



Zoning & Planning Committee Agenda

City of Newton **In City Council**

Monday, May 9, 2016

7:00PM – Note Early Start
Room 205/Council Chamber

PLEASE BRING YOUR BUDGET AND CIP BOOKS

BUDGET & CIP DISCUSSIONS:

CPA Administration
Inspectional Services
Planning & Development

- #148-16** **Mayor's appointment of Gregory Groot to the Economic Development Commission**
GREGORY GROOT, 296 Lake Avenue, Newton Highlands, appointed as a member of the ECONOMIC DEVELOPMENT COMMISSION for a term to expire May 1, 2018 (60 days 6/30/16) [04/13/16 @ 3:55 PM]
- #149-16** **Mayor's appointment of Jeremy Freid to the Economic Development Commission**
JEREMY FREID, 35 Cotton Street, Newton, appointed as a member of the ECONOMIC DEVELOPMENT COMMISSION for a term to expire May 1, 2018 (60 days 6/30/16) [04/13/16 @ 3:55 PM]
- #150-16** **Mayor's appointment of Charles Tanowitz to the Economic Development Commission**
CHARLES TANOWITZ, 51 Harding Street, West Newton, re-appointed as a member of the ECONOMIC DEVELOPMENT COMMISSION for a term to expire May 1, 2018 (60 days 6/30/16) [04/13/16 @ 3:55 PM]
- #151-16** **Mayor's re- appointment of Jack Leader to the Economic Development Commission**
JACK LEADER, 613 California Street, Newtonville, re-appointed as a member of the ECONOMIC DEVELOPMENT COMMISSION for a term to expire May 1, 2019 (60 days 6/30/16) [04/13/16 @ 3:55 PM]
- #152-16** **Mayor's re- appointment of Robert Finkel to the Economic Development Commission**
ROBERT FINKEL, 6 Stearns Street, Newton Centre, re-appointed as a member of the ECONOMIC DEVELOPMENT COMMISSION for a term to expire May 1, 2019 (60 days 6/30/16) [04/13/16 @ 3:55 PM]

The location of this meeting is handicap accessible and reasonable accommodations will be provided to persons requiring assistance. If you need a special accommodation, *please contact Jini Fairley, at least two days in advance of the meeting: jfairley@newtonma.gov, or 617-796-1253. For Telecommunications Relay Service dial 711.*

Referred to Finance and Appropriate Committees

- #288-15(2) Submittal of the FY 2017 Municipal/School Operating Budget**
HIS HONOR THE MAYOR submitting in accordance with Section 5-1 of the City of Newton Charter the FY17 Municipal/School Operating Budget totaling \$378,969,244 passage of which shall be concurrent with the FY17-FY21 Capital Improvement Program (#288-15). [04/11/16 @ 11:31] **EFFECTIVE DATE OF SUBMISSION 04/19/16; LAST DATE TO PASS THE BUDGET 06/03/16**

Referred to Finance and Appropriate Committees

- #288-15 Submittal of the FY17 Capital Improvement Plan**
HIS HONOR THE MAYOR submitting the FY 2017-FY 2021 Capital Improvement Plan pursuant to section 5-3 of the Newton City Charter. [10/01/15 @ 1:53 PM]

Referred to Finance and Appropriate Committees

- #288-15(3) Submittal of the FY 2017 – FY 2021 Supplemental Capital Improvement Plan**
HIS HONOR THE MAYOR submitting the FY 2017 – FY 2021 Supplemental Capital Improvement Plan. [04/11/16 @ 11:31 AM]

All other items before the Committee will be held without discussion.

Respectfully Submitted,

Ted Hess-Mahan, Chair



SETTI D. WARREN
MAYOR

City of Newton, Massachusetts
Office of the Mayor

#148-16

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

David A. Olson, Clerk
Newton, MA 02459

2016 APR 13 PM 3:55

RECEIVED
Newton City Clerk

Ladies and Gentlemen:

I am pleased to appoint Groot Gregory of 296 Lake Avenue, Newton as a member of the Economic Development Commission. His term of office shall expire on May 1, 2018 and his appointment is subject to your confirmation.

Thank you for your attention to this matter.

Very truly yours,

Setti D. Warren

Mayor

1000 Commonwealth Avenue Newton, Massachusetts 02459

www.newtonma.gov



DEDICATED TO COMMUNITY EXCELLENCE

G. GROOT GREGORY

296 Lake Avenue
Newton, MA 02461

SYNOPSYS, Marlboro, MA (Formally Optical Research Associates)

March 2010 to Present:

Technical Marketing Director - Responsible for the development direction of LightTools®, LucidShape® and LucidDrive® optical design software. Establish short and long term product development plans. Responsible for customer engagement for software Alpha programs to obtain feedback on new software features. Work as a functional interface between Sales, Marketing, Customers and the Software Development staff.

OPTICAL RESEARCH ASSOCIATES, Westborough, MA

January 2007 to March 2010:

Technical Business Analyst - Responsible for the development and support of technical specifications for LightTools® and CODE V® optical design software. Functional interface between Sales, Marketing, Customers and the Software Development staff.

Passionate Chocolatier, LLC, Boston, MA

January 1997 to December 1999:

Co-founder and Member – Managed financial reports and filling for The Tea Merchant, a retail shop selling teas, chocolates and accessories. Worked as a retail sales person with direct interactions with customers providing demonstrations, tastings and selection advice prior to sales. Maintained store POS and inventory systems.

LAMBDA RESEARCH CORPORATION, Littleton, MA

February 1995 to December 2006:

Vice President - Responsible for the development and support of TracePro® Opto-Mechanical Analysis Software and OSLO® optical design software. Member Board of Directors. Supervise software development, technical support and IT departments. Participates in corporate governance, sales and marketing activities. Co-inventor TracePro analysis program.

Maintained and supported ACCOS V lens design program under contract 1995 to 2004 to Optikos Software Corporation.

Team Member RaDEO -Rapid Design Exploration & Optimization

June 96 – August 98:

Provided integration of ACCOS V into IGD system using FORTRAN/LISP-AML languages. Lockheed Martin was prime contractor under DARPA program.

OPTIKOS CORPORATION, Cambridge, MA

June 1987 to February 1995

Director of Manufacturing - Responsible for the production of optical test equipment, MTF (Modulation Transfer Function) and RMI (Radius Measurement Instrument). Duties included supervising assembly technicians, maintaining production and inventory software. Responsible for the design and development of custom test instrumentation. Projects included web inspection, automated cosmetic inspection, high uniformity illumination system and laser print head inspection. Developed proposals and quotations for instrumentation development.

