



# **Zoning & Planning Committee Agenda**

## **City of Newton** **In City Council**

**Monday, September 11, 2017**

**8:00PM – Note Late Start Time**  
**Room 205**

### **Items Scheduled for Discussion:**

#### **Referred to Programs & Services and Zoning & Planning Committees**

- #276-17      Ordinance amendments to allow food trucks**  
THE ECONOMIC DEVELOPMENT COMMITTEE, COUNCILORS FULLER, HESS-MAHAN, KALIS, LENNON, LIPOF, NORTON, AND SANGIOLO requesting to amend Chapter 17, Sections 17-46 through 17-50 to allow Food Trucks to locate and operate on public streets in Newton subject to licensing by the Health Department and to location permitting requirements, initially restricted to Wells Avenue; to introduce new rules applicable to all Food Trucks operating in the City; and requesting to amend Chapter 30 to allow Food Trucks in the Public Use District subject to the same restrictions and requirements. [08/24/17 @ 4:17 PM]

*Chairman's Note:* The Planning Department will be making a presentation on the Economic Development Strategy.

- #140-14      Zoning amendment for lodging house ordinance**  
ALD. CROSSLEY AND HESS-MAHAN requesting to amend **Chapter 30**, City of Newton Zoning Ordinances, to include a "lodging house" ordinance to promulgate rules requiring annual fire, safety and health inspections and licensing of buildings providing single room occupancy and/or congregate living arrangements.
- #140-14 (2)      Amend ordinances to add licensing requirements and criteria for lodging houses**  
ZONING & PLANNING COMMITTEE requesting to amend Chapter 17, City of Newton Ordinances, to establish licensing requirements and criteria for lodging houses.

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

## Items Not Scheduled for Discussion at this Meeting:

*Public Hearing assigned for September 25, 2017*

**#264-17      Zoning amendments to rezone parcels related to school uses**

HIS HONOR THE MAYOR requesting that the following residential properties be rezoned to Public Use as they have been acquired by the City for use at the Zervas, Cabot and Pre-School sites:

- 1316 Beacon Street, 1330 Beacon Street and 1338 Beacon Street from SR2 to Public Use
- 23 Parkview Avenue and 15 Walnut Park from MR1 to Public Use

[08/29/17 @ 4:01PM]

**#234-17      Zoning amendment to increase inclusionary zoning units from 15% to 25%**

COUNCILOR SANGIOLO proposing an amendment to the inclusionary housing provisions of the Zoning Ordinance, Chapter 30, to increase the required percentage of affordable units from 15% to 25%. [08/07/17 @ 10:57 AM]

**#238-16      Zoning amendment for exempt lots definition**

COUNCILOR HESS-MAHAN proposing to amend Chapter 30: Zoning Ordinance, Section 7.8.4.C by amending the definition of “exempt lots” to include lots changed in size or shape as a result of an adverse possession claim. [06/30/16 @ 4:12 PM]

**#95-15      Discussion to consider mix of uses at Wells Avenue Office Park**

ALD. CROSSLEY, JOHNSON, LEARY, HESS-MAHAN, DANBERG, ALBRIGHT AND BLAZAR requesting a discussion with the Planning Department to consider the mix of uses in the Wells Avenue Office Park, with and without a second egress to the site, pursuant to the recent MAPC study recommending a strategic introduction of retail and restaurant uses to attract and sustain healthy commercial uses, and some number of residential units sufficient to support an economically viable and vibrant mixed use environment. [04/13/15 @ 2:46 PM]

**#80-13      Updates on the zoning reform project**

THE PLANNING DEPARTMENT requesting update discussions of the zoning reform project. [02/25/13 @ 12:31 PM]

**#184-17      Requesting exit interviews for businesses closing or closed in Newton**

COUNCILOR YATES requesting that the Economic Development Director and the Economic Development Commission develop a system of exit interviews for businesses closing or already closed in Newton to learn what factors led to their closing and what changes could be made in the city to avoid further closings. [06/12/17 @ 2:48 PM]

