



CITY OF SOMERVILLE, MASSACHUSETTS
Office of Strategic Planning & Community Development
KATJANA BALLANTYNE
MAYOR

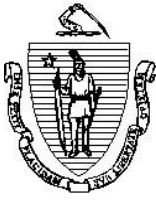
SARAH LEWIS
DIRECTOR OF PLANNING, PRESERVATION, & ZONING

Broadway Corridor Zoning Study Grant

On October 17th, 2022, the city was awarded a grant via the FY2023 Community One Stop for Growth. The Executive Office of Housing and Economic Development (EOHED), Department of Housing and Community Development (DHCD), and Massachusetts Development Finance Agency (MassDevelopment) provided \$75,000 from the Housing Choice Grant Program to study the zoning along the Broadway Corridor as a joint venture with the City of Medford.

Currently, approximately 36 parcels along Broadway between Ball Square and Magoun Square can only be developed with great difficulty and limited benefit because the parcels are split between the cities and are subject to conflicting zoning restrictions. The buildings currently on these parcels are almost uniformly single-story commercial buildings. Both cities understand that zoning will have to change on both sides of the municipal boundary to accommodate both cities' needs, concerns, and goals. It is anticipated that the new regulations will spur new buildings with mixed-income housing—the first new housing in the area in decades—as well as new retail and other commercial uses. But before change can begin, the two cities must understand each other; learn about each other's current codes relating to building massing, permitted building types, and recommended uses; and agree on a vision in which zoning code changes support shared benefits. This plan is intended to provide a shared urban design vision for the Broadway Corridor and recommend zoning and policy changes to streamline and coordinate regulation between Somerville and Medford.

Please find attached for your information the full scope of work and the award letter.



Commonwealth of Massachusetts

DEPARTMENT OF HOUSING &
COMMUNITY DEVELOPMENT

Charles D. Baker, Governor ♦ Karyn E. Polito Lt. Governor ♦ Jennifer D. Maddox, Undersecretary

October 17, 2022

The Honorable Katjana Ballantyne
Mayor, City of Somerville
93 Highland Avenue
Somerville, MA 02143

Dear Mayor Ballantyne:

RE: Somerville 0212 Application

Thank you for submitting this application to the FY2023 Community One Stop for Growth. The Executive Office of Housing and Economic Development (EOHED), Department of Housing and Community Development (DHCD), and Massachusetts Development Finance Agency (MassDevelopment) worked together to evaluate all eligible applications and recommended the most ready and highest-impact projects for a grant. This application from City of Somerville was reviewed by the program(s) that could best serve the project's funding needs.

On behalf of the Baker-Polito Administration, I am pleased to inform you that a grant in the amount of **\$75,000** from the **Housing Choice Grant Program** has been approved to support your project.

This award is contingent the execution of a grant contract between the City of Somerville and the Department of Housing and Community Development (DHCD) and the satisfaction of its special conditions and requirements. We will send the grant contract to the contact person identified in your application, as well as an invitation to an online training on October 25, 2022 at 11:00 a.m. related to grant administration and contract guidance to highlight contractual obligations. Please do not proceed with grant activities until the contract is fully executed. If you have any questions, please contact Chris Kluchman, FAICP, Deputy Director at Chris.Kluchman@mass.gov, and Filipe Zamborlini, Community Grants Coordinator at Filipe.Zamborlini@mass.gov.

Finally, please note that public announcement of this award is embargoed until the Administration has had the opportunity to formally announce it through a local event and/or media release. Please refrain from sharing or publicizing news about this award outside of your organization until it is officially announced.

Congratulations once again. We look forward to working with you to address the City of Somerville's housing and community development needs.

Sincerely,

A handwritten signature in cursive script that reads "Jennifer D. Maddox".

