



Zoning & Planning Committee
Agenda
BUDGET

City of Newton
In City Council

Thursday, May 21, 2020

The Zoning and Planning Committee will hold this meeting as a virtual meeting on Thursday, May 21, 2020 at 7:00 pm. To view this meeting, use this link at the above date and time <https://us02web.zoom.us/j/724394508>. To listen to the meeting via phone dial 1-646-558-8656 and use the Meeting ID 724 394 508.

Chair's Note: Please have your budget and CIP books accessible at the meeting.

Items Scheduled for Discussion:

BUDGET & CIP DISCUSSIONS:

- Inspectional Services
- Planning Department
- CPA Administration

Referred to Finance and Appropriate Committees

#8-20 **Submittal of the FY 2021 to FY 2025 Capital Improvement Plan (#8-20)**
HER HONOR THE MAYOR submitting the Fiscal Years 2021 to 2025 Capital Improvement Plan pursuant to section 5-3 of the Newton City Charter.

Referred to Finance and Appropriate Committees

#8-20(2) **Submittal of the FY 2021 Municipal/School Operating Budget**
HER HONOR THE MAYOR submitting in accordance with Section 5-1 of the City of Newton Charter the FY21 Municipal/School Operating Budget, passage of which shall be concurrent with the FY21-FY25 Capital Improvement Program (#8-20).
EFFECTIVE DATE OF SUBMISSION 05/11/20; LAST DATE TO PASS THE BUDGET 06/25/2020

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

Referred to Finance and Appropriate Committees

- #8-20(3)** **Submittal of the FY 2021 – FY 2025 Supplemental Capital Improvement Plan**
HER HONOR THE MAYOR submitting the FY 2021 – FY 2025 Supplemental Capital Improvement Plan.

Respectfully Submitted,

Deborah J. Crossley, Chair

Inspectional Services Department

Mission

The Inspectional Services Department (ISD) is the keeper of the record for all real property in the City. Homeowners, developers, contractors, property owners, attorneys, architects, engineers and researchers are able to access the property records of the City on-line and at our windows.

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

The ISD issues +/- 10,000 permits annually for building, plumbing, gas, electrical and mechanical work. The business counter at ISD is staffed 53 hours per week, opening at 7:00 AM to service the public. ISD's front counter is tended by Development Service Assistants and inspectors at all hours to provide accurate answers to building and zoning questions.

Every school, camp, day care, restaurant, places of assembly and multi-unit housing units are inspected by the Periodic Inspection program at ISD. Over 800 inspections are completed, and then followed up and re-inspected as necessary.

The Code Enforcement pursues zoning and building code violations, Special Permit conditions monitoring, as well as work hour and noise violations. Violations of historic and conservation restrictions, signage, light and noise complaints also come to ISD for enforcement.

ISD inspectors perform tens of thousands of inspections per year along with dealing with property line disputes, fence violations, accessory structures, signs, tree removal complaints, illegal parking and apartments, work without permits, abandoned building, etc.

ISD interacts daily with many other city departments in pursuit of our work. Engineering, Fire, City Clerk, Law, Planning, DPW, Health, Assessing, and IT are all vital to complete the information that must be accessed on a daily basis.

FY 2020 continued to be very busy in ISD. Construction work and development continues to challenge the City. The following adjustments are being made:

- ISD inspectors utilize scheduling, data entry and reporting via in-field technology.
- This year we have incorporated the 2nd DSA (Development Services Assistant) position into ISD. After a training period this new DSA position will support all business counter work, provide excellent customer service and begin the process of administrative support to both the periodic and code enforcement ends of ISD.
- The property record scanning project continues. This ongoing effort is readying our property records for uploading to a new property management system when it is acquired.
- Code Enforcement remains a substantial challenge in Newton. With the addition of Accessory apartment and STR (short term rentals) and the existing volume of complaints.
- The School Safety program has seen substantial progress in our goal of fully compliant facilities. The cooperation of the School, Fire, Police, Public Buildings, Law and Health Department have achieved much progress; however, more remains to be done.
- ISD remains committed to working with the Planning Department, the Zoning and Planning Committee and the public as we re-start zoning redesign/rewrite project. A changing City requires constant change to meet the challenges of the future.
- This year ISD has been challenged, like everyone else during the COVID-19

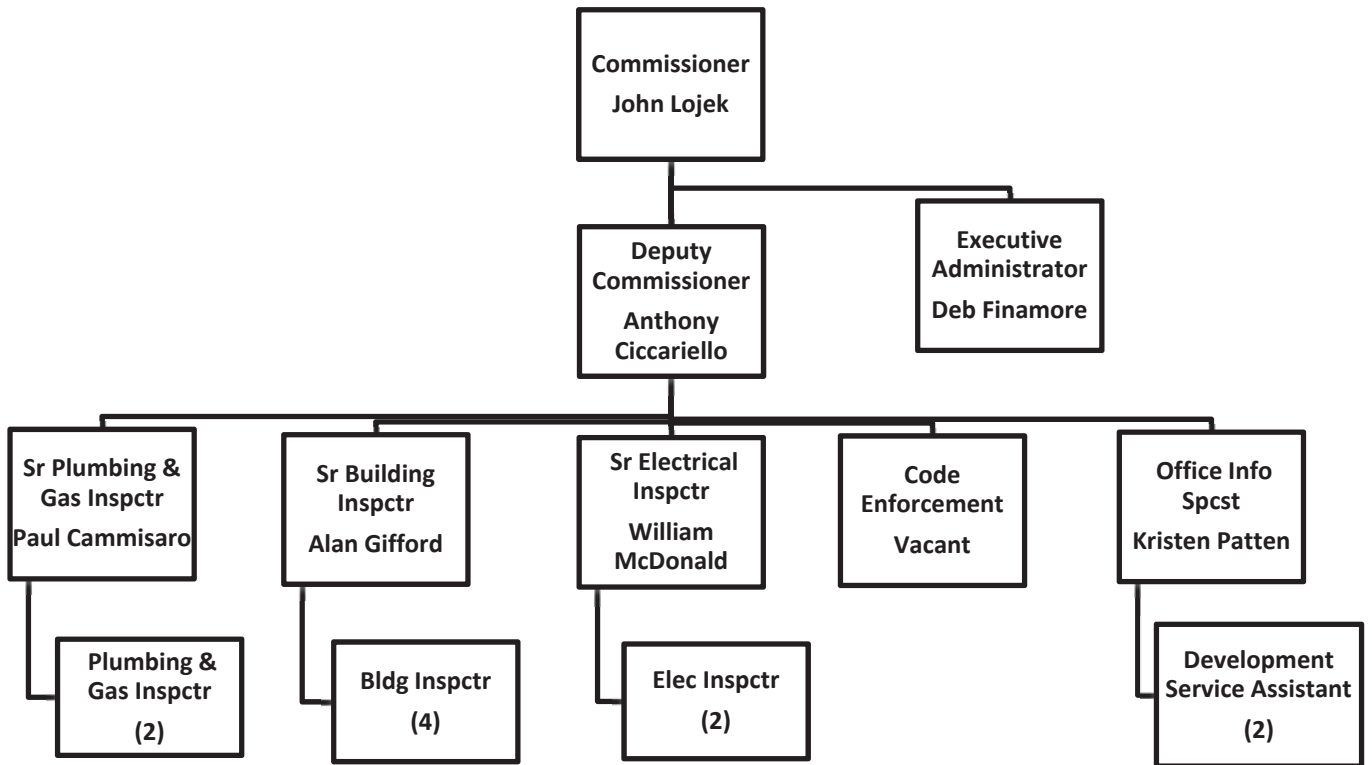
Pandemic, as we had to shut down all non-essential construction, per the order of the Governor. The differentiation between essential and non-essential work caused much consternation among the citizens and the staff. ISD worked hard to try and make people understand the rules and reasoning. Now, as we start the re-entry into all construction being open, ISD is challenged once again to monitor job sites and enforce the rules of distancing and PPE use.

- ISD remains committed to our stated goals and hope to build on our accomplishments. We believe the acquisition and implementation of a new permitting/municipal management system will go a long way in bringing ISD and the City as a whole to a more transparent user-friendly position.
- At this time ISD is nearly fully staffed and we look forward to providing the excellent customer service and strict code enforcement.