- #147-17 Request to include Main Street approach in economic development strategy**  
COUNCILOR YATES requesting that the City's economic development strategy include an element devoted to revitalizing village centers in partnership with village based organizations and using the Main Street approach of the National Main Street Center that has been successful in neighborhoods in Boston, other communities in Massachusetts, and in dozens of other communities across the country. [05/30/17 @ 1:21 PM]
- #136-17 Recommendation to establish a West Newton Historic District**  
NEWTON HISTORICAL COMMISSION submitting a recommendation, pursuant to MGL Chapter 40C, Section 3, that Article III, Historical Provisions, and Division 1, Commissions and Districts, of the City of Newton Ordinances, be amended by establishing a local historic district in West Newton. [04/26/17 @ 9:34 AM]
- #104-17 Recommendation to establish a Newton Highlands Historic District**  
NEWTON HISTORICAL COMMISSION submitting a recommendation, pursuant to MGL Chapter 40C, Section 3, that Article III, Historical Provisions, and Division 1, Commissions and Districts, of the City of Newton Ordinances, be amended by establishing a local historic district in Newton Highlands. [04/10/17 @ 10:45AM]
- #109-15 Zoning amendment for inclusionary housing provisions from 15% to 20%**  
HIS HONOR THE MAYOR requesting consideration of changes to the inclusionary housing provisions of the Zoning Ordinance to increase the required percentage of affordable units to 20% with the additional 5% set aside for middle income households. [04/24/15 @ 2:38 PM]
- #220-16 Discussion relative to regulating Airbnb-type companies**  
COUNCILORS FULLER, HESS-MAHAN, LAPPIN, COTE AND NORTON requesting a discussion with the Planning, Inspectional Services and Fire Departments regarding appropriate regulations, permits, licensing and/or taxes for residential owners who host short-term guests through house-sharing companies such as Airbnb.[06/06/16 @ 2:19 PM]
- #3-17 Proposed ordinance to create a Newton Housing Partnership**  
COUNCILORS CROSSLY, ALBRIGHT, AND HESS-MAHAN proposing an Ordinance to create a Newton Housing Partnership with members jointly appointed by the City Council and Mayor, to continue the mission of the Newton Housing Partnership that was advisory to the Mayor, and which the Mayor has disbanded. [12/23/16 @ 8:37 AM]
- #35-16 Creation of policy to require posting of materials of boards/commissions**  
COUNCILOR SANGIOLO requesting a discussion with the Planning Department relative to creating a policy to require audio recordings of all meetings of boards and

commissions and posting of same to the City's website, as well as posting of all documentation that is reviewed by boards and commissions and/or by their designated City staff member. [01/19/16 @ 2:35 PM]

- #170-15      Discussion of HUD settlement relative to creating 9-12 affordable units**  
ALD. HESS-MAHAN, JOHNSON, CROSSLEY AND ALBRIGHT requesting a discussion relative to the HUD Settlement with Supporters of Engine 6, the Fair Housing Center of Greater Boston and the Disability Law Center in conjunction with the Law and Planning Departments, to explain the settlement and possible implications for the Zoning Board of Appeals and the Board of Aldermen in terms of the City's obligation to identify sites and facilitate the creation of, and issue permits for, affordable housing for 9-12 chronically homeless persons in Newton. [07/06/15 @ 4:18 PM]
- #110-15      Discussion of the Smart Growth Zoning Overlay District Act in Newton**  
HIS HONOR THE MAYOR requesting discussion of The Smart Growth Zoning Overlay District Act M.G.L. Chapter 40R and its potential application in Newton [04/24/15 @ 2:38 PM]
- #447-14      Proposing an ordinance to require building plans with demolition applications**  
ALD. SANGIOLO proposing an ordinance requiring the submission of building plans with applications for full or partial demolitions. [11/13/14 @ 2:03 PM]
- #265-14      Request to increase several time periods for demolition delays**  
ALD. BLAZAR, YATES AND DANBERG requesting:
1. to amend Section 22-50 to increase the time period for determinations of historical significance to 30 days, and to increase the time period for hearings, rulings and written notice on appeals from historical significance determinations to 60 days;
  2. to amend Section 22-50 to increase the time period to hold a public hearing as to whether or not a historically significant building or structure is preferably preserved to 60 days;
  3. to amend Section 22-50 to increase the demolition delay period for buildings and structures on or eligible for listing in the National Register of Historic Places to 30 months;
  4. and to amend Section 22-50 to increase the demolition delay period for all other preferably preserved buildings or structures to 24 months. [7/07/14 @ 12:35 PM]
- #238-14      Request for development of Housing Production Plan**  
ALD. SANGIOLO requesting the Executive Department and Planning Department work with the Board of Aldermen to develop a Housing Production Plan in accordance with 760 CMR 56.03(4) and guidelines adopted by the Department of Housing and Community Development as soon as possible. [06/09/14 @ 11:55 AM]

