

## *Preparing for Transit in the 21<sup>st</sup> Century*

Somerville, Massachusetts (DUNS #76621572)

### **RATING FACTOR #1** – Purpose and Outcomes

#### **Introduction and History**

After decades of sustained community activism, Somerville is on the verge of having extensive rapid transit access reintroduced into its urban fabric. As a result of the MBTA Green Line Extension and Orange Line Station at Assembly Square, six new stations will be built in Somerville by 2015 (see Attachment 1). Today, only 15% of Somerville's residents have ready access to rapid transit, but with the completion of these projects, 85% of residents will be within ½ mile of transit. Receipt of a Community Challenge Planning Grant will allow Somerville to prepare for these transformative events and successfully capture the economic, environmental, and health benefits of this transit investment while providing adequate affordable housing and preserving the community's distinctive character. Somerville proposes to use the Community Challenge Planning Grant resources for five major initiatives – completion of the citywide comprehensive plan, station area planning and implementation, re-write of the Somerville Zoning Ordinance, permit streamlining, and creation of a land bank for affordable housing. Grant funding will also be used to evaluate performance on the five initiatives.

Throughout its history, Somerville's prosperity has been inextricably linked with rail. In 1775, just before the American Revolution, Somerville contained approximately thirty houses and 250 residents. Construction of the Boston & Lowell railroad, which began in 1835, and extension of the Charlestown Branch rail line (predecessor to the Fitchburg line) in 1841 opened up large portions of Somerville to new development. By 1850, eight years after Somerville separated from Charlestown and became an independent town, the population had increased 14 times to 3,540 residents. Introduction of new streetcar lines and rail stations contributed to Somerville's greatest period of population growth and between 1870 and 1900, the population grew from under 15,000 to over 60,000. In fact, construction activity between 1890 and 1900 was so significant that approximately 50% of all residential structures in Somerville today were built during this time. By 1900, Somerville was home to eight passenger rail stations and nearly 13 miles of streetcar lines.

Industrial activity and employment proximate to the rail lines grew exponentially during this time. The industrial revolution arrived in Somerville just prior to its incorporation as a city in 1872 and it quickly became home to a variety of industries, the most prominent including brick-making and meatpacking. By the turn of the century, Somerville contained twelve brick making yards producing over 24 million bricks a

**Figure 1: Rail Transit in Somerville, MA**



year, and by 1898, Somerville was reportedly the third largest meat-packing center in the United States.

Rail transit directly influenced Somerville's built environment. First, the City's tight knit streets, small parcels with two to three units each, and urban neighborhoods were made possible because residents walked to train or trolley stations in their immediate neighborhood. Commercial areas such as Davis Square, Teele Square, and Winter Hill were created to meet the shopping needs of nearby households and Winter Hill, in particular, focused on the trolley traffic that moved through its center. Secondly, light and heavy industrial businesses located along the Fitchburg and Lowell rail lines. Boynton Yards, parts of Union Square, and the Inner Belt all had direct or nearby access to rail and the echoes of these former businesses remain today.

Just as Somerville's growth and prosperity was directly related to the construction of rail, the community's decline can be attributed, at least in part, to the removal of that rail. In 1926 the Ford Motor Company opened a plant in what is now Assembly Square; this proved a bellwether of the postwar period which saw the ascent of the private automobile. By the late 1940's, passenger rail service along the Fitchburg and Lowell lines had declined and architecturally significant stations such as Gilman Square had been removed. By 1958, passenger service in Somerville was discontinued altogether. Absent access to rail stations, the 9.5 miles of railroad right-of-way within Somerville's borders became barriers between neighborhoods, impediments to new development, and concentration points for diesel exhaust. They have constrained opportunity for decades, as opposed to expanding opportunity.

Infrastructure decisions made in favor of the automobile have not been kind to Somerville. The Brickbottom neighborhood was razed in 1950 to prepare for the proposed Inner Belt Expressway and the construction of Interstate 93 resulted in the demolition of homes in the States neighborhood during the 1960's. McGrath Highway (Route 28) was transformed from a component of Boston's emerald necklace park system into a 6+ lane throughway dividing East Somerville from the rest of the city. Further, property owners aggressively paved substantial portions of their properties to make room for vehicle parking – a practice that continues today to the detriment of the local environment. Data about the deleterious impacts air quality near highways has on public health is growing, as can be seen in a recent Community Assessment of Freeway Exposure and Health (CAFEH) study that found that households in Somerville's Mystic Housing units along I-93 were exposed to Ultra Fine Particles (UFPs) which have been found to increase the blood markers of inflammation that are associated with cardiovascular diseases.

In the decades after WWI, Somerville's population experienced dramatic declines as families fled the urban centers for the suburbs. From 1950 to 1990, Somerville's population decreased from 102,351 to 76,210 (-25%) while the number of residents under age 18 fell from 29,920 in 1960 to 11,495 in 2000 (-62%). Like other U.S. cities, employment also shifted dramatically resulting from the loss of heavy and light industry and partial replacement with service and retail dominated businesses. Somerville today only contains 0.47 jobs per resident in the workforce, despite the fact that the local work force is very well educated. Manufacturing jobs, in particular, fell from over 6,000 in 1920 to only 1,175 in 2007. While the environmental impacts of the former manufacturing uses are not desirable, the skilled wage jobs that were lost have not been replaced by cleaner industries.

Not surprising, the majority of employed residents exit Somerville each day to go to work (less than 15% of residents work locally) and daytime activity in the city's commercial squares is lower than desired. In recent years, commute times that were already high have continued to increase. Specifically, 30% of residents experienced a daily commute of longer than 35 minutes in 2007; a 50% increase from 1990 when only 20% of residents experienced such significant commutes. Encouragingly, with only one rapid transit station within Somerville borders, 33% of residents use transit to get to work. This is comparable to nearby Brookline which contains many more stations.

Due to the limited business activity in Somerville, the municipal tax base is overly reliant on residential taxes and 85% of property taxes in 2009 were generated by residential properties. This situation negatively affects the services the City can offer and impacts housing affordability as property owners must make decisions about how best to pay their annual tax burden whether they live on site or pass through the cost to their

tenants.