Director of Software Systems - Responsible for the acquisition and maintenance of corporate computer systems. Installed and maintained TOPS network including file-share and E-Mail. System included

Macintosh and PC computers with a Sun file-server. Setup NFS and TCP/IP systems. Built databases to track advertising inquires, production schedules and customer records. Managed the software development for the corporate product lines and for custom instrumentation. Managed the marketing and user support for the CAMS thin films design program and ACCOS lens design program. Programmed software for GPIB communications for PC to PC and PC the mainframe connections. Programmed user interface in FORTRAN for thin films design program on Macintosh. Programmed screen graphics drivers for Unix and VAX/VMS systems. Programmed control systems utilizing stepper motors and analog to digital converters. Wrote user manuals and tutorials for custom software and CAMS.

LABORATORY FOR LASER ENERGETICS

November 1982 to June 1987

University of Rochester, Rochester, NY

Research Engineer - Full Time - Responsible for the development and characterization of advanced diagnostic systems for the Omega 24 beam UV Irradiation facility. Managed the Diagnostic Evaluation Laboratory. Conducted diagnostic evaluations of high speed visible and x-ray electron-optical cameras, x-ray spectrometers, and target manipulation systems. Developed med-power fiber optic delivery systems for infra-red and ultra-violet laser sources. Evaluated materials for use in high vacuum and high voltage environments. Implemented Electron-Optics computer code under VAX/VMS. Performed design with IBM PC based CAD systems.

May 1980 to November 1982

Student Employee - Full and Part Time - Responsible for maintaining a Nd:YLF Active/Passive Mode-Locked Q-Switched laser. Built optical imaging system to observe visible radiation of laser produced plasmas. Performed laser pinhole drilling and scribing of metal substrates.

EDUCATION

University of Rochester
Rochester, New York
MS, Optics. 1987
BS, Physics with Distinction. 1982
BA, Mathematics. 1982
Kodak scholar.

Riverside School of Aeronautics
Utica, New York
F.A.A Aircraft Mechanic Certification (A&P). 1978
Outstanding Graduate Award.

AFFILIATIONS

Member of SPIE, OSA and SID
Elected Fellow of SPIE (2006)
Member New England Chapter SPIE
Member New England and Rochester Sections of OSA
Member New England Fiber Optics Council
Member Massachusetts Association for Optical Industry
Member MetroWest STEM Advisory Network 2011 – present, Elected to Executive Committee 2013 - present

TECHNICAL ACTIVITIES/INTERESTS

- Optical design, thin films, optical fabrication and testing, high speed x-ray photography.
- Novel Optical Systems Design and Optimization, Program Committee, 2001-2006, Co-Chair 2007-present
- Optical Modeling and Performance Predictions, Program Committee, 2003, 2005, 2007, 2009, 2011, 2013, 2015
- International Optical Design Conference, Program Committee, 1998, 2006, 2010, 2014 Co-Chair 2006
- Optical Fabrication and Testing Conference, Program Committee, 1990
- An Optical Believe It or Not: Key Lessons Learned, Program Committee, 2010, 2012, 2014, 2015
- Optics Education and Outreach, Chair 2010, 2012, 2014, 2016
- SPIE Lens Design Technical Group

SERVICE TO NEWTON

- Lead and volunteered for Newton Serves activities
- Tree plantings with Newton Tree Conservancy
- Support for various Newton Community Pride events
- Village Greeter for Tour Du Newton
- Organizer and volunteer for Highlands Haunted House

SERVICE TO THE TECHNICAL COMMUNITY

- IES TM-25 Working Group, 2012-present
- New England Board of Higher Education STEM PBL Advisory Committee, 2010-2012
- New England Board of Higher Education Photon PBL Advisory Committee, Chair, 2006-2009
- Hands on Optics (HOO) National Visiting Board, 2003-2006
- New England Board of Higher Education PHOTON 2 Advisory Committee, 2003-2006
- New England Board of Higher Education PHOTON Advisory Committee, 2001-2003
- New England Section of the OSA, Treasurer, 1996-present
- New England Section of the OSA, President, 1994
- Optoelectronics & Photonics Technology in Massachusetts Advisory Committee, 1998
- Advisory Committee, The Industrial Physicist. 2004
- Advisory Committee, Physics Today. 2005- 2011
- Customer Advisory Board, Optimax Corporation, 2007 - 2009

SERVICE TO SPIE

- Information Technology Committee, 2014 – Present
- Senior Editor, Optical Engineering, 2013 – Present
- Associate Editor, Optical Engineering, 2000-2013
- Awards Committee, 2004-2014, Chair 2010 - 2011
- Strategic Planning Committee, 2004-2005
- Education Committee, 2002-2006, Chair, 2004-2005
- Scholarship Committee, 1995-2003, Chair, 2000-2002.
- Kingslake Committee, 1996-1997

SERVICE TO OSA

- Industry Council, 2013 – Present
- Optics and Photonics News Editorial Advisory Committee 1997-present, Chair, 1999-2007, Global Optics Column Editor, 2007 – present, Education Column Editor 2012
- Information Technology Committee, 2000-2005
- Publications Council, 2001-2007
- Membership and Educational Services Council, 2010 – present, Chair 2016-2017
- Applied Optics Journal Review Committee, 2011 – 2012
- Engineering & Applications Rapid Action Committee, 2011 – 2012

ELECTED POSITIONS

- Newton Highlands Neighborhood Area Council, Newton, MA, 2010 – Present, Treasurer 2012- 2015

DIRECTORSHIPS

- Director Stellar Optics Research International Corp, 2004 – 2007
- Director Lambda Research Corporation, 1995 – 2006
- Secretary Friends of Newton Crystal Lake, 2009-2011, Director 2011-present
- Director NES/OSA, 1997 – present
- Director Optical Society of America, 2016 - 2017



SETTI D. WARREN
MAYOR

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Office of the Mayor

#149-16

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swarren@newtonma.gov

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

Ladies and Gentlemen:

I am pleased to appoint Jeremy Freid of 35 Cotton Street, Newton Centre as a member of the Economic Development Commission. His term of office shall expire on May 1, 2018 and his appointment is subject to your confirmation.

Thank you for your attention to this matter.

