

CITY OF NEWTON

IN BOARD OF ALDERMEN

ZONING & PLANNING COMMITTEE REPORT

BUDGET

THURSDAY, APRIL 18, 2013

Present: Ald. Johnson, Yates, Sangiolo, Danberg, Kalis, Lennon and Baker

Absent: Ald. Swiston

Also Present: Ald. Albright, Hess-Mahan, Crossley

Others Present: John Lojek (Commissioner, Inspectional Services), Candace Havens (Director, Planning & Development), Robert Rooney (Chief Operating Officer), Rob Symanski (Financial Analyst), Trisha Guditz (Housing Rehab. Program Manager), Anne Marie Belrose (Community Development Manager), Karyn Dean (Committee Clerk)

REFERRED TO FINANCE AND APPROPRIATE COMMITTEES

#322-12(2) HIS HONOR THE MAYOR submitting in accordance with Section 5-1 of the City of Newton Charter the FY14 Municipal/School Operating Budget totaling \$331,073,197 passage of which shall be concurrent with the FY14-FY18 Capital Improvement Program (#322-12). [04-08-13 @ 6:03 PM]
EFFECTIVE DATE OF SUBMISSION: 04/16/13; LAST DATE TO PASS THE BUDGET 05/31/12

REFERRED TO FINANCE AND APPROPRIATE COMMITTEES

#322-12 HIS HONOR THE MAYOR submitting the FY14-FY18 Capital Improvement Program pursuant to section 5-3 of the Newton City Charter.
[10/09/12 @ 2:38 PM]

BUDGET AND CIP

INSPECTIONAL SERVICES DEPARTMENT

The proposed FY14 budget for the Inspectional Services Department is \$1,192,934. There are thirteen full-time positions and the addition of one part-time position for an ADA/504 Coordinator. This was in last year's budget but was never filled. As longer term employees have left, the newer hires come in at a lower salary so there were small changes there. A line item for new tablets for field inspectors has been added for \$10,000.

John Lojek, Commissioner of the Inspectional Services Department (ISD) addressed the Committee. He explained that the philosophy of his department and staff is that strict code enforcement makes the City safer. ISD also provides a valuable public resource for record keeping, technical information and the review for compliance with codes and ordinances.

ISD also issues permits for construction, demolition, renovation and additions to buildings and structures; inspects buildings and structures while in the process of any of these; and provides periodic and licensing inspections of existing places of public assembly. The department investigates and acts upon complaints of zoning and building code violations including legal actions and Zoning Board of Appeals cases. Commissioner Lojek said they are busiest with complaint and enforcement aspect of their duties. This year, a new zoning enforcement agent was hired and he is extremely busy. Some complaints can be resolved fairly quickly, but many take quite a while and have to go through a process. **A list of complaints to date for FY13 can be found in the attached presentation.** Commissioner Lojek said that they are able to generate reports on the aging of complaints. However, the amount of work that is done on code enforcement cannot be completely reflected in the list of complaints as it can be a complex process.

New Position/Unfilled Positions

The organizational make-up of the department has changed this year. An ADA/504 Coordinator position has been added and they are currently interviewing candidates. There are three inspection districts in the City with an inspector covering each one - that is an average of 27K residents per inspector. The fourth inspection district is covered by the inspector who handles the public buildings and therefore works throughout the entire City. This position is in the process of being filled. The Senior Electrical Inspector is out on sick leave at this time and they are working to get those responsibilities covered

Accomplishments

- *Projects:* Managed several major projects simultaneously and successfully including Chestnut Hill Square, The Street, Chestnut Hill Mall, Atrium Mall and Stokes Hall at Boston College. These are all in various stages of development or completion.
- *Inspections:* Increased use of laptops has facilitated recording inspections in real time. There is a line item for the purchase of tablets which will allow more immediate access of information.
- *Permits:* Approximately 85% of permits are issued the same day the application is submitted. Electric, plumbing and gas permits are issued same day in about 99% of the time.
- *Zoning Enforcement:* All zoning complaints are now channeled through the zoning enforcement agent. This makes the process more enforcement.
- *Permits/Inspections:* All permits requiring plans are now received on CD and uploaded to the property file. Paper plans are no longer accepted. All related documents are also uploaded to the file as they work towards a paperless system.

Goals and Objectives

- *Inspections:* The department wants to be more efficient in scheduling in order to provide for timely and thorough inspections. The goal is to create a recording system for incoming calls and requests and then record all results in real time to create a new inspection metric. The new tablets they will be using will facilitate this. They would also like to charge a re-inspection fee for failed inspections.

- *Code Enforcement:* The goal is to dedicate one inspector to proactive building code enforcement. Along with the public buildings inspector, this could turn up quite a few problems so they will both be linked with ADA Coordinator as a team to identify, record, and resolve problems.
- *Customer Service:* Making transactions easier for the public will include solving online payment issues, putting forms online and coordinating input of that information into the permit database.
- *ADA/504 Coordination:* The department hopes to learn quite a bit from the Coordinator about what they should be looking for in their everyday inspections. Creating and implementation and access plan is also something that will be undertaken.

Challenges for FY14

- Zoning Code reform and re-write, Phases 1 and 2.
- Integrate ADA/504 Coordinator
- Conduct School and R-2 inspections when new inspector is hired
- Improve the on-line permitting for electrical, plumbing and gas inspections. This will involve working on the fee structure which is confusing at this time
- City Projects that include Fire Stations and School renovations

Permits

Building permits are down from last year from 3700 to 3100 but there are much bigger projects this year as compared to last. Many more electrical, plumbing and gas permits will be issued however and he believes this is due to the efficiency in issuance. They have found that if they don't turn the permits around quickly, work may occur without permits. Putting the applications online should increase the number as well. Last year the department generated about \$5M in permit fees. Commissioner Lojek is projecting \$6.24M for the coming year. The increase is due largely to the bigger projects that are in the pipeline.

Committee Questions and Comments

Organizational Chart

There was some confusion from members of the Committee about the organizational chart and a clarified chart was requested.

Progress of Paperless Department

The department does not have a budget to scan all the current building plans so they will likely remain. However, from this point forward, the move towards "paperless" has begun by requiring all plans to be submitted on a CD. They do not have any more space to store paper plans and retrieving them is difficult as most end up in the vault. Putting applications online will be a major step and they are working with the IT Department to share information with other Departments. They are doing as much as they can with the money allowed in the budget. The Committee asked if there was onsite or offsite back-up of this information. Ald. Lennon believed that it was backed up offsite.

The Chief Information Coordinator position was meant to work with getting documents scanned and moving towards more digital data. Her time, however, is spent with data entry and accepting

electrical, gas and plumbing permits. She is also working as their ADA person right now. As they are receiving more records via CD, and an ADA Coordinator is hired, more time should be freed up for her. When they start using the tablets, it will also help with the paperless environment.

Need for more Inspectors/Measuring Goals and Accomplishments

There was concern in the Committee that ISD needed more inspectors. Commissioner Lojek said that when the department is fully staffed, it is at the right number. At times, they could probably use some short-term help and that is something he will consider. The Commissioner was asked how many inspections were done by each inspector in a year. Commissioner Lojek said it could be from hundreds to thousands. It depends on the type of inspection that is being done. An electrical inspector can do one inspection a day, while a building inspector could do five or six on any given property. The inspections are so varied that they cannot be compared on a one-to-one basis or by how much time they take. Sometimes, 15 inspections can be done in half a day, and in other instances, 2 inspections could take all day.

Also, in order to understand if goals are met, members would like to see more specific numbers and dates for these goals. It is difficult to determine if the budget numbers can legitimately meet the need without knowing what it will take to meet the goals. Mr. Rooney said he could provide some information.

Mr. Rooney said Inspectional Services used a contract service for the Chestnut Hill Square (CHS) project. Commissioner Lojek explained that Newton North High School project was wrapping up and they were extremely busy with that. The department, therefore, did not have the capability to work on another big project such as Chestnut Hill Square. Therefore, inspectors were contracted by a private company to do the inspections and ISD inspectors coordinated with them to check on their records and occasionally went on inspections with them. Large projects like CHS require many inspections on any given day and that was not something ISD could do at that time. Commissioner Lojek noted that most of the inspections were electrical, plumbing and gas which is the fast-paced work. This is not atypical. It was also pointed out that this provision was in the Board Order for Chestnut Hill Square and approved by the Board of Aldermen. Most of the major part of this project under the Building Code is controlled construction. It does not involve inspections by the City, but instead the City takes affidavits from licensed design professionals who certify that work.

Committee members asked if there were any lesson learned with this project in terms of how a Board Order would be constructed that might be helpful. Commissioner Lojek said it was a good model and it worked well. He suggested that if this sort of arrangement were to be used again, he would like to make sure that there is no confusion over this provision and that it be highlighted somehow so that everyone was aware of it. It was suggested that the City choose the contract inspectors instead of the developer. Commissioner Lojek said there are not that many contract companies to choose from but that should be a process vetted by the Law Department.

This department generates far more revenue than it expends. Several members did believe that ISD could use another inspector position. There had been some input from constituents on

zoning enforcement concerns. The constituents had not been able to get answers from ISD in a timely manner and perhaps that was due to staffing issues. Members wondered how the Commissioner could determine how many inspectors he needed and what metric could be used to calculate that. Other members wanted to see which positions have gone unfilled, how long they were unfilled and what was the level of compensation offered on those positions. Competitive salaries needed to be in place. It was mentioned that the Human Resources Department should be able to track those sorts of things. The inspector position is difficult to fill and has been offered a couple of times but it has been turned down. The interviews are continuing. It was asked how salary recommendations can be put forth for positions.

It was felt that the most important information was related to performance management: turnaround time on building permit applications and complaints. How many applications came in and how long did it take to turn them around; and how many complaints came in and how long did it take to resolve them.

Some Committee members discussed offering a Resolution to the Mayor to provide more staffing for ISD. Members of the Committee were very complimentary to Commissioner Lojek and the professional and effective work his department has done.

Requests to Executive Department

- The Chair noted that FY13 accomplishments do not match the goals that were set for FY13. She would like to see the goals and accomplishments and the metrics to go along with those. Right now, they do not match. This was not specific to the Inspectional Services Department, but was true across all departments. She asked Mr. Rooney if he could be responsive to that.
- Some Committee members also asked the Executive Department to work with all department heads in conjunction with the Performance Management specialist to help determine what departments may need in terms of staff and technology.
- Committee members asked how salary recommendations can be put forth.
- Committee members asked if private inspection contractors can they be chosen by the City instead of by the developer.

Summary of Requests to Commissioner Lojek

- A clarified organizational chart
- Dates and numbers to go along with stated goals (Mr. Rooney offered assistance on this)
- Turnaround time report on complaints
- Turnaround time report on building permit applications
- Report of unfilled positions, how long they have been vacant, and compensation of same
- Appropriate metric to determine if more staff is needed

Responses to Committee questions from Commissioner Lojek are attached to this report.

The Committee voted to approve this budget and discharge it to the Committee of the Whole.

PLANNING & DEVELOPMENT DEPARTMENT

The proposed FY14 budget for the Planning & Development Department is \$1,344,860. This is an increase of \$226,354 over the FY13 budget. The federal funds budget (CDBG, HOME and Emergency Solutions Grant) is \$3,042,479 which is a reduction of \$49,595 for FY14.

There is a mid-year adjustment to a staff member who went from part-time to full-time Chief Planner. The Senior Planner position has been budgeted at .8 FTE but will go to full time as well. The Principal Planner position left vacant from Seth Zeren's departure has been split into two positions: one for zoning code review and the other position is not yet filled but the proposal is to make that a full time position in Long Range Planning. These changes increase the FTEs by 1.7 for FY14.

CDBG funds will be spent by program area as follows:

Affordable housing 54%; Administration 20%; Public Services 15%; Architectural Access 6%; Taret Neighborhood Improvements 5%; and Economic Development 1%

Candace Havens, Director of Planning & Development, presented the budget to the Committee. [Her presentation is attached to this report.](#)

FY13 Accomplishments

Housing and Community Development:

- Completion of 61 Pearl St Project which is permanently affordable housing developed by CAN DO and has a first floor handicap accessible apartment
- Fair Housing Committee advocated for ADA Coordinator and coordinated educational forum
- Continuum of Care membership which is regional, received \$1.2M from HUD for homelessness programs. Part of the money goes to other programs for children's needs, youth services, adult, family and elder services and people with disabilities
- Neighborhood improvements including Carleton Park, Charlesbank Park and Washington Street (retaining wall, trees and shrubs, accessible picnic space, etc.)
- Access improvements including curb cuts, and pedestrian signals as well as accessible hardware for City Hall meeting rooms and main doors
- First-Time Homebuyers Program capitalized by Community Preservation funds which provide subsidies for eligible first-time homebuyers.

Housing Rehabilitation Program

- Funding provided to eligible homeowners for emergency repairs, boilers, roof repairs, new porch railings, energy efficient windows, oil tanks, wheelchair accessibility, etc.

Conservation and Environment

- Completed Management plan for all conservation areas and completed \$27K in deferred maintenance in conservation areas.
- Worked on Hammond Pond storm water improvements to be implemented by July of this year

- Conservation Commission reviewed filings and issued Orders of Conditions, Determinations of Applicability and Certificates of Compliance. They resolved 5 of 10 new violations.

Historic Preservation

- Documented 250 19th century buildings and reviewed 175 applications for demolition and 100 applications in 4 local historic districts

Economic Development

- Completed Economic Development Self-Assessment (EDSAT) and followed up on EDSAT recommendations of marketing and promotion, development opportunities in villages and corridors and business development
- Economic Development Cluster meetings underway
- Community engagement
- Support of local businesses through various initiatives
- Major projects include Chestnut Hill Square, Needham St. Reconstruction, Austin Street parking lot reuse, Chestnut Hill Shopping Center, Riverside MBTA Station and Cypress Street parking lot. These are in various stages from citizen input through active construction.

Land Use

- Forty-nine special permit applications have been submitted, 156 DRT (Development Review Team) reviews, 49 zoning reviews and 83 other reviews including wireless installations, accessory apartments, institutional reviews, site plans, sign permits, comprehensive permits, 5-58 reviews (Carr school, modular at 4 schools, Angier School and Fire Station #10)
- Transportation
- This include Newton North Neighborhood Parking Plan, bike and pedestrian improvements, and Traffic Council review of 61 items at 13 meetings
- Long-Range Planning
- Zoning Reform Phase 1 has begun with Code Studio selected as consultant and the reorganization process is underway
- Parking Management Plan underway which may be concluded this year or next fiscal year
- Establish Mixed-Use 4 district to support village center development

There were two goals for FY13 that are still outstanding: Roadway classifications and that is being discussed with the Transportation Advisory Committee. This should be presented soon; and expenditure of the extra funds for conservation areas. A contract had already been entered into by the time money had been appropriated. They will be able to start moving ahead with that before the end of the fiscal year.

FY14 Goals

Housing and Community Development

- Develop tenant-based Rental Assistant Program to assist approximately 30 families
- Rehab 12 units for low-to moderate income homeowners
- Assist 3 buyers through the First Time Homebuyers Program

- Continue to look at affordable housing trust
- Fund 1-3 affordable projects with \$1.7M. There has been a surge in interest in development.
- Look at WestMetro HOME Consortium restructuring
- Ensure fair opportunities for housing through continued training and education, implanting the Architectural Accessibility Action Plan
- Ensure high quality of community life for all residents through services
- Neighborhood improvements including Pellegrini Park and improvements in Nonantum Village
- Ensure access for people of all abilities by working on ADA-compliant ramps citywide and completion of Newton Centre playground Pathway Phases 4 and 5

Economic Development

- Promote local economy, village vitality, and fiscal stability
- Redevelopment of Austin Street and Cypress Street
- Proposing Economic Development Director to work with Planning and the Mayor's Office

Conservation and Environment

- Create strategy plans for maintenance of conservation areas and initiate maintenance plans for priority areas
- Examine feasibility and funding of possible acquisition of Waban Hill Reservoir
- Design and installation of infiltration system for Hammond Pond and develop long-term care strategy

Historic Preservation

- Restore Civil War Monument
- Survey additional 19th century buildings
- Update and expand website

Transportation

- Conduct additional parking plans and complete Citywide parking management plan
- Improve use of commuter lots with MassDOT
- Further Transportation Advisory Group recommendations
- Adopt Design Classifications for roadways

Long-Range Planning

- Complete Phase One of zoning reform and initiate Phase Two
- Complete Master Plan of Needham Street and update Zoning. There will be ongoing meetings with the public

Committee Questions and Comments

Ald. Baker asked where the extra \$25K conservation money was being used. Ms. Havens said it is in two different places. There is a line item for \$25K and another for \$27K; one is in as a grant and the other is a line item in the operating budget.