Despite its history, progress is being made. Construction of the Davis Square MBTA Red Line Station in 1984 and adjacent Community Path in 1985 has transformed that commercial center and surrounding neighborhood from an unsightly dilapidated area to a dynamic area to live and work. The City has invested in 18 new or renovated parks and has seen the construction of 288 units of affordable housing in the past 6 years. That said, lessons are to be learned from Davis Square which are relevant to the upcoming transit stations. First, the price of housing sales in the Davis Square area has increased 76% between 2000 and 2009, as compared to a citywide change of 18%, and individuals who grew up in the neighborhood cannot afford to remain. Further, the commercial development that has occurred has been ad hoc in nature and evidence exists that businesses that started in Davis Square have been unable to expand locally and have left Somerville to do so.

### **Return to Transit**

As a result of strong community voices and litigation by the Conservation Law Foundation, the Commonwealth of Massachusetts is legally obligated to build the Green Line Extension. Very recently, a certificate from the Secretary of Executive Office of Energy & Environmental Affairs found that local environmental review was complete. Federal environmental review is nearly complete as the Federal Transit Administration (FTA) has asked for continued evaluation of design options for the Washington Street/Brickbottom Station, in response to community and City comment. The project stands ready to move into preliminary engineering and, two weeks ago, MassDOT convened the first meeting of the Design Working Group, a group which consists of community members from the three cities affected by the Green Line Extension – Cambridge, Somerville, and Medford.

The City and MassDOT are actively making progress on the Community Path Extension (CPE) and Somerville is submitting a TIGER II grant application to fund construction of this shared use path. The CPE will run within the same right-of-way as the Green Line Extension and will provide improved access to the new stations at the same time contribute to a 13 mile bicycle and pedestrian network that will link the cities and towns of Bedford, Arlington, Cambridge and Somerville and connect the proposed 104 mile East-West Corridor nearly to downtown Boston.

Work on the Orange Line Station at Assembly Square is ongoing and 75% design has been submitted to MassDOT and the FTA. The new Orange Line Station will make the Assembly Row master planned development which will consist of 2,100 housing units, 1.7 million s.f. of office, and 852,000 s.f. of retail development including a hotel and cinema possible. A 5 acre waterfront park and a shared use path are also planned with this development. However, even with this extensive project, substantial additional acreage in Assembly Square remains to be planned and built.

### **Planning for the Future**

In light of the new transit opportunities, the City of Somerville has begun planning for its future by preparing a comprehensive plan, establishing land use regulations and permit processes for new development around these transit stations while at the same time evaluating infrastructure needs, designing new roadways and systems, and identifying funding options for the millions of dollars of needed investment. Catalyst sites for commercial and residential development are being identified and, as resources become available, the City is seeking to acquire these properties. Permit streamlining efforts are underway to improve customer service and reduce processing times for new projects.

Receipt of a Community Challenge Planning Grant will exponentially expedite the efforts that are underway. Despite the City's limited resources, the Mayor and Board of Aldermen have allocated some resources for planning, but given the short timeline before the transit stations open, supplemental resources are greatly needed. Ongoing activities that directly align with the grant include:

- o Comprehensive Plan – in 2009, Somerville began the process of preparing a comprehensive plan. An Open House event was held in April and four technical reports were completed and presented at a

- series of community meeting during the summer. A 60 member Steering Committee was convened in September and has met one to two times per month ever since. Last winter a series of visioning sessions were attended by approximately 250 community members. To date, the Committee has prepared a draft vision statement and draft goals; they began work on draft polices and action steps recently and will work on a draft land use map throughout the fall. Activities engaging the community will take place this fall and extend into 2011 as the draft plan is reviewed and prepared for adoption by the Planning Board.
- Open Space and Recreation Plan – under Massachusetts law, municipalities are required to have an Open Space and Recreation Plan. Somerville completed its most recent update in February 2009 at which time it was adopted by the Board of Aldermen.
  - Area Plan for Inner Belt/Brickbottom Districts – utilizing an earmark, ARRA funds, and CDBG funds, the City is in the process of securing a consulting team to prepare an area plan and infrastructure study for this 200+ acre area that will soon be served by a Green Line Station. Development of this area is recognized as vital to the long term economic health of the city, but the area suffers from lack of access due to poorly planned transportation infrastructure investments made by the Commonwealth. The planning process will extend through 2011 into early 2012.
  - Union Square Transportation Study – in 2009, the City began work with a consultant on a transportation and infrastructure study for Union Square. A preferred alternative has been developed that increases open space while significantly reducing traffic congestion in this area that will soon be served by a new Green Line Station. Community outreach continues to ensure that the alternative receives strong support. The project will proceed to 25% design in 2011; no additional funding is presently available to continue the project beyond 25% design.
  - Boynton Yards Transportation Study – the City is in the process of hiring a consultant to perform a transportation and infrastructure study of this 43 acre area that will be adjacent to the new Union Square Green Line Station. This area is particularly complex because the existing street network is inadequate to support potential development. Preparation of a concept plan will extend into 2011; no funding is available to continue the project beyond concept plan.
  - Citywide rezoning – a citywide rezoning will begin as the comprehensive plan process is completing and will be one of the most significant action steps recommended in the plan.
  - Rezoning of Union Square/Boynton Yards and Broadway in East Somerville – In April 2009, the Board of Aldermen adopted Somerville’s first Transit Oriented Development (TOD) Districts with increased floor area ratios and dramatically decreased parking requirements. At the same time, they created a new Corridor Commercial District to be mapped on arterial streets with significant bus transit. These districts were mapped in Union Square and Boynton Yards in 2009 and along a 0.5 mile stretch of Broadway in East Somerville in 2010.
  - Streamlining of zoning processes – this fall, the City will be considering a zoning amendment to eliminate dual review of projects under Zoning Board of Appeals (ZBA) jurisdiction. At present, all ZBA cases must also be heard by the Planning Board, a process which has caused community confusion in that residents do not know which meeting to attend and unnecessarily extended review periods for applicants.
  - Electronic permitting system – in July, Somerville implemented a new MUNIS financial system which replaced the City’s antiquated old system. One module that will be implemented in 2011 is for permitting, licensing, and inspections. At present, no permitting or licensing processes are in an automated system and health code inspections are recorded in a 30+ year old software system. MUNIS will allow plan reviews to review projects at the same time and will dramatically improve record keeping and enforcement. In the past year, paper permit records in the zoning and inspectional services divisions were scanned so that they may be uploaded into MUNIS when ready.
  - Energy stretch code – legislation adopting the Massachusetts Energy Stretch Code has been submitted to the Board of Aldermen and is presently under review.
  - Transportation Modeling and Bus Planning – through collaboration with MassDOT, Somerville is receiving technical support from MIT relative to the extensions of the Green Line and Community

