

**To:** City Council

**From:** Richard C. Rossi, City Manager

**Date:** January 9, 2015

**Re:** Report from focus groups regarding ways to improve the Planning Board process

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In response to Council Order O-17 the Community Development Department (CDD) held a series of focus group discussions with various stakeholders involved in the Planning Board process. The focus group sessions, which followed an evening of public comment held at the Planning Board, enabled people to come together in an informal environment and cooperatively work together to discuss ways to improve the Planning Board process.

Initially, five focus groups were convened. Each group represented different interest groups involved in the special permit process:

- two residents and neighbors groups (six and seven participants per group)
- one developers and lawyers group (seven participants)
- one architects and other consultants group (four participants)
- one previous Planning Board members and previous staff group (four participants)

Given the range of stakeholders involved, the sessions resulted in the collection of a diverse range of ideas for improvement. Following the five focus group sessions noted above, the range of suggestions from the focus group sessions along with suggestions made at the Planning Board and in written comment afterwards was presented to a joint session held on December 18, 2014. The purpose of this session was to process the initial broad-based ideas and bring together participants from all groups for more critical discussion and prioritization. This meeting resulted in general agreement on many of the key issues affecting the Planning Board process, as well as a very detailed list of ideas and possible changes to the process. Further written comments from focus group participants were also received and considered. The Planning Board at its January 6, 2015 hearing considered the focus group suggestions and provided further feedback to CDD staff on many of the ideas presented.

### **Recommendations and improvements**

The attached document represents a compilation of the suggestions and feedback heard from: 1) the five initial focus group discussions (November 13 to December 1, 2014) and the joint focus group; 2) spoken comments from the October 28, 2014 and January 6, 2015 Planning Board hearings; and 3) written comments submitted to CDD and the City Manager's office through January 7, 2015.

CDD has considered all of the suggestions and synthesized this information into common themes, which resulted in the identification of six broad goals that were broadly agreed to by all focus group participants. The six broad goals are:

1. Improve website design, including:
  - Subscribe-able web pages and agendas
  - Storage and display of project information
2. Improve meeting logistics, including:
  - Public comments and proponent presentations
  - Equipment improvement and room layout
  - Planning Board operations
3. Improve public notification and access to information, including:
  - Notification methods for Planning Board meetings
  - Content of Planning Board agendas
  - Access to supporting materials
4. Improve understanding at all phases of the process, including:
  - Public records of Planning Board meetings
  - Process clarification
  - Monitoring once a project has been approved
5. Strengthen CDD role
6. Establish an early community engagement process

A staff response to all suggestions is provided with a discussion and recommendation in every case. Each suggestion has also been given a priority and an expected timeframe for implementation. Many of the suggestions are considered a high priority and can be implemented within current work programs and resource allocations. However, several suggestions require further evaluation, legal review, consideration of resource impacts and budget allocations, and ongoing work with the Planning Board and City Departments prior to being acted upon. Furthermore, in some instances, suggestions are considered a low priority and no further action is recommended. A number of improvements are already in progress and have been identified as such in the attached document.

### **High priority**

The following tables summarize those actions that have been identified as high priority items for the City.

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#### **Short-term actions (0-6 months)**

1. Establish an early engagement process for Special Permits through a Planning Board rule change
  2. Explore options for early engagement on zoning petitions (Short to long-term)
  3. Work with the Planning Board on rule changes to improve meeting processes (e.g., allow neighborhood groups to do a presentation or to pool their comments)
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**Short to medium term actions (0-18 months)**

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4. Improve website (Short to medium
  5. Live video streaming of Planning Board Hearings
  6. Develop Planning Board Handbook
  7. City staff will work with the Planning Board to schedule additional training and working sessions with the Planning Board
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**Medium-term action (6 – 18 months)**

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8. CDD to work with the Planning Board and the public to identify opportunities for hosting additional informational and discussion sessions separate from PB meetings
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**Medium to long-term action (6 months – 3 years)**

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9. City staff to work with the Planning Board and the public to revisit the Special Permit criteria for City Council consideration
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Early community engagement

It will come as no surprise to the City Council that the need for early community engagement has been identified as the highest priority. In fact, all stakeholders strongly agreed on the need for some form of early community engagement as part of the Special Permit process. In response to this key issue, within the next four weeks, CDD staff proposes to work with the Planning Board to propose a rule change that will require at least one public meeting prior to the submission of a Special Permit application. The details of this short-term recommendation are outlined on page 15 in the attached document, including sample language to be included in proposed new Planning Board Rules, and matters that need to be addressed in supporting guidelines that will seek to clarify the process for all stakeholders. It is intended that this requirement will be mandatory and that proponents will be required to submit a summary of the meeting(s) as part of their application. The Planning Board endorsed this short-term approach at its January 6, 2015 meeting.