Real Property Reuse

Ald. Albright asked about Real Property Reuse items, in particular the Health Department building and the Parks & Recreation Building. Ms. Havens said the Newton Centre Health

Department building is tied in with the Cypress Street parking lot project. Crescent Street is not specifically in the departmental budget. The work rests on what the outcome of the Committee's recommendations will be. Ald. Albright said she would like to see Real Property Reuse as a category of projects.

Conservation Land

There is a docket item for a strategic plan for conservation lands. Ald. Albright asked if that will be reflected in the goals for conservation land this year. Ms. Havens said they would identify strategy for review of conservation areas and then prioritize them. Then there will be maintenance plans created for priority conservation areas. Ald. Albright said she hoped this would not be restricted to just maintenance and would like to see development and enhancement considered as well. Ald. Yates said there was an Open Space and Recreation Plan update that was recently done. It addresses many of the issues that appear to be the focus of the docket item. Ms. Havens said the updated Plan has gone to MAPC and then will go onto the state for final approval.

Zero-Based Budgeting

Ald. Kalis asked what the department was not able to take on due to time and staff capabilities. Ms. Havens said she has had to say no to a few things though she could not recall them at the moment. He wondered if zero-based budgeting is working and if the new FTE was not hired what would be lost. Ms. Havens said things would just take longer and they would need to set reasonable expectations.

Economic Development

Ald. Danberg said the City relies on the Planning Dept. to move it forward in economic development. Every time a potential project comes to the City, it needs staff time from the Planning Dept. The fewer staff, the longer the wait time to get projects underway and this puts off all the benefits that come to the City. It is critical to keep pace with the things that could be done and spend the money necessary to staff the Department sufficiently. She also said there is a lot of work to be done on Cypress Street and she is very appreciative of the work already done.

The Needham Street project has been at 25% for a long time. She wondered what the realistic timeframe is on that and what barriers might be in place. Ms. Havens said it would depend on MassDOT efforts to get the design work and it's a coordinating effort between the master planning and the work they're doing. There is a very good working relationship with DOT and the barrier would be lack of funds. They are not quite at 25% which would mean they were shovel ready, but they could be within a year which then puts them in the funding queue. It is not unrealistic to get this going very soon. They are working on the appropriate interface between the actual potential for economic development and the roadway to make sure capacity meets what future demands will warrant. They are also seeing a surprising amount of redevelopment on Needham Street right now. Projects have come forward this year and they've been meeting with various property owners to let them know what may be proposed in their properties so they won't be surprised and have time to ask questions. There is a nice synergy right now.

Ald. Crossley said she believed that the coordination of improvements to infrastructure citywide with those areas that are targeted for economic development, would be beneficial. This would include sidewalk and stormwater improvements, etc. She said the Crystal Lake Conservancy has been doing to great work there and wondered if that could be modeled for looking at problems at Hammond Pond.

Ald. Yates would like the new Economic Development Director to undertake coordination and involvement of the Main Streets program with the City. The field rep for the northeast is interested in coming here to look at viable areas for Main Streets applications. He noted that Amanda Stout worked on a corridor in New Jersey similar to the Needham Street project. He asked that she make that plan available to the Board online. He asked that the Upper Falls greenway be kept in mind when Needham Street planning is done. He would like the Upper Falls Neighborhood Area Council and the Newton Highlands Area Council to be kept informed as well.

Historic Buildings

Ald. Danberg asked about the work with 19th century buildings. Alice Ingerson explained that Brian Lever and Katie Holmes got CPA money as well as matching Mass Historical Commission Funds to look at pre-1830 buildings. They discovered some were 1830-1850 and the MHC wanted them to go up to 1850. There are many more of these pre-Civil War buildings than originally thought and they are trying to determine how many there are. Some are small farm buildings that may not be noticed. It should be an exciting project. There is an enormous database of all the City buildings so it will be good to have the private buildings as well.

Zoning Reform

Ald. Crossley said the budget calls for \$75K for consultants which is the same amount as last year. She was under the impression that money was mostly for the Code Studio consultant. She also thought it was agreed that \$100K a year for three years was going to be put aside for consultant services as well as whatever staff time was needed for each phase. It seemed that as Phase 2 began, more staff time was going to be needed and more money for the consultant to help coordinate the effort. She also said there was going to be some mapping by the Planning Dept. as to how the work would be rolled out. Ms. Havens said the funding for Code Studio was taken into account in FY13 but would carry them through September because it is a contract. Phase 2 probably won't start until September. Ultimately it is \$100K for the year but Phase 2 will start ¼ into the FY so that would be \$75K. **Ms. Havens said she would provide a written clarification for this and get back to the Committee. It is attached to this report.**

General Comments

Ald. Albright noted that the Board offered a Resolution for more staff for the Planning Department last year. There is more staff this year and she did not want that to go unnoticed. Ald. Hess-Mahan thanked the Planning Department for all the support that the Land Use Committee has received. He is on the Fair Housing Committee and is happy about the addition of the accessibility coordinator. He said he and some of his colleagues have been in discussion with the Mayor's office about their procurement policy concerning CDBG Funds. He is

concerned that the CDBG funding has gone down and the City has imposed a new policy for requiring a public bidding process.

The Committee voted to approve this budget and discharge it to the Committee of the Whole.

COMMUNITY PRESERVATION PROGRAM

The proposed FY14 Community Preservation Program budget is \$3,177,323. The local CPA surcharge makes up \$2,534,441 and \$642,822 is from state matching funds. Program administration is \$142,090 of the total amount. Statute limits administration costs to 5% and they usually come in between 3% and 4%. The Consulting line item at \$23.5K is considerable because if state funds come in under what the budget estimate was, they still have to come in at 5% or under with the actual revenue, and the consultant money the easiest money not to spend. That is a bit of a cushion so they can have independent people confirm the appraised value of a property, peer review of construction budgets, etc. **A breakdown of the revenue and expenditures for both FY13 and FY14 can be found in the attached presentation.**

New funding guidelines have been established and there has not been a lot of new funding this year. They are waiting for 3 proposals by the June deadline and last week the Community Preservation Committee decided to move the pre-proposal deadline up to March. Next year, the presentation will show any pre-proposals that have come in.

The remaining available FY13 Community Preservation Funds of approximately \$8M include supplemental funds for Angino Farm; 54 Eddy Street, Newton Homebuyer Assistance Program (under review by BOA), Museum archives and Myrtle Village projects that have been recommended by CPC but not yet submitted to BOA, and three pre-proposals that have been submitted to CPC for the Affordable Housing Trust, Allen House and City Hall Historic Windows. If all of these projects were approved and funded, approximately \$2M would remain.

This year a flat percentage has been budgeted for the state match. It did not go down last year for the first time in awhile and the legislature as part of the amendment to the Act last summer put in an additional \$25M to the state fund to be divided between the 155 CPA communities. The thinking is they will probably exceed the budgeted amount on state revenue but they are not required to tell the City until November 15th. The forecast for the state match is 26%. In the beginning of the program the match was 100% but 26% is not insignificant. As more communities adopt the act, there will be a fairly steady decline in the state match. As debt service reaches completion on a 20 Rogers Street and Kessler Woods more money will be available. Ms. Ingerson predicts going up 2% on local revenue and about a 3% decline in the state funds each year.

Committee Questions and Comments

The CPA statutory requirements are 5% for administration; 10% each for housing, open space and historic; 65% for any of the above (excluding administration). Ald. Baker asked if things tend to work out evenly. Ms. Ingerson said the money is put in budgeted reserves for the 10% for each of the three categories and then a general fund for the other 65% that can be used as needed for each.

Ald. Yates said he is pleased that the restoration of the Civil War Monument in the cemetery is going to be implemented this year. The steps of the War Memorial need work, however, and he would like to administration to put in money for exterior restoration. The steps are in the CIP but they are fairly low in priority. He was pretty sure the CIP does not take into account a targeted financial source like this to bring it up the priority list. Ald. Johnson suggested Ald. Yates speak with the Mayor's office.

Ald. Crossley said any of the CPA building projects requires a project manager which means staff from the building department. There are a couple of building projects that have languished in part because there is no manager, or the manager has too much to do already. These projects are important to the City, such as the Jackson Homestead, and need to be addressed. She would like to see enough people in the Building Department to handle these projects and will bring it up at the Public Buildings budget meeting. Ald. Baker noted that there are times when unique opportunities present themselves and they need to be acted upon.

Ald. Albright said she would like to propose that no other CPA monies go to the City until the projects that are on the books are completed. These projects have gone on too long and get more expensive with each passing year. She is interested in proposing a Resolution.

Ald. Lennon said he had concerns about the CIP and the CPA. He is going to forward an email to the Committee that was send to the Executive Department about the review of projects that have been in the queue, citizen petition driven, CPA projects that are languishing. He is trying to set up a meeting with the CPC leadership because one of the questions they now ask is where is the project is on the CIP.

Ald. Johnson asked for a comprehensive list of all debt financed projects. There are only three of them: Kessler Woods, Angino Farm, and Rogers Street.

Because of the late hour, Ms. Ingerson did not go over the Program requirements.

The Committee voted to approve this budget and discharge it to the Committee of the Whole.

Respectfully Submitted,

Marcia T. Johnson, Chairman

Inspectional Services Department

John D. Lojek, Commissioner

City of Newton

Setti D. Warren, Mayor

DEPARTMENT DESCRIPTION

Our long-standing motto: “Strict code enforcement makes the city safer,” reveals the mission of the Inspectional Services Department (ISD). We strive to build a safe environment for the citizens of the City of Newton by enforcing all applicable state and local codes and ordinances in a fair and equitable manner. We strive to provide professional, courteous and user-friendly customer service.

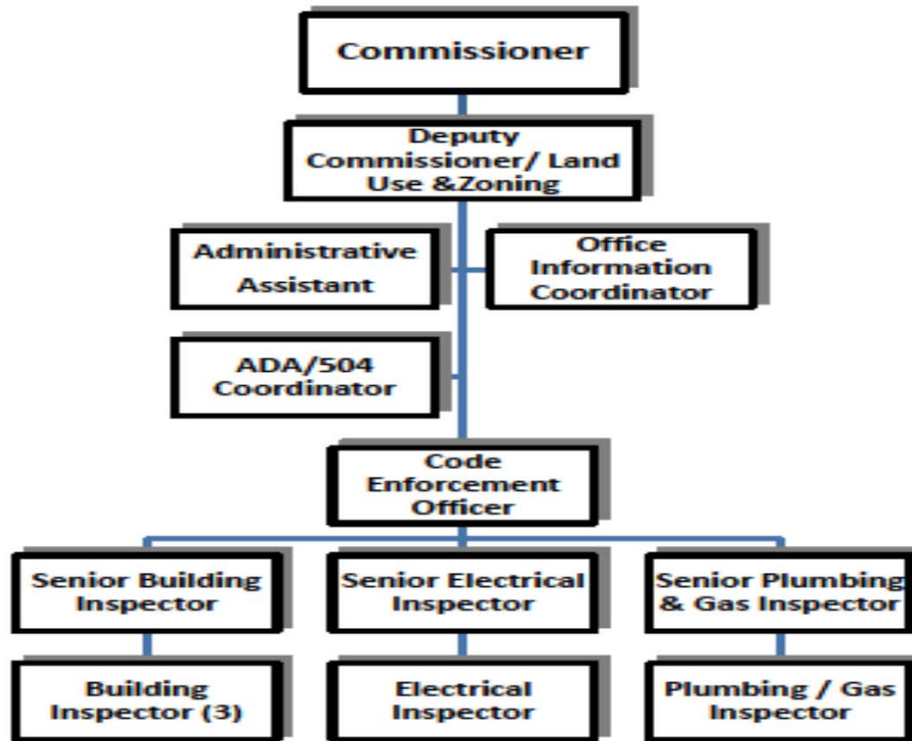
Our code enforcement efforts ensure the public that the highest standards of public safety are achieved during construction. Inspectional Services provides a valuable public resource for record keeping, technical information, and review for compliance with codes and ordinances. Through an integrated approach with the Planning and Development and City Solicitor’s Departments, we provide clear and understandable interpretations of the zoning ordinances and decisions of Department personnel and the Commissioner of Inspectional Services with regard to the State Building Code.

Inspectional Services takes a proactive approach toward code enforcement while employing a constructive engagement management style in dealing with compliance resolution. Inspectional Services is committed to the education and advancement of all of its employees in technical areas as well as in all aspects of public relations and customer service.

DEPARTMENT DESCRIPTION (cont'd)

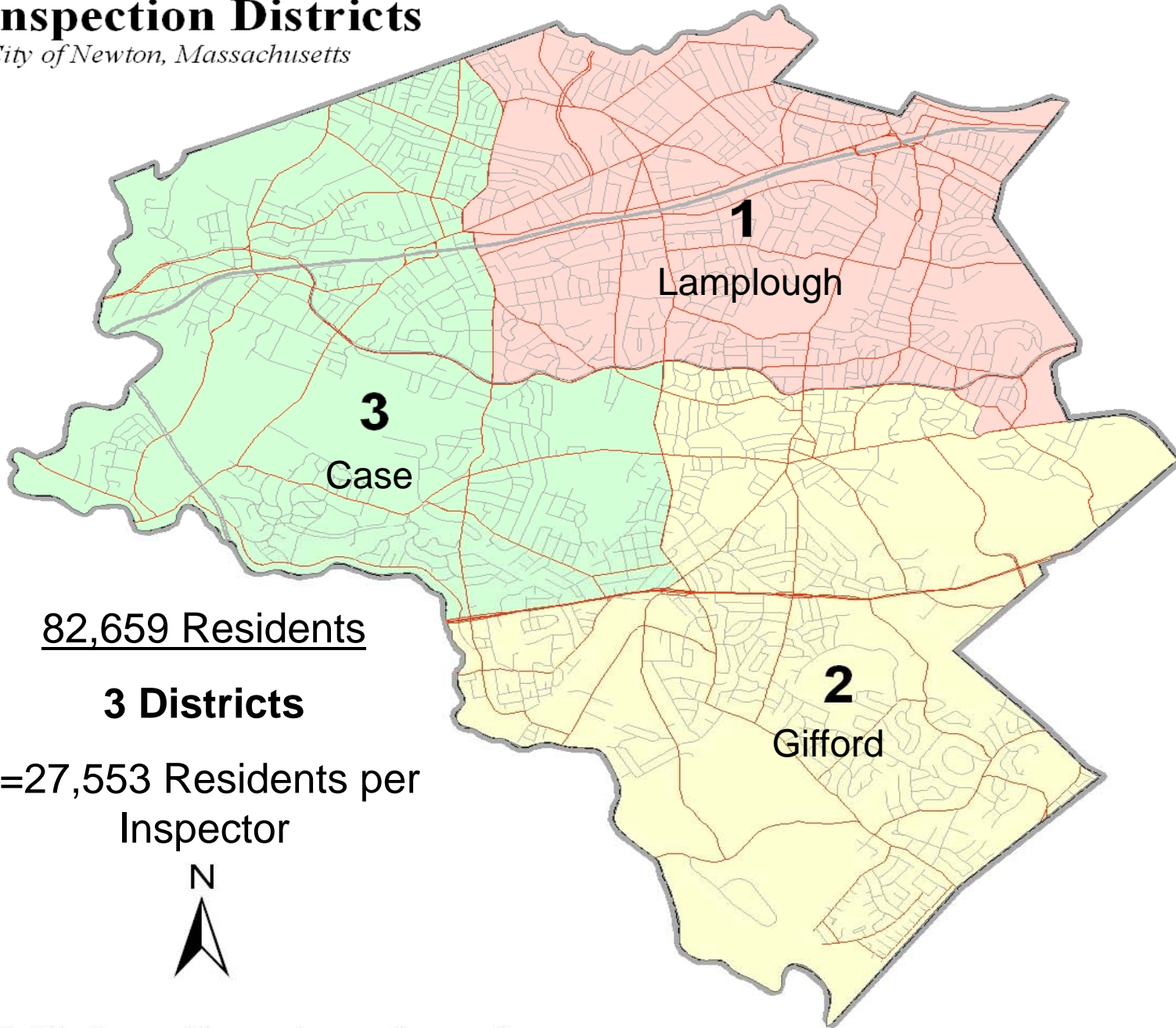
- Provide prompt, accurate and understandable building and zoning information to the public and building professionals.
- Examine plans for Zoning and Building Code compliance.
- Issue permits for the construction of new buildings, as well as demolition, renovation and additions to existing buildings and structures.
- Inspect buildings and structures while in the process of construction, reconstruction, renovation and demolition, as well as periodic and licensing inspections of existing places of public assembly.
- Investigate and act upon complaints of zoning and building code violations, including legal actions and Zoning Board of Appeals cases.
- Staff various committees and commissions of the City to provide technical support.
- Report quarterly to the Mayor and the Board of Aldermen, with a comparative statistical analysis of all zoning and land use complaints and numbers and types of permits issued.
- Maintain the official building files of all real property in the City of Newton, while allowing public access.