- Path. Specifically, MIT is evaluating bus routes for possible modification after stations open and is preparing a citywide computer model that will be used to analyze transportation impacts stemming from comprehensive plan alternatives. These alternatives will be prepared in fall 2010 and analysis will occur in 2011.
- Community Path extension – the City is seeking TIGER II funds to construct a sizeable component of the path extension. In addition, the City is using an earmark to secure consulting services to design a portion of the path between Cedar and Central Streets; the same earmark will be used for construction. MassDOT has committed to completing 100% design from Central Street to Inner Belt Road and constructing retaining walls that will be shared with the Green Line.
  - DIF District – a District Improvement Financing (DIF) plan is being drafted that will allow the City to collect property tax increment for an area identified as having significant development potential. The area includes Somerville Avenue, Union Square, Boynton Yards, Inner Belt and Brickbottom and tax increment funding will be used for infrastructure design and construction, storefront and historic façade grants, land acquisition and other activities. The plan will be submitted to the Board of Aldermen in September with adoption anticipated in October.
  - Inclusionary housing – the City’s inclusionary housing ordinance was adopted in 1990 and requires that 12.5% of new developments of a certain size provide units to be made available to low and moderate income buyers or owners. As part of the Union Square/Boynton Yards rezoning, the requirement was increased to 15% and 17.5% in certain TODs. Comprehensive analysis of the ordinance will take place in conjunction with the citywide rezoning.
  - Linkage fee – the City’s linkage fee ordinance was adopted in 1990 and requires that commercial projects that are new construction or substantial renovation and are in excess of 30,000 s.f. pay into the Affordable Housing Trust Fund. Comprehensive analysis of the ordinance will take place in conjunction with the citywide rezoning.
  - Shape Up Somerville – is an internationally-recognized, city-wide campaign to increase daily physical activity and healthy eating through programming, physical infrastructure improvements, and policy work.
  - Safe Start – a partner to Shape Up Somerville, Safe Start is geared toward identifying needed improvements to sidewalks, roadways, and school sites to make a child’s walk to school safer and more convenient, while improving conditions for all pedestrians.
  - HUD Health Homes Grant – Somerville recently received a grant to study health impacts of installing air quality management systems in affordable housing units adjacent to I-93. This is a collaboration with Tufts University and the Somerville Transit Equity Partnership (STEP)

The vision of Somerville’s future is becoming increasingly clear. In fall 2009/winter 2010, the City held a series of five visioning sessions to solicit community comment into their shared future. The more than 250 attendees discussed what they wanted to conserve in their community and what opportunities existed, among other questions. The resulting data was converted into a “wordle” that outlined the community’s abiding interest in diversity, green space and affordability. This visual depiction was transformed into a formal Vision Statement by the Comprehensive Plan Steering Committee which clearly focused on the priorities of diversity, community, economic base, sustainability, accessibility and innovation (see Attachment 2).

Despite all of the accomplishments to date, serious obstacles remain. First, valid concerns exist about the possibility of gentrification and the community’s ability to maintain its distinctive character. Second, Somerville’s old infrastructure and small parcel size may prevent economic opportunity from being realized. For example, at least 3/4<sup>th</sup> of Somerville’s documented sanitary sewer lines were built before 1900. Some have been upgraded, but most remain as 100+ year old combined sewer and sanitary systems. This is but one infrastructure system in need of upgrade. With regard to parcel size, with a few rare exceptions, Somerville’s parcels are very small. In fact, the median parcel size citywide is 3,583 s.f. and in the opportunity areas of Inner Belt, Brickbottom, and Boynton Yards, the median parcel is only 14,000 s.f. Given these factors, no master developer will likely be found and Somerville is planning to perform pre-

development functions to improve infrastructure systems and their capacity.

### **Livability Principles and Possible Outcomes**

Through receipt of a Community Challenge Planning Grant, Somerville proposes to have its comprehensive plan adopted by the Board of Aldermen; engage in area planning around future transit stations; initiate and complete a re-write of the local zoning ordinance; engage in permit streamlining; and create a land bank for affordable housing. Through other means, the City will complete its assessment of infrastructure demand and will design and construct the needed systems while securing other parcels for catalyst economic development. Everything Somerville is doing through its own means and through the proposed Community Challenge Planning Grant aligns with the Six Livability Principles and all six possible outcomes outlined by DOT, HUD and EPA.

Somerville's *Preparing for Transit in the 21<sup>st</sup> Century* project aligns with all six Livability Principles in multiple ways, including:

- Provide more transportation choices – the provision of transportation options is a key principle in all of Somerville's efforts whether they be advocating for increased transit, evaluating bus routes, or securing funding for the Community Path Extension. As part of the comprehensive planning process, the Transportation and Infrastructure Subcommittee is identifying additional goals, policies and action steps related to increasing transportation choice. These will have zoning implications, such as bicycle parking requirements and pedestrian friendly design guidelines, and the need to ensure that station design is conducive to pedestrians and cyclists. Draft comprehensive plan goals related to transportation choice are found in Attachment 3.
- Promote equitable, affordable housing – Somerville has made progress in creating new affordable housing, but much affordable housing remains in privately owned units that offer reasonable rents. With the upcoming transit, potential exists for price escalation around stations. The Housing Subcommittee of the Comprehensive Plan Steering Committee is preparing policies and actions to support the preservation and creation of affordable housing. Preparing a new zoning ordinance with reasonable parking requirements that do not penalize larger, family-sized units is one step, as is strengthening the inclusionary housing and linkage ordinances. The proposed land bank will provide the City with opportunity to secure parcels proximate to transit that can be used for affordable housing construction and sustainable development. Draft comprehensive plan goals related to housing are found in Attachment 3.
- Enhance economic competitiveness – Somerville is taking strategic steps to increase economic opportunity as can be seen in the comprehensive plan, area plans, infrastructure planning, and zoning re-write. Community consensus is that there is need for significant commercial development in opportunity areas in Somerville. Area planning and zoning revisions will identify locations for commercial development that will increase the City's tax base while also providing high paying jobs. Estimates are that the Inner Belt/Brickbottom area alone can house 7 to 10 million additional square feet of development while Boynton Yards and the remainder of Assembly Square will add several million more. What is particularly challenging, and will be subject of the area plans and rezoning, is to identify the specific land uses most suited for each area and fund the associated infrastructure upgrades necessary to support the preferred level of development. Draft comprehensive plan goals related to Corridors, Commercial Squares, and Growth Districts are in Attachment 3.
- Support existing communities – enclosed fully within the core of the Boston metropolitan area, Somerville is the densest community in New England. All of the City's initiatives align with the principle of enhancing inner core cities through transit investment, mixed use development, and reutilization of property. At the same time, however, that Somerville expands its capacity for additional residential and commercial development, the City must be sensitive to the need for increased open space. As present, Somerville only contains 0.2 acres of open space per resident, a ratio that is far lower than other urban communities.
- Coordinate policies and leverage investment – in preparing its first comprehensive plan, Somerville