In the longer term, the CDD will evaluate the success of the short-term Planning Board rule change approach and undertake further research to consider alternative forms of community engagement, if needed. This research will examine the pros and cons of different types of community representation and engagement activities. Staff will continue to examine best practices from other communities within the region and across the country, including larger cities such as Boston and Seattle, and cities of a comparable character and size to Cambridge. The matrix on page 16 summarizes some of the possible permutations available in terms of the type of community representation, who organizes and attends meetings, and who is responsible for providing a summary of meeting outcomes. Additionally, the Planning Board itself expressed a desire to be involved in earlier engagement, so that they have an opportunity to provide feedback on projects at a more preliminary stage. The details and format of this type of interaction are considered best addressed as part of the long-term investigation process.

It is also important to note that many focus group participants suggested that there is a need to establish an early engagement process for zoning petitions. There are a number of issues associated with this suggestion, including whether such a requirement would create additional hurdles for citizen petitions, which require further consideration and advice from the Law

Department. However, this is a valid matter for the Council to consider given the increased level of public interest in major projects and zoning proposals across the city.

Planning Board handbook

Another key high priority recommendation is the preparation of a Planning Board handbook. It is proposed that the CDD will work with the Planning Board to develop such a book, which will:

- Describe the entire Planning Board process in an understandable manner
- Explain the role and mandate of the Planning Board, and their discretionary jurisdiction – especially concerning the Special Permit criteria and how they are applied
- Describe the relationship between the Planning Board and CDD and their interaction, as well as the role of other City Departments involved in the planning and development process

Revisiting the Special Permit Criteria

The need to reexamine the Special Permit Criteria also arose through the focus group discussions. There is concern amongst some stakeholder groups that the current criteria are ambiguous, do not adequately respond to community values and are too permissive for developers. In response, CDD staff has proposed to work with the Planning Board and the community to revisit the criteria and suggest changes for the City Council’s consideration. Such work could also run in parallel to the city-wide planning process.

**City Council Actions**

While much discussion has focused on Planning Board procedures and early community engagement, some of the proposed improvements fall within the purview of the City Council and City Departments, including CDD and ISD. The following lists those specifically related to the City Council’s responsibilities.

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| <b>High Priority</b>  |
| 1. Explore options for early engagement on zoning petitions (Short to long-term)  |
| <b>Medium Priority</b>  |
| 2. Change the Planned Unit Development (PUD) amendment process, which currently requires two public hearings to require one public hearing for minor amendments |
| 3. Allow absent Planning Board members to read transcripts and participate on a case  |

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I trust that the attached document provides an appropriate response to the City Council’s Order and sets out a series of actions that will assist all stakeholders to work together to improve the Planning Board process.

**City of Cambridge Planning Board**  
**improvement goals:**  
**Summary of Focus Group Process**

- 1. Improve website design**
- 2. Improve meeting logistics**
- 3. Improve public notification and access to information**
- 4. Improve understanding at all phases of the process**
- 5. Strengthen CDD role**
- 6. Establish an early community engagement process**

Suggested implementation timeframe

- Short term: 0 - 6 months
- Medium term: 6 - 18 months
- Long term: 18 months - 3 years

# 1. Improve website design

|   | Suggestion  | Discussion/Recommendation   | Action   |
|---|---|---|--|
| 1 | <p>ALL project information and supporting materials should be located in one webpage for each project</p> <ul style="list-style-type: none"> <li>As soon as a developer comes in, create an online depository for each project where ALL the supporting materials are provided</li> </ul> |   |  |
| 2 | Create a separate webpage for each project  | <ul style="list-style-type: none"> <li>All very good suggestions. CDD will work to make the PB webpage more intuitive (e.g., regulations.gov)</li> <li>Staff will investigate how long it will take to make the suggested changes and resource implications of managing such processes</li> </ul> | <p><b>Short- to medium-term</b></p> <p><b>High priority</b></p> <p>Requires additional resources</p> |
| 3 | Make project webpage subscribe-able   |   |  |
| 4 | Make Planning Board (PB) agenda upload subscribe-able   |   |  |
| 5 | Once subscribed, email notifications should be automatically sent out whenever materials are uploaded   |   |  |
| 6 | On each project page, links to relevant planning documents should be provided   |   |  |
|   |   |   |  |

*This document is a summary of the Focus Group suggestions, Planning Board discussion and the spoken comments from the 10/28/2014 and the 1/6/2015 meeting, and written comments submitted to CDD/City Manager through January 7<sup>th</sup> to improve the Planning Board process. The items listed here are for further discussion and ultimately need to be reviewed by the City for any legal considerations, consistency with state law, and staff resource implications.*