Very truly yours,


Setti D. Warren

Mayor

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Newton City Hall
2016 APR 13 PM 3:55
David A. Olson, City Clerk
Newton, MA 02459

1000 Commonwealth Avenue Newton, Massachusetts 02459

www.newtonma.gov



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Upgrade jmulvey@newtonma.gov

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CURRENT VIEW

[+ FILTER](#) [+ COMPARE](#) [+ SHOW](#)

No rules applied

Rules allow you to FILTER, COMPARE and SHOW results to see trends and patterns. [Learn more »](#)

SAVED VIEWS (2)



Original View (No rules applied)



View complete responses only

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EXPORTS

SHARED DATA

No shared data

Sharing allows you to share your survey results with others. You can share all data, a saved view, or a single question summary. [Learn more »](#)[Share All](#)

RESPONDENTS: 37 of 37

[Export All](#) [Share All](#)Question
SummariesData
TrendsIndividual
Responses

Respondent #37

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#37



COMPLETE

Collector: New Link (Web Link)

Started: Thursday, December 04, 2014 1:03:00 PM

Last Modified: Thursday, December 04, 2014 5:31:42 PM

Time Spent: 04:28:41

IP Address: 173.166.32.250

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PAGE 1: Application for City of Newton Boards and Commissions

Q1: Your contact Information

First Name Jeremy

Last Name Freid

Street Address 35 Newton Cotton Street

Village Newton Centre

Zip code 02458

Q2: How did you learn of the opening on this Board, Commission or Advisory Committee?

Word of mouth

Q3: Several Committees and Commissions currently have openings to which the Mayor can appoint. On which Committee or Commission are you interested in serving? Please select from the list below.

~~Solid Waste Commission~~

EDC

PAGE 2: Tell us about yourself

Q4: Have you ever served on a Newton Commission or Committee in the past?

No

PAGE 3: Past Committee Appointments

Q5: Which Committee/s or Commission/s did you serve on?

Respondent skipped this question

Q6: Dates of Service

Respondent skipped this question

PAGE 4: Letter of Interest

Q7: Please tell us a little about yourself and why you are interested in serving on this committee.

As you may or not be aware, my commercial real estate team at Boston Realty Advisors has focused on the Newton/Needham corridor representing both property owners and business with their commercial real estate needs for more than a decade. The success of my commercial real estate firm and suburban team can be attributed to exemplary representation of our clients via an entrepreneurial approach, leveraging the perfect mix of strategy, creativity, market knowledge, and submarket expertise, all underscored by a deep level of commitment to our clients and pride in a job well done. We have our finger on the pulse of the private sector submarket and as a result, have been involved in more Newton/Needham commercial real estate transactions in the last four years than any other commercial real estate firm. We are confident that a continued relationship with The City of Newton can only continue the mutual benefits; strengthening our ability to serve our clients and your ability to serve our City.

As a Newton resident (who has just completed a renovation on our 2nd Newton home), and father of three growing up within Newton, I am honored to be considered as a candidate to participate in any capacity on the EDC and feel strongly that I would be a valuable addition to the committee.

Q8: If you have an updated resume, please paste a copy of the text here.

<https://www.linkedin.com/pub/jeremy-a-freid-sior/5/3b0/415>

PAGE 5: Other Interests

Q9: If the openings have been filled on your first choice of Committee, would you be willing to serve on another Committee?

No

PAGE 7: SurveyMonkey Audience

Q10: Gender

Respondent skipped this question

Q11: Age

Respondent skipped this question

Q12: Household Income

Respondent skipped this question

Q13: Education

Respondent skipped this question

Q14: Location (Census Region)

Respondent skipped this question

Community: Developers • Facebook • Twitter • LinkedIn • Our Blog • Google+ • YouTube

About Us: Management Team • Board of Directors • Partners • Newsroom • Office Locations • Jobs • Sitemap • Help

Policies: Terms of Use • Privacy Policy • Anti-Spam Policy • Security Statement • Email Opt-In



Language: English • Español • Português • Deutsch • Nederlands • Français • Русский • Italiano • Dansk • Svenska • 日本語 • 한국어 • 中文(繁體) • Türkçe • Norsk • Suomi

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RECEIVED
Newton City Clerk
2016 APR 13 PM 3:56
David A. Olson, CMC
Newton, MA 02459

Ladies and Gentlemen:

I am pleased to appoint Charles Tanowitz of 51 Harding Street, Newton as a member of the Economic Development Commission. His term of office shall expire on May 1, 2018 and his appointment is subject to your confirmation.

Thank you for your attention to this matter.

Very truly yours,

Setti D. Warren

Mayor

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CHARLES TANOWITZ

MARKETING AND PR LEADERSHIP**HB AGENCY / ERIC MOWER AND ASSOCIATES – NEWTON, MASS.****Vice President**, September 2013 to Present

Merged the PR teams from two agencies to work as a seamless unit, integrating Fresh Ground's social and media relations expertise with HB Agency's broader skill sets. Trained and mentored junior employees, expanded editorial capabilities, created a measurement platform, and built the internal culture.

FRESH GROUND, INC. – CAMBRIDGE, MASS.**CEO and Chief Content Officer**, September 2009 to September 2013

Built a PR firm from scratch that delivered strategic outbound and inbound marketing and communications programs for technology and consumer companies. Hired and trained a team of top-notch PR professionals to lead media relations, social programs and content creation. Executed all operations and finance functions, and negotiated an acquisition by HB Agency.

SCHWARTZ COMMUNICATIONS – WALTHAM, MASS.**Director and New Media Strategist**, February 2007 – May 2009**Account Supervisor**, July 2004 – February 2007**Senior Account Executive**, October 2000 – July 2004

Piloted the move into social media for one of the nation's largest technology PR agencies. Trained staff of 250 on how to integrate social strategies and tactics into effective public relations campaigns. Also managed internal and external resources for as many as five teams across various topic areas including information security, supply chain software, content management, open source, telecommunications, VoIP, content management, financial services, instant messaging, mobile technology and healthcare IT.

NAK GROUP – NEW YORK, NY**PR Manager, Writer and Advertising Copywriter**, August 1998 – August 2000

Planned and executed all PR programs for an integrated advertising, marketing and PR firm with a focus on manufacturing and printing companies.

BROADCAST JOURNALISM EXPERIENCE**WCVB-TV – Needham, Mass.****WHDH-TV – Boston, Mass.****WBNG-TV, Binghamton, NY****WBZ-AM, Boston, Mass.****WRKL-AM, New City, NY****Freelance Associate Producer****Morning Producer****11pm Producer****Radio Producer and Tape Editor****Reporter / Anchor**

CHARLES TANOWITZ

EDUCATION

COLUMBIA UNIVERSITY GRADUATE SCHOOL OF JOURNALISM

M.S. with an emphasis on broadcast journalism

BRANDEIS UNIVERSITY

B.A. in English and American Literature and American Studies

ADDITIONAL ACTIVITIES

- Ligerbots – Mentor on the FIRST Robotics team that serves both Newton high schools. **Guided the team as they secured \$2000 in sponsorship from Dunkin Donuts.**
- Village14.com – Regular contributor to a hyperlocal site devoted to Newton, Mass.
- Regular speaker and presenter on social media and media to groups including the Public Relations Society of America, the Social Media Club of Boston, Boston University, Harvard Extension School, Leslie University and Southern New Hampshire University.