intends to establish its priorities for operating and capital spending in collaboration with local organizations and community members and include performance measures that will be tracked annually and published so that community can hold the City accountable for implementation. A detailed Implementation Element will be prepared that will include specific timelines for the actions included in the comprehensive plan.

- Value communities and neighborhoods – Somerville’s unique character is cherished by the community and the Neighborhoods Subcommittee of the comprehensive plan is charged with preparing policies and actions regarding how to maintain neighborhood character while allowing appropriate infill development. These policies will be translated into ordinance language as part of the zoning re-write. One of the tasks with the rezoning is to complete a study of the Residence A (RA) and Residence B (RB) zones, where most two- and three-family homes are located, and describe how the current zoning does not protect these areas. It will also analyze how form-based zoning might be a more appropriate tool for neighborhood preservation. The Neighborhoods Subcommittee of the comprehensive plan is also addressing environmental quality and commercial businesses in neighborhoods as seen in Attachment 3.

Many significant outcomes will occur as a result of Somerville’s *Preparing for Transit in the 21<sup>st</sup> Century* project. However, it should be recognized that these outcomes are long term in nature, as is any type of community transformation. Somerville commits, as required, to track at least two of the following proposed outcomes and report on these during the three year period of performance:

- Travel Changes – implementing the comprehensive plan, adding more bicycle lanes, and ensuring that the new transit stations are built will shift mode share away from the private vehicle. However, this will take some time to complete. *Outcome measure:* significant change to travel patterns will likely occur outside of the three years of the grant, after 2015 when the Green Line Extension and Orange Line Station are built, so no outcome measure is proposed.
- Housing Affordability – as part of the citywide rezoning, in key opportunity areas proximate to transit, the City will increase the percentage of units to be dedicated to affordable housing, thereby expanding the inventory of affordable housing and reducing household costs for transportation at the same time. *Outcome measure:* increase land area mapped with zones that require at least 15% inclusionary housing by at least 30 acres as part of rewriting the Somerville Zoning Ordinance by the end of 2012.
- Economic Development – as part of the citywide rezoning, the City will increase floor area ratios in key opportunity areas and reduce parking requirements in proximity to transit. *Outcome measure:* increase land area mapped with zones allowing 3.0 FAR or greater by at least 30 acres as part of rewriting the Somerville Zoning Ordinance by the end of 2012.
- Improvement to the state of repair of infrastructure – as noted above, the City is comprehensively analyzing infrastructure needs through three different studies. Preparation of a plan for tax increment financing is underway and the draft plan will be submitted to the Board of Aldermen in September. *Outcome measure:* significant infrastructure investment outside of Assembly Square, Somerville Avenue, and Beacon Street which are already funded is unlikely until 2014 when the first DIF bond will be issued. This is outside the 3 year grant period so no outcome measure is proposed.
- Environmental Benefits – as part of the citywide rezoning, if not before, the City will adopt ordinances to: a) restrict increases in impervious surface; b) support green roofs and other technology that reduce storm water run off; and c) incentivize the removal of impervious surface. The City will also revise its zoning to expand the land area in which green building incentives are located. This will allow new development to occur while minimizing its environmental imprint. *Outcome measure:* increase land area mapped with green building incentive by at least 30 acres as part of rewriting the Somerville Zoning Ordinance by the end of 2012.
- Increased participation – Somerville already outreaches extensively to residents and businesses across the city as evidenced by participation in the visioning and the Comprehensive Plan Steering Committee. Trends report information sharing sessions were held in Spanish and Haitian Creole in summer 2009. In addition, the City’s ResiStat program has over 5,000 email addresses for people interested in updates

on City activities. During outreach for Census 2010, a strong network of service providers, faith-based organizations, and others was developed. Both networks are also for public announcements and information sharing. *Outcome measure:* ensure that at least 300 individuals participate in the process of adopting the Comprehensive Plan with a focus on populations traditionally marginalized in the public planning process. The comprehensive plan shall be passed by the end of 2011.

## **RATING FACTOR #2** – Work Plan

### **Work Plan**

In *Preparing for Transit in the 21<sup>st</sup> Century*, Somerville proposes to use the Community Challenge Planning Grant for five major initiatives – completion of the citywide comprehensive plan, station area planning and implementation, complete re-write of the Somerville Zoning Ordinance, permit streamlining, and creation of a land bank for affordable housing. Funding will also be used to evaluate performance on the four initiatives. The required 20% match will be provided through municipal resources with commitments from grant partners providing well in excess of the required 20% match. (See Attachment 4 for a detailed project management plan.)

### **Proposed Activities and Use of Funds**

- **Comprehensive Plan Outreach to facilitate adoption by Board of Aldermen (\$20,000)** - As noted above, the City has been working for more than one to prepare a citywide comprehensive plan. This plan will fully comply with Massachusetts state law and will have elements including but not limited to housing, economic development, and circulation. Pursuant to state law, only the City's Planning Board is required to adopt the plan, however, given the transformative nature of this plan and the desire for local spending to align with plan priorities, adoption by the Board of Aldermen (BOA), the local legislative body, is imperative to its success. Grant resources in the amount of \$20,000 are requested to enhance public participation, prepare high quality promotional materials, and make available additional copies of the draft plan sufficient to garner additional community support for the plan.

