

University of Massachusetts Boston

ScholarWorks at UMass Boston

Edward J. Collins Center for Public
Management Publications

Edward J. Collins, Jr. Center for Public
Management

2-2012

Organizational Assessment of the Brookline Planning & Community Development Department

Richard Kobayashi

University of Massachusetts Boston, richard.kobayashi@umb.edu

Monica Lamboy

University of Massachusetts Boston, monica.lamboy@umb.edu

Follow this and additional works at: https://scholarworks.umb.edu/cpm_pubs



Part of the [Public Administration Commons](#)

Recommended Citation

Kobayashi, Richard and Lamboy, Monica, "Organizational Assessment of the Brookline Planning & Community Development Department" (2012). *Edward J. Collins Center for Public Management Publications*. 9.

https://scholarworks.umb.edu/cpm_pubs/9

This Research Report is brought to you for free and open access by the Edward J. Collins, Jr. Center for Public Management at ScholarWorks at UMass Boston. It has been accepted for inclusion in Edward J. Collins Center for Public Management Publications by an authorized administrator of ScholarWorks at UMass Boston. For more information, please contact scholarworks@umb.edu.



Organizational Assessment of the Brookline Planning & Community Development Department

February 2012

Edward J. Collins, Jr. Center for Public Management

MCCORMACK GRADUATE SCHOOL OF POLICY AND GLOBAL STUDIES





EDWARD J. COLLINS, JR. CENTER FOR PUBLIC MANAGEMENT
JOHN W. McCORMACK GRADUATE SCHOOL OF POLICY AND GLOBAL STUDIES
UNIVERSITY OF MASSACHUSETTS BOSTON

100 Morrissey Boulevard
Boston, MA 02125-3393
P: 617.287.4824
F: 617.287.5566
mccormack.umb.edu/centers/cpm
collins.center@umb.edu

February 24, 2012

Mel Kleckner, Town Administrator
Town Hall
333 Washington Street
Brookline, MA 02445

Re: Organizational Assessment of the Town of Brookline
Planning & Community Development Department

Dear Mr. Kleckner,

I am pleased to transmit the final report on the *Organizational Assessment of Brookline's Planning & Development Department*.

Richard Kobayashi and Monica Lamboy, both Senior Associates at the Collins Center at the University of Massachusetts Boston prepared the report. During the information-gathering phase of the study, staff of the Town generously provided their observations and insights, as did numerous members of the Town's boards and commissions, and community organizations. This report could not have been prepared without their generous contributions.

We deeply value the trust and confidence placed in the Collins Center by the Town and we welcome any questions or comments you may have on the report.

Sincerely,

A handwritten signature in black ink, appearing to read 'Stephen McGoldrick'.

Stephen McGoldrick
Deputy Director

TABLE OF CONTENTS

EXECUTIVE SUMMARY	i
Impetus for the Study	i
Summary of Findings	i
Summary of Recommendations	i
Acknowledgements	ii
INTRODUCTION	1
BACKGROUND	3
Brief History of the Town of Brookline	3
Planning and Community Development in Brookline	3
Community Development Resources	4
Overview of Planning & Community Development Department.....	5
Planning and Development Program Funding.....	8
Community Engagement in Town Planning	10
FINDINGS.....	13
RECOMMENDATIONS.....	28
CONCLUSION	35
APPENDIX – Officials, Staff and Residents Interviewed.....	36

EXECUTIVE SUMMARY

Impetus for the Study

The immediate impetus for the organizational study of the Brookline Planning & Community Development Department (Department) was concern about the appropriate role for the Town in supporting the local business community, in particular whether the role performed by the Commercial Areas Coordinator position should continue.

In addition, the Town needed advice about the appropriate strategy for the Town to maintain planning and development services and staffing in light of the long-term decline in Community Development Block Grant (CDBG) funding. Since its passage in 1974, CDBG has been a principal component of the Department's financial architecture and a significant portion of funding available for staffing and operations. Of the Department's 16 full and part-time positions, 12 are funded in whole or in part by CDBG. As a result of continuing funding reductions, FY2013 funding will be approximately sixty percent of the level in FY2004 (\$1.2 million vs. \$1.9 million) and in upcoming years additional reductions are forecast due to pressure on the CDBG budget at the federal level.

Summary of Findings

Major findings of the report include:

1. The majority of functions the Department performs are mandatory in nature.
2. The discretionary functions of the Department: Economic Development, Sustainable Development, Special Projects and Long Range Planning are important to the implementation of good public policies for the Town.
3. Staff of the Department are well trained, know their jobs and possess considerable institutional knowledge
4. Significantly greater flexibility in the organizational structure and position descriptions is needed to meet current and future service demands
5. CDBG funding allocations in Brookline align with other cities and towns.
6. The Town's reliance upon residential property taxes directly affects its ability to meet community service demands.
7. The Department has good working relationships with the Building Department and the Department of Public Works (DPW) and those relationships need to be sustained.