Jennifer D. Maddox
Undersecretary, DHCD

SOMERVILLE/MEDFORD BROADWAY CORRIDOR STUDY

The City of Somerville is seeking to procure a consultant to assist the cities of Somerville & Medford to produce an Area Plan for the Broadway corridor westward from Ball Square to the crest of Winter Hill. As compared to a neighborhood plan written for one of the major socio-geographic neighborhoods of Somerville, Area Plans focus on more specific topics or on a specific geography such as the core commercial area of a neighborhood, the area within walking distance to a transit station, the campus of an educational institution, or other special areas such as the Broadway corridor that knits the municipalities of Medford and Somerville together.

Transit-oriented infill development along Broadway between Ball Square and Magoun Square (0.5 miles) should have come hand in hand with the opening of two nearby MBTA Green Line Extension T stations opened in 2023, but the municipal boundary between Somerville and Medford splits most parcels along the corridor in half and forces property owners to navigate two sets of sometimes conflicting zoning regulations. This plan is intended to provide a shared urban design vision for the Broadway Corridor and recommend zoning and policy changes to streamline and coordinate regulation between Somerville and Medford.

BACKGROUND

Somerville, a city of roughly 80,000 residents on a little over four square miles, is located just north of Boston and Cambridge, and is experiencing significant change in recent years. With the extension of the MBTA Green Line, Somerville will soon have over 85% of its population within a ½ mile walk of a rapid transit rail station. As a result of this change, the City has developed the “Somerville Vision” Comprehensive Plan and subsequent update, Somerville Vision 2040, to implement a strategy for preserving Somerville’s traditionally residential neighborhoods, enhancing key corridors and squares, and transforming a 360 acre area of underutilized industrial land on the eastern fringe of the City. The Somerville Vision plan encourages adding new jobs to equal available jobs to our working age population and new a variety of housing units (in style and affordability) to meet the needs of our diverse residents.

In 2017, Somerville’s planning staff were involved in a study of the areas immediately surrounding the new Ball and Magoun/Lowell Street MBTA stations which students carried out in a masters-level urban planning course at MIT. The resulting “neighborhood plan” was a non-professional product, but it alerted the city that a neighborhood analysis was needed if the Green Line Extension progressed.

In December 2019, the City Council adopted a complete rewrite of the Somerville Zoning Ordinance as an in-house project to implement over 100 of the goals, policies, and actions outlined in Somerville Vision. Now we have this framework, subsequent neighborhood plans will use zoning overlay or special districts as a part of the implementation.

In 2021, with the Green Line Extension well underway, Somerville budgeted for an in-depth study of the area surrounding each T station that would use charrettes, focus groups, key informant interviews, and surveys. The beginning of the 2021 study uncovered the issues of split parcels (the municipal boundary between Somerville and Medford is about 140 feet from the public right-of-way) and competing zoning regulations between Somerville and Medford but COVID

precautions prevented the design charrettes from proceeding and created staffing issues within PPZ. PPZ could not fully undertake the work, even as a less complex scope.

In 2022, the new Ball Square MBTA Green Line Extension T station opened to serve Ball and Magoun Squares along Broadway - an important thoroughfare that runs the length of Somerville that we recently enhanced with bike and bus-only lanes. The T will bring foot traffic from Boston, Cambridge, Medford, and Somerville while relieving vehicular congestion and limited parking that have stagnated housing and business development in the Ball/Magoun corridor for decades.

Somerville's Planning, Preservation, & Zoning (PPZ) within Somerville's Office of Strategic Planning and Community Development (OSPCD) and Medford's Office of Planning, Development, and Sustainability (OPDS) are already frequent collaborators. Both are responsible for the long-range planning efforts of their respective cities, both of which are small, densely built, ethnically and economically diverse, and integral to a region that includes many other similar communities. They often coordinate their work with each other and with state agencies, such as the Massachusetts Environmental Policy Act Office and the Department of Housing and Community Development, to ensure that their plans are feasible and will benefit the larger region. The two divisions respect and trust each other. When Somerville pitched this project to Medford, Medford signed on immediately.