- #107-15      Discussion of middle income housing supportive of City employees**  
HIS HONOR THE MAYOR requesting discussion of approaches to create middle income housing as a means of allowing City of Newton employees the opportunity to live in the community in which they work. [04/24/15 @ 2:38 PM]
- #81-13      Request for naturally affordable compact housing opportunities**  
DIRECTOR OF PLANNING & DEVELOPMENT on behalf of the Newton Housing Partnership requesting consideration of naturally affordable compact housing opportunities in MR1 zones. [02/22/13 @ 1:13 PM]
- #86-15      Discussion and review of CDBG fund expenditures and citywide goals**  
ALD. CROSSLEY, ALBRIGHT, HESS-MAHAN, & JOHNSON requesting a review and discussion of Community Development Block Grant expenditures and past years' accounting to assess progress in meeting citywide program goals as adopted in the consolidated plan, including creating and sustaining affordable housing, as well as facilities improvements in approved neighborhood districts. [03/30/15 @ 6:02 PM]
- #427-13      Discussion of CDBG, HOME and ESG funds and fair housing**  
ALD. HESS-MAHAN requesting discussion and periodic updates of steps the City of Newton is taking to ensure that its implementation of the Consolidated Plan, Annual Action Plan and Citizen Participation Plan and use of CDBG, HOME and ESG funds comply with federal and state fair housing and anti-discrimination laws and regulations, and its duty to affirmatively further fair housing. [12/06/13 @ 9:51 AM]
- #308-12      Discussion of policies relative to CDBG fund expenditures**  
ALD. HESS-MAHAN & ALBRIGHT requesting a discussion with the Mayor's office and the Planning & Development Department of policies, procedures, and criteria relating to determinations concerning expenditures of Community Development Block Grant (CDBG) funds. [10/09/12 @ 3:59 PM]
- #142-09(7)      Resolution to reconvene Floor Area Ratio working group**  
ALD. HESS-MAHAN AND JOHNSON proposing a Resolution to request that the Director of Planning and Development and the Commissioner of Inspectional Services reconvene a Floor Area Ratio working group to review and analyze the definition of "*Floor area, gross*" for residential structures as it is used in the definition and calculation of "*Floor area ratio*" in **Section 30-1** with respect to actual usage, and, if necessary, make recommendations for amendments thereto and in the dimensional regulations contained in **Section 30-15(u)** and *Table A* of **Section 30-15(u)**, the purpose of which is to regulate the size, density and intensity of use in the construction or renovation of, or additions to a residential structure, to more accurately reflect and be compatible with neighborhood character, and to ensure that a proposed residential structure is consistent with and not in derogation of the

size, scale and design of other existing structures in the neighborhood, and is not inconsistent with the City's Comprehensive Plan.

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

- #315-14**      **Ordinance amendment for procurement requirements for non-profits**  
ALD. HESS-MAHAN, ALBRIGHT, CROSSLEY AND DANBERG proposing an amendment to Chapter 2 of the City of Newton Ordinances setting forth requirements for procurement of materials and services by non-governmental recipients of federal, state or local funds administered by the City, such as CDBG and CPA funds. In order to encourage non-profit and other private organizations to participate in affordable housing, cultural and other public-private collaborations, such procurement requirements should accommodate the needs of non-governmental recipients for flexibility given the multiple public and private sources of funds necessary for any project by not placing undue or unreasonable burdens on them.  
 [08/04/14 @ 5:08 PM] Finance voted NAN
- #446-14**      **Discussion with Commission on Disability regarding the City's ADA compliance**  
ALD. SANGIOLO requesting a discussion with the Commission on Disability regarding the status of City compliance with ADA regulations. [11/13/14 @ 2:03 PM]
- #168-15**      **Discussion of Metropolitan Area Planning Council's Wells Avenue Market Study**  
THE NEWTON-NEEDHAM CHAMBER OF COMMERCE requesting a discussion of the Metropolitan Area Planning Council's 2015 Wells Avenue Market Study.  
 [07/06/15 @ 5:34 PM]
- #195-15(3)**      **Request to acquire land at 300 Hammond Pond Parkway**  
ALD. ALBRIGHT, BAKER, BLAZAR, BROUSAL-GLASER, CICCONE, COTE, CROSSLEY, DANBERG, FULLER, GENTILE, HESS-MAHAN, JOHNSON, KALIS, LAPPIN, LEARY, LAREDO, LENNON, LIPOF, NORTON, RICE, SANGIOLO, SCHWARTZ, AND YATES requesting that, in order to preserve the conservation and recreation values of the land, and to protect existing adjacent public open spaces, the Board of Aldermen vote to acquire for the City of Newton either the undeveloped portion of the land at 300 Hammond Pond Parkway or a conservation restriction on such land.  
 [10/23/15 @ 2:55 PM]

**ZONING AMENDMENT AGENDA ITEMS:**

- #22-17**      **Zoning amendment to further define village commercial centers**  
COUNCILORS ALBRIGHT AND AUCHINCLOSS proposing to amend **Chapter 30**, Section 4.2.1.C. which states the purpose of the Multi Use 4 (MU4) district, to further define "Newton's village commercial centers" as found in this section. The definition would include criteria to guide land use decisions to rezone an area to MU4. The purpose of this definition is to give guidance to both developers and residents concerning

areas appropriate to be rezoned as “village commercial centers” and therefore appropriate to become an MU4 zone. [01/22/17 @ 10:35PM]