## 2. Improve meeting logistics

### 2-a. Public comments and proponent presentations

|   | Suggestion  | Discussion/Recommendation   | Action  |
|---|---|---|---|
| 1 | Place a time limit on proponent presentations   | <ul style="list-style-type: none"> <li>Time limit for proponent presentations in the PB rule is 30 min</li> <li>PB recently started to set the standard at 20 min</li> <li>Need to stay flexible depending on the scale and complexity of projects, and the discretion of the PB</li> </ul> | Improvement in progress   |
| 2 | Allow neighborhood groups to do a presentation and establish guidelines for that (e.g., require submittal of presentation materials or written comments a certain number of days in advance)                                  | <ul style="list-style-type: none"> <li>PB always welcomes neighborhood group presentation</li> <li>CDD will work with the PB and the public to prepare guidelines for public presentations for PB consideration</li> <li>Up to PB discretion</li> </ul>                                     | <b>Short-term</b><br><br><b>High priority</b>   |
| 3 | Allow one speaker to talk on behalf of a group and establish guidelines <ul style="list-style-type: none"> <li>Give more time</li> <li>Have the representing person be responsible for knowing project information</li> </ul> | <ul style="list-style-type: none"> <li>The representative could have more time (e.g., 10 min)</li> <li>Cannot condition opportunities to make a comment</li> <li>Up to PB discretion</li> </ul>   | Work with PB  |
| 4 | Allow only one opportunity for comment per project  | <ul style="list-style-type: none"> <li>Up to PB discretion</li> </ul>   | No changes planned  |
| 5 | Put a total cap on the public comment period  | <ul style="list-style-type: none"> <li>Up to PB discretion</li> </ul>   | No changes planned  |
| 6 | Establish deadline for submission of written comment  | <ul style="list-style-type: none"> <li>Up to PB discretion</li> <li>CDD will work with the PB and the public to suggest a deadline</li> </ul>   | Short- to medium term<br><br>Medium priority  |
| 7 | Allow all parties to clarify factually incorrect comments <ul style="list-style-type: none"> <li>Use index cards to gather comments</li> <li>Create separate opportunity for informational questions</li> </ul>               | <ul style="list-style-type: none"> <li>Up to PB discretion</li> <li>Informational questions should be part of public comments as PB looks to the comments for important questions to be answered</li> </ul>   | Short-term<br><br>Medium priority<br><br>Work with PB to establish standards for practice |

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## 2. Improve meeting logistics

|    | Suggestion   | Discussion/Recommendation   | Action   |
|----|--|---|--|
| 8  | CDD can respond to factually incorrect comments  | <ul style="list-style-type: none"> <li>Requires legal advice</li> </ul>   | <p>Short-term</p> <p>Medium priority</p>                     |
| 9  | Take public comments for GB items  | <ul style="list-style-type: none"> <li>Up to PB discretion depending on the topic and the availability of time</li> </ul>   | Work with PB to establish standards for practice             |
| 10 | Set realistic time limits for agendas  | <ul style="list-style-type: none"> <li>CDD have been working to balance the need for a workable agenda and the need for workable review process within legal timelines</li> </ul> | Improvement in progress                                      |
| 11 | <p>Require developers to bring specific materials. For example:</p> <ul style="list-style-type: none"> <li>Physical models</li> <li>Computer models</li> <li>Boards, including plans and elevations</li> <li>Changes in developer's plans should be presented side-by-side in slideshows</li> <li>Hard copies of presentations (color preferred)</li> <li>Font size used in proponent presentation should be legible from anywhere in the room</li> <li>Up to date context plan showing the project in context with existing neighborhood including any new and anticipated future development projects</li> </ul> | <ul style="list-style-type: none"> <li>Up to PB discretion</li> <li>CDD will discuss with the PB in the context of revising application submission requirements</li> </ul>        | <p>Short-term</p> <p>Medium priority</p> <p>Work with PB</p> |

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## 2. Improve meeting logistics