SELECT AWARDS AND RECOGNITION

- R.L. Tennant Award – Granted the highest honor by the Newton Needham Chamber of Commerce for service to the community
- Gold Bell – Top award by the PubClub of New England for the article Betting Big that appeared on Boston.com.
- Silver Bell, Organizational Identity Communications Campaign – Granted by the PubClub of New England for positioning Greentown Labs as the “Coolest Startup Space in Boston.”
- Sizzle Award – From Exhibitor Magazine for producing a daily publication on the show floor of PRINT 2000.



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David A. Olson, CMC
Newton, MA 02459

2016 APR 13 PM 3:55

RECEIVED
Newton City Clerk

Ladies and Gentlemen:

I am pleased to reappoint Jack Leader of 613 California Street, Newton as a member of the Economic Development Commission. His term of office shall expire on May 1, 2019 and his appointment is subject to your confirmation.

Thank you for your attention to this matter.

Very truly yours,


Setti D. Warren

Mayor

1000 Commonwealth Avenue Newton, Massachusetts 02459

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JACK M. LEADER**OBJECTIVE**

To be re-appointed to the Economic Development Commission - City of Newton.

To continue to service my clients' financial and insurance needs, providing expert advice, counsel and cost-efficient programs and services.

**PROFESSIONAL
ACHIEVEMENTS**

MEMBER, NEWTON NEEDHAM CHAMBER OF COMMERCE 2010 to Present

ECONOMIC DEVELOPMENT COMMISSION 2004-PRESENT

Chair of Commission in 2007 and Vice Chair in 2006.

Initiated, in concert with the MBTA, a review of Riverside with the ultimate goal of redevelopment.

In 2006, the Austin Street Project was started with the backing of all Ward 2 Aldermen. In 2011, chaired the Austin Street JAPG project and co-wrote the final report with Phil Herr with enormous input from 12 citizens of Newton.

UNIVERSITY OF MASSACHUSETTS, AMHERST ALUMNI ASSOCIATION GOVERNING BOARD 1987-2001

Elected President of the UMASS Amherst Alumni Association 1992-1996

Established a dues-paying membership; negotiated the University's first Alumni Credit Card program, bringing \$3.5M to the Association

Maintained a seat on the Governing Board until 2001

TREASURER, ALBERMARLE PLAYGROUND PROJECT – PHASE II 2003-2006

Fund-raised to expand existing handicapped accessible playground to enhance the original structure.

ASSISTANT SOCCER COACH – BAYS 1998-2003

SKILLS

Over a 35 year period, of all the awards I have earned, the greatest is the 95% retention rate with my clients. I strive to find out what they need, and then find the right market for the products.

Proficient in Microsoft Office Tools

WORK HISTORY

INSURANCE BROKER, PHOENIX MUTUAL

Jan 3 1978- Jan 1988

INSURANCE BROKER, WS GRIFFITH

Jan 1988 to Jan 2001

INSURANCE BROKER, BAY FINANCIAL ASSOCIATES, LLC

Jan 2001 to Present

EDUCATION

CABOT SCHOOL 1960-1967

I had the honor of being the first class taught by Penny Smith, who went on to be the McDonald's Teacher of the Year

FRANK ASHLEY DAY JUNIOR HIGH 1967-1970

Ernest Van B. Seasholes, Principal

Newton High School 1970-1973

I was part of the Student Committee that started the SFA – Student Faculty Administration – still in existence today. Graduate Commencement Speaker – June, 1973. First recipient of the Jim Shea Memorial Award (Political Action).

University of Massachusetts, Amherst 1973-1978

Bachelor of Arts, Political Science

PERSONAL

FAMILY

Married Judith C. Haber – June 24, 1978

Two children – Nicholas H. Leader – June 7, 1987; Emma Victoria Leader – January 2, 1993.

DOMICILE**Newton, MA 1959 – 1973**

107 Atwood Avenue

Amherst, MA 1973-1978

24 Merrick Circle

Newton, MA 1978-1980

55 Gay Street

Dedham, MA 1980-1983

130 Washington Street

Newton, MA 1983-Present

613 California Street



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Ladies and Gentlemen:

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Robert A. Finkel ~ Biography:

Robert Finkel's areas of specialty include real estate, general business and corporate matters, employment law and non-profit law.

Robert has assisted many clients with the acquisition, development, leasing, refinance and sale of real estate properties. He has particular expertise in providing counsel to private and institutional lenders and investors in connection with their real estate and business backed financings and transactions. His clients are based in Massachusetts, throughout the U.S. and worldwide.

Robert has substantial experience working with entrepreneurs as they launch and grow their businesses. He has represented many clients in connection with their incorporation, LLC formation, shareholder agreements, equity financings, bank financings, employment agreements, stock option plans, contracts and IP matters. He also has expertise in incorporating and establishing non-profit foundations and public charities and in providing ongoing corporate counsel.

Robert is Chair of the firm's Emerging Company Finance and Non-Profit Practice Groups and is a founding partner of KCL.

Education: Brandeis University, B.A., 1991, Cornell University Law School, J.D., 1994

Memberships:

City of Newton Economic Development Commission; Boston Bar Association; Massachusetts Bar Association; Real Estate Bar Association of Massachusetts;
Newton Needham Chamber of Commerce;
New England Israel Business Council; Board of Directors, Temple Emanuel of Newton.

Bar Admissions: 1995, Massachusetts

Representative Experience:

- Serving as corporate counsel to many businesses and nonprofits.
- Representation of investors and lenders in connection with various business and real estate backed financings.
- Review and negotiation of loan and investment round documents.
- Purchase, refinance and sale of real estate properties.
- Drafting and negotiation of commercial office and retail leases.
- Organization of new nonprofits under section 501 (c)(3) of the Internal Revenue Code.
- Representation of employees in connection with employment and severance agreements.