SCOPE OF WORK

Objective

Currently, approximately 36 parcels along Broadway between Ball Square and Magoun Square can only be developed with great difficulty and limited benefit because the parcels are split between Somerville and Medford and are subject to conflicting zoning restrictions. The buildings currently on these parcels are almost uniformly single-story commercial buildings. Both cities understand that zoning will have to change on both sides of the municipal boundary to accommodate both cities' needs, concerns, and goals. It is anticipated that the new regulations will spur new buildings with mixed-income housing—the first new housing in the area in decades—as well as new retail and other commercial uses. But before change can begin, the two cities must understand each other; learn about each other's current codes relating to building massing, permitted building types, and recommended uses; and agree on a vision in which zoning code changes support shared benefits. This project will create a plan that collects, organizes, and affirms their understanding, learning, and vision.

The PPZ division will lead this project. PPZ will receive active assistance from the City's Economic Development, Mobility, and Public Space & Urban Forestry divisions, as well as the Engineering. Since the study area for this project will span Somerville's boundary with Medford, the project management team will also include Medford's OPDS and Economic Development.

Operations

Somerville City Staff will be the Project Manager and Team Lead for the project and follow SomervilleByDesign process that has been successful in creating long-range plans across the city. SomervilleByDesign teams work differently than typical consulting projects. The plans were the result of an innovative, charrette based public engagement effort that developed a strategic vision, physical design plan, and set of zoning recommendations for each focus area through a

series of day and night meetings held over a compact period. The team is set up to answer the questions that the community wants and needs answered to create the specific plan. Therefore, the project scope is always changing to the differing need of each neighborhood, and outside consultants are asked to participate only where their individual expertise is needed. As a result, consultants focus on completing the parts of the plan related to their area of expertise as a member of the SomervilleByDesign project team and contributing written and graphic materials for the final plan.

A typical SomervilleBy Design planning process includes multiple steps with various feedback loops. It takes the 'dynamic planning process' created by the National Charrette Institute but adds more time in between events for analysis and feedback. As a result, it is uniquely suited to providing implementable planning and design results in a relatively short time frame with extensive community input. Most importantly, the community drives the planning process, by identifying the questions that need to be answered to create a final plan that reflects broad community consensus.

Public interactions will be hybrid. Somerville and Medford value in-person interactions but recognize that remote access makes participation possible for people with health, time and transportation issues. In-person activities will take place at ADA-accessible sites in Somerville and Medford, with simultaneous translation in Spanish, Portuguese, Haitian Creole, Nepali, and ASL as needed. Remote components will be facilitated and offer simultaneous translation as needed.

Study Area



The project study area is from the intersection of Broadway and Main Street at the edge of the Winter Hill neighborhood westward to the intersection of Broadway and Pearson Road for a width of approximately 300' on either side of the Broadway Street center line.

Process

This project is expected to have five components.

PHASE 1 – ORGANIZING

The City Staff will identify stakeholders and prepare a Public Outreach Plan, which will include one-on-one interviews with stakeholders from Somerville and Medford identified in the Plan. They will use this and additional research to develop an Existing Conditions Analysis that shows the context, opportunities, and challenges for the Ball/Magoun corridor and immediate neighborhood. Somerville and Medford planning staff will then establish the final project scope and onboard any consultants. Somerville and Medford planners and consultants (“The Team”) will then complete a site walk of the study area and a kick-off workshop.

Anticipated Community Outreach: Distribution of marketing materials about outreach, community meetings and interviews, and kick-off workshop.

Anticipated Deliverables: Public Outreach Plan, Existing Conditions Analysis plan diagrams, photographs, and summary of public input/comments/concerns.