INSPECTIONAL SERVICES



Inspection Districts

City of Newton, Massachusetts



82,659 Residents

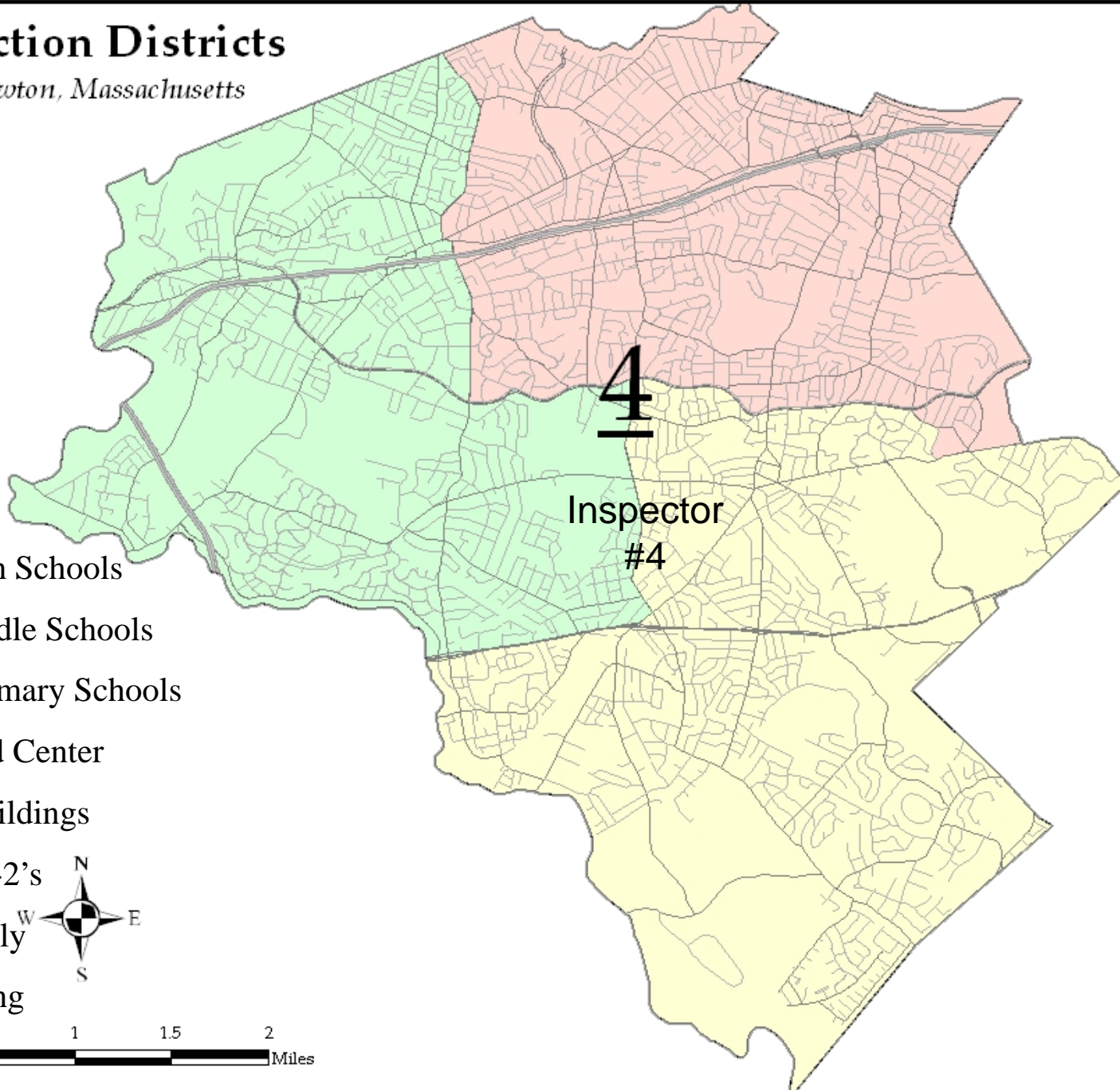
3 Districts

=27,553 Residents per
Inspector

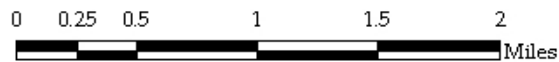
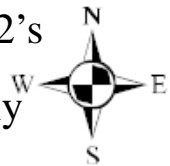


Inspection Districts

City of Newton, Massachusetts



- (2) High Schools
- (4) Middle Schools
- (15) Primary Schools
- (1) Ed Center
- City Buildings
- 400+ R-2's
- Assembly
- Licensing



LINKAGES TO PLANNING & DEVELOPMENT

- Director – Candace Havens
- Chief Zoning Code Official – Jane Santosuosso
- Conservation – Anne Phelps
- Preservation – Brian Lever
- Chief and Senior Planners
- Development Service Agents

ACCOMPLISHMENTS

1. Projects - Managed several major projects simultaneously and successfully
2. Inspections - Increased inspections recorded in real time and entered into database
3. Permits - Maintained timely issuance of all permit types
4. Zoning Enforcement - All zoning complaints are now channeled through the zoning enforcement agent
5. Permits/Inspections - All permits requiring plans are now received on CD and uploaded to the property file

GOALS AND OBJECTIVES

1. Inspections - Insure timely and thorough inspections
 - Create recording system for incoming calls, requests, etc
 - Percentage of scheduled inspections completed on time
 - Record all results in real-time to create new inspection metric
 - Charge reinspection fees for failed inspections

2. Code Enforcement - Develop a proactive code enforcement strategy
 - Dedicate one inspector to proactive building code enforcement
 - Train new employee for reporting and implementation
 - Percentage of R-2 inspections completed toward 100%
 - Work closely with municipal and school departments

3. Customer Service - Make transactions easier for the public
 - Solve online payment issues
 - Put forms online
 - Coordinate input of information into permit database

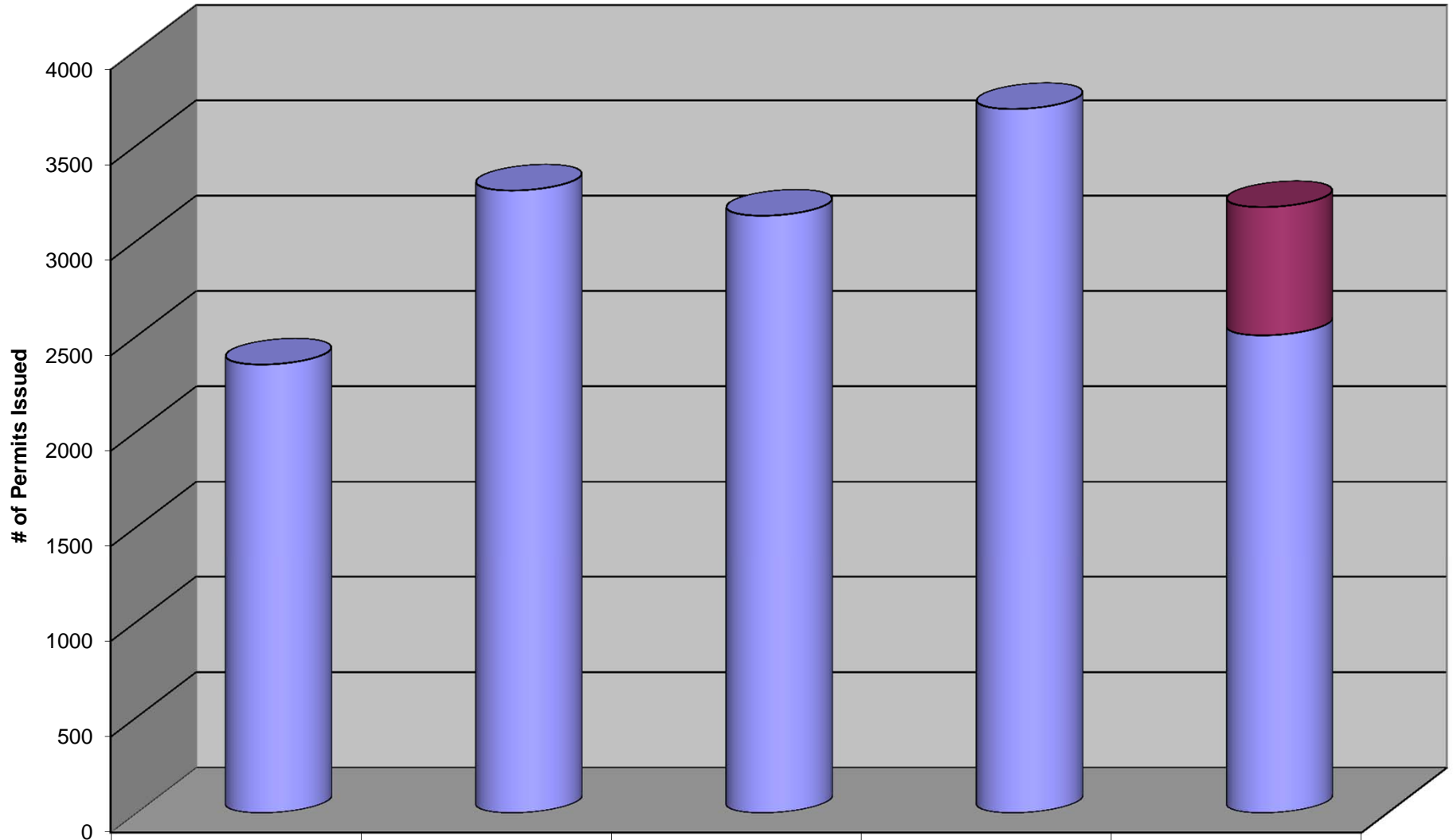
GOALS AND OBJECTIVES (cont'd)

4. ADA/504 Coordination - Staff educated and capable of addressing ADA/504 issues
 - Hire ADA/504 Coordinator into office
 - Department review of Newton Access Report
 - Create implementation and access plan

CHALLENGES FOR FY14

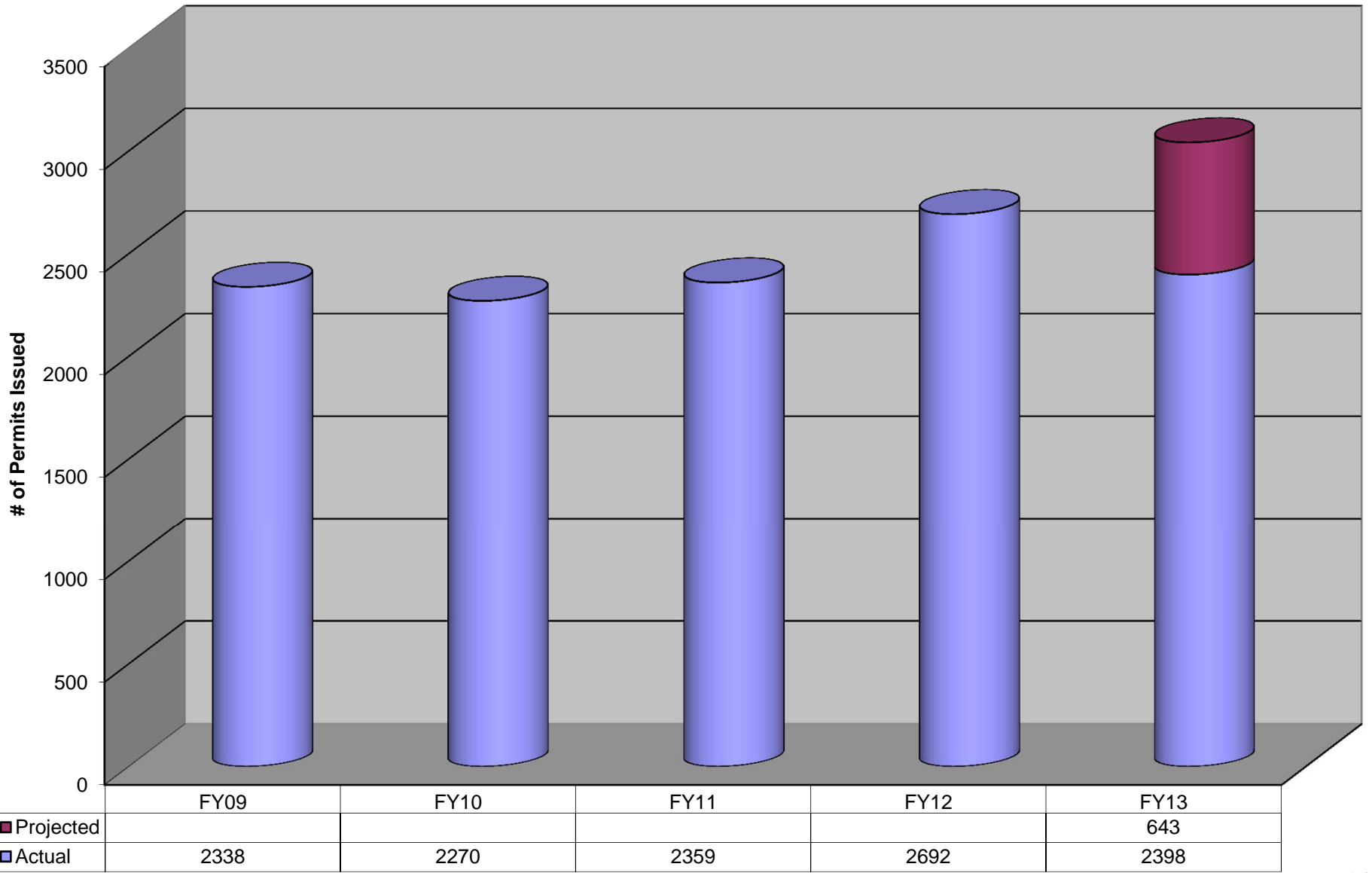
1. Code Re-Write
 - Phases #1 & #2
2. ADA/504 Coordinator integration
3. School & R-2 inspections
4. On-line permitting
 - Fee Schedule
 - Solve online payment issues
 - Put forms online
 - Coordinate input of information into permit database
5. City Projects
 - Fire Stations
 - School Renovations

