Commissions: the citywide Newton Historical Commission and four Local Historic District Commissions
- Review applications for exterior alterations, and proposed demolitions and new construction to all building that are either greater than 50 years old or in a local historic district
- Provide guidance to public about the historic processes for historic building reviews and appropriate historic building treatments.
- Resolve violations of the Demolition Delay and Historic District ordinances

- FY25 Projects:

- Massachusetts Historical Commission Survey & Planning Grant for FY24
  - Continuation of multi-phase project to survey post-war architecture in Newton
- Adopt and publish one set of revised Rules & Regulations for all four Local Historic Districts
  - Document and clarify the critical HDC processes required by the ordinance
- Updating the Design Guidelines
  - Update the existing City of Newton Historic Preservation Design Guidelines, last updated in 2012

## Housing and Community Development Division

### Lara Kritzer, Dir. of Housing & Community Development

8

- Key Functions:

- Oversight and management of federal grants totaling approximately \$3 million annually.
- Management and oversight of inclusionary zoning ordinance.
- Housing development and rehabilitation programs.
- Provide staff support for Newton Housing Partnership, Fair Housing Committee, Newton Affordable Housing Trust, and Commission on Disability.
- Management of approximately 15 subgrants annually for human service program.

- FY25 Projects:

- Potential Walker Center affordable housing
- West Newton Armory redevelopment
- West Newton Family Navigation Center redevelopment
- IZ ordinance look-back

## Transportation Division

### Jenn Martin, Dir. of Transportation Planning

9

- Key Functions:

- Support Complete Streets Design of roadways via Village Enhancement project, Traffic Calming, Safe Routes to School, and other roadways projects
- Special Project Involvement including Washington Street Pilot, Christina Street Bridge, Commonwealth Ave Carriageway, MBTA Commuter Rail, & MassDOT projects.
- Work with Senior Services Department to oversee transportation system for seniors and low-income users
- Coordinate with Office of Sustainability on implementation of sustainable transportation and EV Charging projects

- FY25 Projects:

- Implementation of Washington Street Pilot
- Completion/Adoption of Walk/Ride/Roll Master Plan
- Design/Bid Christina Street Bridge
- Track status of MBTA Commuter Rail, MBTA Newton Highlands, MassDOT Needham St, MassDOT Carriageway, MassDOT Newton Corner

## Economic Development Division

### John Sisson, Dir. of Economic Development

10

- Key Functions:

- Provide concierge service to and assist businesses with permitting processes and other challenges presents by municipal regulations
- Collaborate within Planning and across departments
- Take lessons learned in the field back to City Hall to evaluate regulations and policy that affect commercial enterprises and property owners
- Oversee consultants performing studies of local land use, economic opportunity, and strategic planning

- FY25 Projects:

- Help Newton become more business friendly by working with the City Council on incremental updates to the Zoning Ordinance
- In concert with other departments, focus on strategies to assist small businesses and encourage foot traffic in the City's historic village centers
- Work to identify and evaluate commercial areas of the City where redevelopment would increase foot traffic and augment the commercial tax base

## Planning Dept Customer Service

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- The Planning Dept.'s webpage has every member of the dept.'s individual email and phone number:
  - <https://www.newtonma.gov/government/planning/contact-us>
- The Planning Dept. also has an email set up for general inquiries:
  - [planninginfo@newtonma.gov](mailto:planninginfo@newtonma.gov)
- In addition to the Dept.'s project webpages, the Department releases a weekly Friday report that can be subscribed to:
  - <https://www.newtonma.gov/government/planning/news-weekly-updates>



Ruthanne Fuller  
Mayor

**City of Newton, Massachusetts**  
Department of Planning and Development  
1000 Commonwealth Avenue Newton, Massachusetts 02459

**#195-24**

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Barney Heath  
Director

---

MEMORANDUM

To: Councilor Baker, Chair, Zoning & Planning Committee  
Zoning & Planning Committee Members

From: Barney Heath, Director of Planning & Development  
Jennifer Caira, Deputy Director of Planning & Development

Date: April 25, 2024

Subject: FY25 Community Preservation Act Budget Presentation

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Please find attached the Community Preservation Act FY25 budget presentation.

# NEWTON COMMUNITY PRESERVATION PROGRAM

## FY2025 BUDGET

Presentation to Zoning and Planning Committee

April 30, 2024



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 FY24 Newton received a match of 20.01% of its FY23 CPA surcharge

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

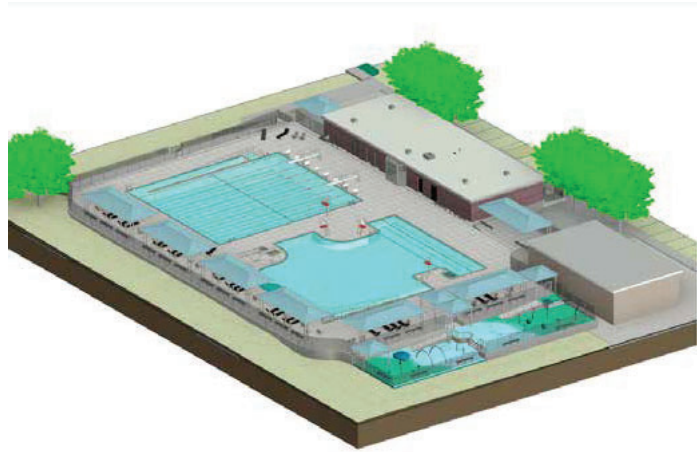
City of Newton COMMUNITY PRESERVATION FUND	Fiscal 2024 FINAL	Fiscal 2025 PROVISIONAL
<b>Program Budget - Revenue</b>		
Local CPA Surcharge	\$4,120,278	\$4,264,488
State Matching Funds - Estimated at 18% (In FY24 actual match was 20.1%. Current Estimate is at 18%, given Community Preservation Coalition announcement that match was expected to be below 20% in FY25)	\$796,154	\$741,650
Rollover – Previous Year State Match (Difference between Prior Year Estimated State Match and Actual Funds Received)	\$703,910	\$3,981
Additional Local Revenue: (assume \$0 in budget)		
<b>TOTAL REVENUE</b>	<b>\$5,620,342</b>	<b>\$5,010,119</b>