John D. Lojek

John D. Lojek, Commissioner

INSPECTIONAL SERVICES



Financial and Operating Highlights

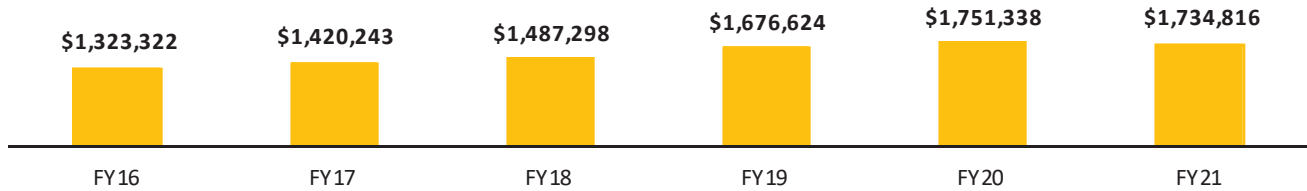
Financial Highlights

	<-----Actual----->		<-Adj Budget->		<-Proposed->	
	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021
Expenditure by Department						
Admin	\$ 526,765	\$ 515,097	\$ 474,428	\$ 672,008	\$ 717,754	\$ 707,073
Bldg Code Enf.	\$ 359,244	\$ 401,373	\$ 449,152	\$ 461,369	\$ 468,018	\$ 483,951
Mech Inspections	\$ 437,313	\$ 503,773	\$ 563,718	\$ 543,247	\$ 565,566	\$ 543,792
Total	\$ 1,323,322	\$ 1,420,243	\$ 1,487,298	\$ 1,676,624	\$ 1,751,338	\$ 1,734,816
% Incr		7.32%	4.72%	12.73%	4.46%	-0.94%

Personnel

Full-Time Employ	16	16	17	18	18	18
Part-Time Employ	0	0	0	0	0	0
Total	16	16	17	18	18	18

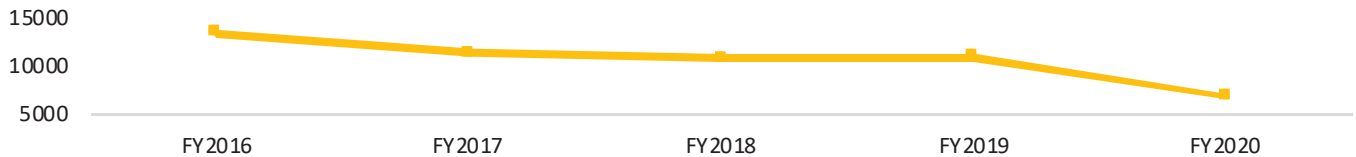
Total Inspectional Services Expenditures



Operating Highlights

	FY2016	FY2017	FY2018	FY2019	FY2020 YTD
Building Permits	4,925	3,971	3,721	3,968	2,530
Electrical Permits	3,373	3,204	3,169	3,017	1,845
Plumbing Permits	3,115	2,422	2,127	2,083	1,342
Gas Permits	1,842	1,635	1,625	1,754	1,084

Total Permits



	New	Open	Closed	Closed 30days
Enforcement Requests (Feb 2018-Feb2020)	550	198	352	89

FY 2020 Building Permit Breakdowns to Date

Residential Construction (new)	65	Solar	84
Commercial (new)	1	Charging Stations	23
Demolition	71		

Inspectional Services Department

Fiscal Year 2021 Outcomes and Strategies

As always, the first priority of ISD is to provide the citizens of Newton with 1st class customer service. ISD is open over 53 hours per week in order to service our clients, opening at 7:00AM in order to be more accessible. ISD issues more than 90% of permits the same day that they are submitted. The public has come to rely upon ISD to explain any property issue which they might encounter as well as making senses of the City of Newton Zoning Code and many other ordinances and codes.

A quick conversation at ISD often enlightens the citizens about what they may or may not do with their own property or a prospective property. There are many questions concerning Accessory Apartment, Short-term Rentals, change of use of existing commercial spaces, dimensional controls and parking, just to name a few.

A well-trained staff is essential to deliver a consistent message to the public. Staff are regularly updated on changes to code, interpretations and legal cases. ISD has brought forward changes to be proposed to the Planning Department and City Council.

We look forward to monitoring and participating in the next phase of Zoning Redesign/Rewrite.

Outcome 1

Provide 1st Class Customer Service

The primary responsibility of ISD is to perform Code Compliance and Enforcement under both the Building and Zoning Codes, the essential goal is to ensure life safety and quality of life issues.

During the course of our work ISD we are engaged in many activities including zoning redesign, scanning of records, permit issuance and customer service. Our most important task however is life safety.

We can and should be judged by how well we respond to citizen complaints. ISD is actively engaged in tracking and resolving code issues in a pro-active and amicable fashion. The School Safety program has made tremendous gains in the resolution of code issues in our public schools. Under the leadership of NFD Chief Proia interdepartmental cooperation has resulted in compliance with building and safety codes heretofore not achieved. We are closing in on awarding permanent certificates of occupancy for all Newton Schools.

While School Safety is important ISD also inspects all schools, daycares and restaurants in Newton so that we can assure safety in all occupancies. We have moved our periodic inspection program forward by cataloging all inspections as we look forward to the software program that will make this information more accessible.

Outcome 2

Ensure Code Enforcement, School Safety, Periodic Inspections

Inspectional Services Department

Fiscal Year 2021 Outcomes and Strategies

Outcome 3

Upgrade the Permitting System with New Software

During the past year ISD and many other Department have been engaged with our consultant D.H. Keene Associates, Inc. to create an RFP (Request for Proposals) for a new city wide permitting and municipal information management system. This process has led to the analysis of all City

Departments who are engaged in any way with property information or the approval of or issuance of permits. The goal of the RFP is to acquire a new system which allows for on-line access, permitting, approvals, and cross departmental communication heretofore not possible. Additionally, it is to be hoped that this system will be capable of consolidating much of the property information of the city which is presently not available and scattered in various formats.

Presently ISD issues more than 10,000 permits for work in building, electrical, plumbing and gas as well as for fences, signs, paving and other zoning issued that require our attention. Replacing the existing system is vital in that the present system is no longer supported.

Outcome 4

Continuing Scanning Project

Since 2013 ISD has immersed in a project to scan the building files to our existing permit software in order to make these historical records available to the public.

These paper files, maintained in ISD, date back to the 1800's. In 2019 we completed the scanning of all the mechanical files and continue to work on the building permit files, which are at 20% complete.

One of the challenges as we move to a new permit system is the migration of old files to the new system so that they are also available in the new format.

FUND: 0001 - GENERAL FUND
DEPARTMENT: 220 - INSPEC SERVICE DEPARTMENT

CITY OF NEWTON BUDGET
DEPARTMENT LEGAL LEVEL OF CONTROL

	ACTUAL 2017	ACTUAL 2018	ACTUAL 2019	ORIGINAL 2020	RECOMMENDED 2021	CHANGE 2020 to 2021
INSPECTIONAL SERVICES SUMMARY						
51 - PERSONAL SERVICES	1,164,503	1,198,822	1,353,328	1,428,517	1,436,704	8,188
52 - EXPENSES	68,187	72,410	62,861	66,365	50,225	-16,140
57 - FRINGE BENEFITS	205,432	233,533	244,726	256,456	247,887	-8,569
TOTAL DEPARTMENT	1,438,123	1,504,765	1,660,915	1,751,337	1,734,816	-16,521
INSPECTIONAL SVS ADMIN						
51 - PERSONAL SERVICES	404,653	352,667	500,293	568,147	573,146	5,000
52 - EXPENSES	55,290	60,267	52,919	50,215	39,425	-10,790
57 - FRINGE BENEFITS	72,998	77,551	93,634	99,391	94,502	-4,889
TOTAL INSPECTIONAL SVS ADMIN	532,940	490,485	646,846	717,753	707,073	-10,680
BLDG CODE/ZONING ENFMT						
51 - PERSONAL SERVICES	347,741	387,649	400,882	399,139	399,797	658
52 - EXPENSES	4,481	4,334	2,340	4,750	4,200	-550
57 - FRINGE BENEFITS	49,152	57,366	61,778	64,130	79,954	15,824
TOTAL BLDG CODE/ZONING ENFMT	401,373	449,349	465,000	468,018	483,951	15,933
MECHANICAL INSPECTIONS						
51 - PERSONAL SERVICES	412,110	458,505	452,153	461,231	463,761	2,530
52 - EXPENSES	8,417	7,809	7,601	11,400	6,600	-4,800
57 - FRINGE BENEFITS	83,283	98,617	89,314	92,935	73,431	-19,504
TOTAL MECHANICAL INSPECTIONS	503,810	564,931	549,068	565,566	543,792	-21,774