Summary of Recommendations

The report recommends that the Town of Brookline:

1. Increase flexibility within the Planning & Community Development Department by enabling the broader utilization of staff through the creation of generalized Planning and Senior Planner job descriptions and by moving toward a new organizational structure that includes a senior-level policy/planning position and an administrative manager/grants administrator position.
2. Prepare for continued reduction in CDBG funding by streamlining processes, actively pursuing outside funding, and bringing resources committed to CDBG administration in line with current funding for the program
3. Retain and potentially expand the positions dedicated to economic development by abolishing the position of Commercial Areas Coordinator and creating a new Planner position under the supervision of the Economic Development Director to participate in a broad spectrum of the Town's economic development efforts.
4. More extensively utilize the skills and expertise of the Economic Development Advisory Board (EDAB) to plan for and facilitate contextually sensitive economic development projects.
5. Move toward making Regulatory Planning functions more self-sustaining by adjusting the fee structure for planning and zoning permits.
6. Recognize that the Department enables the proper functioning of the Town's complex regulatory system. The Town's boards could not function without the professional support provided by the Department.
7. Cease utilizing Economic Development staff as public affairs representative for public construction projects. This intermittent burden should be the responsibility of the implementing Town agency and plans for this function should be incorporated into project designs and budgets by the implementing agency.
8. Assign the Department to serve as staff to the Zoning Board of Appeals and ensure that budgetary resources account for this new responsibility.
9. Seek an outside partner to help support the ongoing health and vitality of Brookline's business districts.
10. Closely monitor workload impacts in the Housing Division as the inventory of affordable units increases, but funding for future unit decreases.

Acknowledgements

The Study Team acknowledges the assistance of the members of the Board of Selectmen, Town staff, members of Boards and Commissions, residents and business people. Without their generous contribution of knowledge and insight this report would not have been possible to produce.

INTRODUCTION

This review of the operations of the Brookline's Planning & Development Department (Department) was initiated by the Town Administrator in October 2011. The Board of Selectmen approved an agreement with the Collins Center in November 2011 and the data-gathering phase was commenced shortly after the Board's approval.

The impetus for the review originated in discussions held by Town Meeting and the Board of Selectmen relative to the appropriate role for the Town in supporting the local business community, in particular whether the role performed by the Commercial Areas Coordinator position should continue. In addition, the Town Administrator had concerns about the Department's financial future given anticipated reductions in the U.S. Department of Housing and Urban Development's (HUD) Community Development Block Grant Program (CDBG).

Since 2000, cities and towns across the country have experienced declines in CDBG resources – with the exception of 2009 when CDBG entitlement was increased and additional federal stimulus dollars became available through the CDBG program. In recent years Brookline's typical CDBG allocation has declined from approximately \$1.94 million (FY2004 and FY2006) to approximately \$1.6 million (FY2007 through FY2011). However, by the current fiscal year (FY2012) this amount had declined to just under \$1.47 million and the outlook for the future of this revenue source is negative. In October 2011, Congress adopted the CDBG budget for the 2013 HUD program year and reduced the program by an additional 15%¹ nationwide, bringing next year's allocation to less than \$1.25 million (effective July 1, 2012). Given current federal fiscal constraints, growth in the program is unlikely and jurisdictions should prepare themselves for additional reductions, while continuing to hope for the best. Brookline is ahead of the curve in that it is evaluating its resource allocation today, several months before the new HUD program year is set to start.

As the table to the right shows the FY 2004 Entitlement was \$1.94 million and the FY 2013 Entitlement will be \$1.23 million, sixty-three percent of the FY 2004 level.

Complicating the reductions in CDBG is the fact that the Town's General Fund budget is under strain and it is unlikely that the Town has the capability to make up for losses in the CDBG funds that support current operations of the Department.

Given this context, the Collins Center was engaged to assess current operation of the Planning & Development Department by reviewing records, interviewing staff and significant stakeholders, and comparing the Department to like departments in

BROOKLINE CDBG ENTITLEMENT FY2003-2012		
Fiscal Year	CDBG Entitlement (\$)	% Change
2004	1,937,000	
2005	1,918,000	-1.0
2006	1,922,000	+0.2
2007	1,651,334	-14.1
2008	1,660,111	+0.5
2009	1,607,057	-3.2
2010	1,639,129	+2.0
2011	1,777,234	+8.4
2012	1,469,407	-17.3
2013 (est.)	1,237,650	-15.8

¹ The HUD HOME Program will experience a 40% budget cut during the same program year.

Cambridge, Newton, and Somerville, and making recommendations for the future. The Consulting Team reviewed a wide range of records and documents and interviewed more than thirty-five people, including all Departmental staff, all Selectmen, representatives of key Boards and Commissions, and representatives of several community and business groups. A list of people interviewed is included as the Appendix.