Newton Community Preservation Program Fy17 Budget for Zoning & Planning Committee, 9 May 2016

FY 16
PROJECTS

1



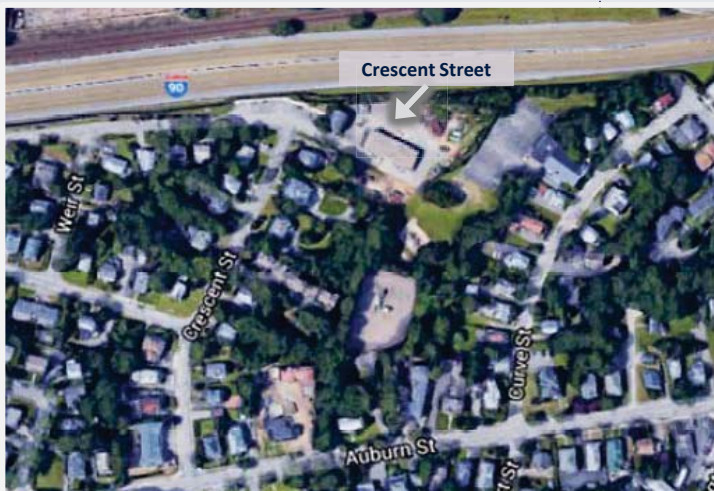
Newton, Massachusetts, Community Preservation Program

www.newtonma.gov/cpa

Newton Community Preservation Program Fy17 Budget for Zoning & Planning Committee, 9 May 2016

FY 16
PROJECTS

2



Newton, Massachusetts, Community Preservation Program

www.newtonma.gov/cpa

Newton Community Preservation Program Fy17 Budget

for Zoning & Planning Committee, 9 May 2016

3

Revenue

- local surcharge
- state funds
- undesignated fund balance

Expenditures

- program administration
- debt service
- budgeted reserves

Newton Community Preservation Program Fy17 Budget

for Zoning & Planning Committee, 9 May 2016

4

REVENUE	Fiscal 2016	Fiscal 2017
local CPA surcharge	\$2,843,904	\$2,915,002
state matching funds	\$499,417	\$426,586
undesignated fund balance	\$229,184	\$340,472
TOTAL REVENUE	\$3,572,506	\$3,682,060

Q. What is the “undesignated fund balance”?

A. Sometimes a portion of Newton’s state CPA funding for a given year is confirmed too late to be included in that year’s budget.

We add these “extra” state funds to the *following* year’s budget as “undesignated fund balance.”

EXPENDITURES	Fiscal 2016	Fiscal 2017
PROGRAM ADMINISTRATION & DEBT SERVICE		
Program Administration	-\$150,505	-\$154,767
Debt Service: 20 Rogers St. (recreation)	-\$269,344	-\$259,681
BUDGETED RESERVES		
Community Housing Reserve (10% of annual new funds)	-\$357,251	-\$368,206
Historic Resources Reserve (10% of annual new funds)	-\$357,251	-\$368,206
Open Space Reserve (10% of annual new funds)	-\$357,251	-\$368,206
General Reserve - all annual new funds not budgeted for purposes above.	-\$2,080,905	-\$2,162,994
TOTAL EXPENDITURES	-\$3,572,506	-\$3,682,060

Newton Community Preservation Program Fy17 Budget

Detail for Program Administration

5

REVENUE	Fiscal 2016	Fiscal 2017
local CPA surcharge	\$2,843,904	\$2,915,002
state matching funds	\$499,417	\$426,586
undesignated fund balance	\$229,184	\$340,472
TOTAL REVENUE	\$3,572,506	\$3,682,060

Program Administration	Fiscal 2016	Fiscal 2016
PERSONNEL		
Program Manager (salary plus benefits)	\$103,905	\$108,867
Work by Other Depts. (mostly Housing in Planning)	\$11,700	\$7,000
SUBTOTAL Personnel	\$115,605	\$115,867
OTHER		
Consultants	\$21,500	\$22,000
Advertising/ Publications	\$500	\$500
Audiovisual Equipment	\$500	\$500
Computer Software	\$0	\$1,500
Dues & Subscriptions	\$7,900	\$7,900
Office Supplies & Equipment	\$500	\$500
Postage	\$1,500	\$1,000
Printing	\$1,500	\$3,000
Signs	\$1,000	\$2,000
SUBTOTAL Other Expenses	\$34,900	\$38,900
TOTAL	\$150,505	\$154,767

Newton Community Preservation Program Overview

for Zoning & Planning Committee, 9 May 2016 - Optional Slides

6

- A. **sources of funds** (CPA & Newton's program)
- B. **allowable/required/cumulative uses of funds** (CPA & Newton's program)
- C. **Newton's *Community Preservation Plan***: funding guidelines
- D. **Newton's funding process**
- E. **Newton's currently available funds**, showing impact of recent & pending funding decisions
- F. **Newton's 5-year funding forecast**
- G. **Newton's 5-year comparison of future available funds vs. possible future proposals**
- H. **reports available on Newton CPC website**

The Community Preservation Act

A. Sources of Funds

bonds	debt financing: CPA communities may sell bonds backed by their future local surcharge revenue but may not borrow against their future state matching funds.
other local	(including interest) Since 2012, communities that adopt at least a 1% surcharge may also adopt a revised version of the CPA to count toward their state match additional local revenue from the following sources. Newton has not done this. ✓ <ul style="list-style-type: none"> hotel taxes linkage & inclusionary zoning payments sale of municipal property parking fines private gifts for CPA-eligible purposes other pre-existing local funds for CPA-eligible purposes but not state or federal funds
state	matching funds from fees paid to the Registry of Deeds; maximum 100% match for local funds Newton's most recent match was 31%. ✓ As of 2013, the state legislature may (but is not required to) add \$25 million from each year's state budget surplus. 1% communities participate in only the 1 st round state match each year; communities that raise more locally participate in the 1 st , 2 nd and in some cases 3 rd rounds.
local	surcharge on local real estate taxes maximum 3%, minimum 1% Newton's surcharge is 1%. ✓ Communities may also adopt a range of exemptions for both residential and commercial/ Industrial properties. Newton has no exemptions. ✓

The Community Preservation Act

B. Allowable Uses of Funds

NOT EVERY USE for EVERY RESOURCE	Community Housing	Historic Resources	Open Space	Recreation Land
ACQUIRE	YES	YES	YES	YES ^B
CREATE	YES	NO	YES	YES
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

The Community Preservation Act

B. Allowable Uses of Funds



**NOT EVERY USE for
EVERY RESOURCE**

**Community
Housing**

**Historic
Resources**

**Open
Space**

**Recreation
Land**

Real property

- if acquired with CPA funds, must be owned by local government
- the CPA-eligible use must be permanent & protected by a deed restriction

CPA funds are for capital improvements, which

- 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

CPA funds “shall not replace existing operating funds, only augment them.”