PHASE 2 - VISIONING

The Team will create multilingual marketing materials to communicate the project’s objectives, process, and key dates to the public via Somerville and Medford’s websites and social media. The Team will organize and hold a multi-day Design Charrette containing at least two types of feedback loops for public input. Following the Charrette, The Team will promote a survey to the Phase I community groups and the general public to create a third feedback loop. This will likely be done online via Somerville’s SomerVoice platform allowing The Team to gather further community input on topics discussed during Phase I and reach people unable to participate in the Charrette.

Anticipated Community Outreach: Distribution of marketing materials, additional interviews with community groups and stakeholders, digital/online survey

Anticipated Deliverables: Vision and Design Summary including the goals and objects, massing studies in SketchUp showing possible scenarios, the progress presentation from end of Design Charrette, and a summary of the survey.

PHASE 3 - PLANNING & DESIGN

Each idea in the Vision and Design Summary will now be vetted by each city for logistics, feasibility, and capacity to unite the Somerville and Medford economic development goals. Both cities will coordinate with its Economic Development, Public Space & Urban Forestry, Mobility, and Engineering divisions to ensure that each idea is aligned with current and anticipated improvement projects and infrastructure capacity. The resulting Draft Vision Plan will be presented at a Public Open House. Attendees will likely be able to comment via dot surveys, sticky-note boards, or other means; additional comments will be accepted after the Open House via SomerVoice and emails to a centralized location.

Anticipated Community Outreach: In-person Open House style meeting, and online comments.

Anticipated Deliverables: Draft Vision Plan as a PowerPoint presentation and as boards for the Open House, and any technical documentation as may be required from other city divisions.

PHASE 4 - FINALIZATION

The Team will add feedback from the Open House and other public comments to the Draft Vision Plan and publish it as a draft. The consultants will conduct follow-up meetings with any property and business owners who would prefer not to speak in a group and hold focus groups with the

Phase 1 community groups. After this final check and any last-minute changes, Somerville and Medford planning staff, with support from the consultants, will begin the intense work of coordinating their zoning to address the dual community needs and goals in the Draft Vision Plan. The resulting Vision Plan will be published online and presented in a public meeting.

Anticipated Community Outreach: Follow-up meetings with residents and business owners, and a public presentation.

Anticipated Deliverables: Fully packaged InDesign files (including all imagery as separate high-resolution JPG files) of the Vision Plan and a print-ready PDF file, along with a PowerPoint presentation of editable slides.

PHASE 5 – ADOPTION OF PLAN

Planning staff in Somerville and Medford will lead the process of obtaining Vision Plan approval from their respective Planning Boards. Once adopted, amendments to each city's zoning ordinance will be proposed to implement the goals of the Vision Plan. It is expected that zoning adoption by the City Councils will take place after the grant period is complete. In Somerville, the City Council's Land Use Committee will oversee and vote on the zoning code amendments before the amendments go for a final vote by the full Council.

Anticipated Community Outreach: Planning Board, Council Committee, and City Council meetings

Anticipated Deliverables: Final Vision Plan, and Recommended Zoning Amendments.

Schedule

Consultant hired – May 2023

Internal Kick-off & Public Outreach Plan – June 2023

Existing Conditions Analysis – March-June 2023

Public Walking Tour & Input Session – June 2023

Design Charrette (live & virtual public meeting) – September 2023

Draft Plan – October 2023

Public Review & Comment – October 2023

Final Documentation – November-December 2023

Public Presentation – January 2024

Finalization – January-February 2024

Adoption – February-May 2024

Grant completion – June 2024

PROJECT REQUIREMENTS

- All project files will be stored on a shared drive for access by all team members.
- Meeting notes from all public meetings.
- Mapping will be completed as GIS and/or CAD files.
- All PowerPoint presentations.
- All SketchUp files.
- Complete packaged InDesign files of Draft Vision Plan and Final Vision Plan.
- Native format files will be shared as well as final presentation graphics. (For example, separate image files of all graphics as well as the layout files and final PDF files.)
- All files will be high-resolution digital files usable by the City with no attribution.