BACKGROUND

Brief History of the Town of Brookline

Nearly surrounded by the City of Boston except where it abuts the City of Newton, Brookline has a distinctive history stretching back to the colonial period. The unique configuration of Brookline's 6.7 square miles is largely a consequence of the annexation of two formerly abutting towns by the City of Boston: West Roxbury in 1873 and Hyde Park in 1912. As a result of its decision to remain an independent political entity, Brookline retains an updated form of the traditional New England Town Meeting (Representative Town Meeting) as its legislative body. Brookline is the only municipality in Massachusetts with its density (approximately 8,700 people per square mile) to retain the Town Meeting form of government, even though with 59,000 residents it is not the largest town in terms of total population.

Rail and street car service during the mid-19th century - at first horse drawn and later powered by steam or electricity - brought large swaths of Brookline into easy commuting range of downtown Boston. This produced the urban form the Town now enjoys, particularly in the easternmost portions of the town and along the major transit corridors of Beacon Street and Route 9/Boylston Street. According to the Brookline Comprehensive Plan, "the first apartment buildings in Brookline were built in the 1880's and, by World War I, Beacon Street was lined by luxury apartments."² Other housing options were within reach of middle class families who appreciated the quality of life offered in the streetcar suburbs where they could reside away from the center city; yet remain close enough for a daily commute.

The town's major business and retail centers, including Coolidge Corner, Brookline Village, Washington Square, Cleveland Circle and Chestnut Hill are well served by transit and are recognized throughout the region (and sometimes envied) for their diverse business mix and pedestrian-friendly environments. Brookline's proximity to the renowned medical facilities of the Longwood Medical area in nearby Boston has brought economic opportunity to the town while also contributing to development pressures.

Since Brookline remained an independent town and in Massachusetts land use regulatory policy is typically made at the local level, both new and old residents of Brookline wielded considerable power to shape the development of the town. The rich architectural details found in homes and commercial buildings across town, the neighborhoods with their human scale and sense of history, and the commercial districts with their small storefronts and pedestrian orientation are evidence of the care and attention paid to development by the Brookline community over the years. Through its diligence, Brookline seems to have largely avoided the types of poor planning decisions, (e.g., large scale demolition redevelopment and super-sized transportation infrastructure projects) which characterize many municipalities in the region.

Planning and Community Development in Brookline

A multitude of regulations govern the use of land within Brookline. These include federal, state, and local provisions and programs –some of which are discretionary in nature, but many of which are

² *Brookline Comprehensive Plan 2005-2015*, page 12.

mandatory (see Finding #1).

Although the names vary, planning and development departments are typically responsible for the implementation of land use regulations that are in place, while also helping a community plan for its future. Often times, they have characteristics that set them apart from other municipal departments. They house highly educated professionals who possess a range of skills that support visioning and policymaking, as well as day-to-day implementation. This enables municipal leaders (both elected and appointed) to utilize planning staff for a variety of tasks that cannot be effectively performed in more specialized departments. Multi-modal transportation planning and sustainable development are examples of policy initiatives that accrete over time. This characteristic of having capable staff seemingly “on-call” is one of the reasons departments like the one in Brookline become multifaceted.

The preeminent tool for land planning for the past near century is zoning, whose constitutionality was upheld by the U.S. Supreme Court in 1926. Testimony to Brookline’s focused interest in development within its boundaries is the fact that the first Brookline Zoning By-Law dates to 1922. Even though it has been modified over time, the foundation of the by-law in effect today dates back to 1962, when the zoning was recodified. The 50-year anniversary of this event will take place this spring. In addition, through its by-laws, the Town has also established several Boards and Commissions and regulations that further guide how land and property can be used in town and how they can or cannot be modified.

Brookline’s Planning & Community Development Department is the agency with the most direct accountability for implementing land use policy in town. As such, it has a weighty responsibility to take into account the needs and demands of a large and diverse constituency of residents, business persons, and elected officials, while remaining in compliance with guidelines and expectations established by outside state and federal agencies and funders.

Community Development Resources

Created during the Nixon Administration through the Housing and Community Development Act of 1974, CDBG Program “merged 7 categorical programs into a block of flexible community development funds distributed each year by a formula that considers population and measures of distress including poverty, age of housing, housing overcrowding, and growth lag.”³ Communities receiving these funds were given the authority to determine how to utilize the funds, provided that the activity is eligible for the program and meets one of three program objectives.

Nationwide, CDBG funds are allocated either to “entitlement communities” or to state/regional agencies that are responsible for allocating CDBG resources to the smaller jurisdictions within their boundaries. Entitlement communities are principal cities of Metropolitan Statistical Areas (MSAs) or other metropolitan cities with populations of at least 50,000. Resources are allocated among the entitlement communities based upon one of two formulas contained in Title 42 Chapter 69 Section 5306b.