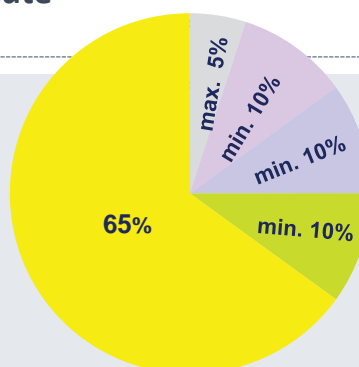
CPA funds may not be used for

- 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

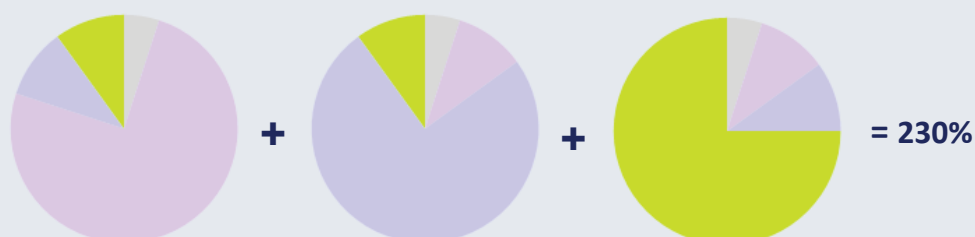
The Community Preservation Act

E. Uses of Funds – State Statute

program administration
affordable housing
historic resources
open space or recreation land
any resource

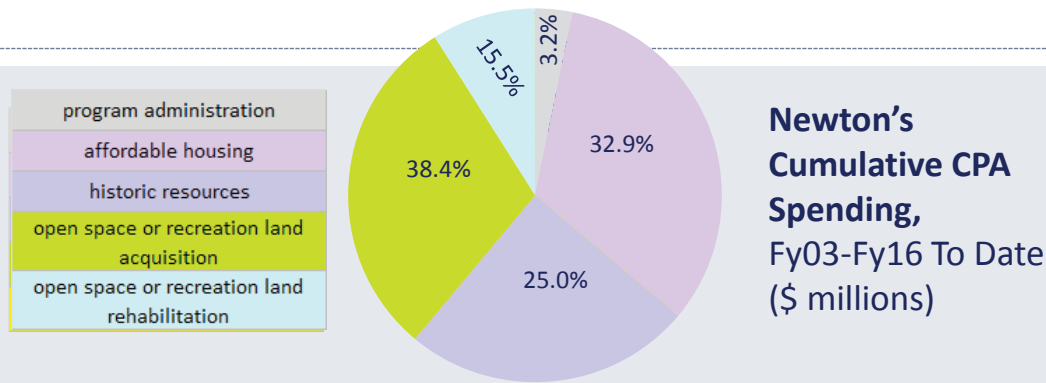


The “general” 65% can be spent on any resource ... but not on every resource!



The Community Preservation Act

E. Uses of Funds - Newton's Guidelines



Allocation Targets: Balancing Funds Among CPA-Eligible Resources	± 5%
affordable housing: development	30
historic resources: all purposes	25
open space & recreation land: acquisition	20
open space & recreation land: rehabilitation / capital improvements	20
total, min. - max.	75-115%

Newton Community Preservation Plan

C. Funding Guidelines



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

Newton Community Preservation Plan

C. Funding Guidelines



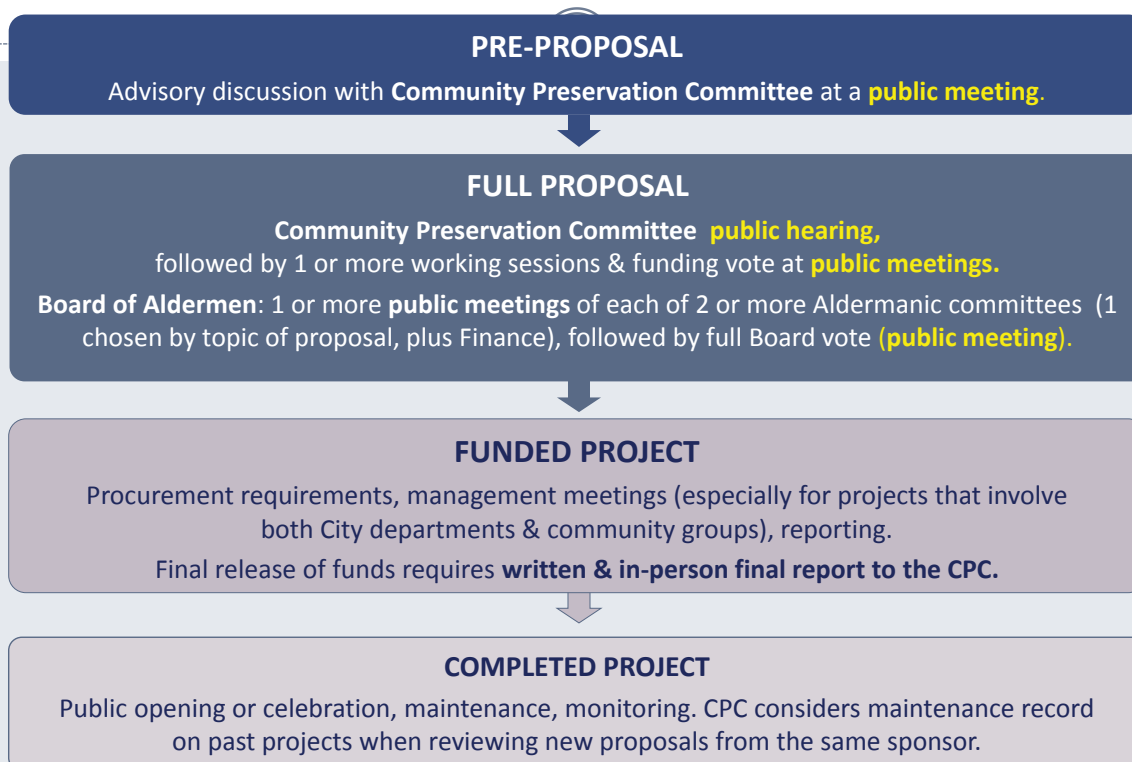
CPA Appropriateness	
core public services & assets:	appropriate for funding from core public revenue (not CPA)
special public or community projects:	appropriate for full CPA funding
public-private partnerships:	appropriate for partial CPA funding that will leverage other funds
philanthropy:	appropriate for entirely private funding (not CPA)

Expected Share of Non-CPA Funding	
projects on public property, with broad or City-wide public benefits	less
projects on public property, with narrower or mostly single-neighborhood benefits	more
projects on private property, with broad public benefits (including affordable housing)	
projects on private property, with narrower but still significant public benefits	most

Allocation Targets: Balancing Funds Among CPA-Eligible Resources		± 5%
affordable housing:	development	30
historic resources:	all purposes	25
open space & recreation land:	acquisition	20
open space & recreation land:	rehabilitation / capital improvements	20
total, min. - max.		75-115%

Newton's Community Preservation Program

D. Funding Process



Newton Community Preservation Program Fy16

Additional Handouts in Council Packet

- E. Currently Available Funds
- F. 5-year Funding Forecast
- G. 5-Year Comparison of Potential Proposals vs. Available Funds