FUND: 0001 - GENERAL FUND
DEPARTMENT: 220 - INSPEC SERVICE DEPARTMENT

CITY OF NEWTON BUDGET
DEPARTMENTAL DETAIL

	ACTUAL FY2017	ACTUAL FY2018	ACTUAL FY2019	ORIGINAL 2020	RECOMMENDED 2021	CHANGE 2020 to 2021
220 - INSPECTIONAL SERVICES						
0122040 - INSPECTIONAL SVS ADMIN						
PERSONAL SERVICES						
511001 FULL TIME SALARIES	357,066	328,231	426,035	488,997	528,396	39,400
512001 SEASONAL WAGES	0	0	24,840	25,000	25,000	0
513010 REGULAR OVERTIME	21,054	10,365	11,564	15,000	15,000	0
51301B OVERTIME/SPEC PROJEC	18,017	11,391	31,514	35,000	0	-35,000
514001 LONGEVITY	775	900	2,150	2,150	2,750	600
514006 EXCEPTIONAL SVS PAY	0	79	1,791	0	0	0
515005 BONUSES	0	700	900	0	0	0
515006 VACATION BUY BACK	6,741	0	0	0	0	0
515101 CLOTHING ALLOWANCE	1,000	0	0	0	0	0
515102 CLEANING ALLOWANCE	0	1,000	1,500	2,000	2,000	0
TOTAL PERSONAL SERVICES	404,653	352,667	500,293	568,147	573,146	5,000
EXPENSES						
524010 OFFICE EQUIPMENT R-M	0	0	0	200	200	0
524030 MOTOR VEHICLE R-M	0	16,022	0	0	0	0
527400 RENTAL - EQUIPMENT	1,500	250	0	6,000	6,000	0
530400 DOCUMENT PRESERVATI	10,710	9,731	19,560	10,000	0	-10,000
531300 TEMP STAFFING SERVICE	9,496	0	0	0	0	0
531900 TRAINING EXPENSES	606	35	0	0	0	0
534010 TELEPHONE	1,455	1,296	1,394	1,325	1,325	0
534020 CELLULAR TELEPHONES	15,306	15,935	11,821	15,000	15,000	0
534100 POSTAGE	1,659	966	1,068	2,500	1,500	-1,000
534200 PRINTING	3,577	1,445	1,447	1,500	1,500	0
542000 OFFICE SUPPLIES	2,536	3,029	3,532	3,500	3,500	0
548000 GASOLINE	478	485	765	1,000	0	-1,000
548400 VEHICLE REPAIR PARTS	1,821	9,736	10,960	2,000	2,000	0
558100 UNIFORMS/PROTECTIVE	559	378	448	500	1,000	500
558500 COMPUTER SUPPLIES	4,354	619	1,565	5,000	5,000	0
559200 BOOKS/MANUALS/PERIODI	779	0	0	1,000	1,500	500
571000 VEHICLE USE REIMBURSE	139	0	60	150	150	0
573000 DUES & SUBSCRIPTIONS	315	339	299	540	750	210
TOTAL EXPENSES	55,290	60,267	52,919	50,215	39,425	-10,790
FRINGE BENEFITS						
57DENT DENTAL INSURANCE	2,020	1,965	2,688	2,796	1,632	-1,164
57HLTH HEALTH INSURANCE	61,863	66,609	77,952	82,740	73,358	-9,382
57LIFE BASIC LIFE INSURANCE	57	57	113	114	114	0
57MEDA MEDICARE PAYROLL TAX	5,377	4,842	6,803	7,187	7,590	402
57OPEB OPEB CONTRIBUTION	3,681	4,078	6,077	6,554	11,809	5,255
TOTAL FRINGE BENEFITS	72,998	77,551	93,634	99,391	94,502	-4,889
TOTAL INSPECTIONAL SVS ADMIN	532,940	490,485	646,846	717,753	707,073	-10,680

CITY OF NEWTON BUDGET DEPARTMENTAL DETAIL
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		ACTUAL	ACTUAL	ACTUAL	ORIGINAL	RECOMMENDED	CHANGE
		FY2017	FY2018	FY2019	2020	2021	2020 to 2021
0122041 - BLDG CODE/ZONING ENFMT							
PERSONAL SERVICES							
511001	FULL TIME SALARIES	342,341	377,950	384,858	386,639	389,797	3,158
513010	REGULAR OVERTIME	0	132	0	0	0	0
514001	LONGEVITY	2,900	3,650	4,000	4,000	3,500	-500
514006	EXCEPTIONAL SVS PAY	0	11	4,881	0	0	0
515005	BONUSES	0	1,750	1,500	0	0	0
515006	VACATION BUY BACK	0	1,656	3,143	6,000	4,000	-2,000
515101	CLOTHING ALLOWANCE	2,500	2,500	2,500	2,500	2,500	0
TOTAL PERSONAL SERVICES		347,741	387,649	400,882	399,139	399,797	658
EXPENSES							
531900	TRAINING EXPENSES	500	673	20	1,500	1,500	0
548000	GASOLINE	1,738	2,567	1,669	1,700	0	-1,700
558000	PUBLIC SAFETY SUPPLIES	0	0	0	100	1,250	1,150
558100	UNIFORMS/PROTECTIVE	1,917	861	551	1,000	1,000	0
571100	IN-STATE CONFERENCES	0	65	0	0	0	0
573000	DUES & SUBSCRIPTIONS	225	100	0	250	250	0
577100	PROFESSIONAL LICENSES	100	68	100	200	200	0
TOTAL EXPENSES		4,481	4,334	2,340	4,750	4,200	-550
FRINGE BENEFITS							
57DENT	DENTAL INSURANCE	1,243	1,509	1,569	1,632	1,398	-234
57HLTH	HEALTH INSURANCE	42,952	48,156	52,085	54,168	67,551	13,383
57LIFE	BASIC LIFE INSURANCE	57	57	57	57	0	-57
57MEDA	MEDICARE PAYROLL TAX	4,900	5,400	5,563	5,701	5,732	31
57OPEB	OPEB CONTRIBUTION	0	2,244	2,503	2,572	5,273	2,701
TOTAL FRINGE BENEFITS		49,152	57,366	61,778	64,130	79,954	15,824
TOTAL BLDG CODE/ZONING ENFMT		401,373	449,349	465,000	468,018	483,951	15,933

CITY OF NEWTON BUDGET DEPARTMENTAL DETAIL
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	ACTUAL FY2017	ACTUAL FY2018	ACTUAL FY2019	ORIGINAL 2020	RECOMMENDED 2021	CHANGE 2020 to 2021
0122049 - MECHANICAL INSPECTIONS						
PERSONAL SERVICES						
511001 FULL TIME SALARIES	405,137	440,403	426,815	448,731	453,261	4,530
511101 PART TIME < 20 HRS/WK	0	0	8,587	0	0	0
513010 REGULAR OVERTIME	0	1,189	0	0	0	0
513050 WORK FOR OTHER DEPT	0	24	0	0	0	0
514001 LONGEVITY	2,500	2,500	3,500	3,500	3,500	0
514006 EXCEPTIONAL SVS PAY	0	87	5,073	0	0	0
515005 BONUSES	0	2,100	1,800	0	0	0
515006 VACATION BUY BACK	1,473	9,202	3,129	6,000	4,000	-2,000
515101 CLOTHING ALLOWANCE	3,000	3,000	3,250	3,000	3,000	0
TOTAL PERSONAL SERVICES	412,110	458,505	452,153	461,231	463,761	2,530
EXPENSES						
531900 TRAINING EXPENSES	2,068	1,202	1,184	2,500	2,500	0
543200 SMALL TOOLS	43	0	68	1,000	1,000	0
548000 GASOLINE	2,680	4,321	3,890	4,000	0	-4,000
558000 PUBLIC SAFETY SUPPLIES	508	142	0	500	500	0
558100 UNIFORMS/PROTECTIVE	2,037	1,206	1,765	1,500	1,500	0
571000 VEHICLE USE REIMBURSE	37	0	0	0	0	0
573000 DUES & SUBSCRIPTIONS	655	539	555	600	600	0
577100 PROFESSIONAL LICENSES	390	399	140	1,300	500	-800
TOTAL EXPENSES	8,417	7,809	7,601	11,400	6,600	-4,800
FRINGE BENEFITS						
57DENT DENTAL INSURANCE	2,070	2,608	2,249	2,328	1,164	-1,164
57HLTH HEALTH INSURANCE	71,016	83,303	73,210	75,736	59,753	-15,983
57LIFE BASIC LIFE INSURANCE	170	222	170	171	57	-114
57MEDA MEDICARE PAYROLL TAX	5,584	6,134	6,051	6,526	6,657	131
57OPEB OPEB CONTRIBUTION	4,443	6,350	7,634	8,174	5,800	-2,373
TOTAL FRINGE BENEFITS	83,283	98,617	89,314	92,935	73,431	-19,504
TOTAL MECHANICAL INSPECTIONS	503,810	564,931	549,068	565,566	543,792	-21,774
TOTAL INSPECTIONAL SERVICES	1,438,123	1,504,765	1,660,915	1,751,337	1,734,816	-16,521