To benefit from the flexibility of the block grant, communities eligible for CDBG funds are required to prepare and make public their plans to utilize the funds and to produce an annual report on how the funds were expended. The required documents include:

³http://portal.hud.gov/hudportal/HUD?src=/program_offices/comm_planning/communitydevelopment/rulesandregs

- **Five Year Consolidated Plan** – as indicated by the title, this plan covers five years of the program and provides the underpinning for how each year’s resources are to be used. The Consolidated Plan must identify objectives and performance measures to determine success.
- **One Year Action Plan (Action Plan)** – this plan identifies specifically how the annual resources are to be allocated among administrative activities and programmatic activities.
- **Consolidated Annual Performance and Evaluation Report (CAPER)** – after the close of the program year, each community must document expenditures and accomplishments made during the program year.

HUD has established specific requirements to ensure opportunity exists for public participation in the preparation of the annual Action Plan and Consolidated Plan. Each year, two advertised public hearings must be held – the first to solicit input before the Action Plan is drafted and the second to solicit input after a draft is prepared. The elected body of the jurisdiction must vote on the plan before it is submitted to HUD. Before funding is released, HUD reviews and approves the Action Plan to ensure that HUD standards have been met during the process of preparing the annual plan and that the content of the annual plan also meets HUD standards.

The Town of Brookline benefits from a special exception receiving its eligibility as an entitlement community due to the age of its housing stock, rather than household income. Brookline’s exception enables it to target CDBG resources to areas with fewer low-income households than the national standard. The Town can define eligible areas as those where thirty-four percent or more of households are low income, whereas the general standard is fifty percent or more. Eligible block groups can only be found in the northeast quadrants of Brookline (see Map 1) – within these areas, greater flexibility is granted regarding use of CDBG funds. In contrast, CDBG activities that take place outside these areas must demonstrably benefit low-income residents.

Overview of Planning & Community Development Department

As with most, if not all town departments, the configuration and expectations of the Planning & Community Development Department have changed over time. The most significant reorganization in recent years occurred in 1999 when the Department of Planning & Community Development was created. As the by-law states, “the consolidation is designed to attain efficiencies and economies of scale, to reduce or eliminate duplication and overlapping of services, responsibilities and functions, and to improve communication and coordination for planning and development functions between and among the various offices and agencies of the town.”⁴ This reorganization occurred shortly before the work on the Brookline comprehensive plan began. Pursuant to an option in the by-law, the economic development function was converted from a stand-alone department into a division of Planning & Community Development by vote of the Board of Selectmen in 2008.







Today, the Department consists of a director’s office and three divisions – each of which has multiple responsibilities. To facilitate discussion about the resource and other needs of the department going forward and its appropriate responsibilities, it is important to understand the roles and responsibilities of the organization today. To that end, following is an organizational chart and a brief summary of responsibilities of each division.

⁴ *Brookline Town By-Laws*, Article 3.12, Department of Planning & Community Development, Section 3.12.2.

Town of Brookline, Massachusetts
CDBG Area Map
 (Based upon 2000 census)



Legend

-  Census Tract
- Low-Moderate Income Percentage**
-  30s
-  40s
-  50s
-  60s
-  3001 Census Block/Number