Newton Community Preservation Plan

H. reports available on Newton CPC website

www.newtonma.gov/cpa

News, Calendar, Contact	(same as "home" -- calendar lists all agenda & funding deadlines)	
About the CPA	(state statute, Newton's ordinance, etc.)	
Committees & Meetings	(CPC agendas, packets, minutes; CPC members; City Council committees)	
Guidelines & Forms	(proposal instructions, sample forms, community plans to reference, etc.)	
Proposals & Projects	(each project page has links to full-text major documents)	
Reports & Presentations	Current Status Reports	Pending Pre- & Full Proposals
		Active Funded Projects
		Currently Available Funds
		Debt-Financed Projects
		Funding Forecast (5-year)
	Cumulative Reports	All Projects
		All Funds & Spending
	Annual Reports	
	Special Presentations	

City of Newton, Massachusetts Community Preservation Fund AVAILABLE FUNDS	DRAFT updated 28 April 2016, A. Ingerson		
	Fiscal 2014	Fiscal 2015	Fiscal 2016
REVENUE			
local CPA surcharge	\$2,707,415	\$2,811,676	\$2,843,904
state matching funds			
confirmed & budgeted in listed year	\$642,882	\$622,706	\$499,417
confirmed late in prior year, budgeted in listed year	NA	\$668,257	\$229,184
additional Fy16 state funds to budget in Fy17 (excluded from Fy16 available funds below)			\$340,472
additional sources:			
fund balance (<i>unspent funds forwarded from prior year; should not be totaled across years</i>)	\$8,140,573	\$8,214,318	\$8,223,464
interest	\$18,635	\$25,333	
other (<i>incl. liens</i>)	\$5,952	\$7,070	
TOTAL REVENUE	\$11,515,457	\$12,349,360	\$11,795,970
EXPENDITURES			
PROGRAM ADMINISTRATION & DEBT SERVICE			
program administration (max 5% of current-yr new funds)	-\$107,779	-\$109,760	-\$150,505
debt service for 20 Rogers St. (<i>final payment in fy17, allocated 100% to recreation / general reserve</i>)	-\$293,250		
		-\$280,500	-\$269,344
AVAILABLE FUNDS after program administration & debt service	\$10,605,928	\$11,959,100	\$11,376,121
PROJECT APPROPRIATIONS by City Council (chronological order)			
in FISCAL 2016 (chronological order)			
Museum Archives - <i>remainder of Fy15 recommendation</i>			-\$93,491
WPA Mural (Newton North High School)			-\$114,900
New Art Center			-\$72,652
Crescent Street Site Assessment (housing & park)			-\$100,000
Cambria Road (housing)			-\$471,117
Allen House Phase 2 (historic resources)			-\$2,000,000
AVAILABLE FUNDS after new appropriations	\$8,379,749	\$8,026,775	\$8,523,961
CPC RECOMMENDATIONS to City Council (chronological order)			
AVAILABLE FUNDS if all current recommendations were funded in full	\$8,379,749	\$8,026,775	\$8,523,961
FULL PROPOSALS SUBMITTED to CPC			
Newton Highlands Playground (construction) - <i>docketed with City Council, then held at request of Parks & Recreation, which plans to submit a revised request to CPC</i>			-\$2,500,000
AVAILABLE FUNDS if all submitted proposals were funded in full	\$8,379,749	\$8,026,775	\$6,023,961
Pre-PROPOSALS SUBMITTED to CPC * = estimates by CPC staff			
Crescent Street Design & Construction (housing & park) - design & construction			-\$3,200,000
Jackson Road Senior Housing (Newton Housing Authority)			-\$1,500,000
Newton Highlands Local Historic District Survey			-\$20,000
AVAILABLE FUNDS if all pre-proposals were funded in full	\$8,379,749	\$8,026,775	\$1,303,961
Note: Unless exceptional needs require otherwise, Newton's CPC aims to maintain a fund balance of ≈ \$3 million, so the program can start each year with about 2 years' worth of funds.			

Last revised 28 April 2016, A. Ingerson							
City of Newton, Massachusetts Community Preservation Fund	annual assumptions	Fiscal 2017	Fiscal 2018	Fiscal 2019	Fiscal 2020	Fiscal 2021	Estimated Totals for Fy17-21
FUNDING FORECAST, Fy17-21		<i>Assumptions : Local revenue increasing 2.5% per year; state match declining 3% per year, from 18% in fy17 to 6% in fy21. * State funds available each year are a percentage of the previous year's local revenue.</i>					
NEW REVENUE							
local CPA surcharge	2.5%	\$2,915,002	\$2,987,877	\$3,062,574	\$3,139,138	\$3,217,617	\$15,322,207
state matching funds:							
confirmed & budgeted in listed year	-3.0%	\$511,902.76	\$437,250.28	\$358,545.23	\$275,632	\$188,348.29	\$1,771,678
confirmed late in prior year, budgeted in listed year *		\$340,472					\$340,472
forwarded fund balance **							
TOTAL REVENUE		\$3,767,377	\$3,425,127	\$3,421,119	\$3,414,770	\$3,405,965	\$17,434,358
BUDGETED EXPENDITURES							
Program Administration & Debt Service							
program administration (fy 16 actual budget; other years as 4.5% of annual new funds; statutory maximum is 5%)		(\$154,767)	(\$154,131)	(\$153,950)	(\$153,665)	(\$153,268)	(\$1,390,424)
debt service for 20 Rogers St. from general reserve		(\$259,781)	\$0	\$0	\$0	\$0	(\$259,781)
AVAILABLE FUNDS after program administration + debt service		\$3,352,828	\$3,270,996	\$3,267,169	\$3,261,105	\$3,405,965	\$29,729,483
Required Reserves (min. allocation of annual new funds under the CPA)							
affordable housing (10%)		\$376,738	\$342,513	\$342,112	\$341,477	\$340,596	\$1,743,436
historic resources (10%)		\$376,738	\$342,513	\$342,112	\$341,477	\$340,596	\$1,743,436
open space & recreation (10%)		\$376,738	\$342,513	\$342,112	\$341,477	\$340,596	\$1,743,436
general (total revenue minus all budgeted expenses above)		\$2,222,615	\$2,243,458	\$2,240,833	\$2,236,674	\$2,384,175	\$11,327,756
NOTES							
* State revenue received each year is confirmed too late to be included in the current-year budget. Any state funds in addition to those budgeted are therefore budgeted and become available in the following year.							
** Unspent funds forwarded from prior budget year. This amount is not forecast for future years, in part to avoid counting the same unspent funds multiple times, and in part because the amount forwarded could be zero, if all funds available in a given year are spent in that year.							