Planning Department

Mission

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

“Use Less and Green the Rest”

The City of Newton’s Five-Year Climate Action Plan

A Living Plan for 2020-2025



*Green Buildings:
Zervas Elementary School*



*Clean vehicles:
City Hall EV charging station.*



*Renewable Energy:
Solar array at Rumford Avenue*



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

The Planning Department provided staff technical expertise and guidance to help facilitate the following in 2019:

- City Council passage of an amended Inclusionary Zoning ordinance, expanding the current affordable housing requirements for developments of 7 or more units to now include an additional 2.5% set-aside for middle-income households (110% area median income), increasing to a 5% middle income requirement in January of 2021 for all project of 100 units or more.
- City Council adoption of a Five-Year Climate Action Plan.
- Preparation of all of the necessary documentation precedent to the City Council's decision to acquire Webster Woods by eminent domain.
- Provision of affordable housing funding from the City's Community Preservation Act (CPA), Community Development Block Grant (CDBG), and HOME Program to assist and leverage funding to help make possible the completion of an eight-unit all affordable housing development at 236 Auburn Street.
- Extensive support to the City Council Land Use Committee in assisting with the review of the Northland and Riverside Special Permit petitions.
- City Council adoption of the Washington Street Vision Plan.
- City Council passage of climate action related zoning amendments: one requiring energy efficiency certification for projects over 20,000 feet, and one offering

dimensional relief to homeowners undertaking certain energy efficiency improvements to their properties.

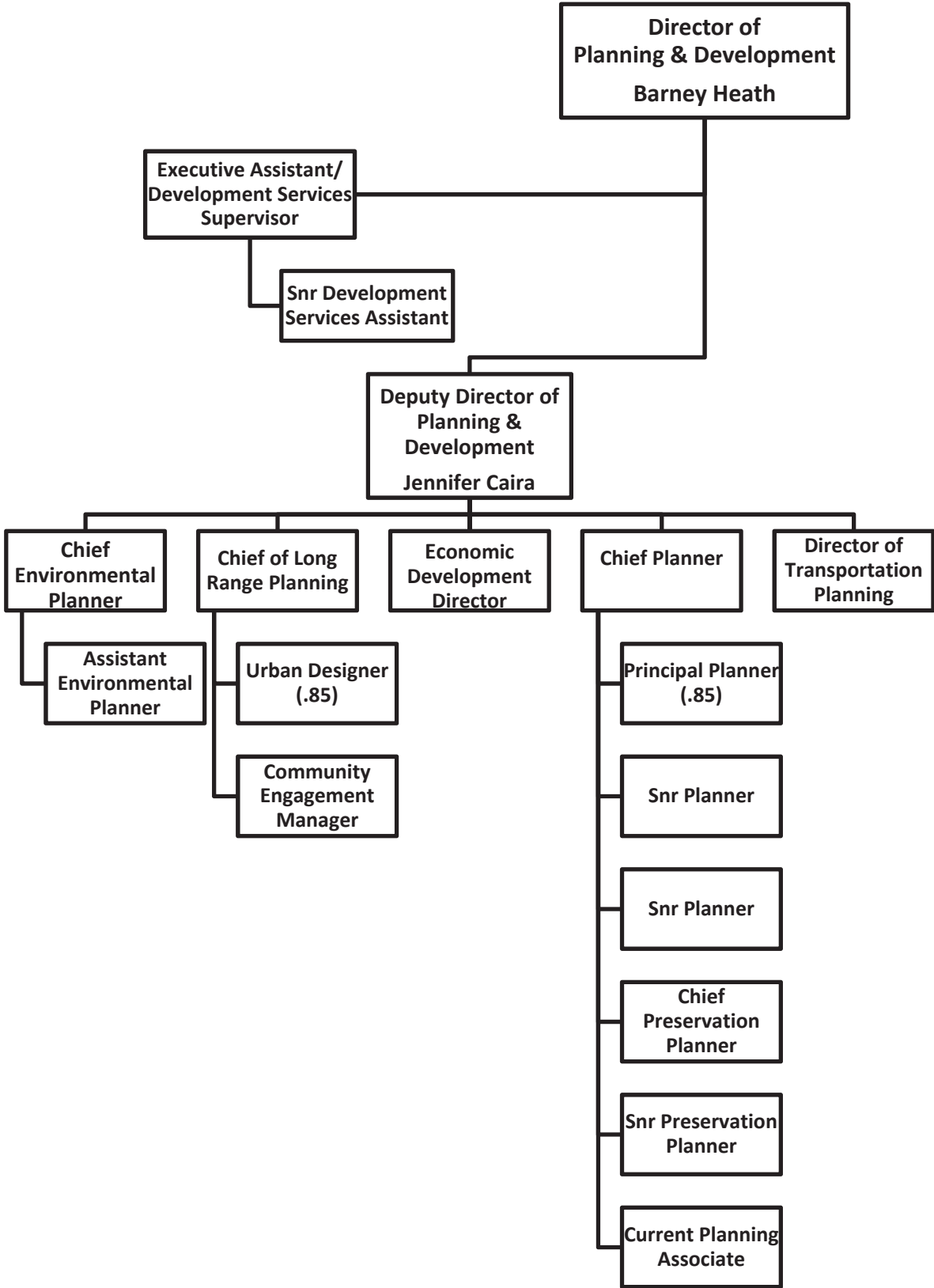
In addition to these, the Planning Department continued its mission to endeavor to provide excellent customer service to the public and professional support to the following Boards and Commissions:

- ❖ Auburndale, Chestnut Hill, Newtonville and Newton Upper Falls Historic District Commissions
- ❖ City Council
- ❖ Commission on Disability
- ❖ Conservation Commission
- ❖ Economic Development Commission
- ❖ Fair Housing Commission
- ❖ Farm Commission
- ❖ Newton Historical Commission
- ❖ Newton Housing Partnership
- ❖ Planning and Development Board
- ❖ Urban Design Commission
- ❖ Zoning Board of Appeals

Barney S. Heath

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

Planning & Development
Current and Long-Range Planning Division



Financial and Operating Highlights

Financial Highlights

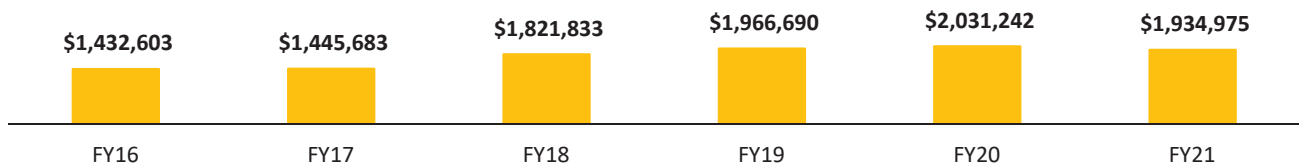
	Actual				<-Adj Budget->	<-Proposed->
	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021
Expenditure by Department						
Planning	\$ 1,022,267	\$ 1,114,767	\$ 1,365,445	\$ 1,522,485	\$ 1,564,108	\$ 1,464,203
Conservation	\$ 157,972	\$ 124,856	\$ 179,785	\$ 158,598	\$ 168,504	\$ 169,733
Historical	\$ 113,766	\$ 111,009	\$ 113,558	\$ 117,710	\$ 123,740	\$ 127,403
Econ Development	\$ 134,342	\$ 58,978	\$ 118,028	\$ 119,150	\$ 134,846	\$ 117,391
ZBA	\$ 4,256	\$ 36,073	\$ 45,017	\$ 48,747	\$ 40,044	\$ 56,245
Total	\$ 1,432,603	\$ 1,445,683	\$ 1,821,833	\$ 1,966,690	\$ 2,031,242	\$ 1,934,975
% Incr	39.13%	0.91%	26.02%	7.95%	3.28%	-4.74%