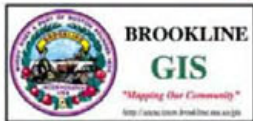
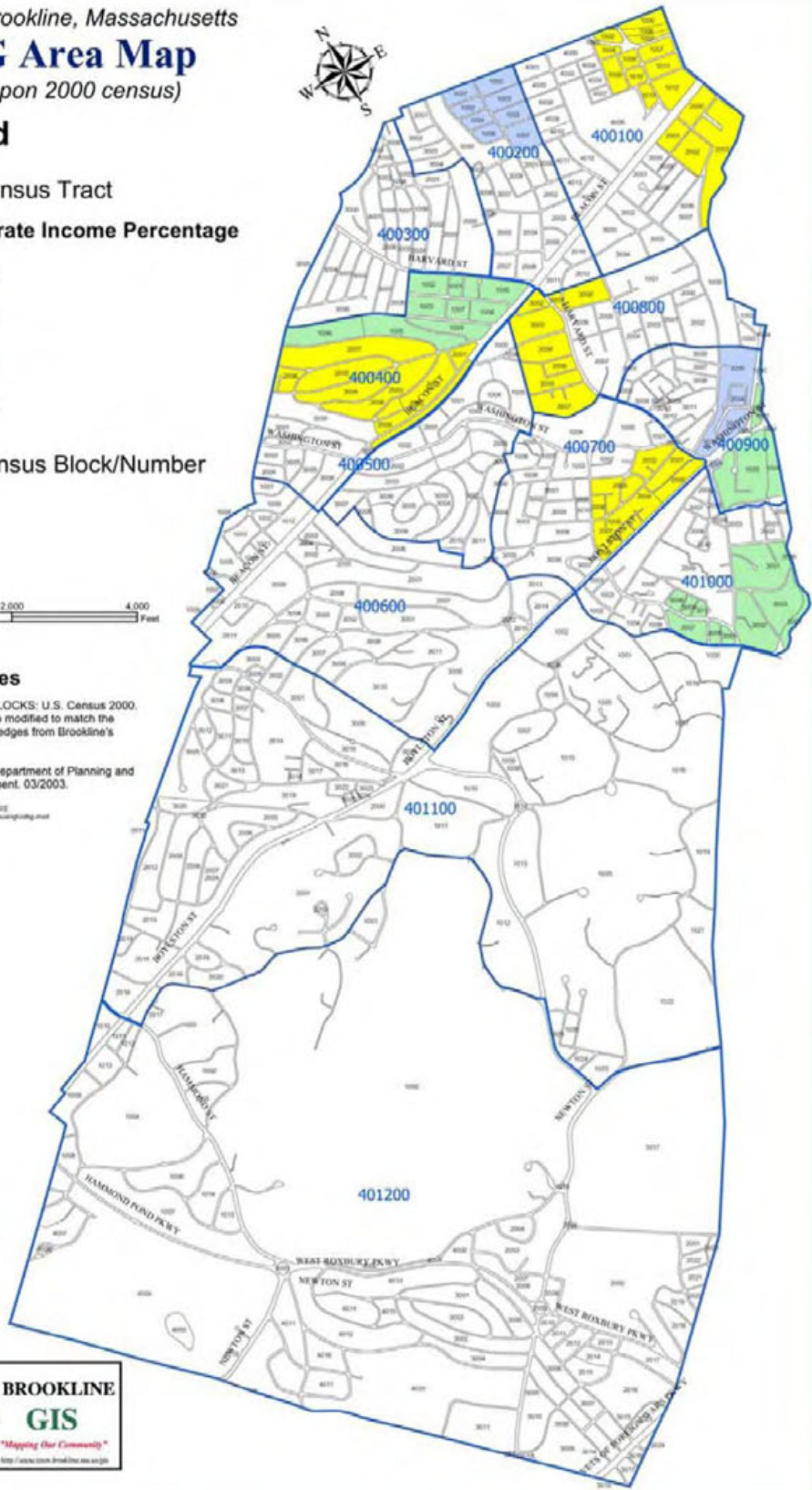


Data Sources

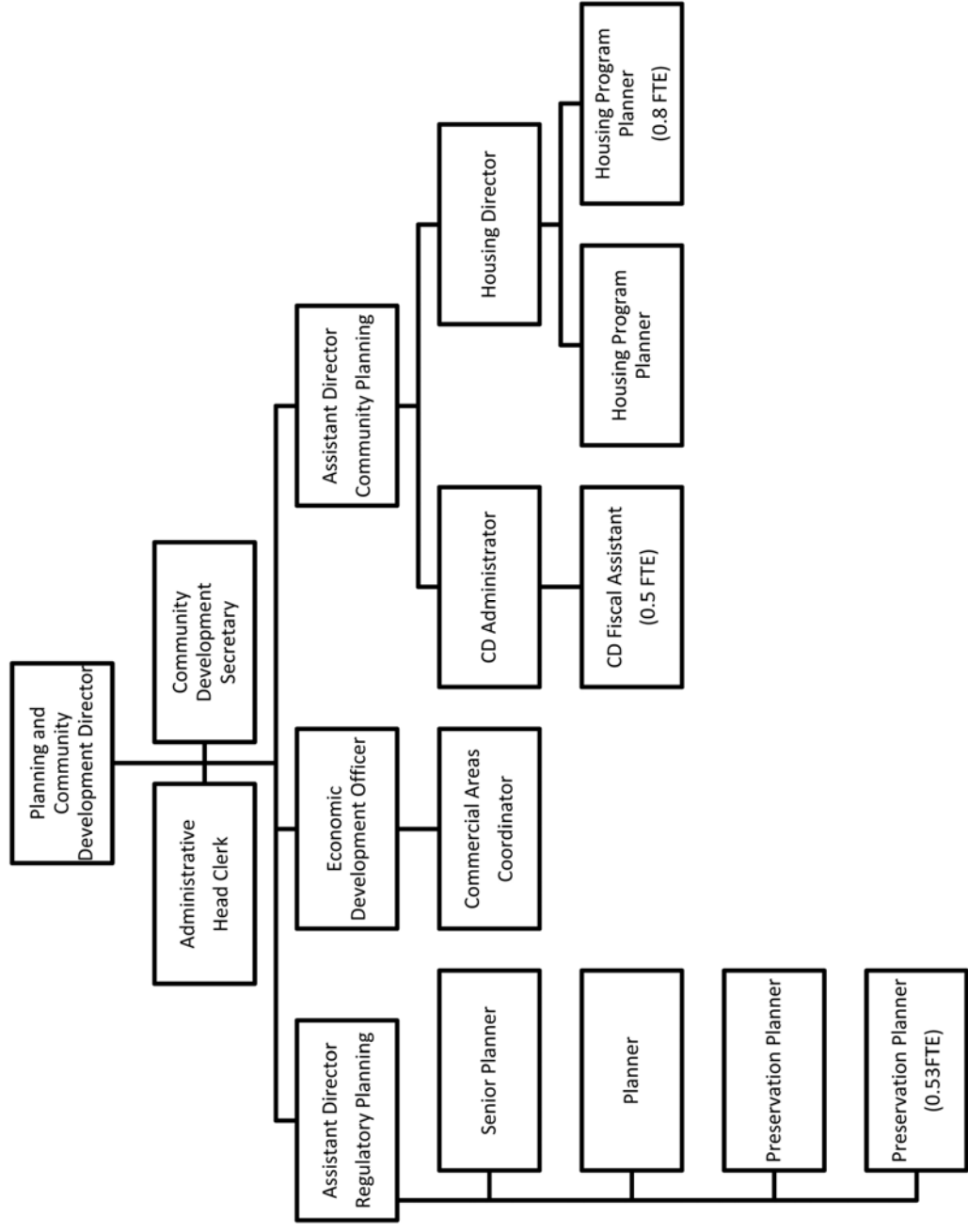
CENSUS TRACTS/BLOCKS: U.S. Census 2000. The TIGER lines were modified to match the more accurate street edges from Brookline's GIS database.