- #16-17      Zoning amendment regarding Administrative Site Plan Approval**  
COUNCILOR HARNEY requesting an amendment to the City of Newton Revised Ordinances Chapter 30, Sec. 7.5. Administrative Site Plan Review, to require that as part of the process, the Planning & Development Department conduct a public hearing and to extend the amount of time that the City has to review the application. [01-17-17 @ 3:35 PM]
- #22-15      Zoning amendment to allow rental voucher program re: inclusionary zoning**  
ALD. YATES requesting that utilization of the Massachusetts Rental Voucher Program be added as an allowable means of complying with the inclusionary zoning provision in Phase II of Zoning Reform. [01/05/15 @ 9:53 PM]
- #222-13(7)      Additional zoning amendment to Garage Ordinance**  
COUNCILORS ALBRIGHT, LENNON, CROSSLEY, DANBERG, LIPOF, FULLER AND COTE proposing to amend Chapter 30, Section 3.4.4. of the Revised Ordinances as amended by Ordinance A-78, as follows: (1) limit the application of a maximum (45%) proportional width of garage to total building to all lots in MR districts; and/or (2) limit the application of a maximum (45%) proportional width of garage to total building to lots in SR districts having a maximum frontage of 70 feet; and/or (3) use the special permit process to determine exceptions providing clear and specific guiding criteria, such as preservation of historic properties, topography, odd lot configurations, preservation of certain natural features, etc., where such features may prohibit otherwise safe access to or parking on a site. [10/31/16 @ 3:51 PM]
- #222-13(5)      Zoning amendment to Garage Ordinance**  
COUNCILOR HESS-MAHAN proposing to amend Chapter 30, Section 3.4.4. of Revised Ordinances as amended by Ordinance A-78, as follows: (1) allow front facing garages that are no closer to the front lot line than the longest front facing wall, or a front porch at least 6 feet wide, to be the greater of up to 12 feet wide or 50% of the total length of the building parallel to the street; (2) allow front-facing garages that are closer to the front setback than the rest of the building and at least 24 feet from the front lot line to be up to 40% of the total length of the building parallel to the street; (3) delete Sec. 3.4.4.F "Exemptions"; and (4) add a provision grandfathering permits requested or construction begun on or after the date of the notice of public hearing on Ordinance A-78 [08/01/16 @ 4:58 PM]  
Public Hearing Closed on 9/26/16; 90 Days: 12/26/16
- #222-13(3)      Review of Garage Ordinance**  
COUNCILOR LENNON, LIPOF, ALBRIGHT, CROSSLEY, LAPPIN, LAREDO, GENTILE AND CICCONE requesting a review of Ordinance A-78, which amends Chapter 30, Section

3.4.4 of the Revised Ordinances, for the purpose of amending, clarifying, and/or interpreting the Ordinance. [08/01/16 @ 4:53 PM]

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

- #444-16**      **Amendment add fines for certain violations of the Accessory Apartment Ord.**  
COUNCILOR BAKER AND COMMISSIONER OF INSPECTIONAL SERVICES proposing an amendment to Chapter 20 of the City of Newton Revised Ordinances to allow non-criminal ticketing of certain violations of the Accessory Apartment Ordinance. [12/16/16 @ 1:40 PM]
- #291-16**      **Zoning Amendment relative to nonconforming single- and two-family dwellings**  
COUNCILOR SANGIOLO proposing to amend Chapter 30, Section 7.8.2.A.1.a. regarding nonconforming buildings, structures and uses, to also require that if an existing nonconforming single- or two-family structure is demolished, and the lot on which that structure existed does not meet current lot area or lot frontage requirements, then a special permit or variance would be required for any alteration, reconstruction, extensions or structural changes from the original structure. [08/22/16 @ 2:08 PM]
- #54-16**      **Zoning ordinance amendment relative to Health Club use**  
ACTING DIRECTOR OF PLANNING proposing amendments to the Newton Zoning Ordinance to allow the “Health Club” use in Business 1, Business 2 and Business 4 districts; and to clarify the definition of “Personal Service” as it relates to health and fitness uses. [02/09/16 @ 4:24 PM]  
**ITEM SPLIT INTO PART A AND PART B:**  
**PART A – To allow Health Club use in BU1, BU2 and BU4;**  
**PART B – To clarify the definition of Personal Services as it relates to health and fitness issues.**  
**Approved Part A 6-0**  
**Held Part B 6-0**
- #34-16**      **Zoning amendment for large house review process**  
COUNCILORS SANGIOLO, KALIS AND DANBERG proposing an amendment to Chapter 30 for a large house review ordinance requiring design review and approval of by-right single and multi-residence residential structures exceeding certain dimensional limits. [01/19/16 @ 2:35 PM]
- #169-15**      **Zoning amendment to require new lot standards after demolition**  
ALD. SANGIOLO requesting a zoning amendment which would require any residential structures in Single Residence or Multi Residence zoning districts built after the demolition of an existing structure conform to new lot standards. [07/02/15 @ 3:20 PM]