Personnel

Full-Time Employees	17	20	22	19	19	19*
Part-Time Employees	2	2	0	3	3	3
Total	19	22	22	22	22	22*

*Executive Admin deferred to FY2022

Total Planning Expenditures



Operating Highlights

11,750	Rides taken by Newton Seniors in Newton in Motion (NewMo) on-demand shuttle vehicles
307	Historic Reviews Undertaken
157	Development Reviews Provided
105	Zoning Reviews Provided
74	Sign Reviews Presented to the Urban Design Commission
88	Special Permits Filed
60	Complete Streets Reviews of Newton Roadways and Intersections
39	Wetlands Permits Issued
14	City Boards and Commissions Staffed
2	Vision Plans Completed
1	CDBG Funded Accessible Restroom Constructed (1st Floor City Hall)

Planning and Development

Fiscal Year 2021 Outcomes and Strategies

Outcome 1

Plan for Newton's Future

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

how our City can continue to retain this quality of place while at the same time pro-actively planning ahead for Newton's future. Our goal is to provide the best possible guidance to our community's leaders to achieve the community's desired outcomes for the City.

Goals for Fiscal Year 2021 include:

- Achieving substantial progress on new Zoning Ordinance rewrite.
- Implementing actions from the Newton Climate Action Plan.
- Providing technical guidance and analysis to the City Council and Zoning Board of Appeals on development proposals.

The Planning Department is positioned to implement a variety of transportation measures in the upcoming year including:

- Launching a Wells Avenue area transportation shuttle service with an eye toward citywide expansion.
- Installing five "Bluebike" share rental docking stations while continuing to expand Newton's bike infrastructure network.
- Initiating the design and engineering work to extend the Upper Falls Greenway and upgrade the Pettee Square intersection and surrounding streetscape.
- Monitoring and strongly advocating to expedite all MBTA and MASS DOT related projects benefiting Newton residents and businesses.
- Partnering with the Department of Public Works on major village traffic and streetcape improvements in West Newton Square and along Walnut Street in Newtonville.

Outcome 2

Improve Newton's Transportation Systems

Planning and Development

Fiscal Year 2021 Outcomes and Strategies

Outcome 3

Provide Opportunity for All

The Planning Department is committed to providing opportunity for all in Newton by pursuing opportunities and leveraging its grant resources, including the annual allocation set-asides from

both the federal housing and community development grant programs and the Community Preservation Act (CPA) program.

- Determining the feasibility of converting the West Newton Armory into affordable housing.
- Partnering with Newton Housing Authority (Haywood House—55 units) and 2Life Communities (Golda Meir Expansion—69 units) to enable construction on their respective affordable housing elderly developments.
- Continuing the work to retrofit park pathways, such as the “Marty Sender” path at Lyons Field, to make them accessible for persons with physical disabilities.

A principal role of the Newton Planning Department is to offer City of Newton officials, whether it be the Mayor, City Council, other departments or one of the many Boards or Commissions we staff, with our considered professional recommendations. As a team, we strive to base our recommendation on a combination of broad community input, data, and guidance taken from approved City of Newton plans and policies.

For Fiscal Year 2021, the Planning Department will endeavor to maintain a standard of excellence by:

- Availing staff of professional training opportunities to stay current on planning practices.
- Bringing “best practice” and case study examples forward to determine their applicability to Newton issues.
- Remaining open to testing and piloting strategies, whenever possible to evaluate effectiveness in advance of permanent decisions.
- Engaging with residents and businesses to receive their input.

Outcome 4

Attending to Advances in Planning Practice

FUND: 0001 - GENERAL FUND
DEPARTMENT: 114 - PLANNING DEVELOPMENT

CITY OF NEWTON BUDGET
DEPARTMENT LEGAL LEVEL OF CONTROL

	ACTUAL 2017	ACTUAL 2018	ACTUAL 2019	ORIGINAL 2020	RECOMMENDED 2021	CHANGE 2020 to 2021
PLANNING SUMMARY						
51 - PERSONAL SERVICES	1,077,972	1,381,226	1,578,291	1,675,459	1,593,060	-82,399
52 - EXPENSES	211,239	208,245	125,825	137,050	151,800	14,750
58 - DEBT AND CAPITAL	57,026	72,886	91,347	25,000	25,000	0
57 - FRINGE BENEFITS	127,973	161,666	175,860	193,733	165,115	-28,619
TOTAL DEPARTMENT	1,474,210	1,824,023	1,971,323	2,031,242	1,934,975	-96,267
CONSERVATION						
51 - PERSONAL SERVICES	65,635	104,884	130,125	139,605	141,990	2,385
52 - EXPENSES	1,164	376	728	1,700	450	-1,250
58 - DEBT AND CAPITAL	57,026	72,886	91,347	25,000	25,000	0
57 - FRINGE BENEFITS	1,030	1,639	2,109	2,198	2,293	94
TOTAL CONSERVATION	124,856	179,785	224,309	168,504	169,733	1,229
PLANNING						
51 - PERSONAL SERVICES	840,053	1,039,414	1,201,463	1,288,846	1,182,799	-106,048
52 - EXPENSES	169,434	180,944	94,546	96,200	132,200	36,000
57 - FRINGE BENEFITS	108,965	147,256	159,974	179,062	149,204	-29,858
TOTAL PLANNING	1,118,452	1,367,615	1,455,982	1,564,108	1,464,203	-99,906
ZONING BD OF APPEALS						
51 - PERSONAL SERVICES	41,556	43,106	45,214	37,794	53,224	15,430
52 - EXPENSES	3,305	1,303	2,209	2,250	2,250	0
57 - FRINGE BENEFITS	591	609	624	0	772	772
TOTAL ZONING BD OF APPEALS	45,452	45,017	48,047	40,044	56,245	16,201
ECONOMIC DEVELOPMENT						
51 - PERSONAL SERVICES	33,727	92,726	95,508	99,152	101,716	2,564
52 - EXPENSES	35,331	23,904	26,011	34,200	14,200	-20,000
57 - FRINGE BENEFITS	5,383	1,398	1,422	1,494	1,475	-20
TOTAL ECONOMIC DEVELOPMENT	74,441	118,028	122,941	134,846	117,391	-17,455
HISTORICAL						
51 - PERSONAL SERVICES	97,001	101,096	105,980	110,062	113,332	3,270
52 - EXPENSES	2,005	1,718	2,332	2,700	2,700	0
57 - FRINGE BENEFITS	12,003	10,764	11,731	10,978	11,371	393
TOTAL HISTORICAL	111,009	113,578	120,043	123,740	127,403	3,663