Building Permits Issued by Fiscal Year as of 4/13/13

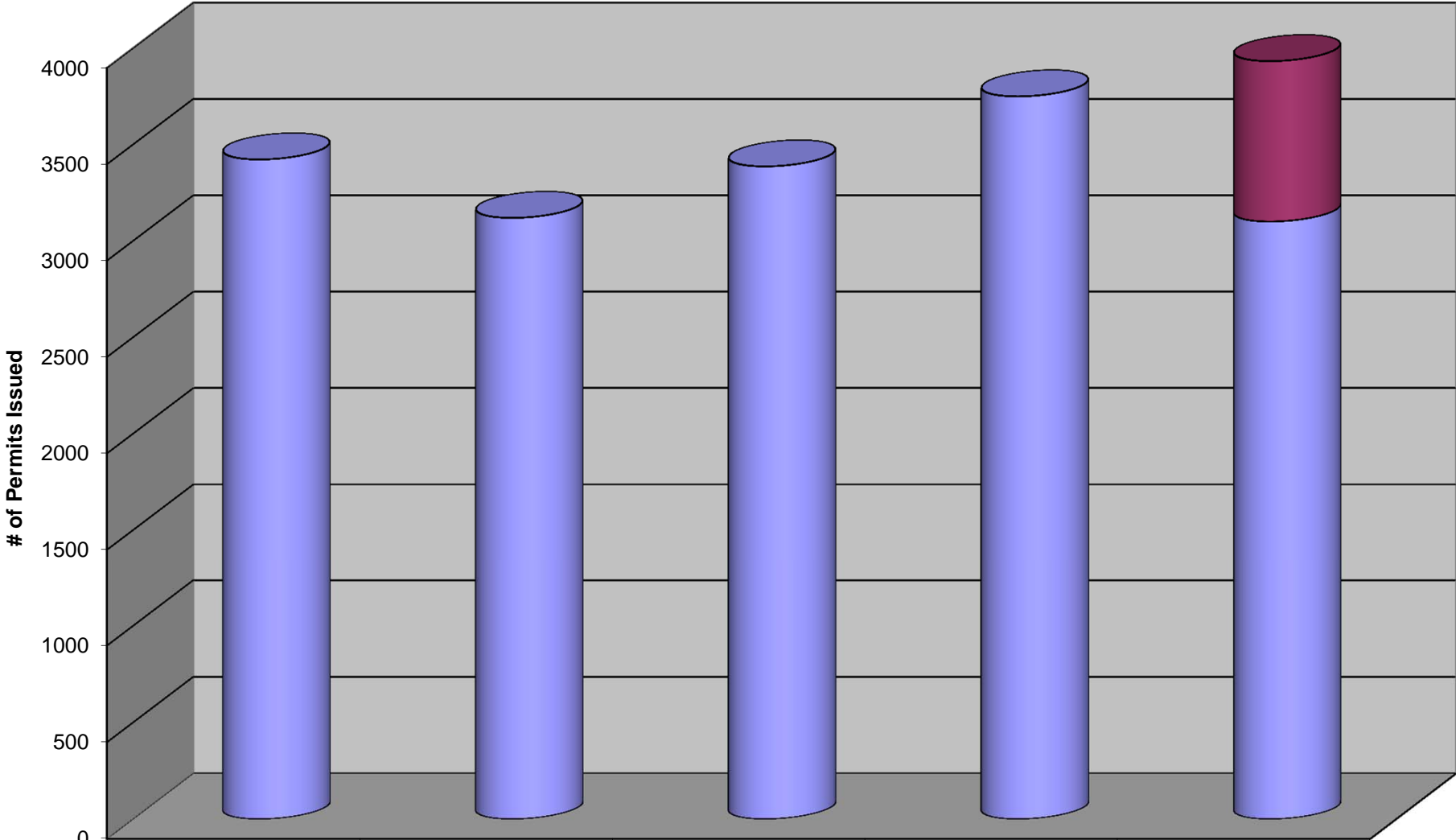


	FY09	FY10	FY11	FY12	FY13
■ Projected					672
■ Actual	2352	3264	3132	3691	2505

Electrical Permits Issued by Fiscal Year as of 4/13/13

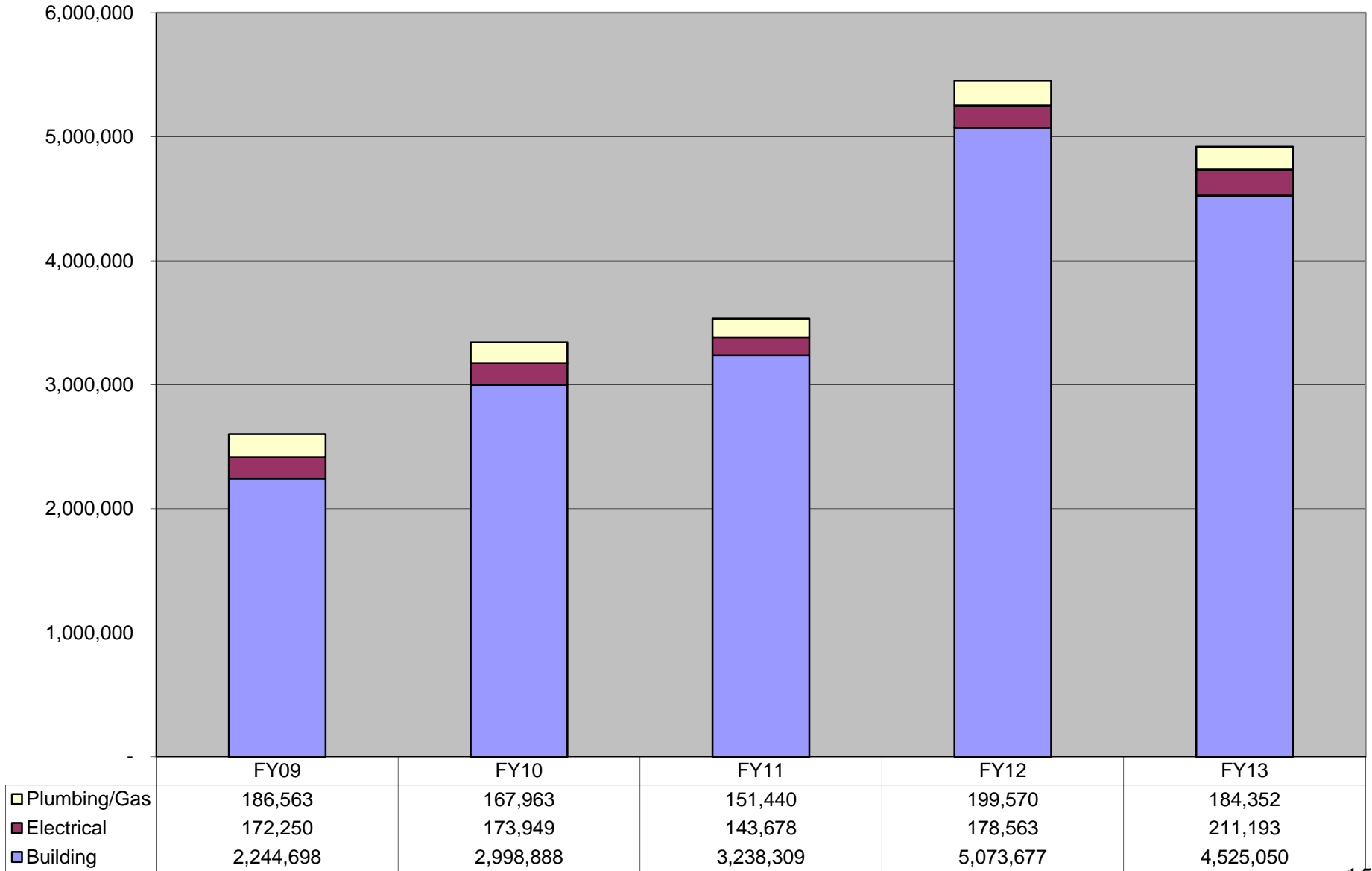


Plumbing/Gas Permits Issued by Fiscal Year as of 4/13/13

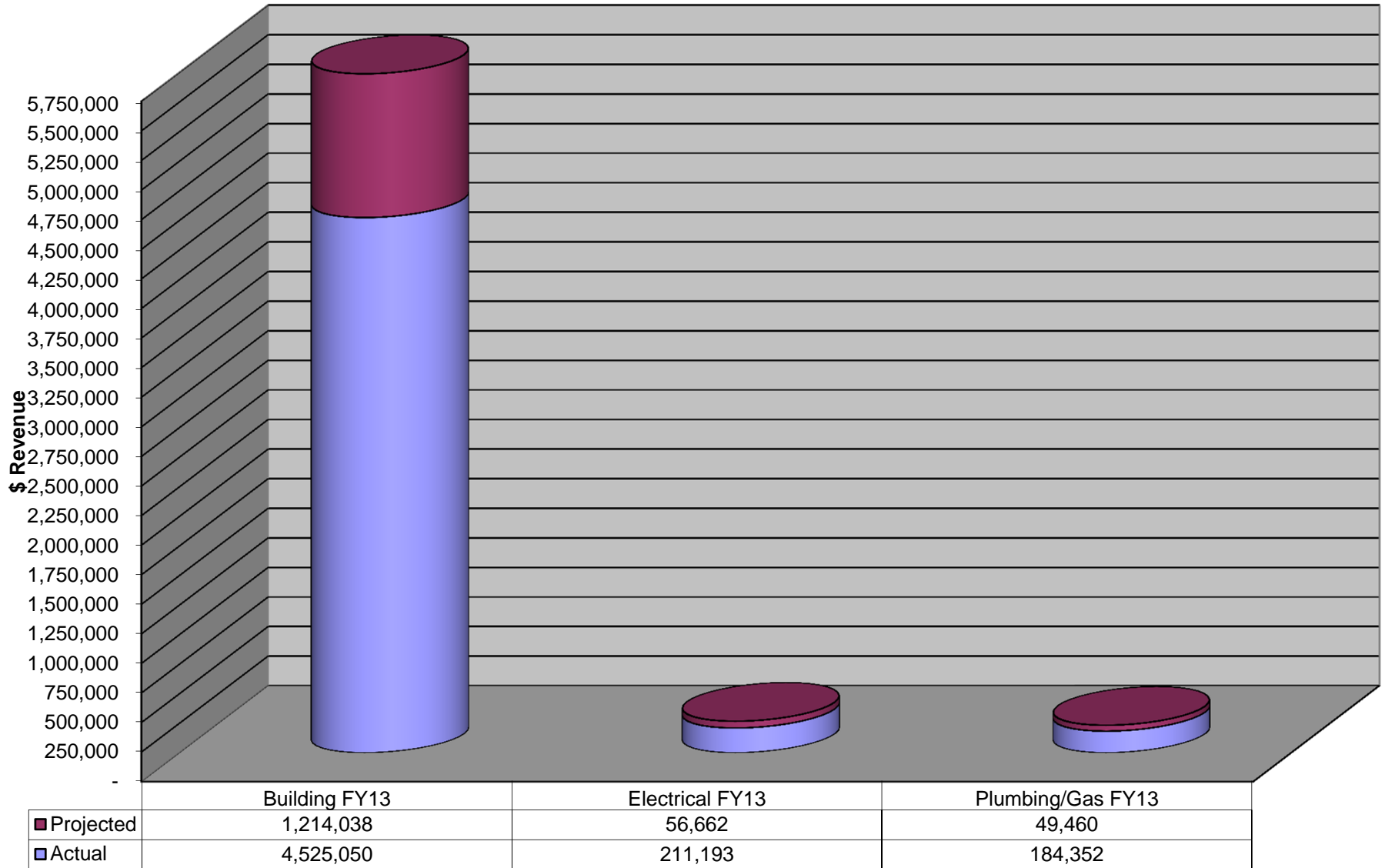


■ Projected					832
■ Actual	3423	3120	3387	3750	3101

Total Actual Revenue FY09-13 (As of 4/13/13)



FY13 Revenue (As of 4/13/13)



7/01/12 to 4/13/13

Abandoned autos	-----	6
Accessibility	-----	3
Apartments/ Illegal Units	-----	14
Auto repair	-----	0
Building Code Violations	-----	12
Boarding House	-----	2
Business Home	-----	2
Business Illegal	-----	3
Condemnation	-----	0
Construction w/out a permit	-----	7
Construction in the setback	-----	9
Disabled/ Abandoned Vehicles	-----	0
Electrical Code	-----	2
Floor Area Ratio	-----	0
Fence ordinance	-----	5
Fire	-----	1
Grade Change/Water Runoff	-----	8
Life Safety	-----	4
Light ordinance	-----	0
License Violation	-----	0
Maximum Capacity Exceeded	-----	1
Minimum Housing	-----	0
No Certificate of Occupancy	-----	0
No Complaint Code Declared	-----	10
No Special Permit	-----	0
Noise Ordinance	-----	1
Open and Abandoned property	-----	1
Parking Commercial	-----	2
Parking Residential	-----	7

Plumbing/Gas Violation	-----	2
Sewer Violation	-----	0
Sign Ordinance	-----	1
Structural Violation	-----	1
Trash/ Overgrowth	-----	3
Tree Removal	-----	1
Unsafe Building or Structure	-----	7
Variance Violation	-----	1
Violation of Comprehensive Permit	-----	0
Violation of Special Permit	-----	1
Zoning/Use Violation	-----	9
Total logged in	-----	126
Open	-----	42
Resolved	-----	84

FUND: 01 - GENERAL FUND
 DEPARTMENT: 220 - INSPEC SERVICE DEPARTMENT

CITY OF NEWTON BUDGET
 DEPARTMENT LEGAL LEVEL OF CONTROL

	ACTUAL 2011	ACTUAL 2012	AMENDED 2013	YTD 03/31/2013	RECOMMENDED 2014	CHANGE 2013 to 2014
DEPARTMENT SUMMARY						
51 - PERSONAL SERVICES	876,149	866,466	938,601	645,684	964,693	26,092
52 - EXPENSES	37,912	42,034	47,769	24,195	59,172	11,403
57 - FRINGE BENEFITS	139,776	139,926	142,843	101,269	169,069	26,227
TOTAL DEPARTMENT	1,053,837	1,048,426	1,129,213	771,148	1,192,934	63,721
INSPECTIONAL SVS ADMIN						
51 - PERSONAL SERVICES	274,185	273,065	316,288	200,553	408,162	91,895
52 - EXPENSES	25,326	27,562	30,673	16,791	42,109	11,436
57 - FRINGE BENEFITS	41,134	40,493	47,889	33,453	73,900	26,012
TOTAL INSPECTIONAL SVS ADMIN	340,644	341,119	394,829	250,797	524,172	129,343
BLDG CODE/ZONING ENFMT						
51 - PERSONAL SERVICES	340,304	320,343	333,621	224,957	280,496	-53,125
52 - EXPENSES	4,610	5,122	5,982	2,200	5,814	-168
57 - FRINGE BENEFITS	47,579	45,047	43,555	30,199	58,024	14,469
TOTAL BLDG CODE/ZONING ENFMT	392,494	370,512	383,158	257,357	344,334	-38,824
MECHANICAL INSPECTIONS						
51 - PERSONAL SERVICES	261,661	273,058	288,713	220,173	276,035	-12,678
52 - EXPENSES	5,924	7,710	8,214	3,722	8,749	535
57 - FRINGE BENEFITS	51,063	54,386	51,389	37,617	37,145	-14,254
TOTAL MECHANICAL INSPECTIONS	318,648	335,154	348,326	261,513	321,928	-26,398
BLDG/ZONING ADJUD.						
52 - EXPENSES	2,051	1,639	2,900	1,482	2,500	-400
TOTAL BLDG/ZONING ADJUD.	2,051	1,639	2,900	1,482	2,500	-400