- #323-14      Zoning amendment to require front-facing front doors in residential zones**  
ALD. YATES, NORTON, COTE AND SANGIOLO proposing to amend **Chapter 30** to require that the front doors of single-family homes, two-family homes and other residential structures face the street on which their lots are located. [08/25/14 @ 11:42 AM]
- #139-14      Zoning amendment to clarify rules for retaining walls**  
ALD. ALBRIGHT requesting to amend **Chapter 30**, City of Newton Zoning Ordinances, to clarify rules relative to retaining walls.
- #429-13      Zoning amendment for Congregate Living Facility parking requirements**  
ALD. HESS-MAHAN requesting repeal and/or amendment of Zoning Ordinances **Section 30-1**, Definitions, 30-8(b)(2), Special Permits in Single Family Residential Districts, and 30-10(d)(4), Number of Parking Stalls, concerning “Congregate Living Facility”, as required by federal and state anti-discrimination and fair housing laws and regulations. [12/06/13 @ 9:51 AM]
- #404-13      Request for rezoning in Newton Centre**  
NATASHA STALLER et al. requesting a revision to the zoning District boundary Lines so as to transfer from Multi-Residence 1 District to a Single Residence 3 District the following properties:  
Assessors’ parcels SBL nos. 61-037-0004 through 61-037-0013; 61-042-0007 through 61-042-0023; 65-019-0001; 65-019-0007 through 65-019-0012; 65-019-0014 through 65-019-0022; 65-019-0009A; 65-019-0017B and 65-019-0022A. Also requesting transfer from a Single Residence 2 District to a Single Residence 3 District SBL no. 65-019-0015A.
- #264-13      Zoning amendment to develop residential districts for small lots**  
ALD. YATES requesting that the Zoning Reform Group or its successor consider amending City of Newton Zoning Ordinances **Chapter 30** to develop additional residential districts reflecting the small lots in older sections of the City and map changes to bring the zones of more residential sections of the City into conformity with the existing land uses. [08/15/13 @ 12:28 PM]
- #129-13      Zoning amendment for special permits for attached dwellings**  
ALD. HESS-MAHAN proposing to amend and/or clarify definition and provisions for granting a special permit for “attached dwellings” in the City of Newton Zoning Ordinances, **Chapter 30-1, 30-8(b)(13) and 30-9(b)(5)**. [05/25/13 @ 5:14 PM]
- #65-13      Zoning amendment to require special permit for major topographic changes**  
ALD. YATES, FISCHMAN, KALIS requesting that **Chapter 30** be amended to require a special permit for major topographic changes.]

- #153-11      Zoning amendment for Retail Overlay Districts around village centers**  
ALD. DANBERG, ALBRIGHT, HESS-MAHAN, JOHNSON requesting that **Chapter 30** be amended by adding a new **Sec. 30-14** creating certain Retail Overlay Districts around selected village centers in order to encourage vibrant pedestrian-oriented streetscapes which would allow certain uses at street level, including but not limited to financial institutions, professional offices, and salons, by special permit only and require minimum transparency standards for street-level windows for all commercial uses within the proposed overlay districts.
- #152-10      Zoning amendment to clarify parking requirements for colleges and universities**  
ALD. BAKER, FULLER, SCHNIPPER, SHAPIRO, FISCHMAN, YATES AND DANBERG recommending discussion of possible amendments to **Section 30-19** of the City of Newton Ordinances to clarify parking requirements applicable to colleges and universities.
- #391-09      Zoning amendment to allow payments-in-lieu of parking spaces: special permits**  
ALD. DANBERG, MANSFIELD, VANCE AND HESS-MAHAN requesting an amendment to **§30-19** to allow payments-in-lieu of providing required off-street parking spaces when parking spaces are waived as part of a special permit application.  
[09/09/09 @ 3:53 PM]

Respectfully Submitted,

Ted Hess-Mahan, Chair

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### **Economic Development Strategy**

#### **RFP**

The City of Newton is seeking a consultant team to assist the City in the development of a comprehensive Economic Development Strategy. The intent of this study is to build on existing work and successes to identify opportunities for expanding the City's economic base, creating a range of jobs and expanding the commercial side of the City's tax revenue. The City is strongly committed to a strategy that takes advantage of the City's assets, from its varied village centers and shopping districts, to its developing participation in the innovation economy with the N2 Innovation District, the Charles River Mills District, and MassChallenge's location at the Newton Innovation Center in Newton Corner. The City has a strong partnership with the Newton/Needham Chamber of Commerce, which is the fastest growing chamber in the Commonwealth of Massachusetts. Further, this effort should advance the City's Economic Opportunity for All programs, seeking to create opportunities for people of all economic stations to find pathways to success in the City. The City strongly believes in regional approaches to economic development activity and anticipates that this strategy will reflect that perspective.

Strategic planning efforts in the City of Newton adhere to the following principles: they are data driven, look to best practices and proven approaches from other communities that can be tailored to Newton, and a robust community engagement program that seeks out ideas and opportunities from within the community and builds broad support across the community for implementation. Newton's strategies include actions for immediate implementation as well as more medium term and long term activities. The Economic Development Strategy can be expected to include identification of actions tied to specific areas of the City in addition to broader economic development initiatives. Newton's Housing Strategy, released in June, 2016, and the Transportation Strategy, Newton in Motion, released in February, 2017 are both good models of strategy development in Newton and informative of the types of progressive work happening in the City. Since the degree to which robust economic development is closely tied to robust housing and transportation systems, this strategic planning should explicitly respond to and build on previous studies in these areas.