FUND: 0001 - GENERAL FUND
DEPARTMENT: 114 - PLANNING DEVELOPMENT

CITY OF NEWTON BUDGET
DEPARTMENTAL DETAIL

	ACTUAL FY2017	ACTUAL FY2018	ACTUAL FY2019	ORIGINAL 2020	RECOMMENDED 2021	CHANGE 2020 to 2021
114 - PLANNING						
0111471 - CONSERVATION						
PERSONAL SERVICES						
511001 FULL TIME SALARIES	65,135	104,034	129,325	138,355	140,740	2,385
514001 LONGEVITY	0	0	0	750	750	0
515005 BONUSES	0	350	300	0	0	0
515102 CLEANING ALLOWANCE	500	500	500	500	500	0
TOTAL PERSONAL SERVICES	65,635	104,884	130,125	139,605	141,990	2,385
EXPENSES						
534100 POSTAGE	936	119	142	250	250	0
534200 PRINTING	83	0	0	500	0	-500
534300 ADVERTISING/PUBLICATIO	0	0	0	750	0	-750
542000 OFFICE SUPPLIES	145	122	99	200	200	0
546000 GROUNDS MAINT SUPPLIE	0	0	487	0	0	0
573000 DUES & SUBSCRIPTIONS	0	135	0	0	0	0
TOTAL EXPENSES	1,164	376	728	1,700	450	-1,250
FRINGE BENEFITS						
57DENT DENTAL INSURANCE	0	121	225	234	234	0
57MEDA MEDICARE PAYROLL TAX	1,030	1,519	1,884	1,964	2,059	94
TOTAL FRINGE BENEFITS	1,030	1,639	2,109	2,198	2,293	94
DEBT AND CAPITAL						
584100 GROUNDS IMPROVEMENT	57,026	72,886	91,347	25,000	25,000	0
TOTAL DEBT AND CAPITAL	57,026	72,886	91,347	25,000	25,000	0
TOTAL CONSERVATION	124,856	179,785	224,309	168,504	169,733	1,229

CITY OF NEWTON BUDGET DEPARTMENTAL DETAIL
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		ACTUAL	ACTUAL	ACTUAL	ORIGINAL	RECOMMENDED	CHANGE
		FY2017	FY2018	FY2019	2020	2021	2020 to 2021
0111475 - PLANNING							
PERSONAL SERVICES							
511001	FULL TIME SALARIES	774,643	966,079	1,127,067	1,077,218	1,002,927	-74,290
511101	PART TIME < 20 HRS/WK	2,648	2,210	6,850	62,529	76,397	13,867
511102	PART TIME > 20 HRS/WK	42,783	45,104	45,860	120,399	85,475	-34,925
513010	REGULAR OVERTIME	10,927	14,418	8,984	10,000	10,000	0
514001	LONGEVITY	2,167	2,133	1,398	5,300	5,000	-300
514006	EXCEPTIONAL SVS PAY	0	129	0	0	0	0
515005	BONUSES	0	2,800	2,600	0	0	0
515006	VACATION BUY BACK	3,636	2,041	4,704	0	0	0
515102	CLEANING ALLOWANCE	3,250	4,500	4,000	3,400	3,000	-400
519700	CURRENT YEAR WAGE RE	0	0	0	10,000	0	-10,000
TOTAL PERSONAL SERVICES		840,053	1,039,414	1,201,463	1,288,846	1,182,799	-106,048
EXPENSES							
524100	SOFTWARE MAINTENANC	1,198	1,597	2,737	3,000	3,000	0
527400	RENTAL - EQUIPMENT	1,500	2,614	2,935	3,000	3,000	0
527500	RENTAL/LEASE - PROPER	0	0	240	0	20,000	20,000
530100	CONSULTANTS	117,330	143,600	50,511	50,000	70,000	20,000
530204	APPRAISAL SERVICES	23,000	0	5,000	0	0	0
530209	PUBLIC MEETING EXPENS	5,000	5,386	3,620	5,000	4,000	-1,000
531900	TRAINING EXPENSES	925	454	1,100	4,500	4,500	0
534010	TELEPHONE	516	428	470	500	500	0
534020	CELLULAR TELEPHONES	1,456	2,223	2,097	2,500	2,500	0
534100	POSTAGE	7,066	4,074	3,127	5,000	3,000	-2,000
534200	PRINTING	4,574	8,990	11,212	8,000	8,000	0
534300	ADVERTISING/PUBLICATIO	497	503	828	1,000	1,000	0
542000	OFFICE SUPPLIES	1,938	1,998	3,665	3,000	3,000	0
558500	COMPUTER SUPPLIES	489	1,087	0	450	450	0
571000	VEHICLE USE REIMBURSE	475	842	736	750	750	0
571100	IN-STATE CONFERENCES	1,553	1,340	1,100	1,500	1,500	0
571200	REFRESHMENTS/MEALS	49	0	0	0	0	0
572000	OUT-OF-STATE TRAVEL	0	3,753	3,461	5,000	5,000	0
573000	DUES & SUBSCRIPTIONS	1,869	2,055	1,707	3,000	2,000	-1,000
TOTAL EXPENSES		169,434	180,944	94,546	96,200	132,200	36,000
FRINGE BENEFITS							
57DENT	DENTAL INSURANCE	1,317	2,811	3,121	3,264	1,866	-1,398
57HLTH	HEALTH INSURANCE	80,721	109,326	114,987	131,895	108,517	-23,378
57LIFE	BASIC LIFE INSURANCE	218	308	281	342	342	0
57MEDA	MEDICARE PAYROLL TAX	11,722	14,214	16,342	18,235	16,991	-1,244
57OPEB	OPEB CONTRIBUTION	14,987	20,599	25,242	25,326	21,488	-3,838
TOTAL FRINGE BENEFITS		108,965	147,256	159,974	179,062	149,204	-29,858
TOTAL PLANNING		1,118,452	1,367,615	1,455,982	1,564,108	1,464,203	-99,906

CITY OF NEWTON BUDGET DEPARTMENTAL DETAIL
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	ACTUAL FY2017	ACTUAL FY2018	ACTUAL FY2019	ORIGINAL 2020	RECOMMENDED 2021	CHANGE 2020 to 2021
0111476 - ZONING BD OF APPEALS						
PERSONAL SERVICES						
511001 FULL TIME SALARIES	31,476	42,756	44,914	37,294	52,224	14,930
511102 PART TIME > 20 HRS/WK	9,379	0	0	0	0	0
513010 REGULAR OVERTIME	200	0	0	0	0	0
514001 LONGEVITY	0	0	0	0	500	500
515005 BONUSES	0	350	300	0	0	0
515102 CLEANING ALLOWANCE	500	0	0	500	500	0
TOTAL PERSONAL SERVICES	41,556	43,106	45,214	37,794	53,224	15,430
EXPENSES						
534100 POSTAGE	1,000	206	654	1,000	1,000	0
534200 PRINTING	100	0	0	0	0	0
534300 ADVERTISING/PUBLICATIO	2,000	1,026	1,521	1,250	1,250	0
542000 OFFICE SUPPLIES	205	71	34	0	0	0
TOTAL EXPENSES	3,305	1,303	2,209	2,250	2,250	0
FRINGE BENEFITS						
57MEDA MEDICARE PAYROLL TAX	591	609	624	0	772	772
TOTAL FRINGE BENEFITS	591	609	624	0	772	772
TOTAL ZONING BD OF APPEALS	45,452	45,017	48,047	40,044	56,245	16,201

CITY OF NEWTON BUDGET DEPARTMENTAL DETAIL
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	ACTUAL FY2017	ACTUAL FY2018	ACTUAL FY2019	ORIGINAL 2020	RECOMMENDED 2021	CHANGE 2020 to 2021
0111482 - ECONOMIC DEVELOPMENT						
PERSONAL SERVICES						
511001 FULL TIME SALARIES	31,841	92,726	95,508	99,152	101,716	2,564
515006 VACATION BUY BACK	1,887	0	0	0	0	0
TOTAL PERSONAL SERVICES	33,727	92,726	95,508	99,152	101,716	2,564
EXPENSES						
530100 CONSULTANTS	5,944	15,000	11,000	20,000	0	-20,000
534100 POSTAGE	168	0	4	200	200	0
534200 PRINTING	1,050	1,218	1,500	1,000	1,000	0
534300 ADVERTISING/PUBLICATIO	805	347	1,500	1,000	1,000	0
542000 OFFICE SUPPLIES	969	914	121	500	500	0
571000 VEHICLE USE REIMBURSE	0	221	498	500	500	0
571100 IN-STATE CONFERENCES	50	225	218	500	500	0
571200 REFRESHMENTS/MEALS	0	241	0	500	500	0
572000 OUT-OF-STATE TRAVEL	0	0	1,170	0	0	0
573000 DUES & SUBSCRIPTIONS	17,689	5,739	10,000	10,000	10,000	0
579700 GRANTS	8,657	0	0	0	0	0
TOTAL EXPENSES	35,331	23,904	26,011	34,200	14,200	-20,000
FRINGE BENEFITS						
57DENT DENTAL INSURANCE	139	0	0	0	0	0
57HLTH HEALTH INSURANCE	4,032	0	0	0	0	0
57LIFE BASIC LIFE INSURANCE	5	57	57	57	0	-57
57MEDA MEDICARE PAYROLL TAX	459	1,341	1,366	1,437	1,475	38
57OPEB OPEB CONTRIBUTION	748	0	0	0	0	0
TOTAL FRINGE BENEFITS	5,383	1,398	1,422	1,494	1,475	-20
TOTAL ECONOMIC DEVELOPMENT	74,441	118,028	122,941	134,846	117,391	-17,455