Estimated
Totals for
Fy17-26
(using same
assumptions)

\$29,017,441

\$1,868,507

\$340,472

\$31,226,419

(\$1,390,424)

(\$259,781)

\$29,729,483

\$3,122,642

\$3,122,642

\$3,122,642

\$20,361,557

DRAFT as of 29 April 2016

	Newton, Massachusetts, Community Preservation Program Current & Future Proposals Compared to Available Funds & Allocation Targets						
	Info. Source, CIP Priority & Yr	Project Title	Affordable Housing	Historic Resources	Open Space or Recreation Land		
					Acquisition	Rehabilitation	
	Funded Projects, Fy12-Fy15 (including debt service) ≈						
		\$9,368,276	\$3,026,208	\$2,206,787	\$3,178,081	\$957,200	
		% allocation by resource	32%	24%	34%	10%	
	CPC target allocations by resource, ± 5%		30%	25%	20%	20%	
Oct 2015 CIP Ranking	Current Proposals or Pre-proposals, with Related Future Proposals						
	✓ = Fy16 appropriation ? = recommended by CPC but not yet funded * = cost revised or estimated by CPC staff						
	Fy16 budget	✓ 20 Rogers Street (debt service)			\$269,344		
	Proposal	✓ Museum Archives, Fire Suppression, Etc.		\$93,491			
	Proposal	✓ 1930s Mural		\$114,900			
	Proposal	✓ New Art Center (preservation planning)		\$72,562			
	Proposal	✓ 70 Crescent Street Site Assessment	\$50,000			\$50,000	
	Proposal	✓ Cambria Road housing (2 units)	\$471,117				
	Proposal	✓ Allen House		\$2,000,000			
	CIP 56 & 141	Proposal, CIP 71 & 72, Fy18	Newton Highlands Playground (constr.) - <i>CPC recommendation on hold at request of Parks & Recreation</i>				\$2,500,000
	CIP 140	Pre-proposal & Proposal, CIP 76	70 Crescent Street (4 affordable housing units, park, City of Newton)	\$1,950,000			\$1,250,000
		Proposal	New Art Center * (final design & construction)		\$2,250,000		
		Pre-proposal	Jackson Road Senior Housing (32 units, Newton Housing Authority)	\$1,500,000			
		Pre-proposal	New Local Historic District - Newton Highlands		\$20,000		
		Subtotal ≈					
			\$12,591,414	\$3,971,117	\$4,550,953	\$269,344	\$3,800,000
		% Allocation by Resource		32%	36%	2%	30%
	Other Future Proposals * = cost revised or estimated by CPC staff CIP (Capital Improvement Plan) listings as of October 2015						
	Branch Libraries (Current or Former)						
CIP 116 & 224	CIP 67 & 68	Waban Library		\$318,500			
CIP 120	CIP 63	West Newton Library (Police Annex)		\$250,500			
CIP 126	CIP 56	Newton Centre Library (former Health Dept.)		\$1,500,000			
CIP 171 & 173	CIP 46 & 47	Auburndale Library		\$255,000			
CIP 199 & 215	CIP 60 & 61	Newton Corner Library (Mass Challenge)		\$292,500			
CIP 214	CIP 62	Nonantum Library		\$200,000			
	City Archives						
CIP 138	CIP 50	City Archives (facilities)		\$100,000			
CPI 198	CIP 69	Engineering Map Archives (scanning)		\$900,000			
	City Hall						
CIP 133	CIP 51	City Hall War Memorial - Exterior Stairs		\$450,000			
CIP 189	CIP 52	City Hall War Memorial - Auditorium HVAC		\$150,000			
CIP 239	CIP 70	City Hall/War Memorial Historic Landscape		\$1,500,000			
CIP 63	CIP 49, Fy18-19	City Hall Doors & Windows (note: Public Bldgs Commissioner withdrew this pre-proposal in writing on 7 January 2016).		\$1,000,000			
	Crafts Street Stable (Public Works, Operations)						
CIP 92 & 175	CIP 53 & 54, Fy20	Crafts Street Stable		\$1,450,000			
	Jackson Homestead (Historic Newton)						
CIP 216 & 232	CIP 57 & 58	Jackson Homestead		\$292,000			

	Info. Source, CIP Priority & Yr	Project Title	Affordable Housing	Historic Resources	Open Space or Recreation Land	
					Acquisition	Rehabilitation
	Historic Burying Grounds (Historic Newton)					
CIP 211, 241, 247	CIP 73, 74, 75	Historic Burying Grounds		\$702,600		
	Parks & Recreation					
CIP 87 (Fy20)	CIP 55	Crystal Lake Bathhouse (Fy20)				\$5,543,589
CIP 162	CIP 48	Burr Park Fieldhouse				\$313,500
CIP 226	CIP 59	Newton Centre Playground Recreation Ctr ("The Hut")		\$1,500,000		
CIP 242	CIP 45	Chaffin Park Wall (abutting Farlow Park)		\$200,000		
CIP 159, City Bonding	Parks & Rec Commissioner 22 Nov 2015 memo to CPC, (CIP still lists as 159 for City bonding)	Upper Falls/Braceland Playground <i>(Fy21, per memo from Parks & Rec Commissioner)</i>				\$1,675,000
	Senior Center					
CIP 160, 168, 206	CIP 64, 65, 66	Senior Center		\$519,000		
	Not Listed in CIP *					
	Inquiry to CPC	Conservation Land Acquisition - placeholder			\$5,000,000	
	Inquiries to CPC staff	New Local Historic Districts - placeholder		\$50,000		
	Subtotal ≈					
		\$24,162,189	\$0	\$11,630,100	\$5,000,000	\$7,532,089
		% Allocation by Resource	0%	48%	21%	31%
	TOTAL Current Proposals + Pre-proposals & Related Proposals + Other Future Proposals ≈					
		\$36,753,603	\$3,971,117	\$16,181,053	\$5,269,344	\$11,332,089
		% Allocation by Resource	11%	44%	14%	31%
	AVAILABLE FUNDS, based on CPC target allocations by resource, ± 5%:		30%	25%	20%	20%
	FIVE-YEAR FORECAST: Total Available Funds for Fy16-20 ≈					
		\$25,125,000				
		target allocations – 5%	\$7,160,625	\$5,967,188	\$4,773,750	\$4,773,750
		target allocations + 5%	\$7,914,375	\$6,595,313	\$5,276,250	\$5,276,250
	TEN-YEAR FORECAST: Total Available Funds for Fy16-25 ≈					
		\$42,750,000				
		target allocations – 5%	\$12,183,750	\$10,153,125	\$8,122,500	\$8,122,500
		target allocations + 5%	\$13,466,250	\$11,221,875	\$8,977,500	\$8,977,500