A city of approximately 89,000 people adjacent to Boston, Newton benefits from a prime location with good transportation access to the region's job centers in Boston, Cambridge, and the Route 128 corridor and an excellent public school system. The City also represents an ideal mixture of good community design with a number of historic walkable and transit-oriented village centers, attractive neighborhoods, and beautiful parks. These amenities make Newton a highly desirable community and, coupled with the strong regional economy, there is a high demand for new residential and business development and a commensurate increase in traffic

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and related growth issues. The fact that the community is changing under these influences, and will continue to do so as the City's demographics, transportation choices, and businesses evolve over time, has led to the understanding that the City needs a detailed planning effort, beyond that of the 2007 Comprehensive Plan, that prepares the City for these changes and results in transportation improvements, diverse housing opportunities, robust economic development and a new zoning ordinance.

### Planning and Analysis Goals:

- Conduct research and analysis on key data points and trends in order to understand Newton's economic strengths and weaknesses.
- Develop an agreed-upon baseline of Newton's current status of economic development assets and liabilities and a shared understanding of the processes, actions, and trends that support or maintain them.
- Develop a set of near-term and long-term tactical recommendations for preserving and enhancing Newton's economic development competitiveness.

### Project Outcome Goals:

- Create a strong core economic development vision and identity for the City.
- Inform the strategic activities of the City's economic development policy makers, including the Mayor, City Council and Economic Development Commission.
- Have a realistic set of ideas for the beneficial use of existing commercial and industrial spaces in the City.
- Educate the broader community about the benefits of smart and sustainable economic development tactics.

### Scope of Work

The Scope of Work for this project can broadly be divided into three phases, as identified in the headers below. The project is anticipated to be completed within 6 to 9 months of initiation.

#### **Understanding Newton – The Listening and Learning Phase**

1. **Project Initiation Meetings:** The consultant team will meet with the staff project team to confirm a detailed scope of work, discuss project schedule and project management protocols, and for staff to provide data and documents to the consultant team. Following this meeting, the consultant team will meet with the Economic Development Commission, to present the project scope and timeline, answer questions, and begin to collect community perspectives.

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2. **Project Public Kick-off Meeting:** This meeting will serve as the public kick-off event for the project. The meeting should include information on the project and feature innovative ways of collecting community comments, questions, and ideas.
3. **Stakeholder Meetings:** The consultant and staff team will do a series of meetings with economic development stakeholders to gather information and perspectives on economic development in the City today. The City recommends that this task be completed over the course of a day with back-to-back meetings with individuals and small groups conducted at City Hall or a similar centralized location.
4. **Newton's Existing Economy Report:** The first major deliverable of this project is a report detailing the City's economic position and current economic development strengths, weaknesses, and opportunities. This report should catalogue and provide analysis of available data on the City, looking at industry areas, commercial and industrial space, and other factors. The consultant team should rely on recent existing reports for some of this data collection such as the N2 Innovation District report (Camoin report, 2016). The report should be easy to read, with high-quality graphics that clearly explain the ideas being conveyed for a public audience. There should be both a full report and a summary report that delivers the key messages of the data and analysis.
5. **Draft Presentation:** The consultant will do an initial draft presentation of the Existing Economy Report for the Economic Development Commission and City Staff.
6. **Existing Economy Report Public Meeting:** The consultant will lead an interactive meeting that describes the findings of this report and allows opportunity for comment and questions. City staff will work with the consultant team in the design of this meeting, which will likely include a poster gallery conveying important findings, a presentation and break-out discussion groups.

### **Designing a Strategy – The Trying Ideas Phase**

7. **Strategy Development:** The consultant team will begin developing a draft strategy report, drawing on the findings, analysis, and ideas of the first phase. As noted above, strategies should include a select list of immediate actions as well as longer term implementation measures. Further, the strategy should include:
  - Analysis and identification of specific parcels or areas where the City should encourage or support economic development activity, with descriptions of what kinds of activity should be invested in.

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- Analysis and recommendations relative to the City's zoning ordinance and overall permitting process including current Zoning Redesign project, which aims to rewrite Newton's zoning code
  - Analysis of the economic development infrastructure in Newton which should include resources available to support new business formation, business expansion/retention, business relocation
  - An articulation and inventory of Newton's existing economic development assets
  - A comparative analysis of Newton's existing assets as related to the broader region, including quality of life indicators
  - Information about the current local marketplace and regional trends.
  - Sufficient content to help support a core economic development brand identity for the town
  - Identification of trends and strategies to support sustainable economic development
  - Strategies regarding how the City can most effectively and efficiently utilize its staff and financial resources for positive economic development
  - Analysis and recommendations for the economic resiliency of Newton's village centers and commercial areas.
  - Recommendations that tie in with those of the Housing and Transportation Strategies, as well as other City initiatives or plans.
  - Recommendations relative to partner or allied organizations, including neighboring municipalities.
  - Identify ways to capture economic benefits from existing or potential connections to regional economic growth opportunities in Boston, Cambridge, Needham, etc.
  - Identify and expand upon any observations of existing business practices that serve Newton market especially well.
  - Highlight sustainable business practices that are currently used by Newton businesses and/or strategies for increasing environmental resiliency and economic growth.
8. Draft Presentation: The consultant will do an initial draft presentation of the strategy for the Economic Development Commission and City Staff.
9. Draft Strategy Public Meeting: The consultant will lead an interactive meeting that describes the proposed strategy and allows opportunity for comment and questions. City staff will work with the consultant team in the design of this meeting, which will likely include a presentation and break-out discussion groups.