### 2-b. Equipment improvement and room layout

|   | Suggestion  | Discussion/Recommendation   | Action   |
|---|---|---|--|
| 1 | Get a countdown timer <ul style="list-style-type: none"> <li>• Timer can have two colors of warning light</li> </ul>  | <ul style="list-style-type: none"> <li>• CDD is investigating the cost and types of timers</li> </ul>   | Short- to medium-term<br><br>Medium priority<br><br>May require additional resources<br><br>Work with PB |
| 2 | Rearrange the room so that the proponents do not have their back to the public <ul style="list-style-type: none"> <li>• Make sure that everyone in the room can see the visual presentations</li> </ul> | <ul style="list-style-type: none"> <li>• CDD, working with the PB, will investigate alternative arrangements and propose a suggestion</li> </ul>  |  |
| 3 | Fix the lighting so that it doesn't shine on the screen   | <ul style="list-style-type: none"> <li>• CDD will discuss with City electrician</li> </ul>  |  |
| 4 | Install auxiliary screen in a different room  | <ul style="list-style-type: none"> <li>• Additionally, online streaming would help</li> <li>• Will look into options for locations considering noise</li> <li>• CDD will look into using existing TV screens</li> </ul> |  |
| 5 | Get a new video projector and a podium  | <ul style="list-style-type: none"> <li>• Room upgrade is planned</li> <li>• CDD will investigate</li> </ul>   |  |
| 6 | Allow the use of iPads instead of laptops for presentations   | <ul style="list-style-type: none"> <li>• Will purchase the cable (Approx. \$40)</li> </ul>  |  |
| 7 | Get a laser pointer for the public  | <ul style="list-style-type: none"> <li>• Laser pointer will be available upon request</li> </ul>  |  |
| 8 | Use the senior center for PB meeting  | <ul style="list-style-type: none"> <li>• CDD is looking into the option of using the senior center as a temporary alternative before the room upgrade</li> </ul>  |  |

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## 2. Improve meeting logistics

### 2-c. PB operations

|   | Suggestion  | Discussion/Recommendation  | Action   |
|---|---|--|--|
| 1 | Establish early engagement process for zoning petitions   | <ul style="list-style-type: none"> <li>Zoning petitions are decided by City Council</li> <li>CDD will discuss with the City Council and the Law Department</li> </ul>  | <b>Short- to long-term</b><br><br><b>High priority</b> |
| 2 | Agenda should carry a Business Not Anticipated section  | <ul style="list-style-type: none"> <li>CDD will discuss with PB</li> <li>Requires legal advice</li> </ul>  | Short-term<br><br>Low priority                         |
| 3 | Change the PUD amendment process, which currently requires two public hearings, to require one public hearing for <u>minor</u> amendments | <ul style="list-style-type: none"> <li>Requires City Council action</li> </ul>   | Medium-to long-term<br><br>Medium priority             |
| 4 | Allow absent PB members to read transcripts and participate on a case   | <ul style="list-style-type: none"> <li>Requires City Council action</li> </ul>   | Medium-to long-term<br><br>Medium priority             |
| 5 | Revise PB Rule 3.4 to require the Chair to review PB agenda <u>before</u> publishing  | <ul style="list-style-type: none"> <li>CDD will discuss with PB</li> <li>Up to PB discretion</li> </ul>  | Short-term<br><br>Low priority<br><br>Work with PB     |
| 6 | Take public comments for BZA cases  | <ul style="list-style-type: none"> <li>Up to PB discretion; BZA cases are under BZA jurisdiction; PB only provides advice to the BZA</li> </ul>  | No changes planned                                     |
| 7 | Create advisory and voluntary groups of design professionals (e.g., Boston Civic Design Commission)                                       | <ul style="list-style-type: none"> <li>Creating an additional design review process would duplicate much of the role of the PB</li> <li>CDD provides design expertise</li> <li>PB may request additional design consultant services as needed</li> </ul> | No changes planned                                     |
| 8 | Require comparable life-cycle analysis of major alternative energy systems  | <ul style="list-style-type: none"> <li>The City's Energy Green Building Requirements/Article 22 requires substantial technical analysis</li> </ul>   | No changes planned                                     |

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## 3. Improve public notification and access to information

### 3-a. Notification methods for PB meetings

|   | Suggestion   | Discussion/Recommendation   | Action                  |
|---|--|---|-------------------------|
| 1 | Community bulletin board with a roof and a Plexiglas cover | <ul style="list-style-type: none"> <li>DPW has responded to the council order requesting the installation of community bulletin boards</li> </ul>   | Improvement in progress |
| 2 | Invitation to participate prepared by the CDD              | <ul style="list-style-type: none"> <li>CDD proposes to address the notification issue with website improvement first.</li> <li>CDD will review potential changes to the notification panel, PB agenda and its language with PB</li> </ul> | Short- to medium-term   |
| 3 | Placards with QR codes (both onsite and in key locations)  |   | Medium priority         |