FUND: 01 - GENERAL FUND
 DEPARTMENT: 220 - INSPEC SERVICE DEPARTMENT

CITY OF NEWTON BUDGET
 DEPARTMENTAL DETAIL

	ACTUAL FY2011	ACTUAL FY2012	AMENDED 2013	YTD 03/31/2013	RECOMMENDED 2014	CHANGE 2013 to 2014
220 - INSPEC SERVICE DEPARTMENT						
0122001 - INSPECTIONAL SVS ADMIN						
PERSONAL SERVICES						
511001	267,052	263,041	282,518	193,273	373,965	91,447
511101	0	0	0	0	25,448	25,448
511102	0	0	25,000	0	0	-25,000
513001	5,132	5,149	6,000	4,531	6,000	0
514001	0	875	1,750	1,750	1,750	0
515005	1,000	3,000	0	0	0	0
515102	1,000	1,000	1,000	1,000	1,000	0
TOTAL PERSONAL SERVICES	274,185	273,065	316,268	200,553	408,162	91,895
EXPENSES						
52401	515	279	1,000	135	1,000	0
52403	0	0	80	0	0	-80
52410	471	0	0	0	0	0
5274	424	1,018	1,100	1,018	1,100	0
5301	62	430	600	180	600	0
5319	554	456	1,300	1,092	1,300	0
53401	1,559	1,515	1,700	992	1,700	0
53402	10,697	9,419	10,000	7,260	10,000	0
5341	2,911	3,113	3,135	2,400	3,800	665
5342	1,782	2,445	2,000	608	2,500	500
5420	2,489	4,002	2,500	1,051	4,000	1,500
5480	955	859	1,289	597	1,289	0
5484	842	539	3,000	0	2,000	-1,000
5581	0	0	475	228	600	125
5585	1,211	2,684	1,050	855	11,050	10,000
5592	577	511	874	60	600	-274
5710	0	1	30	21	30	0
5730	279	290	540	295	540	0
TOTAL EXPENSES	25,326	27,562	30,673	16,791	42,109	11,436
FRINGE BENEFITS						
57DENTAL	881	1,072	1,052	769	1,095	43
57HLTH	36,305	35,400	42,530	29,377	64,899	22,369
57LIFE	156	175	170	99	227	57
57MEDA	3,792	3,846	4,136	2,759	5,831	1,695
57OPEB	0	0	0	449	1,848	1,848
TOTAL FRINGE BENEFITS	41,134	40,493	47,889	33,453	73,900	26,012
TOTAL INSPECTIONAL SVS ADMIN	340,644	341,119	394,829	250,797	524,172	129,343

CITY OF NEWTON BUDGET DEPARTMENTAL DETAIL
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		ACTUAL	ACTUAL	AMENDED	YTD	RECOMMENDED	CHANGE
		FY2011	FY2012	2013	03/31/2013	2014	2013 to 2014
0122002 - BLDG CODE/ZONING ENFMT							
PERSONAL SERVICES							
511001	FULL TIME SALARIES	335,654	313,718	330,371	221,707	275,871	-54,500
514001	LONGEVITY	650	875	1,750	1,750	2,625	875
515005	BONUSES	2,000	3,750	0	0	0	0
515101	CLOTHING ALLOWANCE	2,000	2,000	1,500	1,500	2,000	500
TOTAL PERSONAL SERVICES		340,304	320,343	333,621	224,957	280,496	-53,125
EXPENSES							
5319	TRAINING EXPENSES	645	810	1,200	0	1,000	-200
5480	GASOLINE	2,161	2,951	2,918	1,329	2,950	32
5580	PUBLIC SAFETY SUPPLIES	383	69	43	43	100	57
5581	UNIFORMS/PROTECTIVE	842	963	1,114	469	1,114	0
5588	PHOTOGRAPHIC SUPPLIE	130	0	160	0	100	-60
5730	DUES & SUBSCRIPTIONS	350	330	347	260	350	3
5771	PROFESSIONAL LICENSE	100	0	200	100	200	0
TOTAL EXPENSES		4,610	5,122	5,982	2,200	5,814	-168
FRINGE BENEFITS							
57DENTAL	DENTAL INSURANCE	1,029	1,189	1,228	769	1,095	-133
57HLTH	HEALTH INSURANCE	41,647	39,025	37,763	26,158	51,242	13,479
57LIFE	BASIC LIFE INSURANCE	156	156	170	85	57	-114
57MEDA	MEDICARE PAYROLL TAX	4,748	4,677	4,394	3,188	4,067	-326
57OPEB	OPEB CONTRIBUTION	0	0	0	0	1,563	1,563
TOTAL FRINGE BENEFITS		47,579	45,047	43,555	30,199	58,024	14,469
TOTAL BLDG CODE/ZONING ENFMT		392,494	370,512	383,158	257,357	344,334	-38,824

CITY OF NEWTON BUDGET DEPARTMENTAL DETAIL
--

		ACTUAL	ACTUAL	AMENDED	YTD	RECOMMENDED	CHANGE
		FY2011	FY2012	2013	03/31/2013	2014	2013 to 2014
0122003 - MECHANICAL INSPECTIONS							
PERSONAL SERVICES							
511001	FULL TIME SALARIES	253,556	263,498	269,035	199,996	271,085	2,049
513001	REGULAR OVERTIME	0	184	0	0	0	0
514001	LONGEVITY	4,104	4,375	4,550	4,550	2,950	-1,600
515003	SPECIAL LEAVE BUY BAC	0	0	6,000	6,000	0	-6,000
515005	BONUSES	2,000	3,000	0	0	0	0
515006	VACATION BUY BACK	0	0	7,128	7,128	0	-7,128
515101	CLOTHING ALLOWANCE	2,000	2,000	2,000	2,500	2,000	0
TOTAL PERSONAL SERVICES		261,661	273,058	288,713	220,173	276,035	-12,678
EXPENSES							
5319	TRAINING EXPENSES	665	890	795	275	795	0
5432	SMALL TOOLS	179	0	345	215	345	0
5490	GASOLINE	3,736	5,383	5,044	2,265	5,400	356
5590	PUBLIC SAFETY SUPPLIES	300	0	100	43	100	0
5581	UNIFORMS/PROTECTIVE	490	521	1,035	438	1,035	0
5730	DUES & SUBSCRIPTIONS	554	559	620	487	620	0
5771	PROFESSIONAL LICENSE	0	357	275	0	454	179
TOTAL EXPENSES		5,924	7,710	8,214	3,722	8,749	535
FRINGE BENEFITS							
57DENTAL	DENTAL INSURANCE	1,222	1,544	1,490	1,030	1,085	-395
57HLTH	HEALTH INSURANCE	47,797	50,891	47,151	34,928	31,562	-15,589
57LIFE	BASIC LIFE INSURANCE	189	184	170	109	114	-57
57MEDA	MEDICARE PAYROLL TAX	1,855	1,767	2,588	1,551	2,886	278
57OPEB	OPEB CONTRIBUTION	0	0	0	0	1,508	1,508
TOTAL FRINGE BENEFITS		51,063	54,386	51,399	37,617	37,145	-14,254
TOTAL MECHANICAL INSPECTIONS		318,648	335,154	348,326	261,513	321,928	-26,398
0122004 - BLDG/ZONING ADJUD.							
EXPENSES							
5304	DOCUMENT PRESERVATI	0	0	150	150	0	-150
5341	POSTAGE	784	362	1,000	462	700	-300
5342	PRINTING	24	29	200	6	100	-100
5343	ADVERTISING/PUBLICATIO	1,158	1,248	1,400	863	1,400	0
5420	OFFICE SUPPLIES	85	0	150	0	300	150
TOTAL EXPENSES		2,051	1,639	2,900	1,482	2,500	-400
TOTAL BLDG/ZONING ADJUD.		2,051	1,639	2,900	1,482	2,500	-400
TOTAL INSPEC SERVICE DEPARTMENT		1,053,837	1,048,426	1,129,213	771,148	1,192,934	63,721

FUND: 01 - GENERAL FUND
 DEPARTMENT: 220 - INSPEC SERVICE DEPARTMENT

CITY OF NEWTON BUDGET
 PERSONAL SERVICES SUMMARY

ACCOUNT	POSITION TITLE	2013			2014		
		RANGE	FTE	SALARY	RANGE	FTE	SALARY
511001	ADMINISTRATIVE ASSISTAN	S06	1.0	51,488	S06	1.00	52,957
	BUILDING INSPECTOR	IBI	3.0	191,845	IBI	3.00	199,598
	DEPUTY COMMISH INS SVC	H10	1.0	80,282	H10	1.00	83,273
	INSPECTIONAL SERV COMM	H13	1.0	107,743	H13	1.00	110,861
	OFFICE INFO COORDINATOR	S06	1.0	51,488	S06	1.00	52,957
	PLUMB/GAS FITTING INSP	IBI	1.0	58,832	IBI	1.00	60,329
	SENIOR BUILDING INSPECT	ISI	1.0	74,128	ISI	1.00	76,273
	SR PLUMB GAS/FITTING IN	ISI	1.0	74,128	ISI	1.00	65,951
	SR WIRE INSPECTOR	ISI	1.0	74,128	ISI	1.00	76,273
	WIRE INSPECTOR	IBI	1.0	66,605	IBI	1.00	68,532
	ZONING ENFORCEMENT AGEN	H08	1.0	71,838	H08	1.00	73,917
		Account Totals:		13.0	902,275		13.00
511101	ADA Coordinator		0.0		XXX	0.50	25,448
	Account Totals:		0.0			0.50	25,448
	Report Totals:		13.0	902,275		13.50	946,368

Inspectional Services Department

City of Newton
Massachusetts

Inter-Office Correspondence

RECEIVED
Newton City Clerk
2013 MAY -3 PM 2:48
DAVID A. OLSON, CMC
Newton, MA 02459

TO: Board of Alderman
Zoning and Planning Committee

FROM: John D. Lojek, Commissioner of Inspectional Services

DATE: May 3, 2013

RE: Budget answers and information

Organizational Chart

Attached is the amended Organizational Chart for Inspectional Services which more accurately depicts the working relationship among staff. I hope this helps the members of the committee with their understanding of the reporting and responsibilities within ISD.

Partial FTEs.

I would like to reiterate as I mentioned in my budget presentation that ISD is currently "right sized" when fully staffed. We have experienced instances where we have had a prolonged absence of an FTE and that absence has put a strain on the department, particularly in the area of the trades, such as Plumbing/Gas and Electric. These two areas do not have redundancy for coverage, but can be adequately covered on a short term basis with overtime. In a longer term situation we have now assembled a list of qualified trade professionals who can be hired on a temporary part time or temporary full time basis to provide services in the event of such a vacancy.

While I don't believe that we require additional personnel at this time, I am in constant contact with Bob Rooney, C.O.O. to evaluate the staffing needs on a regular basis. Should the annual needs exceed the overtime or P/T salary available, I would work with the administration to make adjustments to meet department needs.

We currently have four Building Inspector positions. Additionally, the Code Enforcement Official, the Deputy Commissioner and the Commissioner are all Certified Building Inspectors for a total of seven qualified personnel.. When there is an absence on the "building inspection side" there is sufficient flexibility to cover the necessary inspections because I can direct such resources to address those needs. i.e. all Building Inspection personnel are available to do field inspections when needed.

Historically, I feel that with the current construction market, the department can provide adequate services with the current staffing.

Outside Contractor assistance

Because of the size, scope and timeline of The Chestnut Hill Square project the ISD found it necessary to seek outside assistance for the inspections on this project. As you are aware, the NNHS project was in full swing as this project was coming forward and that project already had our staff fully extended. Many staff members were doing several inspections per day at NNHS in addition to their regular workload. During the Special Permit process the City negotiated that the Developer pay for plans examination and inspections by a code consultant outside of ISD, with City Staff providing oversight and validation of inspections. This model has proven successful due to the pace and timing of the project, at certain phases, the inspectors would be required to be there several times a day, early, late and perhaps on Saturdays in order to keep the project moving. While the Developer paid the cost of the outside assistance, the City Staff were/ responsible for oversight of the inspectors, spot checking and receipt of all inspection reports.. All invoices from the consultant come to ISD and are approved by the Commissioner prior to payment. This process was approved by the City Solicitors office.

Metrics

The ISD has a metrics report on the City of Newton website which reports several areas of measurement by which we monitor our success per our departmental goals. Attached please find the latest report.

Assemblies, R-2s and Licenses: As reflected in the report this year has been a challenging year in the inspection of R-2s, licensed establishments and assembly use occupancies. An extended vacancy in the position has caused this temporary shortfall. We have increased the salary and reposted for hire and expect the position to be filled in the near future.

Complaints: The Complaint metric goal is for the resolution of 50% of complaints within 30 days of receipt. WE have found that this posed some confusion about the type of complaints and violations recorded and measured, and warrant further refinement this year.

Permits: (a) The goal for rate of issuance of Plumbing, electric and gas permits within 24 hours has remained very steady at between 98-100%, despite an increase of approximately 600 total permits in these trade categories.

(b) The goal for the rate of issuance of building permits within 24 hours of application is at 85% and we have met or exceed that metric regularly for 2012-2013.

For FY2014 I am working on additional metrics to include numbers of inspections, inspections completed within 3 days of request, and failure rate of inspections. As these new metrics develop, I will be posting them on our scorecards on the City website.

FY13 Outcomes Results

My evaluation of the Fiscal Year 2013 Desired Outcomes revealed the following:

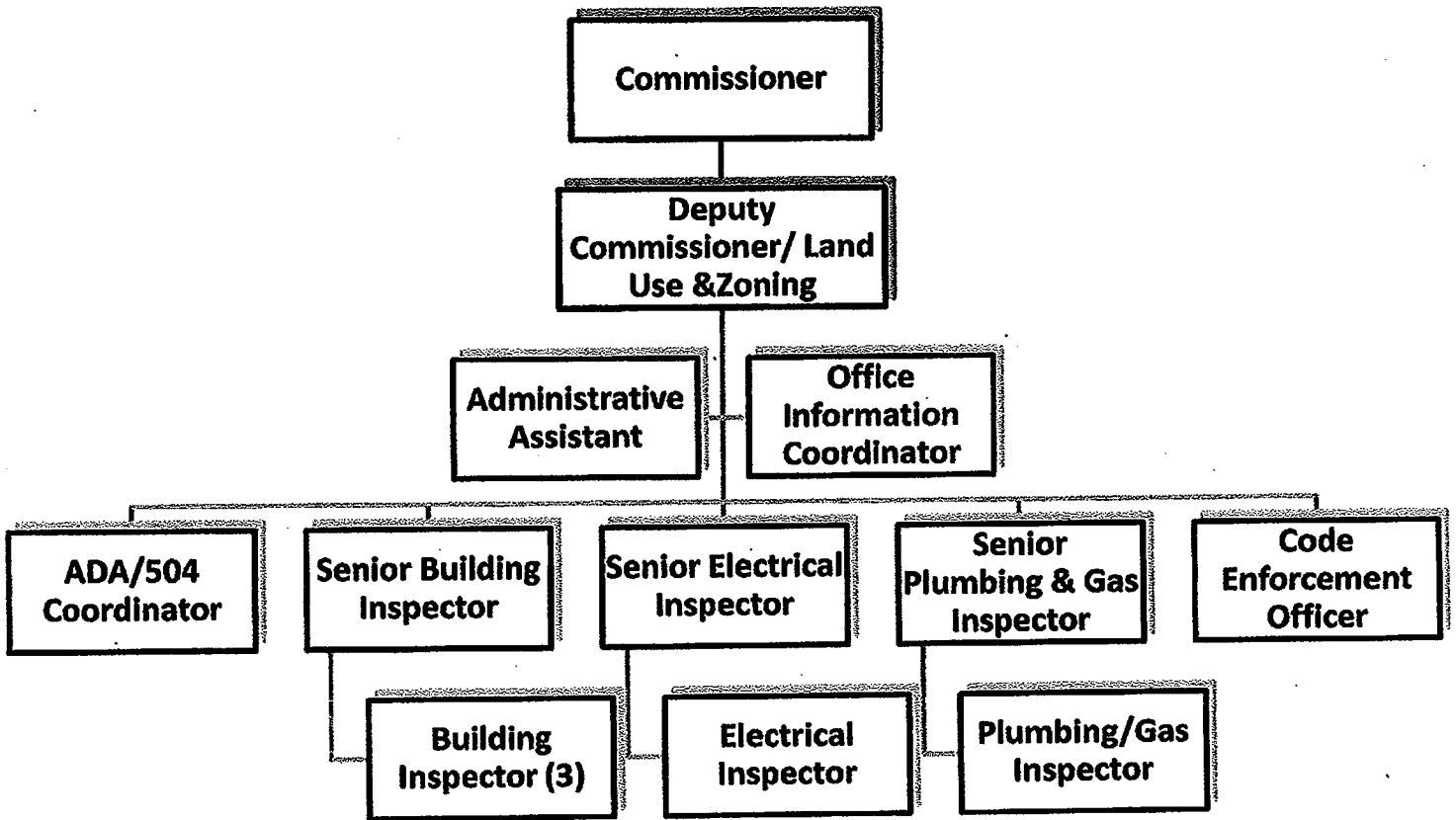
- 1) Permit issuance data continues to be excellent.
- 2) Inspections timeliness: We have received very few complaints regarding the wait time for Inspections. This was not uniform across the year however as we have had periods where

both plumbing and electrical were in backlog, but that issue is now resolved. Efficiency of our work has improved this past year with laptops in the vehicles, and that should improve further as new equipment is adopted.