CDBG areas: HUD/Department of Planning and Community Development. 03/2003.

Map created by Town of Brookline GIS
 Map date: 10/16/2003/gis/planning/cdbgarea/gisprint.mxd



ORGANIZATIONAL STRUCTURE
Brookline Planning & Community Development Department
FY2012



Department Divisions include:

- **Director's Office** (3 fte) – although not recognized as a “program” in Brookline’s program based budget, leadership of the Department comes from the Director of Planning and Community Development. The Department’s two support staff (Administrative Head Clerk and CD Secretary) report to the Director, but are typically assigned to work with the divisions.
- **Regulatory Planning Division** (4.53 fte) - led by the Assistant Director for Regulatory Planning, this division has dual responsibility for administering the Town’s zoning and historic preservation regulations. Staff includes two zoning planners (Senior Planner and Planner) and 1.53 planners for historic preservation (Preservation Planner).
- **Community Development Division** (5.60 fte) – led by the Assistant Director for Community Planning, this division also encompasses two significant responsibilities – administrative oversight of HUD programs (CDBG and HOME) and the provision of affordable housing. Staff overseeing HUD programs include 1.8 fte (CD Administrator and 0.80 CD Fiscal Assistant) and 2.8 fte for housing programs (Housing Development Manager and 1.8 fte Housing Project Planner).
- **Economic Development Division** (2 fte) – the Economic Development Division consists of the Economic Development Officer and the Commercial Areas Coordinator. This group “encourages commercial growth and fosters the prosperity of businesses” in the Town of Brookline.

For FY2012, the Department is budgeted for 15.03 FTE which translates into 16 full and part-time staff members. Two of the positions are presently are vacant and three are funded as permanent, part-time. Despite the relatively small size of the Department, 14 different position descriptions can be found. Seven positions are covered by union collective bargaining agreements.

CDBG funding represents a significant source of funding for staffing in the Planning & Development Department.

Planning and Development Program Funding

The most significant resources available to the Department are CDBG and local funds, although the Department also administers other grant funds such as HOME (affordable housing) and the Energy Efficiency and Conservation Block Grant (EECBG). As noted earlier, CDBG resources have been on a downward trend since 2000, a trend that is anticipated to continue. Nevertheless, during FY2012, the Town of Brookline has nearly \$1.47 million on CDBG entitlement funds available to it to meet the goals outlined in the Town’s Action Plan, as well as the intent of the federal program.

To understand how Brookline utilizes CDBG funding and compare Brookline with other CDBG funded communities, the table below divides Brookline’s allocation into seven expenditure categories. (See also Finding #5).

BROOKLINE CDBG ALLOCATION BY CATEGORY (FY2012)				
POLICY/PROGRAM AREA	PERSONNEL (\$)	NON- PERSONNEL (\$)	TOTAL	% OF TOTAL
CD Admin	160,663	8,256	168,919	11.5%
Planning	58,228	554	58,782	4.0%
Housing	279,075	632,128	911,203	62.0%
Economic Development				0.0%
Historic Preservation	63,878	1,224	65,103	4.4%
Transportation / ADA Access		45,000	45,000	3.1%
Parks				0.0%
Public Services Grants		220,400	220,400	15.0%
TOTAL	561,844	907,562	1,469,407	
% OF TOTAL	38.2%	61.8%		

As the table above shows, housing activities receive the largest share of CDBG program funds and approximately 38% of resources are expended on personnel and 62% on direct programmatic activities.