Public participation to date has been significant, but the City's goal is always to involve more community members. The City proposes to hold at least 4 meetings in different parts of Somerville to solicit public comment on the draft vision, goals, policies, actions and land use map. Community partners (see Rating Factor #3) will actively outreach to their communities. Flyers and promotional materials will be translated into Spanish, Portuguese, and Haitian Creole as is City practice and will be posted in businesses and faith-based institutions that cater to these communities. The Somerville Housing Authority will assist with outreach to its 15,000 families and the Council on Aging will facilitate participation by seniors at senior-specific meetings or at the broader community meetings.

Specific expenditures could include translation services, duplication costs for flyers and possible bus shelter posters for community outreach, printing costs for copies of the plan, as well as any additional technical analyses needed by the BOA. Transportation modeling is already a component of an existing agreement with Massachusetts Institute of Technology (MIT), but the BOA may request additional analysis of the plan's assumptions and findings.

- **Planning around New Transit Stations (\$215,000)** - While the citywide comprehensive plan will address preferred land uses around future transit stations, such a plan is only a small component of the effort needed to produce compatible, sustainable development around each station. With Community Challenge Planning Grant resources, Somerville proposes to hire a full time Senior Planner for 36 months (\$54,207 plus fringe per year) to engage in detailed planning around stations including, but not limited to, contributing to the citywide rezoning effort as it relates to the station areas, management of infrastructure studies and engineering design, securing grant resources for infrastructure and environmental remediation, and facilitating catalyst development. For example, the City owns a 1.1 acre parcel immediately adjacent to the future Gilman Square Station which presently houses a vacant, dilapidated building. The Station Area Planner will be responsible for working with zoning staff and the community to identify the appropriate



zoning designation for the site, preparing pro forma analyses for various development alternatives, and managing the disposition process for the property to identify the developer that will most closely meet the City's vision for the site. The Station Area Planner will work with MassDOT and the City's Transportation & Infrastructure Division to ensure that station design, including ingress, bicycle parking, drop off, etc., melds well with the land use plan for the area. The cost estimate above also includes acquisition of a personal computer for the planner position.

- **Preparation of new citywide Zoning Ordinance (\$185,000)** - The latest substantial overhaul of Somerville Zoning Ordinance took place in 1989<sup>1</sup> at a time when transit oriented development and sustainable development were not conceived as relevant to Somerville. As a result, the existing ordinance contains suburban parking requirements, fails to adequately regulate impervious surface, and contains a mix of land uses that are not in keeping with current community desires. Further, the floor area ratios for parcels around future transit stations are lower than is appropriate in an urban, transit-oriented city because in 1989 the reintroduction of six transit stations into Somerville was but a dream.

In addition, a particularly challenging aspect of the current zoning ordinance is that upwards of 97% of properties in the primary residential zones are non-conforming. At the time of adoption, making properties non-conforming was seen as a means to scrutinize proposed projects through a special permit or variance process so that neighborhood character could be preserved. In actuality, it has contributed to inconsistency in design quality and decision making. Today, other tools such as form based codes have been developed that to preserve neighborhood character while allowing compatible development to occur.

One positive aspect of the zoning ordinance is that it contains an inclusionary housing provision and a linkage fee. However, these ordinances were adopted in 1990 and warrant reevaluation in light of potential for price escalation after the reintroduction of transit. In the recently adopted Union Square rezoning, the inclusionary housing percentage was increased in the transit oriented districts to ensure a mix of incomes would remain in these zones, but this is only one means that a zoning ordinance can help preserve or promote affordable housing. Re-writing the Somerville Zoning Ordinance through funding of the Community Challenge Planning Grant will provide an opportunity to identify additional regulatory means or incentives to support affordable housing.

Somerville proposes to use the grant funding to hire one full time Senior Planner for 24 months (\$54,207 plus fringe per year) to draft and oversee adoption of a new zoning ordinance in collaboration with a community steering committee and other City staff. The City especially seeks to evaluate whether form-based codes or other modern zoning tools will be useful in either the existing neighborhoods or opportunity areas, or both. Funding is also requested to secure outside legal services and technical services (\$40,000) to evaluate the draft ordinance, and ensure it is internally consistent and in compliance with applicable state and federal laws. The cost estimate above also includes acquisition of a personal computer for the planner position.

- **Permit Streamlining (\$43,000)** - One key mechanism to accelerate development is to streamline permit processes. Citywide rezoning which will not only determine what types of uses require special permit, but will address the zoning permitting process. However, building permits, inspections, and code enforcement, affect even more properties than the special permit process does. In 2010, Somerville secured outside consulting services to perform a management study of the City's building department, known as Inspectional Services Division (ISD) in Massachusetts. The report will be completed in October and contain a host of recommendations relative to training, technology, procedures, etc. Somerville proposes to hire an ISD Operations Manager for 6 months (\$32,000 plus fringe for 6 months) to manage implementation of the organizational study. Responsibilities will include overseeing implementation of the MUNIS electronic permitting system, establishing and documenting permitting procedures, identifying staff training needs and securing services, preparing public information materials, updating the division website,

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<sup>1</sup> Zoning was first introduced in Somerville in 1925, after substantial portions of the city had been developed. The foundation for the current zoning ordinance was adopted in 1960 with a substantial update in 1977.

among other activities. At the end of the 6 month period, the City hopes to document additional revenues or funding sources to support transferring the position to the local fund.

**Creation of Land Bank for Affordable Housing (\$1,937,000)** - The single largest proposed activity under the Community Challenge Planning Grant is to create a nearly \$2 million fund for land acquisition for affordable housing and sustainable development. In Somerville, land costs are high, land availability is low, and, due to the City's history as an industrial center, environmental contamination is prevalent. The City will use the grant to create a revolving fund that can assist in the creation of affordable housing in potentially multiple ways.

**1. City acquires land and sells to affordable housing developer** – Under this scenario, the City will acquire property, remediate it, and sell it to a developer for construction of new units. Since there is limited vacant land in Somerville, the City could elect to purchase property with existing structures. Optimally, resources other than the land bank fund would be used to demolish them and perform remediation, but that would depend on available funding. The City will then make the properties available for disposition after determining whether any land should be retained for open space or public infrastructure and would return the proceeds to the land bank fund. This would be most likely occurring on properties where more units could be built under the zoning than exist today or where significant environmental conditions exist that affect the livability of existing units.