### 3-b. Content of the PB agenda

|   | Suggestion  | Discussion/Recommendation  | Action                         |
|---|---|--|--------------------------------|
| 1 | Post PB agenda in time with sufficient description about what is to be discussed                            | <ul style="list-style-type: none"> <li>PB agenda will generally be posted Tuesdays at noon, the week before the meeting.</li> <li>CDD will review enhancing the level of detail for each item (e.g., CRA agenda vs. PB agenda on Volpe discussion)</li> </ul>              | Improvement in progress        |
| 2 | Include tentative schedules for the upcoming PB agenda even if listed as tentative                          | <ul style="list-style-type: none"> <li>Publishing tentative meeting schedule is not recommended as it would likely create confusion</li> <li>Video streaming will allow for real time viewing of the PB meeting and at a later date for those who cannot attend</li> </ul> | No changes planned             |
| 3 | Agenda and notice must specify whether public comment is expected, or PB is planning to deliberate, or both | <ul style="list-style-type: none"> <li>CDD will look to specify when possible. Not always feasible as the Board sometimes decides at the meeting</li> <li>Up to PB discretion</li> </ul>   | Improvement in progress        |
| 4 | PB agenda should include contents of General Business (GB) items and BZA cases                              | <ul style="list-style-type: none"> <li>CDD will work with the PB to consider this suggestion</li> </ul>  | Medium-term<br>Medium priority |

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## 3. Improve public notification and access to information

### 3-c. Access to supporting materials

|   | Suggestion  | Discussion/Recommendation   | Action                         |
|---|---|---|--------------------------------|
| 1 | Information and supporting materials should be available online as soon as possible | <ul style="list-style-type: none"> <li>• CDD goal is to have materials <u>2 weeks prior</u> to the <u>first</u> scheduled hearing</li> <li>• CDD goal is to schedule subsequent hearings when all the requested materials are submitted subject to legal requirements</li> <li>• Once submitted, CDD will do its best to upload the materials as soon as possible</li> <li>• CDD will try to post the pre-application materials prepared for the early community engagement meetings</li> </ul> | Improvement in progress        |
| 2 | Supporting materials should include a date of posting                               | <ul style="list-style-type: none"> <li>• CDD is already working towards this matter</li> <li>• When making web improvements, will attempt to automatically stamp the uploaded date</li> </ul>   | Short-term<br>Medium priority  |
| 3 | CDD/TPT memos should be available online  | <ul style="list-style-type: none"> <li>• CDD goal is to post the memos <u>one week prior</u> to the meetings</li> </ul>   | Improvement in progress        |
| 4 | Make proponent presentations available online in advance of the meeting             | <ul style="list-style-type: none"> <li>• Making presentations available before the meeting would be challenging as the proponents often make last minute changes</li> <li>• However, CDD will investigate ways to have the presentation accessible real-time or right before the meeting</li> </ul>   | Short-term<br>Medium priority  |
| 5 | Supporting materials for General Business items should also be made available       | <ul style="list-style-type: none"> <li>• CDD will review best practices</li> <li>• Will be considered as part of the website improvement process</li> </ul>   | Medium-term<br>Medium priority |

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## 4. Improve understanding at all phases of the process

### 4-a. Public records of PB meetings

|   | Suggestion   | Discussion/Recommendation  | Action   |
|---|--|--|--|
| 1 | Make transcripts available earlier   | <ul style="list-style-type: none"> <li>CDD will work with the contract company to see if the process can be expedited</li> </ul>   | Improvement in progress  |
| 2 | Post CDD summaries of PB meetings online   | <ul style="list-style-type: none"> <li>CDD proposes to address the desire to review PB meetings earlier with the live video streaming option first</li> </ul>  | See below  |
| 3 | Video streaming <ul style="list-style-type: none"> <li>Integrate proponent presentation</li> </ul>   | <ul style="list-style-type: none"> <li>CDD will investigate video streaming options</li> </ul>   | <b>Short- to medium-term</b><br><br><b>High priority</b><br><br>May require additional resources   |
| 4 | PB summarize at the end of each project discussion/ hearing to clarify the key points and future directions  | <ul style="list-style-type: none"> <li>Up to PB discretion</li> <li>CDD will discuss with the PB</li> <li>Hope that some of the actions taken by the series of initiatives proposed through this process (e.g., early meeting requirements, CDD memo, putting time limit on proponent presentation) would open-up more time for summary discussions</li> </ul> | Short- to long-term<br><br>Medium priority<br><br>Work with PB to establish standards for practice |
| 5 | Make written comments available to the public <ul style="list-style-type: none"> <li>Post submitted written comments on the web (e.g., regulations.gov)</li> </ul>   | <ul style="list-style-type: none"> <li>Posting submitted written comments will be further investigated</li> </ul>  | Medium- to long-term<br><br>Medium priority  |
| 6 | Make sure that public comments are heard and considered: <ul style="list-style-type: none"> <li>Note what the PB heard from the public and note the PB responses</li> <li>Produce a summary of the quantity of public comments and the frequency of positions</li> </ul> | <ul style="list-style-type: none"> <li>PB takes into consideration all the public testimony and written comments, which then serve to inform their questions, comments, and decisions</li> </ul>   | No changes planned   |