The non-salary resources are used for projects identified in each year's Action Plan, including capital improvements and services to low-income residents, among other activities. These include allocations made through sub-grants for public services, which are capped at 15% by HUD, and/or specific projects identified in the plan such as affordable housing construction or capital improvements benefitting disabled residents. In FY2012, services funded by CDBG included job training, English as a Second Language classes, and elder home care among others. The table below shows the range of CDBG supported programs and the funding for each.

PUBLIC SERVICES GRANT ALLOCATIONS (FY2012)		
Name	Purpose	Amount
Parent Child HOME Program	Risk prevention for low/mod children	\$12,400
NEXT Steps	Resource and referral counseling	\$11,580
Youth Employment Training Program	Job training leading to employment	\$69,250
Job Opportunities for Elders	Employment of elders at Senior Center to assist with services	\$12,640
Brookline Learning Project	ESL classes for low/mod-income Brookline residents	\$10,750
Brookline Elder Taxi Program	Transportation subsidy through cab discount for elderly	\$34,700
HOME and Escort Linkage Prgm (HELP)	Support for elderly homecare program	\$5,000
Adolescent Outreach Program/BCMHC	Crisis intervention /counseling for low/mod youth	\$36,580
Comprehensive Services for Children & Families/BCMHC	Comprehensive services for children & families at the Brookline Center	\$27,500
	TOTAL	\$220,400

PROJECT ALLOCATIONS (FY2012)		
Name	Purpose	Amount
Affordable Housing Program	Create, develop, retain affordable housing	\$359,878
BHA Accessible Apartments	Create 3 new ADA access units at 2 developments	\$272,250
Brookline Senior Center Renovation	Design & capital funds to renovate former day space	\$45,000
	TOTAL	\$677,125

Recent noteworthy accomplishments funded all or in part by CDBG resources include:

- *Gateway East/Village Square and Emerald Necklace Crossing:* These two projects will reshape the Route 9 corridor from Washington Street in Brookline Village to the Boston city line. Improvements included increased ADA accessibility, safer pedestrian crossings, on-street bicycle accommodations, and aesthetic improvements. A total of \$350,000 in CDBG funds have been allocated toward the \$500,000 for the combined design and engineering costs.
- *Juniper Playground:* The Town committed approximately \$330,000 in CDBG funds for design and construction of the Juniper Street Playground, located at the rear of Brookline Housing Authority's High Street Development. Improvements included removal of outdated equipment that did not meet current safety standards and replacement with new play equipment, and improved seating and landscaping.
- *Capital Improvements at Brookline Housing Authority (BHA) Properties:* Upwards of \$1.2 million in CDBG and ARRA funds have been committed to BHA capital needs such as energy efficiency projects (new windows and heating systems), roof replacement, safety monitoring equipment, ADA improvements, asbestos removal and lead paint testing, masonry repair and replacement of building facades, among other improvements.

The accomplishments noted above are made possible by the work of Department staff in collaboration with other town departments and the Town Administrator.

Community Engagement in Town Planning

Brookline stands out among Massachusetts towns for a citizenry that is actively involved and interested in Town affairs. The level of citizen interest and participation in Town governance is exemplary; as is the level of sophistication and dedication that Brookline's community members bring to service through Town Meeting and on various Boards, Commissions and committees (Boards). With 240 directly elected members plus officials who serve ex officio including members of the Board of Selectmen, Town Clerk, and state legislators. The Representative Town Meeting ensures that representative democracy is alive and the perspectives of community members are taken into consideration in public decision-making. Indeed, the highly participatory form of governance in Brookline lends the Town as much of its character as the Town's physical layout does. The Advisory Committee is significantly larger than most similar bodies in Massachusetts. Due to its size and diligence in reviewing the Town's budget and operations, a remarkably large number of residents have an intimate knowledge of the Town's financial affairs.

The members of the Town's boards are to be commended for the considerable time they dedicate to town governance. In a time of limited fiscal resources, the culture of community volunteerism in