Potential acquisition parcels in particular are located on Allen Street, approximately 1/10<sup>th</sup> of a mile from the future Union Square Station. Well known to the EPA and MassDEP, acquisition of these parcels is of potential interest to the City because they have been found to have high levels of contamination from lead and arsenic. In 2009, after being apprised of the test results from the DEP, the City utilized its own funds to temporarily cap the site under 6 inches of crushed stone in order to prevent any potential health impacts to the residents of these properties. A potential solution is to cap the parcels under asphalt, but this will increase storm water run off and will not produce an amenable living environment for the residents. Through use of the land bank funding and other funding, the parcels could be purchased and remediated and returned to productive use for affordable housing.

**2. City acquires buildings and sells to affordable housing management organization** – as noted above, much of the affordable housing in Somerville is privately held, but rented at reasonable rates. At times, buildings may be available for sale and if sold to a for-profit developer, could see significant increases in rent. If the City had a resource available to acquire a building, it could then deed restrict the property and then sell it to an organization committed to the preservation of affordable housing. A logical partner in this endeavor would be the Somerville Community Corporation, the only local CHDO, although the City would also be open to having other non-profits participate in this program.

**3. City to lend funds to affordable housing organizations to acquire property or buildings** – when properties become available, often times there is only a limited window of time when they can be secured for affordable housing. A non-profit may not have sufficient time to go through the application process with the Commonwealth or federal government to gather funds to acquire the property. In this instance, the City affordable housing land bank fund could be used to loan funds to the organization for the acquisition that would get repaid at some mutually agreed upon time.

Under all of the scenarios above, the City would use the land bank fund to perform due diligence prior to acquisition, e.g. pay for closing costs and perform inspections and other activities associated with the acquisition. If the City acquired a tenanted building, the land bank fund would be used to hire a management company until the property was sold. Proceeds from the sales of property acquired by the land bank fund would be returned to the fund for other acquisitions.

The land bank funds could be leveraged with funds available to the City such as Community Development Block Grants (CDBG), HOME Program, Lead Hazard Abatement funds or Affordable Housing Trust funds. The City specifically plans to utilize funding from a \$200,000 Hazardous Assessment Grant it recently received from the EPA to minimize expenditure from the land bank fund. These funds could also

leverage other state and/or federal funds to reduce the total development costs for the project including Housing Stabilization Funds, Capital Improvement and Preservation Funds, State HOME funds, Low-Income Housing Tax Credits, Historic Tax Credits, New Markets Tax Credits and State Affordable Housing Trust Funds.

**Project Evaluation (\$10,000)** - the City recognizes the importance of evaluating the outcomes of the project and their policy impact. The City proposes to contract with MIT Department of Urban Studies and Planning to perform evaluation services. It is expected that a programmatic analysis report will be prepared. The document will be published on the City of Somerville website so that it is available for public review.

### **Project Completion Schedule**

In general terms, the City proposes to hire the two planners and operations manager positions within 90 days of receipt of the cooperative agreement; secure approval for the Comprehensive Plan by the Board of Planning Board in 2011; and prepare a new zoning ordinance and submit it for review by the Planning Board and Board of Aldermen in 2012. Land acquisition efforts will begin immediately upon receipt of the cooperative agreement with a target to fully commit the funds by October 2012. Optimally, clean up efforts will be completed by 2013 so that the properties can be sold to affordable housing developers no later than 2014 and projects can be initiated before the Green Line Stations open. See Attachment 4 for a detailed project plan.

### **Performance Metrics**

As noted above, the *Preparing for Transit in the 21<sup>st</sup> Century* has five expected outcomes – adoption of comprehensive plan, preparation of rezoning, station area planning, permit streamlining, and land banking for affordable housing. Individually and collectively, these efforts will capitalize on the impending state and federal investment in transit in Somerville and will make the city even more environmentally sustainable, transit-oriented, economically strong, and affordable than it is today. Interim products are identified on the project plan and include draft documents, public meeting to solicit input and other activities.

Given the level of community consensus that already exists around transit, transit-oriented development, and extension of the Community Path Challenges, the major challenge to the initiatives include resources and time. In terms of long range planning, the Green Line Extension and Orange Line will be up and running in five years (the Orange Line Station is anticipated in 2013). The City is well aware of this timeline which is why the comprehensive planning effort began in 2009, but time is passing quickly. The City has very limited resources for these efforts and in addition to staff time, the comprehensive planning project only received its first operating budget of \$9,000 in FY2011 (i.e. July 2010), prior to that expenditures were incorporated into the Mayor's Office of Strategic Planning and Community Development (OSPCD) baseline budget. Receipt of a Community Challenge Planning Grant would dramatically expedite the necessary activities in preparing for transit.

### **RATING FACTOR #3** – Leveraging and Collaboration

#### **Resources for 20% Match**

*Preparing for Transit in the 21<sup>st</sup> Century* can provide more than the 20% match by leveraging municipal resources with resources from the many organizations working on transportation and planning issues in Somerville.

#### **Municipal Contribution**

As identified in the attached correspondence (Attachment 5) from Mayor Joseph A. Curtatone, the City of Somerville commits to providing \$602,000 in local match provided by staff time and operating funds related to the Community Challenge Planning Grant initiatives over the three years of the grant program. Resources committed include portions of time from 16 staff members who work in economic development, transportation and infrastructure, planning and zoning, and the OSPCD director's office, as well as the Health Department and Office of Sustainability and the Environment.

OSPCD will be the lead agency on completion of all of the Community Challenge Planning Grant initiatives. OSPCD staff will be supported by the Director of the Health Department who is and will be a significant contributor, especially concerning the interrelationship between the built environment and public health. The Director of the Office of Sustainability and the Environment will provide technical support to the initiatives focusing on environmental sustainability. Housing counsel will facilitate the acquisition of parcels to be made available for affordable housing.