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## 4. Improve understanding at all phases of the process

### 4-b. Process clarification

|   | Suggestion   | Discussion/Recommendation  | Action  |
|---|--|--|---|
| 1 | <p>Create PB handbook</p> <ul style="list-style-type: none"> <li>Clarify the role of the PB and their mandate</li> </ul>   | <ul style="list-style-type: none"> <li>CDD will work with the PB to develop a table of contents               <ul style="list-style-type: none"> <li>layout of the entire process in an understandable manner including a list of required application materials</li> <li>explain the role of the PB and its jurisdiction, and how SP criteria are applied</li> <li>PB – CDD relationship and their interaction</li> <li>role of the different city departments</li> </ul> </li> <li>Once the content for the handbook is created, also create an FAQ section in the PB webpage</li> </ul> | <p><b>Short- to medium-term</b></p> <p><b>High priority</b></p> <p>Work with PB</p> <p>May require additional resources</p> |
| 2 | Inform public about CDD-developer meetings   | <ul style="list-style-type: none"> <li>Could be included as a summary in the CDD memo (e.g., key issues that were discussed, CDD suggestions, proponent response, etc)</li> </ul>  | Short-term<br>Medium-priority   |
| 3 | Circulate the draft decision to the PB and the public before finalizing the decision   | <ul style="list-style-type: none"> <li>Up to PB discretion</li> <li>PB may ask to review drafts at a public meeting; most commonly, this occurs on unusually complex and large decisions</li> <li>Draft decisions should not be circulated prior to the meeting or be commented on by the public</li> </ul>  | No changes planned  |
| 4 | <p>SP decisions should include:</p> <ul style="list-style-type: none"> <li>Criteria for triggering design review</li> <li>Construction impact mitigation requirements</li> </ul> | <ul style="list-style-type: none"> <li>Up to PB discretion</li> <li>CDD will work with the PB to consider this suggestion</li> </ul>   | Medium-term<br>Medium priority  |

### 4-c. Monitoring once a project has been approved

|   | Suggestion   | Discussion/Recommendation  | Action                           |
|---|--|--|----------------------------------|
| 1 | Project website could provide information about the <u>status</u> after its approval | <ul style="list-style-type: none"> <li>Under ISD jurisdiction; CDD will work with ISD to evaluate</li> </ul> | Medium- to long-term             |
| 2 | Ensure that buildings are being constructed consistent to the approved plans         | <ul style="list-style-type: none"> <li>Under ISD jurisdiction; CDD will work with ISD to evaluate</li> </ul> | Medium-priority<br>Work with ISD |

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## 4. Improve understanding at all phases of the process

### 4-d. Miscellaneous items

|   | Suggestion  | Discussion/Recommendation   | Action  |
|---|---|---|---|
| 1 | <p>PB training materials should be made public and a proper record of materials should be kept by CDD, and relevant customization should be applied to training</p>   | <ul style="list-style-type: none"> <li>• Requires legal advice</li> <li>• City staff will take this suggestion under consideration</li> </ul> | <p>Long-term</p> <p>Low priority</p>                      |
| 2 | <p>Information about projects that do not fall under the purview of the PB should also be available</p> <ul style="list-style-type: none"> <li>• Provide a list of addresses that had building permits requested</li> <li>• Require on-site posters at the application stage</li> </ul> | <ul style="list-style-type: none"> <li>• Under ISD jurisdiction; CDD will work with ISD to evaluate</li> </ul>                                | <p>Long-term</p> <p>Low priority</p> <p>Work with ISD</p> |
| 3 | <p>When a PB member has recused themselves, the Chair or the member should state that he or she has recused</p>   | <ul style="list-style-type: none"> <li>• The recusal will be publicly noted for the record</li> </ul>   | <p>Short-term</p> <p>Low priority</p>                     |

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## 5. Strengthen CDD role

### CDD's role

Many FG participants urged CDD to play a more robust role throughout the process. CDD is and has been evaluating its role and making some changes accordingly (e.g., staff memo, enforcing application deadlines). CDD will further identify areas of improvement and redefine its role in response to the following suggestions.