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### Finalizing the Strategy – Preparing for Implementation

10. Final Strategy Document: Based on comments received on the draft, create a final strategy document. Amend the summary document prepared as part of task 4 above to incorporate the key strategies identified for immediate action. The summary document should be written for a general audience and use graphics or attractive design as appropriate.
11. Final Public Meeting: The consultant will lead an interactive meeting that describes the study findings and recommended strategies and allows opportunity for comment and questions. City staff will work with the consultant team in the design of this meeting, which will likely include a presentation and break-out discussion groups. The consultant will create promotional and presentation materials for this meeting that can be used in a longer term staff-led roll out of the strategy and overall implementation.

### Selection Criteria

Any proposer submitting a proposal must satisfy the following minimum criteria. **Proposals which do not demonstrate compliance with the minimum criteria will not be further considered.**

The proposer and/or those employees of the proposer who will be assigned to this project shall provide the following:

1. A Master's degree in Planning, Public Policy, Economics, or a closely related field
2. A work portfolio demonstrating experience working on similar economic development strategies or plans.
3. A minimum of five (5) years of professional experience in transportation or similar planning.
4. Resumes are required for all project personnel.
5. Bidder's Qualifications and References Form, 2 pages
6. Non-Collusion Form, 1 page
7. Debarment Letter, 1 page
8. IRS W-9 Form, 1 page

**Comparative Evaluation Criteria - provide documentation demonstrating your compliance with each criterion or reference what page number within your technical proposal this documentation can be found. These criteria are listed in order of priority.**

The evaluation of each proposal for Economic Strategy Consulting Services will be based upon the "Comparative Evaluation Criteria" described in this section. The following scale will be used to rate each evaluation criterion, as well as to determine a composite rating of each proposal:

"Highly Advantageous"

"Advantageous"

"Not Advantageous"

"Unacceptable"

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An “Unacceptable” rating in any one of the criteria will eliminate a proposal from further consideration.

### EVALUATION CRITERIA

Proposals from contractors who meet or exceed the minimum criteria will be evaluated and rated on the basis of the following comparative criteria. The city reserves the right to ask any respondent to provide additional supporting documentation in order to verify its response.

Ratings of Highly Advantageous (HA); Advantageous (A); Not Advantageous (NA); or Unacceptable (U) will be given to each of the following criteria for each respondent. A composite rating will then be determined. A composite rating of Highly Advantageous or Advantageous may be assigned only if a proposal has received at least one such rating among the criteria listed below.

To the extent that an Evaluation Criterion requires the certification of fact, the proposer’s certification as to that fact shall be an adequate response provided, however, that on request the proposer shall provide to the City such evidence as the City may request to support that fact.

#### 1. Quality of Work Proposal

The proposal should include a sample scope of work addressing the tasks described above. The sample should clearly articulate the approach that the consultant proposes to use to meet the requirements of the program and should define the steps in the process, the roles of different members of the consultant team and an approximate timeframe for each part.

**Highly advantageous:** The project proposal demonstrates strong understanding of intent of the project and the needs of the City and presents an efficient and thorough process.

**Advantageous:** The project proposal demonstrates good understanding of the intent of the project and the needs of the City and presents an efficient process.

**Not Advantageous:** The project proposal demonstrates some understanding of the intent of the project and the needs of the City and presents a generally efficient process.

**Unacceptable:** The project proposal does not demonstrate understanding of the intent of the project and the needs of the City.

#### 2. Quality and Depth of Project Experience

Include with your proposal samples of at least two (2) similar projects the consultant has successfully completed, preferably for municipalities similar in size to Newton.

**Highly advantageous:** The samples demonstrate superior experience in providing services related to the City’s requirements. They demonstrate a wide depth of experience with similar projects (5 or more), and prior experience with municipally or privately funded not-to-exceed or fixed-fee contracts. Project work samples are of outstanding quality in content and technical presentation.

**Advantageous:** The samples demonstrate solid experience in providing services related to the City’s requirements. The project proposal demonstrates a good depth of experience with similar projects (3 to 5), and prior experience with municipally or privately funded not-to-



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exceed or fixed-fee contracts. Project work samples are of good quality in content and technical presentation.

**Not Advantageous:** The proposer has limited experience in providing services related to the City's requirements or with similar projects (less than 3), and prior experience with public or private, not-to-exceed or fixed fee contracts. Project work samples minimally meet current standards for content and technical presentation.

**Unacceptable:** Has not completed any projects similar in scope.

### 3. Qualifications of the Proposer Based on Submitted Resume(s)

**Highly advantageous:** The resume(s) demonstrate that the proposer has superior training, educational background and work experience appropriate to the project described herein and all key project personnel demonstrate professional experience well beyond the minimum requirements.