<b>COMMUNITY CHALLENGE PLANNING GRANT – Municipal Match</b>					<b>3 Year Match</b>
	<b>Salary</b>	<b>Fringe</b>	<b>Total</b>	<b>Percent</b>	
OSPCD Executive Director	\$110,443	\$33,133	\$143,576	15.0%	\$64,609
OSPCD Project Manager	\$60,231	\$18,069	\$78,300	40.0%	\$93,960
OSPCD Economic Development Division (6 fte)	\$346,327	\$103,898	\$450,225	15.0%	\$202,601
OSPCD Planning Director	\$73,281	\$21,984	\$95,265	25.0%	\$71,449
OSPCD Senior Zoning Planner	\$54,208	\$16,262	\$70,470	15.0%	\$31,712
OSPCD Zoning Planner	\$45,173	\$13,552	\$58,725	15.0%	\$26,426
OSPCD Director of Transportation & Infra	\$80,307	\$24,092	\$104,399	10.0%	\$31,320
OSPCD Senior Transportation Planner	\$54,208	\$16,262	\$70,470	10.0%	\$21,141
OSPCD Director of Finance & Admin	\$70,269	\$21,081	\$91,350	5.0%	\$13,702
Director of Department of Health	\$71,826	\$21,548	\$93,374	5.0%	\$14,006
Dir of Off of Sustainability & the Environment	\$78,774	\$23,632	\$102,406	2.5%	\$7,680
Housing Counsel	\$61,006	\$18,302	\$79,308	1.5%	\$3,569
OSPCD operating budget	\$9,000		\$9,000		\$27,000
<b>TOTAL</b>					<b>\$602,173</b>

The City’s Housing Director is also an essential member of the planning team, but his salary is currently paid by 100% federal resources so he is not listed in the table above as a match. The salaries above are actual salaries. Comparison with the American Planning Association (APA) salary data indicates that Somerville salaries are less than national and regional averages. Therefore, the figures above are conservative estimates of the actual contribution of staff time.

Community Partners

Local community organizations have a long history of involvement in the shaping of policy in Somerville. One of the most vivid examples of community participation is when over 500 community members came to the Somerville High School auditorium to show their support for the Green Line Extension during the 4<sup>th</sup> game and clinching of the World Series Playoffs in 2004 against the Cardinals. For those who are not familiar, from 1918 to 2004, the Boston RedSox had been “cursed” and unable to win a World Series. People’s willingness to come out during the game emphasized the importance of transit to the community and helped sway then Governor Romney to support the project.

Over time, the City has worked with a network of diverse groups and individuals, and built systems that are used to encourage ongoing community engagement and participation. Success of the proposed initiatives is contingent upon participation of a network of community partners, both private and public, both local and regional, which will increase the effectiveness and implementation of our project activities. Each of the following entities has committed in-kind contributions of staff or member time, services and/or resources. The partners’ commitment includes continued participation in the comprehensive plan effort, collaborating on citywide rezoning and area plans, and/or community outreach for the multiple community meetings that will occur throughout these processes. Four letters of support are attached (see Attachments 6-9); all others are available upon request.

<b>COMMUNITY CHALLENGE PLANNING GRANT – Partner Match</b>			
<b>Organization</b>	<b>In-Kind</b>	<b>Organization</b>	<b>In-Kind</b>

Somerville Community Corporation	\$25,380	Somerville Arts Council	\$7,650
Somerville Transportation Equity Partnership (STEP)	\$25,000	Community Corridor Planning	\$6,750
Somerville Chamber of Commerce	\$22,424	Union Square Main Streets	\$5,000
Affordable Housing Trust Fund	\$22,100	East Somerville Main Streets	\$4,536
Council on Aging	\$12,000	Somerville Housing Authority	\$3,000
Metropolitan Area Planning Council	\$10,800	Commission on Energy Use & Climate Change	\$7,200
Groundwork Somerville	\$9,840		
		<b>TOTAL</b>	<b>\$161,680</b>

An important partner for Somerville in the Community Challenge Planning Grant and other initiatives is the Metropolitan Area Planning Council (MAPC), the regional planning organization. One effort is *MetroFuture: Making a Greater Boston Region* - the comprehensive blueprint plan for the region to promote smart growth and regional collaboration, which includes protecting the environment, supporting economic development, encouraging sustainable land use, improving transportation, bolstering affordable housing, ensuring public safety, advancing equity and opportunity among people of all backgrounds, and fostering collaboration among municipalities. *MetroFutures* is entirely consistent with the livability principles recently released by the Sustainable Communities Partnership. In addition, MAPC is filing the Sustainable Communities Regional Planning Grant application with HUD, and the City of Somerville will be working with MAPC on many aspects of regional collaboration under that program.

### **Documenting Matching Funds**

The time spent on the Community Challenge Planning Grant initiatives by OSPCD staff will be documented in the department’s existing tracking system called “Timeforce”. This system is presently used to track time spent on HUD programs and can be expanded to include the comprehensive plan, rezoning, etc. Expenditures in the OSPCD operating budget will be tracked through the City’s financial system. The time for other City staff not in OSPCD will be tracked through quarterly memos from the respective departments. Community partners will be asked to prepare documentation on their contribution semi-annually throughout the three years of the grant.

### **RATING FACTOR #4 – Capacity**

The mission of Somerville’s municipal government is to provide the highest possible level of public service consistent with the laws of our city, state, and nation; sound fiscal management; and innovative and effective administrative practice. The power to govern Somerville, framed by the City Charter, is held by the Executive Branch and the Board of Aldermen. The Mayor, who heads the Executive Branch, is elected every two years. The Board of Alderman, the City’s legislative branch, consists of 11 members elected every two years. Twenty-one departments carry out the mission of the City. Key departments include Auditing, Finance, Constituent Services, Health, Public Works, Recreation and Youth, and Strategic Planning and Community Development.

In the past five years, Somerville has become a model of best practices, with a strong Moody’s rating of aA3 and a national reputation for excellence and it has done so while spending fewer tax dollars per capita than any city in Massachusetts with a population of 50,000 or more. Somerville’s innovation, good governance, and commitment to sustainability and transit were recognized by the City’s designation as an All America City in 2009. Somerville is known internationally for its SomerStat performance management system, which measures performance outcomes for city programs and services. Somerville was the first American city to utilize a 311 resident call center and Connect CTY mass notification technology to inform, and be informed by, its residents regarding health, safety, and service issues throughout the city. Thanks to the City’s financial acumen and focus on open communications internally and with residents, Somerville remains an excellent investment.

## **Project Management**

The lead on implementing *Preparing for Transit in the 21<sup>st</sup> Century* will be the City's Office of Strategic Planning & Community Development (OSPCD). OSPCD consists of 49 FTE organized into 6 divisions: director's office, economic development, planning and zoning, transportation and infrastructure, housing, and inspectional services. The OSPCD Project Manager will be responsible for project oversight. This position reports directly to the OSPCD Executive Director and in other organizations would be called Chief of Staff or Assistant Director. The Project Manager has been successfully managing the comprehensive planning effort since March 2009 through trends reports, visioning, and establishment of goals, policies and actions. (Members of the comprehensive planning team include: Director of Economic Development, Director of Transportation & Infrastructure, Housing Director, Planning Director, and Landscape Project Manager).