- 3) Zoning Enforcement Complaints: The Code Enforcement Officer records all complaints and drives resolutions in a timely manner with emphasis on making changes in our process that are systemic detractors.
- 4) ADA/504 Coordinator: We are in the final stages of hiring this position.
- 5) Zoning determinations: Information sharing and transparency has been emphasized through the electronic uploading of property-centric memos and public information as they become available, along with approved plans and building applications, so that they will be readily available to the staff and public.

Attachements: org chart (A)
metrics (B)

INSPECTIONAL SERVICES



Encl. A

JAN '13

Inspectional Services Department

City of Newton Performance Management Scorecard
January 2013

Traffic Light Key

Green = actual value meeting or exceeding the target
Yellow = actual value within 10% of meeting target
Red = actual value worse tmore than 10% away from meeting target

Trend Key

Green = cumulative Year-to-Date better than Last Year-to-Date
Yellow = cumulative Year-to-Date the same as Last Year-to-Date
Red = cumulative Year-to-Date worse than Last Year-to-Date

Metrics measured monthly unless otherwise noted

Metric	Yearly Goal	Monthly				Yearly		
		Avg.	Target	Actual	Result	LYTD	YTD	Trend
1. Issue permits in a timely manner								
% of Plumbing/Gas Permits issued in 24 hours of request	Maintain a rate of 98% or higher	99	98	100	Green	693	697	Green
% of Eletrical Permits issued in 24 hours of request	Maintain a rate of 98% or higher	98	98	100	Green	690	697	Green
% of Building Permits issued in 24 hours of request	Maintain a rate of 85% or higher	90	85	91	Green	617	631	Green

FEB '13

Inspectional Services Department

City of Newton Performance Management Scorecard
February 2013

Traffic Light Key

Green = actual value meeting or exceeding the target
Yellow = actual value within 10% of meeting target
Red = actual value worse tmore than 10% away from meeting target

Trend Key

Green = cumulative Year-to-Date better than Last Year-to-Date
Yellow = cumulative Year-to-Date the same as Last Year-to-Date
Red = cumulative Year-to-Date worse than Last Year-to-Date

Metrics measured monthly unless otherwise noted

Metric	Yearly Goal	Monthly				Yearly		
		Avg.	Target	Actual	Result	LYTD	YTD	Trend
1. Issue permits in a timely manner								
% of Plumbing/Gas Permits issued in 24 hours of request	Maintain a rate of 98% or higher	97	98	100	Green	792	796	Green
% of Eletrical Permits issued in 24 hours of request	Maintain a rate of 98% or higher	99	98	100	Green	790	796	Green
% of Building Permits issued in 24 hours of request	Maintain a rate of 85% or higher	85	85	89	Green	706	720	Green

MAR '13

Inspectional Services Department

City of Newton Performance Management Scorecard
March 2013

Traffic Light Key

Green = actual value meeting or exceeding the target
Yellow = actual value within 10% of meeting target
Red = actual value worse tmore than 10% away from meeting target

Trend Key

Green = cumulative Year-to-Date better than Last Year-to-Date
Yellow = cumulative Year-to-Date the same as Last Year-to-Date
Red = cumulative Year-to-Date worse than Last Year-to-Date

Metrics measured monthly unless otherwise noted

Metric	Yearly Goal	Monthly				Yearly		
		Avg.	Target	Actual	Result	LYTD	YTD	Trend
1. Issue permits in a timely manner								
% of Plumbing/Gas Permits issued in 24 hours of request	Maintain a rate of 98% or higher	99	98	100	Green	892	896	Green
% of Eletrical Permits issued in 24 hours of request	Maintain a rate of 98% or higher	99	98	93	Yellow	889	896	Green
% of Building Permits issued in 24 hours of request	Maintain a rate of 85% or higher	90	85	86	Green	797	806	Green

ENCL. B

Department of Planning and Development



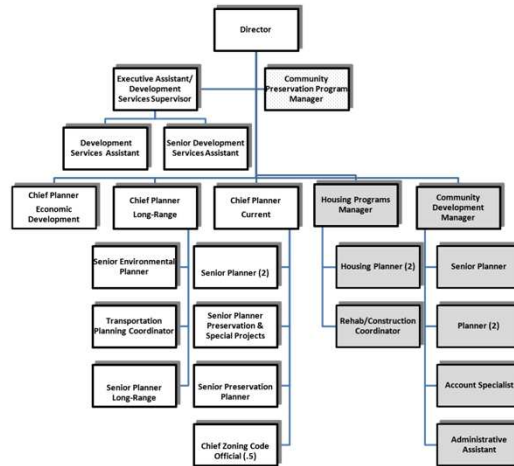
BUDGET PRESENTATION
Zoning and Planning Committee
April 18, 2013

The Mission of the Department is...

2

*...to preserve and enhance
the quality of community life, as well as
the natural and built environments
for all who visit, live and work in Newton
~ now and for the future.*

Department of Planning and Development



Grey boxes indicate federally-funded positions; Box with dots is funded by Newton's Community Preservation Fund

Committees and Commissions assisted by Planning Department

4

- Board Committees
 - Land Use Committee
 - Public Safety and Transportation Committee
 - Real Property Reuse Committee
 - Traffic Council
 - Zoning and Planning Committee
- Auburndale Historic District Commission
- Austin Street Evaluation Group
- Brookline-Newton-Waltham-Watertown Continuum of Care
- Chestnut Hill Historic District Commission
- Commission on Disability
- Community Preservation Committee
- Conservation Commission
- Economic Development Commission
- Economic Development Advisory Committee
- Fair Housing Committee
- Farm Commission (Angino)
- Human Services Advisory Committee
- Newton Corner Advisory Committee
- Newton Historical Commission
- Newton Housing Partnership
- Newton Upper Falls Historic District Commission
- Newtonville Advisory Committee
- Newtonville Historic District Commission
- Nonantum Advisory Committee
- Planning and Development Board
- Transportation Advisory Group (TAG)
- Waban Hill Reservoir Advisory Group
- West Newton Advisory Committee
- Urban Design Commission
- Zoning Board of Appeals

FY13 Accomplishments



Housing and Community Development Affordable Housing Development

6



Housing and Community Development First-Time Homebuyer Program

7

- Single-Family Home



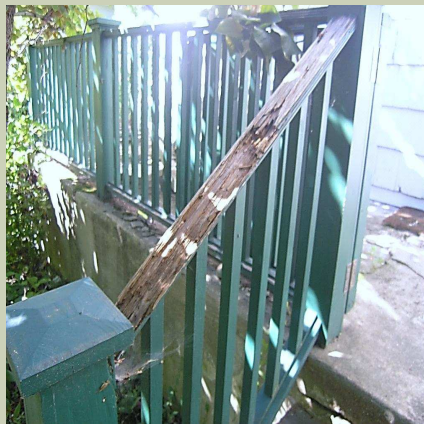
- Condominium



Community Development and Housing Housing Rehabilitation Program

8

- Split railings and posts



- New railings and posts



Community Development and Housing

Housing Rehabilitation Program

9

- Peeling lead paint, old windows, deteriorated steps, railing not to code



- Exterior delead, new windows, side entrance rebuilt to code



Community Development and Housing

Housing Rehabilitation Program

10

- Not wheelchair accessible



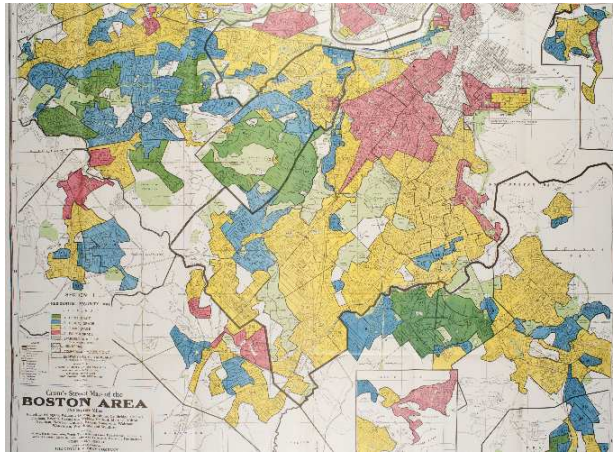
- ADA compliant



Fair Housing Committee advocated for ADA / Section 504 Accessibility Coordinator position

Completed *Housing Discrimination Questionnaire* for human service providers and their clients

Coordinated Educational Forum on *Financing Affordable Housing and Affirmatively Furthering Fair Housing in Newton*



Housing and Community Development Fair Housing

11

\$1.2 million from HUD for homeless assistance in Continuum of Care program funds

\$749,719 for Newton programs

\$126,259 Federal Emergency Solutions Grant funds for homelessness prevention services



Housing and Community Development Homelessness and Prevention Services

12

Community Development and Housing CDBG ~ Public Services

13

Children's Needs



Boys and Girls Club Kids Corp

Organization/Program	Project
Bowen After School Program	Tuition Assistance Program
John M. Barry Boys and Girls Club	Camp Scholarships
	Kids Corp Scholarships
Newton Child Care Fund	Child Care Scholarship Fund
Newton Parks and Recreation Department	Summer Camp Scholarships
Peirce Extended Day Program	Extended Day Scholarship Program
Plowshares Education Development Center	Tuition Assistance Program
Newton Community Service Center	Child Care Scholarships

Community Development and Housing CDBG ~ Public Services

14

Youth Services



YMCA Teen Mentoring

Organization/Program	Project
John M. Barry Boys and Girls Club	Teen Programs
West Suburban YMCA	Teen Programs
Newton Health and Human Services Department	Youth Outreach Counseling
Riverside Community Care	Family Crisis Stabilization

Community Development and Housing

CDBG ~ Public Services

15



Parents Program at Newton Community Service Center

Adult and Family

Organization/Program	Project
Newton Community Service Center	Parent Child Home Program
	The Parents Program
REACH Beyond Domestic Violence	Individual Support and Advocacy
Riverside Community Care	Mental Health and Substance Abuse Recovery
Cousens Fund	Emergency Assistance

Community Development and Housing

CDBG ~ Public Services

16

Elder Services



Newton Senior Center Computer Class

Organization/Program	Project
Newton Community Development Foundation	Resident Services Program
Jewish Community Housing for the Elderly	Caring Choices
Newton Senior Services Department	Senior Center Program Coordinator
	Social Services Program
Newton Housing Authority	Resident Services Coordinator
Newton Health and Human Services Department	Mental Health Intervention for the Elderly

Community Development and Housing

CDBG ~ Public Services

17

People with Disabilities



Charles River Center Children's Programs

Organization/Program	Project
Barry Price Center	Job Developer and Coach
	Person Centered Planning
Charles River Center	Children's Programs Scholarships
	Music Therapy
NWW Committee	Clinical Services and Supports
	Community Access
	Wednesday Night Drop-In

Community Development and Housing

Shelter Services and Homelessness Prevention

18

Federal Emergency Solutions Grant

- Middlesex Human Service Agency
 - Emergency Shelters for Homeless Individual Women and Men
- REACH Beyond Domestic Violence
 - Emergency Shelter Services for Survivors of Domestic Violence
- The Second Step
 - Services for Survivors of Domestic Violence
- Brookline Community Mental Health Center
 - Homelessness Prevention and Rapid Re-housing

Community Development and Housing CDBG ~ Neighborhood Improvements

19

- Carleton Park - Phase II
 - Trees and shrubs
 - Accessible picnic space
- Charlesbank Park
 - New retaining wall
 - Fencing
 - Signage
- Washington Street
 - 15 trees
 - 101 junipers and vines



Charlesbank Before & After



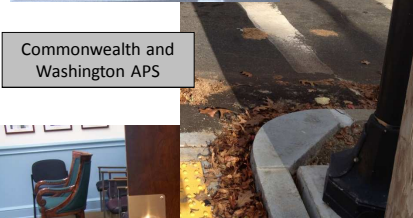
Community Development and Housing CDBG ~ Access Improvements

20

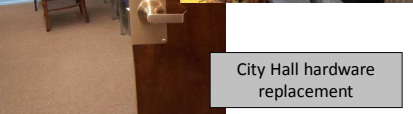
- 4 reconstructed curb cuts at Pearl St. and Jackson Rd.
- Alignment of accessible pedestrian signals at Commonwealth Ave. and Washington St. with new curb cuts and median crossings
- Accessible hardware for City Hall meeting rooms and main doors



Pearl and Jackson curb cuts



Commonwealth and Washington APS



City Hall hardware replacement

Conservation and Environment

21

- Conservation areas
 - Completed Management Plan
 - Completed \$27,000 of deferred maintenance in conservation areas
- Hammond Pond
 - Worked with DOT and DCR on design for stormwater improvements
- Conservation Commission Administration
 - Reviewed filings and issued
 - 3 Orders of Condition
 - 1 amended Order of Conditions
 - 15 Determinations of Applicability
 - 19 Certificates of Compliance
 - Resolved 5 of 10 new violations

Historic Preservation

22

- Grants
 - Completed 2 Massachusetts Historical Commission (MHC) grants to document 250 19th century buildings
- Reviews
 - ~175 applications for demolition
 - ~100 applications in 4 local historic districts



~ Newton Civil War Monument~
Recently found eligible for listing on
National Register of Historic Places

Economic Development

23

- Completed Economic Development Self-Assessment (EDSAT)
- EDC follow-up on EDSAT recommendations
 - Marketing and Promotion
 - Development Opportunities in Villages and Corridors
 - Business Development
- Economic Development Cluster
 - Sidewalk Café Ordinance



Economic Development

24

- Community Engagement
 - Newtonville - Banner Competition, Village Day, Visioning
 - Nonantum - Accessibility and façade improvements
 - Newton Centre - Merchants' association
- Support local businesses
 - Commercial Real Estate Connection
 - Assistance with City processes
 - National Small Business Week coffee hours
 - Business inventory
 - "Shop Local" with Chamber of Commerce
 - Women's Enterprise Initiative
 - Mayor's Roundtables



Economic Development

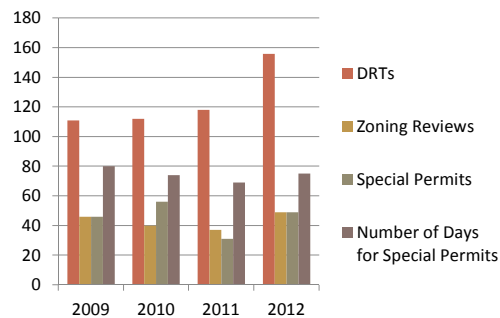
25

MAJOR PROJECTS	Concept	Citizen Input	Zoning/ Design	Reviews/Approvals	Construction
Chestnut Hill Square	X	X	X	X	X
Needham Street Reconstruction	X	X	X		
Austin Street Parking Lot Reuse	X	X	RFP Zoning		
Chestnut Hill Shopping Center	X	X	X	X	X
Riverside MBTA Station	X	X	X	X	
Cypress Street Parking Lot	X	X			

Land Use

26

- 49 special permit applications
- Technical reviews for projects
 - DRT Reviews (156)
 - Zoning Reviews (49)
 - Other Reviews (83)
 - Wireless installations (9)
 - Accessory Apartments
 - Institutional reviews
 - Site Plans
 - Sign Permits (61)
 - Comprehensive Permit
 - 5-58 Reviews (6)
 - Carr School
 - Modulars at 4 schools
 - Angier
 - Fire Station #10