City of Newton, Massachusetts COMMUNITY PRESERVATION FUND	Fiscal 2024 FINAL	Fiscal 2025 PROVISIONAL
<b>Program Budget - Expenditures</b>		
Program Administration (max. 5% of annual new funds)	\$182,907	\$164,853
Debt Service Payments (after Open Space Reserves)	\$132,819	\$994,759
<b>BUDGETED RESERVES</b>		
Community Housing Reserve (10% minimum of Total Revenue)	\$562,034	\$501,020
Historic Resources Reserve (10% minimum of Total Revenue)	\$562,034	\$501,020
Open Space Reserve (10% minimum of Total Revenue)	\$562,034	\$501,020
General Reserve (unrestricted, any CPA purpose)	\$3,618,514	\$2,347,447
<b>TOTAL EXPENDITURES</b>	<b>\$5,620,342</b>	<b>\$5,010,119</b>

# Gath Pool Renovation

## Recreation

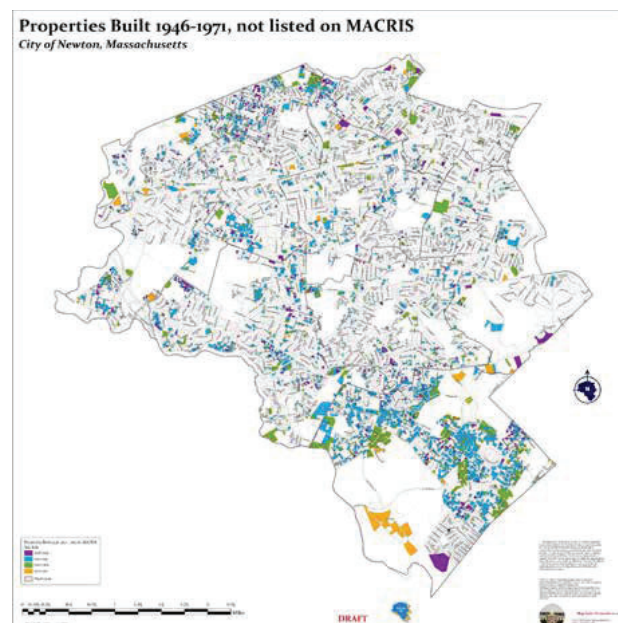
- Gath Pool received a total of \$7,034,362 in CPA funds for the Phase III Construction:
  - \$5,834,362 originally approved in June 2023, and an additional \$1,200,000 in October 2023
  - These funds were authorized as 30 year bonds.
- Previous Phases had received a total of \$545,500 in CPA funds, which allowed for an existing conditions survey and design work
- Gath Pool is currently finishing Phase III of the project, and is scheduled to be open in June.



# Midcentury Architecture Survey

## Historic Resources

- The City undertook a survey project to inventory Newton's mid-20<sup>th</sup> century architecture.
- \$17,500 in CPA Historic Resource funds were given to the project, with a 50% match from the Massachusetts Historical Commission Survey & Planning Grant program.
- Work was completed in September 2023, adding a total of 241 new inventory forms to MHC's historic buildings database.
- City staff is pursuing a second phase of the project, and has received another round of funding from MHC.





# Haywood House

## Affordable Housing

- The Newton Housing Authority requested \$3,000,000 in CPA housing funds in 2018, and an additional \$77,900 in 2020, for Haywood House.
- The project created 55 new units, which are restricted as permanently affordable one-bedroom rental units for residents 62+ years old.
- The project was completed in Summer 2023.



# CPA FUND “FINANCES AT A GLANCE”

### Fiscal Year 2024

#### Revenue

Beginning balance	4,323,992
Local CPA surcharge	4,120,278
State match	
Budget for this FY	800,135
Additional from prior FY	714,416
<b>Total Available Resources</b>	<b>9,958,822</b>

Actual FY23 State Match 20.01%

#### Expenses

Bond repayment obligations	694,853	12%
New funding authorizations	2,242,619	40%
Administrative costs	182,907	3%
<b>Total Expenses</b>	<b>3,120,379</b>	<b>55%</b>

Webster Woods  
Includes funding recommended by CPC

**Current Fund Balance 6,838,443**

### Fiscal Year 2025

#### Revenue

Beginning balance	6,838,443
Local CPA surcharge	4,264,488
State match	
Budget for this FY	741,650
Additional from prior FY	3,981
<b>Total Available Resources</b>	<b>11,848,562</b>

Estimated at 18%, based on most recent information

#### Expenses

Bond repayment obligations	1,495,779	30%
New funding authorizations	-	0%
Administrative costs	164,853	3%
<b>Total Expenses</b>	<b>1,660,632</b>	<b>33%</b>

Webster Woods, Gath Pool, and Athletic Fields\*  
Includes funding recommended by CPC

**Projected Fund Balance 10,187,930**