The Project Manager has also been facilitating permit streamlining and preparation of the Area Plan for the Inner Belt and Brickbottom. The Planning Director will take on a larger responsibility for the citywide rezoning while working with the Project Manager. The Rezoning Planner will report to the Planning Director. Together with the Project Manager, the Director of Economic Development will guide area planning and the Station Area Planner will report to the Economic Development Director. The Operations Manager will report to the ISD Director but will regularly work with the Project Manager on permit streamlining.

Division Directors, the Operations Manager, and Project Manager will meet weekly with the OSPCD Executive Director on interrelated topics; weekly or semi-weekly meetings of the Comprehensive Plan team will continue; weekly or semi-weekly meetings of the zoning update will start in 2011; and station area planning coordinating meetings will be held semi-weekly or monthly starting in 2011.

MIT has been identified as a consultant to perform an analysis of the initiatives at the close of the grant. Its analysis will document the processes, evaluate the successes and identify possible improvements to consider in the future. Legal and technical assistance will also be sought as part of the rezoning; the procurement of these services will comply with city, state and federal procurement law.

## **Experience with Outreach and Public Involvement**

As noted above, Somerville has extensive experience with and a commitment to outreach and public involvement. In recent years, OSPCD has used the following mechanisms: survey research and interviews, community meetings and workshops, open houses, visioning sessions, Comprehensive Plan website, blog discussions, planning news bulletin, and virtual visualization. OSPCD regularly translates materials into Spanish, Portuguese, and Haitian Creole and has had translation services available at all visioning and open house meetings; a practice that will be continued with the Community Challenge Planning Grant initiatives.

In addition, Steering Committee composed of residents and businesspersons with diverse areas of expertise has been convened to oversee and guide the comprehensive planning process. The Steering Committee is made up of mayoral appointees, representatives from wards across the city, and residents/businesses representative of various organizations. The Committee has approximately 60 appointed representatives from 20 organizations and committees and is regularly meeting at least once per month.

To initiate the SomerVision visioning process in late 2009 and early 2010, OSPCD held a series of "World Cafés": small round-table conversations aimed at creating greater community connection and mapping out the best ideas from a broad range of community members. The World Cafés involved more than 250 residents and workers from all segments of the community. Student translators were hired to participate and provided a youth perspective and bilingual resources. Through the World Cafés, the Steering Committee created a vision that captures the elements vitally important to community members - diversity, community spirit, economic growth, city-wide accessibility, sustainability, and innovation.

The City of Somerville with a variety of community partners held open houses on April 25, 2009 and June 12, 2010 to discuss the various planning initiatives and present information on the Green Line Extension stations and surrounding land uses. The open house format will be continued as part of the five proposed

Grant activities as a way to partner with State and community organizations in order to share information and further relationship-building.

### **Relevant Experience**

Somerville and OSPCD have extensive experience with large scale transformational projects. Three examples are Assembly Square zoning and master plan, Union Square rezoning, and trends reports:

- **Assembly Square** - is a 56-acre former industrial tract in East Somerville. The City worked with the site developer over several years to reposition the property and revise the zoning to facilitate a master planned development. The master plan considers a transit-oriented, mixed-use development of approximately 2,100 residential units, 1.75 million s.f. of office, 850,000 s.f. of retail space, including a cinema and hotel, and a 5 acre waterfront park. The site also benefits from a proposed new rail transit station towards which the developer is contributing \$15 million. Approval of the rezoning required extensive collaboration between City and local community groups; as a result, the master plan is consistent with the long-term vision established by the Mystic View Task Force. In addition to the adopting the zoning and approving the master plan, the City helped the developer secure \$67 million in infrastructure funding including a Growth District Initiative grant (\$2 million), ARRA funds (\$15 million) and I-Cubed Bond Financing (\$50 million).
- **Union Square rezoning** – the Union Square and Boynton Yards rezoning was produced through a collaborative effort of a 20 member focus group, city officials, and local non-profits and has resulted in the creation of four new transit oriented development districts of different scales and development intensities and a new corridor commercial district. Multiple public meetings were held to solicit comment and with assistance from Community Resources Design Center, a Boston non-profit, a visual model was produced to show what the new zoning would produce. As a result of the effort, floor area ratios were increased by 1.5 to 2.5 times, green building incentives were put in place, and property owners were incentivized to donate land to the City for infrastructure.
- **Trends reports** - Starting in May 2008 and continuing through 2010, OSPCD staff have researched, analyzed and written on five historic trend areas: population, economic, transportation and infrastructure, housing, and land use. Through evaluation of these trends, City staff, as well as residents and stakeholders, have gained a more thorough understanding of Somerville's history and recent trends, as well as comparison to neighboring cities and state averages. The trends reports establish a solid foundation of factual data that serve as the backdrop to the proposed planning efforts. Furthermore, with data from the 2010 Census data imminent, an understanding and assessment of previous data is critical to ensure an accurate understanding of Somerville's disposition. With major transportation and infrastructure projects proposed for the coming decade - such as the extension of the Green Line and the station addition of the Orange Line at Assembly Square - an understanding of previous transportation and infrastructure trends is critical to ensure an accurate understanding of Somerville's mobility patterns and development potential. The trends reports have been widely disseminated, as well as summarized into fact sheets for distribution.

### **Procedures for Setting Goals and Resolving Disputes**

Under the leadership of Mayor Curtatone, the City has been very successful in working collaboratively with community partners; he was instrumental in helping the Mystic View Task Force and the developers of Assembly Square reach agreement on the future of the area. Since that time, there has been little conflict requiring dispute resolution. However, in advance of any conflict, the comprehensive plan Steering Committee has developed specific procedures to resolve potential disagreements about policy direction (see Attachment 10.) This involves a 4-tier decision tree identifying the level of consensus or disagreement on a topic. Depending on which tier it is in, a policy can be released for community comment or held for continued discussion either at the subcommittee or steering committee level. This model has been successful to date and will continue to be used until the comprehensive plan is completed. The model will be provided to the rezoning steering committee convened so that they could consider applying it to their process or making modifications.