Land Use

27



429 Cherry Street



Brae Burn Country Club



335 Walnut Street

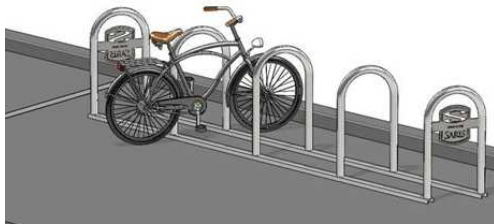


The Street

Transportation

28

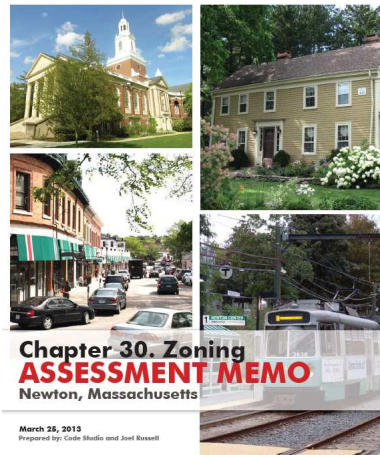
- Newton North Neighborhood Parking Plan
- Bike and pedestrian improvements across the City
- Traffic Council reviewed 61 items at 13 meetings



Long-Range Planning

29

- Zoning Reform Phase 1
 - Consultant selected
 - Reorganization begun
- Parking Management Plan
- Established Mixed-Use 4 district to support village center development
 - Austin Street



Goals for FY14

30

- Conservation** ■ Protect and enhance our natural resources for public enjoyment
- Historic Preservation** ■ Protect and appreciate our historic resources
- Economic Development** ■ Foster business success and community vitality for the City's long-term fiscal stability
- Long-Range Planning** ■ Continue to implement the goals of the Comprehensive Plan and to continue to plan for the future
- Land Use and Transportation** ■ Foster great places where people of all ages, incomes, and abilities can live, work and play
- Community Development and Housing** ■ Improve the quality of community life for people of all ages and abilities, and assure access to a diversity of housing that is safe and affordable

This Year's Budget Changes

31

City-funded changes

- Budgeted FY14 \$1,344,860
- Budgeted FY13 \$1,118,506
- **FY14 Increase of \$ 226,354**
 - Austin Street
 - Needham Street
 - Cypress Street
 - Zoning Reform
 - COLA increases
 - 1.7 new FTEs

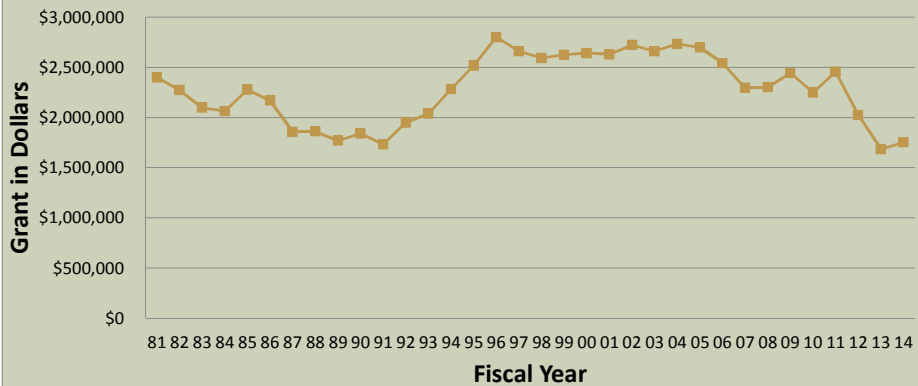
Federally-funded changes

- CDBG \$1,754,045 (+4.0%)
- HOME \$1,168,434 (-5.0%)
- Emergency Solutions Grant
Estimated to be \$120,000
- Total \$3,042,479
- **FY14 Reduction of \$49,595**

Annual Changes to Newton's CDBG Allocation

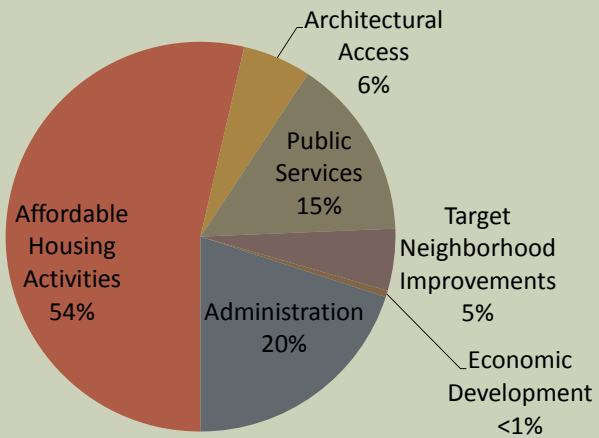
FY1981 - 2014

32



FY14 CDBG Funding by Program Area

33



Community Development and Housing

34



54 Eddy Street

Community Development and Housing

35

- Develop tenant-based Rental Assistance Program
 - Commit \$200,000 in HOME funds
 - Assist ~ 30 families
- Rehab 12 units for low-to-moderate income homeowners through the Newton Housing Rehabilitation Program
- Assist 3 buyers through the First Time Homebuyer Program
- Affordable housing trust
- Fund 1-3 affordable housing projects with \$1.7 million
- WestMetro HOME Consortium restructuring

Community Development and Housing

36

Ensure fair opportunities for housing

- Continuing Training and Education
 - Public officials
 - Realtors/landlords/property managers
 - General Public
- Fair Housing Performance, Monitoring and Compliance
 - Implement *Architectural Accessibility Action Plan*
 - Create regional affirmative marketing and language assistance plans
 - Determine supply of accessible units in Newton
 - Identify patterns, frequency of housing discrimination in rental market
 - Develop minimum accommodation requirements for people with disabilities for use by housing providers seeking City-administered funds

Community Development and Housing

37

Ensure high quality of community life for all residents

- Children's Service Needs
- Youth Service Needs
- Adult and Family Service Needs
- Elder Service Needs
- People with Disabilities



Community Development and Housing

38

Neighborhood Improvements

- Pellegrini Park
- Nonantum Village
 - Sidewalks
 - Crosswalks
 - Handicap Ramps
 - Trees
 - Façades



Community Development and Housing

39

Ensure access for people of all abilities

- ADA-compliant ramps citywide
- Newton Centre Playground Pathway Phases 4 and 5



Newton Centre Playground



Before & After



Economic Development

40

- Promote local economy, village vitality, and fiscal stability
 - Newton Small Business Center & Commercial Real Estate Connection
 - Partnerships (Chamber of Commerce, MOBD, IEC)
 - Community Engagement Team
 - Economic Development Cluster
 - Economic Development Commission
 - Development Opportunities in Villages and Corridors
 - Business Development
 - Marketing and Promotion
 - Economic Development Director
- Redevelopment of City properties
 - Austin Street
 - Cypress Street



Conservation and Environment

41

Protect and enhance our natural resources

- Conservation areas
 - Create short- and long-term strategies for maintenance of
 - Initiate maintenance plans for priority areas
- Waban Hill Reservoir
 - Examine feasibility and funding of possible acquisition
- Hammond Pond
 - Complete design and install infiltration system
 - Develop strategy for long-term care
 - Assess funding mechanisms

Historic Preservation

42

Protect and appreciate our historic resources

- Restore Civil War Monument
 - Restoration specs complete
 - Walking tour of cemetery
 - PTO Council presentation
- Survey additional 19th century buildings
- Update and expand website as resource for community



Transportation

43

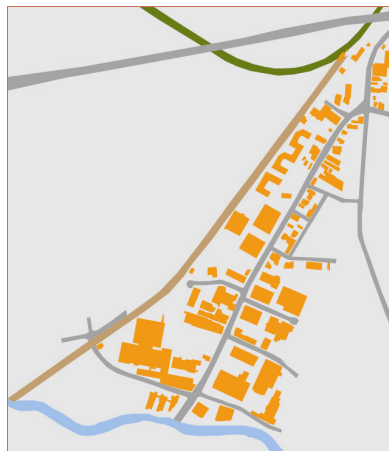
Improve all modes of transportation


- Conduct additional neighborhood parking plans
- Work with MassDOT to improve use of commuter lots
 - West Newton
 - Auburndale
- Work with TAG Team to further TAC recommendations
- Adopt Design Classifications for Roadways
- Complete Citywide Parking Management Plan

Long-Range Planning

44


- Zoning Reform
 - Complete Phase One
 - Initiate Phase
- Needham Street
 - Complete Master Plan
 - Update zoning






"Make no little plans. They have no magic to stir men's blood and probably will not themselves be realized."


Daniel Burnham (1846-1912)



"Cities have the capability of providing something for everybody, only because, and only when, they are created by everybody."



Lewis Carroll, novelist and poet (1832-1898)
Alice's Adventures in Wonderland



Jane Jacobs (1916-2006)
The Death and Life of Great American Cities

46

William "Holly" Whyte (1917-1999)

City: Rediscovering the Center (1988)

A Guide to People Watching in Urban Open Spaces (1979)


Plan for the City of New York (1969)

The Last Landscape (1968)

Cluster Development (1964)

The Exploding Metropolis (1958)

The Organization Man (1956)



"What attracts people most, it would appear, is other people."

- The Street Life Project
 - Project for Public Places
- The Social Life of Public Spaces
- Bottom-Up Place Design
- The Power of Observation





Setti D. Warren
Mayor

City of Newton, Massachusetts
Department of Planning and Development
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Candace Havens
Director

May 3, 2013

TO: Maureen Lemieux, Chief Financial Officer

FROM: Candace Havens, Director of Planning and Development

SUBJECT: Responses to Budget Question

The following question was asked at the budget hearing for the Planning Department:

Will there be sufficient funds to cover the cost of Zoning Reform, Phase 2? There is currently \$75,000 budgeted for this purpose. This budget is the same as last year's budget, so will the amount shown be adequate to cover costs?

Response: When staff surveyed costs for such consultant services, it was anticipated that \$100,000 per year would be needed over the next two years or so to complete the Phase 2 work. The FY14 budget shows \$75,000 for this work and an additional \$25,000 from unspent economic development and other consultant funds will be carried over to ensure that \$100,000 is available to fund this portion of Phase 2.

Department of Planning and Development

COMMUNITY PRESERVATION PROGRAM



FISCAL 2014 BUDGET & PROGRAM OVERVIEW

for Board of Aldermen,
Zoning & Planning Committee
18 April 2013

Newton Community Preservation Program Fy14 Budget & Program Overview

Revenue

- local surcharge
- state funds

Available fy14 funds will also include the fund balance rolled over at the close of fy13. Why is the fund balance *not* in the budget?

- fy13 currently available funds
- fy14-18 funding forecast



Jackson
Homestead

Expenditures

- program administration
- debt service
- budgeted reserves

Program Overview

- What must & can be funded?
- What do we want to fund?
(results from 10th anniversary outreach)
- new *Funding Guidelines*

Fy14 Community Preservation Program Budget

Revenue	Fiscal 2013	Fiscal 2014
local CPA surcharge	\$2,472,625	\$2,534,441
state matching funds	\$652,294	\$642,882
Total	\$3,124,919	\$3,177,323

Forte Park



Expenditures	Fiscal 2013	Fiscal 2014
Program Administration	-\$142,320	-\$142,583
Debt Service: Kessler Woods <i>(open space - amt due in addition to open space reserve)</i>	-\$221,173	-\$190,768
Debt Service: 20 Rogers St. <i>(recreation)</i>	-\$306,000	-\$293,250
Community Housing Reserve <i>(10% of annual new funds)</i>	-\$303,952	-\$317,732
Historic Resources Reserve <i>(10% of annual new funds)</i>	-\$303,952	-\$317,732
Open Space Reserve <i>(10% of annual new funds - currently dedicated to Kessler Woods debt service)</i>	-\$303,952	-\$317,732
General Reserve	-\$1,543,570	-\$1,597,526
Total	-\$3,124,919	-\$3,177,323

Fy14 Community Preservation Program Budget

With Detail for Program Administration

Revenue	Fiscal 2013	Fiscal 2014
local CPA surcharge	\$2,472,625	\$2,534,441
state matching funds	\$652,294	\$642,882
Total	\$3,124,919	\$3,177,323

Forte Park



Expenditures	Fiscal 2013	Fiscal 2014
Program Administration	(detail)	
Program Manager	\$92,420	\$95,909
Assistance from Planning staff ("work by other depts.")	\$6,750	\$6,250
Assistance from Engineering staff ("transfer to General Fund")	\$6,750	\$6,250
Consultants	\$26,000	\$23,500
Advertising/ Publications	\$0	\$500
Dues & Subscriptions	\$7,500	\$7,500
Office Supplies & Equipment	\$1,500	\$1,000
Postage	\$400	\$500
Printing	\$1,000	\$1,500
Total	\$142,320	\$142,909

Fy13 Available Community Preservation Funds

Community Preservation Fund AVAILABLE FUNDS	Fiscal 2013 as of 18 March 2013
REVENUE	
local CPA surcharge	\$2,472,625
state matching funds	\$566,894
fund balance (forwarded at end of fy12)	\$6,335,670
TOTAL REVENUE	\$9,375,189

Eddy Street



Fy13 Available Community Preservation Funds

Community Preservation Fund AVAILABLE FUNDS	Fiscal 2013 as of 18 March 2013
EXPENDITURES	
AVAILABLE FUNDS after program administration + debt service	\$8,395,734
PROJECT APPROPRIATIONS by Board of Aldermen in FISCAL 2013	
Angino Farm Barn - supplemental (<i>historic resources & recreation</i>)	-\$180,000
54 Eddy Street (<i>housing</i>)	-\$255,000
AVAILABLE FUNDS after new appropriations to date	\$7,960,734
CPC RECOMMENDATIONS SUBMITTED to Board of Aldermen	
Newton Homebuyer Assistance Program	-\$475,000
AVAILABLE FUNDS if all pending recommendations were funded in full	\$7,485,734
CPC RECOMMENDATIONS NOT YET SUBMITTED to Board of Aldermen	
Museum Archives (<i>construction funding request</i>)	-\$461,602
Myrtle Village (<i>housing</i>)	-\$938,063
AVAILABLE FUNDS if all pending proposals were funded in full	\$6,086,069
Pre-PROPOSALS SUBMITTED to CPC	
Affordable Housing Trust (<i>pre-proposal</i>)	-\$1,500,000
Allen House (<i>pre-proposal</i>)	-\$1,500,000
City Hall Historic Windows (<i>pre-proposal</i>)	-\$1,093,000
AVAILABLE FUNDS if all submitted pre- & full proposals were funded in full	\$1,993,069

Eddy Street

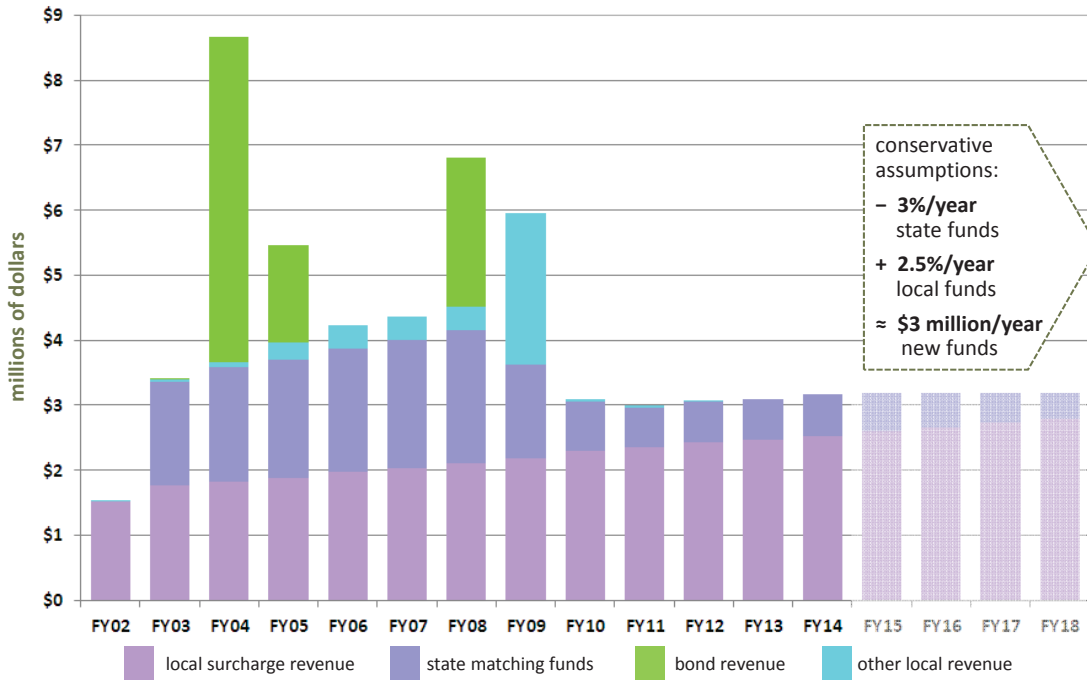


Newton's Community Preservation Funding Forecast Fy14-18



Community Preservation Fund	Fiscal 2014	Fiscal 2015	Fiscal 2016	Fiscal 2017	Fiscal 2018
<i>Based on conservative assumptions: Local revenue increasing 2.5% per year; state match declining 3% per year, from 26% in fy14 to 14% in fy18. State funds available each year are a percentage of the previous year's local revenue.</i>					
NEW REVENUE					
local CPA surcharge	\$2,534,441	\$2,597,802	\$2,662,747	\$2,729,315	\$2,797,548
state matching funds	\$642,882	\$582,921	\$519,560	\$452,667	\$382,104
BUDGETED EXPENDITURES					
program administration (as max 5% of current-yr funds)	-\$158,866	-\$159,036	-\$159,115	-\$159,099	-\$158,983
debt service for Kessler Woods from open space reserve	-\$317,732	\$0	\$0	\$0	\$0
debt service for Kessler Woods from general reserve	-\$190,768	\$0	\$0	\$0	\$0
debt service for 20 Rogers St. from general reserve	-\$293,250	-\$281,000	-\$269,844	-\$260,281	\$0
AVAILABLE FUNDS after program administration + debt service	\$2,216,707	\$2,740,687	\$2,753,348	\$2,762,602	\$3,020,670