|   | Suggestion   | Discussion/Recommendation  | Action  |
|---|--|--|---|
| 1 | Establish more time for review before the application submission   | <ul style="list-style-type: none"> <li>CDD will clarify the time required before the filing of an application (e.g., Traffic Impact Study process)</li> </ul>  | Improvement in progress   |
| 2 | Increase the level of professional advice given to the PB, while leaving room for judgment   | <ul style="list-style-type: none"> <li>Recent CDD memo includes staff discussion of criteria and guidelines as well as technical zoning requirements</li> </ul>  | Improvement in progress   |
|   |  | <ul style="list-style-type: none"> <li>CDD may request <u>external expertise</u> as needed</li> <li>Additional staffing will require budget considerations</li> </ul>  | Medium- to Long-term<br><br>Medium priority<br><br>Requires additional resources          |
| 3 | Work with the proponent/neighbors before a project comes to the PB, while making sure that projects are not set in stone once they get to the PB | <ul style="list-style-type: none"> <li>CDD hope to achieve this goal through developing an early engagement process</li> </ul>   | <b>Short-term</b><br><br><b>High priority</b><br><br>Work with PB                         |
| 4 | Present CDD/TPT comments at the beginning of a hearing to set the planning context   | <ul style="list-style-type: none"> <li>Have done so in the past (e.g., North Point, Concord Alewife), which the Board and the public found helpful. Will make the presentation material available online</li> <li>CDD will look to refer to the staff presentations more regularly (e.g., Assistant Manager or PB Chair could refer to the CDD presentation)</li> <li>Up to PB discretion</li> </ul> | Short-term<br><br>Medium-priority<br><br>Work with PB to establish standards for practice |

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## 5. Strengthen CDD role

|   | Suggestion  | Discussion/Recommendation  | Action  |
|---|---|--|---|
| 5 | Create a neighborhood liaison position who will also perform as Project Manager (Special Permit Coordinator)  | <ul style="list-style-type: none"> <li>Neighborhood Planners have been and will continue to act as neighborhood liaisons including acting as a point of contact for Special Permits</li> <li>CDD will evaluate current resources and suggested staff responsibilities</li> </ul>   | <p>Short- to medium-term</p> <p>Medium priority</p>                                 |
| 6 | <p>CDD should work with the PB to:</p> <ul style="list-style-type: none"> <li>make sure that all the members are aware of the context of a project</li> <li>assist the Board in anticipating the major issues/challenges of a project</li> <li>schedule additional training sessions with the PB</li> </ul> | <ul style="list-style-type: none"> <li>CDD memo/presentations are expected to resolve these concerns</li> <li>CDD will seek to identify opportunities to schedule additional training sessions with the PB</li> <li>CDD will also seek to identify topics appropriate for more extensive discussion which may include bringing in <u>external experts</u> (e.g., retail consultant). Need to look into scheduling time on the PB agenda or schedule separate sessions</li> </ul> | <p><b>Short- to medium-term</b></p> <p><b>High priority</b></p> <p>Work with PB</p> |
| 7 | <p>CDD should work with the PB to:</p> <ul style="list-style-type: none"> <li>revisit existing city plans periodically and assess the development trajectories</li> </ul>   | <ul style="list-style-type: none"> <li>CDD will further investigate to assess the amount of staff time and resources needed to identify how often and in what format such assessments could be conducted</li> </ul>  | <p>Medium- to long-term</p> <p>Medium priority</p> <p>Work with PB</p>              |
| 8 | <p>CDD should work with the PB to:</p> <ul style="list-style-type: none"> <li>schedule regular sessions at the PB meeting reserved for the discussion of broader planning issues</li> </ul>   | <ul style="list-style-type: none"> <li>CDD will work with the PB to identify appropriate time for such discussion</li> </ul>   | <p>Short- to medium-term</p> <p>Medium priority</p> <p>Work with PB</p>             |