CITY OF NEWTON BUDGET DEPARTMENTAL DETAIL
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		ACTUAL	ACTUAL	ACTUAL	ORIGINAL	RECOMMENDED	CHANGE
		FY2017	FY2018	FY2019	2020	2021	2020 to 2021
0111494 - HISTORICAL							
PERSONAL SERVICES							
511001	FULL TIME SALARIES	96,251	100,227	104,680	69,513	71,325	1,812
511101	PART TIME < 20 HRS/WK	0	0	0	39,098	40,106	1,008
514001	LONGEVITY	0	0	500	950	1,400	450
514006	EXCEPTIONAL SVS PAY	0	19	0	0	0	0
515005	BONUSES	0	350	300	0	0	0
515102	CLEANING ALLOWANCE	750	500	500	500	500	0
TOTAL PERSONAL SERVICES		97,001	101,096	105,980	110,062	113,332	3,270
EXPENSES							
531400	REGIST/RECORDING FEES	0	0	0	100	100	0
534100	POSTAGE	1,157	1,600	1,570	1,600	1,600	0
534200	PRINTING	543	79	140	120	120	0
534300	ADVERTISING/PUBLICATIO	24	0	0	80	80	0
542000	OFFICE SUPPLIES	281	39	432	300	300	0
573000	DUES & SUBSCRIPTIONS	0	0	189	500	500	0
TOTAL EXPENSES		2,005	1,718	2,332	2,700	2,700	0
FRINGE BENEFITS							
57DENT	DENTAL INSURANCE	248	216	225	234	234	0
57HLTH	HEALTH INSURANCE	7,311	5,921	6,404	6,660	6,926	266
57MEDA	MEDICARE PAYROLL TAX	1,328	1,388	1,465	1,582	1,643	61
57OPEB	OPEB CONTRIBUTION	3,116	3,239	3,637	2,502	2,568	65
TOTAL FRINGE BENEFITS		12,003	10,764	11,731	10,978	11,371	393
TOTAL HISTORICAL		111,009	113,578	120,043	123,740	127,403	3,663
TOTAL PLANNING		1,474,210	1,824,023	1,971,323	2,031,242	1,934,975	-96,267

Community Preservation Program

Our Mission

To preserve and renew Newton's cultural, economic and environmental diversity with our Community Preservation Act funds.

In 2001, Newton voters adopted the Massachusetts Community Preservation Act (CPA) by accepting a 1% surcharge on City real estate taxes. This local funding qualifies Newton for state matching funds from fees collected by the Registry of Deeds.

The CPA state statute limits the use of these special funds to:

- affordable housing (including for families, residents with disabilities or special needs, seniors, ...)
- historic resources (including archives, art, buildings, landscapes, ...)
- open space (including land for trails, wildlife habitat, watershed protection, ...) or
- recreation (including land for parks, playgrounds, playing fields, ...)

CPA funds also have other special requirements. For example, real estate acquired with CPA funds must be restricted to its CPA-eligible use in perpetuity. In addition, CPA funds may be used only for capital improvements, not for maintenance or operations; must augment regular public funds, not replace them; and may be saved and combined over multiple years for major projects.

Only the City Council may appropriate CPA funds, but those appropriations must be based on recommendations made by the all-volunteer Community Preservation Committee (CPC). In Newton, the nine member Committee includes five members appointed from other City boards and the maximum four non-statutory members appointed by the Mayor. Newton's CPA ordinance aims to ensure that the CPC represents all neighborhoods and all CPA-eligible resources, and Newton's CPC strives to make its recommendations to the Council unanimous whenever possible.

These requirements and practices allow Newton's CPA program to take a collaborative approach to community needs that in other settings are often seen as competing.

As of late February 2020, the Community Preservation Committee (CPC) and the City Council had approved the following new CPA project funding in Fiscal 2020:

- \$15,940,000 to the City of Newton for the acquisition of 300 Hammond Pond Parkway (“Webster Woods”) which will preserve 17.4 acres of wooded open space and vernal pools situated between two existing conservation areas.
- \$15,000 to the Newton Conservators for the costs of holding the conservation restrictions required by the Community Preservation Act for the purchase of Kessler Woods.
- \$50,000 to the Riverside Greenway Working Group to complete the 100% design of the Pigeon Hill Trail in Auburndale along the Charles River.

The CPC has also recommended funding in FY20 for the following project which has yet to be reviewed by the City Council:

- \$1,105,000 to the Newton Housing Authority for their acquisition of CAN-

DO’s 33- unit permanently affordable rental housing portfolio

Unless additional new projects are funded in Fiscal 2020, Newton’s Community Preservation Fund will have over \$13.6 million in forwarded fund balances and new local and state funds available for future project funding at the start of Fiscal 2021. Some of these funds are restricted to a specific resource as required by the state CPA statute, but over \$12.6 million is available for any CPA-eligible use.

After twelve years working with the CPC, Community Preservation Program Manager Alice Ingerson retired from the City in January 2020. Lara Kritzer succeeded Alice as the new Community Preservation Program Manager in February and looks forward to her new role in Newton.

Barney S. Heath

Director, Newton Department of Planning & Development

Community Preservation Program

Fiscal Year 2021 Outcomes and Strategies

Outcome 1

Promote the CPA Program and its Benefits

Newton was an early adopter of the Community Preservation Program and over the last nineteen years, the program has provided approximately \$74 million in CPA funding to over 80 projects. CPA funding has been used to accomplish the program's

core functions, with approximately two-thirds of its funding equally divided between community housing and open space projects, and the remaining third nearly equally divided between historic resource and recreation programs.

In recent years, the CPC has noticed that fewer and fewer new organizations are applying for CPA funding, and that the core functions and accomplishments of the program are not always well known. This has suggested that despite its successes in the community, more efforts are needed to increase both the visibility of the program and how it impacts neighborhoods across the City. The Committee and its staff will work over the next year to promote and publicize the CPA program and its successes, as well as its possibilities for future use. These efforts may take several forms, including mailings to residents and local organizations, meeting with neighborhood groups and City departments to discuss the program, new signage and informational materials, and taking advantage of future opportunities for social media promotions and other public awareness opportunities.

Outcome 2

Design and purchase new CPA project site signs and implement outreach initiatives to improve the program's recognition and visibility

Since its adoption in 2001, Newton's CPA program has provided funding which might otherwise not be available for projects involving community housing, historic resources, open space, or recreation. The recent acquisition of the Webster Woods parcel has brought the CPA back into the news, and many residents are curious to know more about the program and what it can achieve.

The CPC proposes to work in Fiscal 2021 to improve the community's understanding of the program and its possibilities by improving its visibility in the community. The Committee plans to design and purchase new signs to be installed at CPA funded projects throughout Newton. The CPC will also work on additional outreach efforts to increase awareness of the program and encourage potential new project applications.