Newton's Community Preservation Funds Past vs. Future

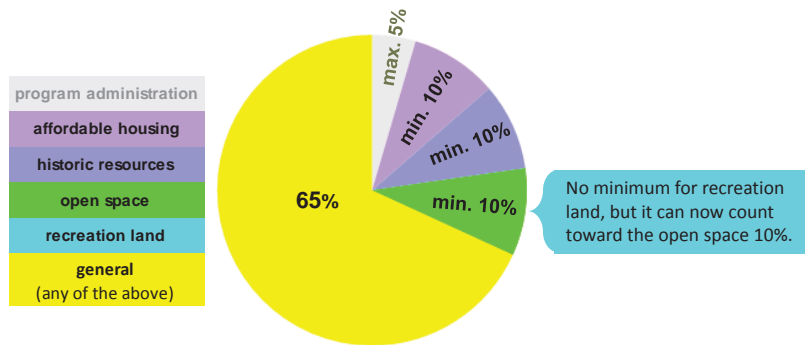


Newton's Community Preservation Funds

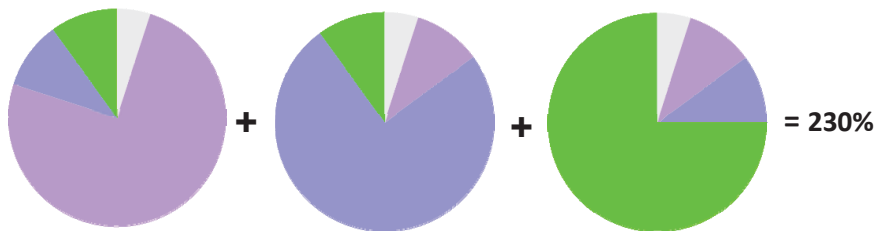
Debt Financing



What must be funded under the CPA?



The "general" 65% can be spent on any resource ... just not on every resource!





On 18 April 2013 Q&A began here;
remaining slides were not presented.

What can be funded under the CPA?

NOT EVERY USE for EVERY RESOURCE	Community Housing	Historic Resources	Open Space	Recreation Land
ACQUIRE ^A	YES	YES	YES	YES
CREATE	YES	NO	YES	YES ^B
PRESERVE	YES	YES	YES	YES
SUPPORT	YES ^C	NO	NO	NO
REHABILITATE/ RESTORE	YES ^D	YES ^E	YES ^D	YES

A. real property acquired with CPA funds must be owned by the local government

B. convert land never used for recreation, or not used recreationally for a very long time

C. including funds for an affordable housing trust

D. IF the resource was acquired or created with CPA funds in the first place

E. projects must use National Park Service guidelines

What can be funded under the CPA?

NOT EVERY USE for EVERY RESOURCE	Community Housing	Historic Resources	Open Space	Recreation Land
ACQUIRE	CPA-eligible use of real property must be permanent & protected by a deed restriction.			
CREATE	CPA funds are for capital improvements, which			
PRESERVE	<ul style="list-style-type: none"> materially add to or appreciably prolong the useful life of real property are permanently affixed so that removal would cause material damage are intended to remain for an indefinite period of time 			
SUPPORT	CPA funds shall not replace existing operating funds, only augment them. CPA funds may not be used for			
REHABILITATE/RESTORE	<ul style="list-style-type: none"> maintenance = incidental repairs that keep the property in a condition of fitness, efficiency or readiness artificial turf; land for horse or dog racing; or a stadium, gymnasium or similar structure 			

A. real property acquired
 B. convert land never used
 C. including funds for an a
 D. If the resource was acq
 E. projects must use Natio

Massachusetts Chapter 44B: The Community Preservation Act

We Are Not Alone

PROGRAM	MASSACHUSETTS	VERMONT	RHODE ISLAND	CONNECTICUT	HAWAII	NEW HAMPSHIRE
	Community Preservation Act	Vermont Housing & Conservation Board	Rhode Island Housing & Conservation Trust Fund	Community Investment Act	Legacy Lands Act	Land & Community Heritage Investment Program
FUNDING FROM	local property tax surcharge & state registry of deeds fees	50% of state real property transfer tax	50% of state real property transfer tax	state registry of deeds fees	real estate conveyance tax, exemption for primary residences, higher taxes on second homes; matching funds required	state registry of deeds fees & sale of special license plates
FUNDING TO	local governments	local governments	local governments	local governments	state & county agencies	local governments
	nonprofits	nonprofits	nonprofits	local govt or private match required		nonprofit land conservation

Massachusetts Chapter 44B: The Community Preservation Act

We Are Not Alone ... or Are We?

PROGRAM	MASSACHUSETTS	VERMONT	RHODE ISLAND	CONNECTICUT	HAWAII	NEW HAMPSHIRE
	Community Preservation Act	Vermont Housing & Conservation Board	Rhode Island Housing & Conservation Trust Fund	Community Investment Act	Legacy Lands Act	Land & Community Heritage Investment Program
DECISION-MAKERS	LOCAL COMMUNITY	STATE BOARD	LOCAL GOVTS. (1/3) STATE BOARD (2/3)	TOWN CLERKS & LOCAL GOVTS. (\$4) STATE DEPTS. (\$36)	STATE COMMISSION & AGENCIES	STATE COMMISSION
STATUS in EARLY 2013	Recently amended to broaden allowable uses; additional one-time \$25 million in state funds committed for fy14.	Fy11 expenditures \$33 million, fy12 expenditures \$25 million, fy13 budget request \$28 million.	Proposed but not adopted, no funding to date.	Two protracted challenges in state legislature, ultimately retained with fy12-14 additional funding earmarked to help preserve dairy farms.	Approximately \$2.5 million available in 2013-14, subject to legislative appropriations.	Fy 2012-13 nearly all funds reallocated to state's General Fund, but governor's proposed budget restores grantable funds partly in fy14 & fully in fy15.

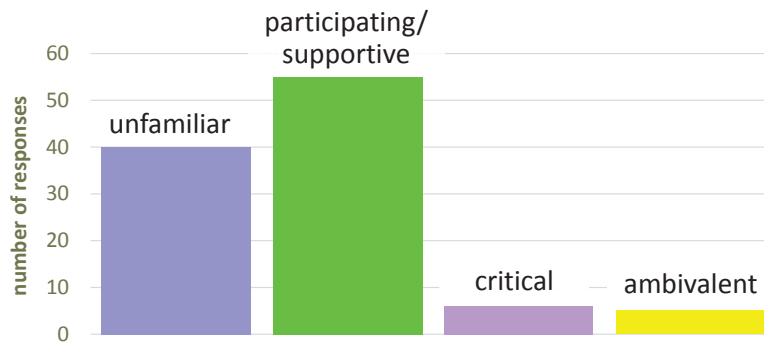
What do we want to fund?

Happy 10th Birthday, Newton CPA!
Neighborhood Meetings & Community Survey



Experiences With/Attitudes Toward the CPA

2012-13 Survey Results



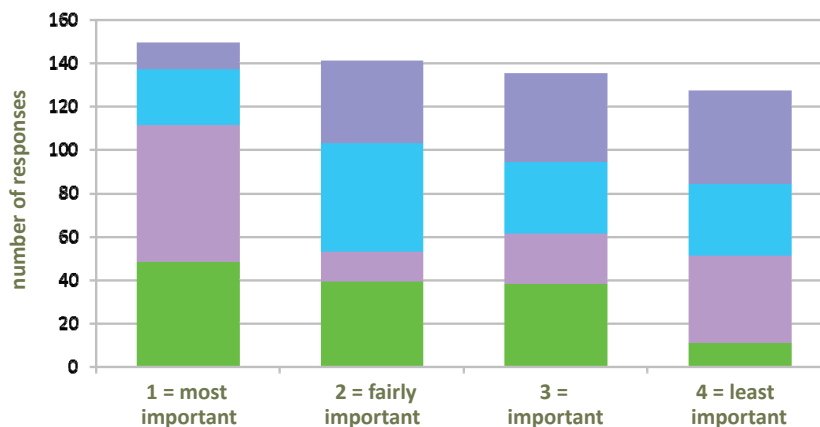
- **Unfamiliar:** I don't know much about it, really.
- **Participating/supportive** (at least one of the following): helped pass the CPA statewide or in Newton, submitted a proposal or supported someone else's in Newton, managed a funded project in Newton
- **Critical** (at least one of the following): opposed the CPA statewide or in Newton, opposed a proposal in Newton
- **Ambivalent:** at least one participating/supportive and one critical response

17

What's most important to preserve about Newton?

2012-12 Survey Results

	Forced Ranking	average rank (descending order)
from 1 = most important	open space	2.1
	affordable housing	2.3
to 4 = least important	recreation land	2.5
	historic resources	2.9



What's most important to preserve about Newton?

Why did *you* move here?

Its diversity, both economically and ethnically - we all learn different things from each other, and this is important for the richness of our community.

affordable housing is sorely needed ... the wisdom of Seniors is an important contribution to the diversity of the community

Our school and park infrastructure is a shambles. The city was reputed to be a great place to raise a family, and it is, but our space doesn't match our spirit.

Newton's unique character is in its history and integration with modern times.

the old houses, the trees along the streets, the open space, the many active community groups, the library, and the schools

vibrant and diverse community with a good mix of open space and local small businesses

We are very impressed with Newton's effort to promote sustainable living and a sustainable environment. The people of Newton are well educated, friendly, understanding, and down to earth.

quality school system, inclusiveness, open spaces, access to historic and natural resources and liberal political persuasions

the democratic nature of the community with people of different wealth [levels] and the natural areas

Newton should not become a "gated community" but should remain a welcoming city with some affordable housing, attractive public space, some wildlife habitat and a sense of history.

The neighborhood I moved into 26 years ago was far more diverse and mixed. It has changed dramatically and will change even further with tear downs and McMansions. At least in areas closer to the centers, allow more density for more affordable housing, so newer generations can have the same opportunity we had to live in this city.

Crystal Lake, trails, Library, schools are what attracted us. But the historic homes, Newton Centre, the library and City Hall cluster- all of these contribute to Newton.

the mixture of town and country ... the villages and the open spaces

Newton's Funding Guidelines

adopted by the Community Preservation Committee,
14 November 2012



1. Use community-wide plans to guide funding decisions.
2. Balance the allocation of funds across all the eligible resources & allowable uses.
3. Require proven capacity for project management & long-term maintenance.
4. Evaluate results to ensure accountability & improve future projects.



Angino Farm

Newton's Funding Guidelines

adopted by the Community Preservation Committee,
14 November 2012



Flowed Meadow

Process

- Use pre-proposals to screen & strengthen proposals.
 - Hold a public hearing on every full proposal.
 - Accept most proposals in an annual funding round, but consider proposals that involve real estate acquisition on a rolling basis, upon request.
- pre-proposal cut-off date for fy14-15: **1 June 2013**
 - full instructions & read-only forms are online, **ask staff for fillable form**
 - pre-proposal is just first 3 pages of proposal form, **ask staff for help adapting the form to your project**

Funding Guidelines

adopted by
Newton
Community
Preservation
Committee
14 November 2012

Past	10-yr averages
program administration	4%
affordable housing: development	31%
historic resources: all purposes	22%
open space & recreation land: acquisition	36%
open space & recreation land: rehabilitation	7%
total	100%

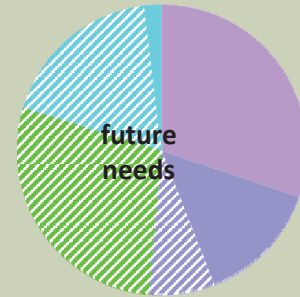
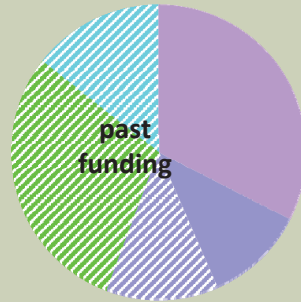
	Future flexible ranges	
	min.	max.
program administration	3%	5%
affordable housing: development	25%	40%
historic resources: all purposes	15%	20%
open space & recreation land: acquisition	20%	30%
open space & recreation land: rehabilitation	15%	20%
total	78%	115%

Newton's Community Preservation Needs

Past vs. Future



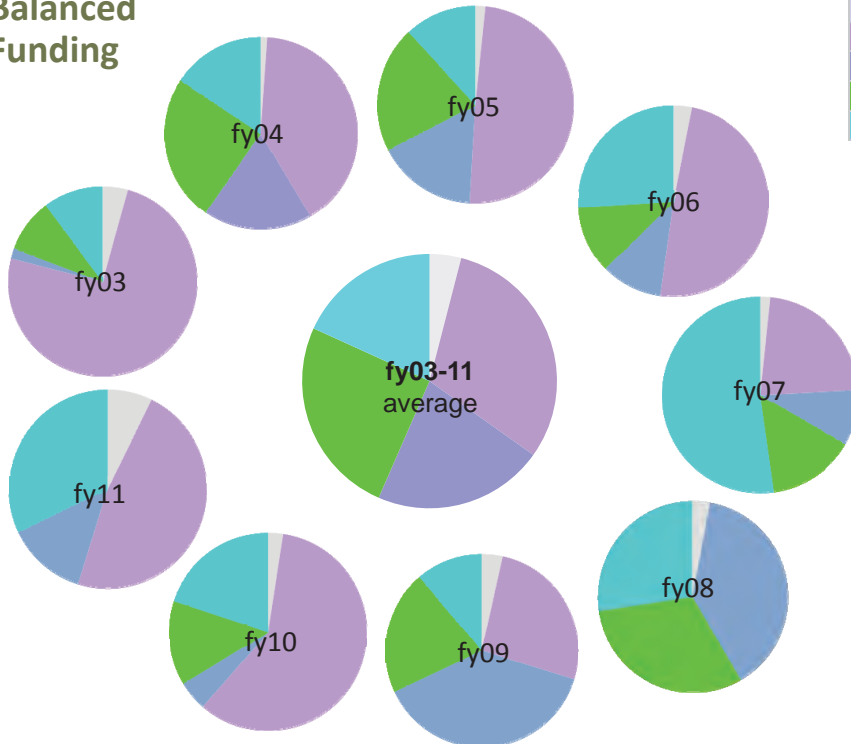
Crystal Lake – 20 Rogers Street



Real property acquired with CPA funds must be owned by local government.

Other than housing and some historic resources, most projects have involved and will involve public ownership.

Balanced Funding



In the past, each year's balance looked very different from the cumulative average.

The same will be true in the future, although the CPC will aim for a cumulative average in line with the new target funding ranges.