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## 5. Strengthen CDD role

|    | Suggestion   | Discussion/Recommendation   | Action  |
|----|--|---|---|
| 9  | <p>CDD should work with the PB and the public to identify opportunities for <u>hosting</u> (separate from PB meetings):</p> <ul style="list-style-type: none"> <li>informational sessions for neighborhood groups on PB process</li> <li>informational sessions for major projects</li> <li>sessions to discuss the city's long-term planning goals and specific issues such as traffic and housing</li> </ul> | <ul style="list-style-type: none"> <li>CDD will incorporate these sessions into the citywide planning process</li> <li>CDD will also investigate having regular intervals for such educational sessions (e.g., every six months), which could include <u>external expert</u> assistance</li> </ul>  | <p><b>Medium- to long-term</b></p> <p><b>High priority</b></p> <p>Work with PB</p> <p>Requires additional resources</p> |
| 10 | <p>CDD should work with the PB and the public to revisit the SP criteria</p>   | <ul style="list-style-type: none"> <li>Any changes to the criteria will require additional analysis and planning work by city staff and PB with consultant input for City Council consideration</li> </ul>  | <p><b>Medium- to long-term</b></p> <p><b>High priority</b></p> <p>Work with PB and Council</p>                          |
| 11 | <p>Enforce deadlines for material submissions</p> <ul style="list-style-type: none"> <li>A second PB meeting should not be held unless all the supporting materials have been uploaded on the website</li> </ul>   | <ul style="list-style-type: none"> <li>CDD goal is to have materials <u>2 weeks prior</u> to the <u>first</u> scheduled hearing</li> <li>CDD goal is to schedule subsequent hearings when all the requested materials are submitted subject to legal requirements</li> <li>Recently started to further tighten the deadline. CDD will continue to work on establishing a consistent level of expectation.</li> <li>Requires legal advice</li> </ul> | <p>Improvement in progress</p>  |
| 12 | <p>Review SP application material submission requirements. E.g.:</p> <ul style="list-style-type: none"> <li>summaries of changes to a project (e.g., revision history)</li> <li>site analysis and site photos</li> <li>footprints of existing and new buildings</li> <li>all items should be electronic documents</li> </ul>   | <ul style="list-style-type: none"> <li>CDD will review</li> </ul>   | <p>Short-term</p> <p>Medium priority</p> <p>Work with PB</p>  |

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## 6. Establish an early community engagement process

### a. Short-term action (Short-term / High priority)

CDD will work with the PB as they consider establishing rules requiring an early community engagement process.

- **Sample language: Developers must host at least one public meeting prior to the submission of the application, noticed in advance as suggested below. Follow-up meetings are recommended as needed.**
  - Developers must submit a summary of what they've heard and how they responded to the major concerns. (Written summary by the neighborhood groups are appreciated and welcomed.)
  - A summary of a community meeting must be included as part of the application material in order for the application to be considered complete.

Establish guidelines for early community engagement:

- **Notification**
    - How?
      - e.g., Posting, mailing, postcards or flyers slipped under doors
    - Who should the developers be advised to be reaching out to?
      - Abutters, Existing community groups, CDD who else?
    - When?
      - e.g., two weeks in advance
    - Where?
      - e.g., public schools, in close proximity to a proposed project
  - **Are there particular requirements for presentation materials?**
    - e.g., Site analysis, tentative program mix, schematic design options, etc.
  - **Should the presentation materials be available online? Where?**
  - **Require meeting with the CDD before going out to the community?**
- \* Most FG participants suggested that CDD should be involved in the early engagement process to create a neutral environment for discussion and to hear major concerns from the public. However, due to staff and resource constraints, this suggestion will be considered as part of the long-term investigation process.

## 6. Establish an early community engagement process

### b. Identify priorities for longer term investigation (Short-to long-term / High priority)

CDD is investigating the pros and cons of the different types of community engagement forms, as listed below. We are looking at the best practices of other communities around the region and across the country.

#### Possible permutations of early community engagement formats

| Types of community representation |  | Developer-organized meetings  |  |  | CDD-organized meetings                           |
|-----------------------------------|--|---|--|--|--|
|                                   |  | A   | B  | C  | D  |
|                                   |  | CDD attendance <u>NOT</u> required – Developer provides a summary                             | CDD attendance required – Developer provides a summary | CDD attendance required – CDD provides a summary | CDD attendance required – CDD provides a summary |
| 1                                 | Project-based committees (appointed per project) |   |  |  | Boston Impact Advisory Group (IAG) model         |
| 2                                 | Appointed area-based committees                  |   |  | Central Square Advisory Committee model          | Seattle Design Review Board model                |
| 3                                 | Elected area-based committees                    |   |  |  | Boston Neighborhood Council model                |
| 4                                 | Existing neighborhood groups                     | Approximate to current practices at the existing neighborhood groups (e.g., ECPT, NCSC, MCNA) |  |  |  |
| 5                                 | Identified by the developer with CDD guidance    | Approximate to the proposed short-term action (pg. 15)  |  |  |  |

### Further questions for longer term investigation

#### How are committees formed?

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## 6. Establish an early community engagement process

- Who appoints them?
- What is an appropriate mix of representation?
  - Abutters, neighborhood groups, representatives of city-wide interests, business owners

**How should the community be reached out to?** Options for different methods of notification

### **When?**

- At the scoping phase
- At the schematic design phase
- At the design development phase

### **Material submission requirements?**

- Require developers to submit a Letter of Intent (e.g., Boston) that would initiate the pre-application process?
- Require developers to submit schematic design options at the first meeting (e.g., Early Design Guidance meeting, Seattle)
- No specific required materials

### **How many meetings?**

- At least one pre-application
- Require one meeting during the PB review procedure?

**Aside from the community meetings, are there other creative ways to get a wider range of community members involved?** (e.g., using technology)