Community Preservation Program Fiscal Year 2021 Outcomes and Strategies

Outcome 3

Analyze community feedback on CPA funding priorities and develop/implement Program Recommendations

The Community Preservation Act requires that the CPC “study the needs, possibilities and resources of the city or town regarding community preservation.” These studies provide the CPC with direction on the goals of the community and how residents would like to see the City’s CPA funds spent. As a result of this work, the Committee has established the following guidelines for funding targets:

Newton CPA Allocation Targets: Balancing Funds Across Resources			± 5%
affordable housing (statutory minimum 10%)			35 ±5%
historic resources (statutory minimum 10%)			20 ±5%
open space & recreation land	acquisition	(combined statutory minimum 10%)	20 ±5%
	rehabilitation / capital improvements		20 ±5%
total, min. (-5%) – max. (+5%)			75-115%

The need for clear funding guidelines which reflected the goals of the community became particularly important in 2019 when the Committee eliminated its annual funding round and agreed to consider all pre and full proposals on a rolling basis. As part of these changes, the Committee developed an online survey and met with local boards, commissions and nonprofits to update its guidelines and develop a better understanding of what Newton as a community wants and expects from its CPA program. In FY21, the CPC and its staff will analyze these survey results to determine whether the funding targets and program goals still represent the needs and goals of the City. Based on the results of this survey analysis and responses to additional public outreach, the CPC anticipates that changes may be recommended, including to the funding targets noted above and “appropriateness” standards as stated below. While the eligibility of a CPA project is determined by the state CPA statute, Newton’s CPC has also adopted the following criteria for determining whether eligible projects are also CPA-appropriate. It is possible that this could also be amended based on the results of the community outreach survey:

Newton CPA project categories	CPA appropriateness & leverage
special public resources and public-private partnerships: publicly or privately-owned assets that benefit all Newton residents & neighborhoods, including permanently affordable housing	highest priority for CPA funding , with at least 30% non-CPA funding for public projects, 50% for private projects
limited-benefit special public resources: publicly owned assets that benefit only some residents or neighborhoods	lower priority for CPA funding , with at least 60% non-CPA funding
core public resources: assets already in public ownership and that the City of Newton would be obligated to rehabilitate even if Newton had not adopted the CPA	usually not appropriate for CPA funding except for the incremental additional cost of using historically appropriate materials and methods
limited-benefit private resources: privately owned assets that benefit only some residents or neighborhoods	not appropriate for CPA funding

This budget was adopted by the Newton Community Preservation Committee on March 10, 2020 by a vote of 6-0 with 3 members absent.

City of Newton, Massachusetts COMMUNITY PRESERVATION FUND	Fiscal 2020 FINAL	Fiscal 2021 PROVISIONAL
Program Budget	approved by CPC 10 Sept 2019, by City Council 22 Oct 2019	Draft updated Feb 20, 2020
REVENUE		
local CPA surcharge	\$3,568,921	\$3,658,144
state matching funds (in Fy20, DoR allowed budgeting up to 11.75% of Fy19 surcharge revenue; for Fy21, this sample estimates DoR allowance as 20% of Fy20 surcharge revenue)	\$383,309	\$713,784
unrestricted fund balance (previously called "undesignated fund balance")	\$360,816	\$425,445
additional local revenue: (assume \$0 in budget)		
TOTAL REVENUE	\$4,313,046	\$4,797,373
EXPENDITURES		
Program Administration (max. 5% of annual new funds)	(\$215,456)	(\$200,044)
Debt Service: Webster Woods (in addition to Open Space Budget Reserve) Estimated amount of principal and interest minus funding taken from Open Space Reserve		(\$425,263)
BUDGETED RESERVES		
Community Housing Reserve (min. 10% of annual new funds)	(\$431,305)	(\$479,737)
Historic Resources Reserve (min. 10% of annual new funds)	(\$431,305)	(\$479,737)
Open Space Reserve (min. 10% of annual new funds)	(\$431,305)	(\$479,737)
General Reserve (unrestricted, any CPA purpose) (all annual new funds not budgeted for debt service, program administration or restricted reserves)	(\$2,803,676)	(\$2,732,855)
TOTAL EXPENDITURES	(\$4,313,046)	(\$4,797,373)

Budget Detail for Program Administration	Fiscal 2020 FINAL	Fiscal 2021 PROVISIONAL
	approved by CPC 10 Sept 2019, by City Council 22 Oct 2019	Draft Updated Feb 20, 2020
PERSONNEL		
Program Manager (salary plus benefits)	\$136,805.97	\$118,544.00
Work by Other Depts.	\$7,000.00	\$7,500.00
SUBTOTAL Personnel	\$143,805.97	\$126,044.00
OTHER		
Consultants	\$52,500.00	\$50,000.00
Advertising/ Publications	\$2,500.00	\$3,000.00
Audiovisual Equipment	\$500.00	\$1,000.00
Computer Software	\$500.00	\$1,000.00
Computer Supplies	\$1,000.00	\$1,000.00
Dues & Subscriptions	\$7,900.00	\$7,900.00
In-State Conferences	\$1,000.00	\$2,100.00
Office Supplies & Equipment	\$1,000.00	\$1,000.00
Postage	\$1,000.00	\$1,000.00
Printing	\$3,000.00	\$3,000.00
Signs	\$750.00	\$2,500.00
SUBTOTAL Other Expenses	\$71,650.00	\$74,000.00
TOTAL All Expenses	\$215,455.97	\$200,044.00

This budget was adopted by the Newton Community Preservation Committee
on March 10, 2020 by a vote of 6-0 with 3 members absent.

City of Newton, Massachusetts Community Preservation Program Budget	Fiscal 2020 Budgeted	Fiscal 2021 Approved by CPC March 10, 2020
REVENUE		
Local CPA surcharge	\$3,568,921	3,658,143.69
State Matching Funds (this estimates DoR allowance is 20% of Fy20 surcharge revenue)	\$383,309	713,784.13
Undesignated Fund Balance ("lagged" state funds - amount of state funding match confirmed after FY20 budget was approved)	\$360,816	425,445.33
TOTAL REVENUE	\$4,313,046	4,797,373.15
EXPENDITURES		
PROGRAM ADMINISTRATION & DEBT SERVICE		
Program Administration <i>(max. 5% of annual new funds)</i>	-215,455.97	-200,044.00
Debt Service: Webster Woods (in addition to Open Space Budget Reserve)		-217,961.77
BUDGETED RESERVES		
Community Housing Reserve <i>(min. 10% of annual new funds)</i>	-431,304.58	-479,737.31
Historic Resources Reserve <i>(min. 10% of annual new funds)</i>	-431,304.58	-479,737.31
Open Space Reserve <i>(min. 10% of annual new funds)</i>	-431,304.58	-479,737.31
General Reserve <i>(all annual new funds not budgeted for debt service, program administration or restricted reserves)</i>	-2,803,676.10	-2,940,155.45
TOTAL EXPENDITURES	-4,313,045.81	-4,797,373.15
COMMUNITY PRESERVATION PROGRAM		
Program Administration Details	Fiscal 2020 Budgeted	Fiscal 2021 Approved by CPC March 10, 2020
PERSONNEL		
Program Manager total (salary plus benefits)	\$136,805.97	\$118,544.00
Work by Other Depts.	\$7,000.00	\$7,500.00
SUBTOTAL Personnel	\$143,805.97	\$126,044.00
OTHER		
Consultants	\$52,500.00	\$50,000.00
Advertising/ Publications	\$2,500.00	\$3,000.00
Audiovisual Equipment	\$500.00	\$1,000.00
Computer Software	\$500.00	\$1,000.00
Computer Supplies	\$1,000.00	\$1,000.00
Dues & Subscriptions	\$7,900.00	\$7,900.00
In-State Conferences	\$1,000.00	\$2,100.00
Office Supplies & Equipment	\$1,000.00	\$1,000.00
Postage	\$1,000.00	\$1,500.00
Printing	\$3,000.00	\$3,000.00
Signs	\$750.00	\$2,500.00
SUBTOTAL Other Expenses	\$71,650.00	\$74,000.00
TOTAL ALL EXPENSES	\$215,455.97	\$200,044.00

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

CITY OF NEWTON BUDGET
 PERSONNEL DETAIL

Account	Position Title Employee Name	Benefits Date			Holiday		Grade	F.Y.	FTE	GROSS
		Hire Date	Yrs. Service	Longevity	OPEB	Add Comp				
114 - PLANNING										
58Z11400 - CPA ADMINISTRATION										
511001	CPA PROGRAM MANAGER	2/11/2020				0		FY 2020	1.00	103,586
	KRITZER, LARA	2/11/2020	0.39	0	0	0	H9-27	FY 2021	1.00	74,505
Account Totals:										
					0	0	0	FY 2020	1.00	103,586
					0	0	0	FY 2021	1.00	74,505
TOTAL CPA ADMINISTRATION										
					0	0	0	FY 2020	1.00	103,586
					0	0	0	FY 2021	1.00	74,505
TOTAL PLANNING										
					0	0	0	FY 2020	1.00	103,586
					0	0	0	FY 2021	1.00	74,505