**Advantageous:** The resume(s) demonstrate that the proposer has adequate training, educational background and work experience appropriate to the project described herein and all key project personnel demonstrate professional experience that meets or somewhat exceeds the minimum requirements.

**Not Advantageous:** The resume(s) do not demonstrate that proposer has adequate training, educational background and work experience appropriate to the project described herein.

**Unacceptable:** The proposer did not provide any resumes or background information for project personnel.

### 4. Capacity for Innovation

**Highly Advantageous:** The project proposal demonstrates the proposer's capacity for generating innovative solutions and going beyond conventional economic development strategies. Examples show data and best practice driven ideas, which have been tracked after implementation to show success or the need for modification. The proposer is able to show a pattern of questioning past practices in a way that has led to demonstrably better outcomes.

**Advantageous:** The project proposal demonstrates that the proposer has some capacity for generating innovative or different solutions and going beyond conventional economic development strategies. Examples show incorporation of best practices even with less reliance on tailored data sets.

**Not Advantageous:** The project proposal demonstrates that the proposer has limited to no capacity for generating innovative solutions for economic development. Examples show a heavy reliance on conventional approaches and data.

**Unacceptable:** The project proposal demonstrates that the proposer provides stock solutions for economic development.

### 5. Completeness and Quality of Proposal Package

**Highly advantageous:** Response is complete, concise, informative, and highly detailed. Proposal reflects that proposer is able to perform in a superior manner acceptable to the City. Evaluation team is completely convinced about the proposer's ability to provide the level of services as

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required by the City. Proposal demonstrates excellent communication and documentation skills.

**Advantageous:** Response is complete, informative, and meets criteria for responsiveness. Evaluation team finds proposal reflects that proposer is able to perform in an adequate manner acceptable to the City. Proposal demonstrates a good level of communication and documentation skills.

**Not Advantageous:** Response lacks a comprehensive approach, but meets criteria for responsiveness. Evaluation team finds proposal reflects that proposer may be able to perform in a manner acceptable to the City. Communication and documentation skills appear only adequate.

**Unacceptable:** Proposal lacks project information regarding the proposers approach to the project.

### 6. Quality of the Presentation

All proposers meeting minimum criteria and rated as Highly Advantageous or Advantageous on 1-5 above will be invited to interview. Each proposer selected for an interview will be asked to make a maximum 20 minute presentation of the proposal.

**Highly advantageous:** Presentation is visually attractive, informative and demonstrates excellent communication skills. The presentation reflects that the proposer is able to perform in a superior manner acceptable to the City. Evaluation team is completely convinced about the proposer's ability to provide the level of services as required by the City.

**Advantageous:** Presentation is good, informative, and demonstrates acceptable communication skills. Evaluation team finds that the presentation reflects that proposer is able to perform in an adequate manner acceptable to the City.

**Not Advantageous:** Presentation lacks a comprehensive approach, but demonstrates adequate communications skills. Evaluation team finds that the presentation reflects that the proposer may be able to perform in a manner acceptable to the City.

**Unacceptable:** Presentation does not demonstrate adequate communication skills.

**7. References (3)** One member of the Evaluation Committee will check three (3) references of all proposers who meet the minimum criteria and have been selected for an interview, asking the same questions of each reference. The person who checks the references will prepare a report for the remaining evaluators.

**Highly advantageous:** All references contacted spoke favorably of the work performed by the proposer and would use them again for a similar project without hesitation.

**Advantageous:** The great majority of references spoke favorably of the work performed by the proposer and would use them again for a similar project without hesitation.

**Not Advantageous:** One reference stated that there had been significant difficulties with the proposer's ability to deliver the contracted services and deliverables.

**Unacceptable:** Proposal lacks references.

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*The selection process will include an evaluation procedure based on the criteria identified above. Finalists will be required to appear for an interview.*

**Sample Economic Development Strategy Milestone Chart**

<b>Task</b>	<b>Group</b>	<b>Time-Frame</b>
Initial Kick-Off/Scheduling Session	Internal Project Team	Following Contract Signing
Internal Team Check-Ins	Internal Project Team	Every Other Week Check-in
Opening General Session	General Public	30-45 days following contract
Meeting with Newton Economic Development Commission	Newton Economic Development Commission	30-60 days following contract
Meeting with City Council's Zoning and Planning Committee	Newton City Council	30-60 days following contract
Meeting with Newton- Needham Chamber of Commerce	Chamber of Commerce	45-75 days following contract
Business Focus Group Meeting #1	Select Businesses	45-75 days following contract
Business Focus Group Meeting #2	Select Businesses	45-75 days following contract
Baseline Analysis of Newton's Economic Development Picture	Newton Economic Development Commission	75-90 days following contract
Presentation of Newton's Strengths, Weaknesses, Opportunities and Threats	General Public Session	90-150 days following contract
Presentation of Draft Economic Development Strategy	City Council Zoning & Planning Committee and Newton Economic Development Commission	180-210 days following contract
Feedback on Draft Strategy	All	180-240 days following contract
Presentation of Final Economic Development Strategy	General Public Session	240-270 days following contract