BROOKLINE PERSONNEL COSTS BY FUNDING SOURCE FY2012 (including fringe benefits)									
Position	Salary	Fringe	Total	%CDBG	\$CDBG	%Local	\$Local	Total	
Planning and Community Development Director	\$117,140	\$23,709	\$140,849			100%	\$140,849	\$140,849	
CD Administrator	\$74,802	\$15,892	\$90,694	100%	\$90,694			\$90,694	
CD Fiscal Assistant (pt – 50%) ¹	\$27,102	\$17,379	\$44,481	50%	\$44,481			\$44,481	
CD Secretary	\$39,390	\$11,586	\$50,976	100%	\$50,976			\$50,976	
Administrative Head Clerk	\$50,493	\$18,377	\$68,870			100%	\$68,870	\$68,870	
Sub-total Admin			\$395,870		\$186,151		\$209,719	\$395,870	
Assistant. Dir. – Regulatory Planning	\$82,593	\$7,658	\$90,251			100%	\$90,251	\$90,251	
Senior Planner ²	\$69,303	\$20,057	\$89,360	20%	\$17,872	74%	\$66,488	\$89,360	
Planner	\$59,221	\$4,685	\$63,906	33%	\$21,302	67%	\$42,604	\$63,906	
CD Intern			\$8,500	100%	\$8,500			\$8,500	
Sub-total Planning			\$252,017		\$47,674		\$199,343	\$252,017	
Preservation Planner	\$59,904	\$19,450	\$79,354	50%	\$39,672	50%	\$39,672	\$79,354	
Preservation Planner (pt – .53 fte)	\$39,067	\$6,605	\$45,672	53%	\$24,206	47%	\$21,466	\$45,672	
Sub-total Historic Preservation			\$125,026		\$63,878		\$61,138	\$125,026	
Economic Development Officer	\$89,807	\$7,185	\$96,922			100%	\$96,922	\$96,992	
Commercial Areas Coordinator	\$71,230	\$20,036	\$91,266			100%	\$91,266	\$91,266	
Sub-total Economic Development			\$188,188				\$188,188	\$188,258	
Assistant Dir. – Community Planning	\$84,142	\$21,396	\$105,538	35%	\$36,938	65%	\$68,600	\$105,538	
Housing Development Manager ³	\$78,175	\$25,125	\$103,300	72%	\$74,376			\$103,043	
Housing Project Planner	\$65,617	\$14,193	\$79,810	100%	\$79,810			\$79,810	
Housing Project Planner (pt - .8 fte)	\$52,494	\$20,083	\$72,577	80%	\$72,577			\$73,202	
Sub-total Housing			\$361,225		\$263,701		\$68,600	\$361,593	
GRAND TOTAL			\$1,322,326		\$561,404		\$726,988	\$1,322,764	

¹ Position was closer to 80% in FY2011 and part of FY2012 because of recovery act funding, but is only budgeted through CDBG at 50% for FY2012.

² Some federal ARRA funds were also budgeted for this position in FY2012.

³ Position is 1.0 FTE. For simplicity's sake, the full HOME funding available to the housing unit is accredited to this position but is used by other positions as they are assigned to HOME projects.

Brookline fosters a town-resident partnership approach to addressing important issues. At the same time, considerable process is involved with each of the boards and committees. There is a time and cost impact of the prominence given to process in Brookline - impacts the community has been willing to accommodate to date. To paraphrase one interviewee, "Brookline likes its process and is willing to pay for it."

There is a synergistic relationship between boards and town staff. In Brookline, it has been customary to provide boards with professional staff support as they carry out their duties. Board representatives interviewed for this project could not envision their boards functioning successfully without professional support.

The Planning & Community Development Department supports multiple boards - providing data and technical expertise, as well as serving as the caretakers of processes required by statute (e.g. public notification requirements for planning or historic preservation cases). As currently configured, the plethora of boards, the activism of board members and the participation of interested community members, coupled with a complex land use regulatory structure requires significant staff support to function effectively. The land use regulatory system requires two kinds of support: technical support for boards making decisions and educational activities to assist residents or businesses in making their way through the Town's complex regulatory system.

The boards that the Planning & Community Development Department regularly interacts with include:

- Board of Appeals (with Building Commissioner and Town Clerk)
- Design Advisory Teams (as created by Planning Board)
- CDBG Advisory Committee
- Climate Action Committee
- Economic Development Advisory Board
- Housing Advisory Board
- Emerald Necklace Crossing Committee (with DPW)
- Fisher Hill Building Oversight
- Gateway East CAC
- Hancock Village Planning
- Moderator's Committee on Parking (administrative support only)
- Planning Board
- Preservation Commission
- Zoning Bylaw Committee

The Department also supports some committees that meet on as-needed basis. These include:

- Bike Sharing
- Davis Path Committee
- Parking Committee

FINDINGS

Finding #1: The majority of functions the Department performs are mandatory in nature.

The Department's responsibilities can be divided into those that are mandatory and those that are discretionary. Mandatory functions are those required by the federal government, state government or by the Town's by-laws or regulations. Examples include Local Historic District regulations adopted by the town and statutory timelines required of the Planning Board and Board of Appeal. Grants from federal or state government agencies come with legal obligations to meet the specific grant deliverables and reporting requirements. An example is the requirement that construction funded by CDBG meet Davis-Bacon prevailing wage requirements. The Department must not only ensure compliance by contractors, it needs to report compliance to HUD. Discretionary functions and activities are not required by law, but instead design or implement what the Town considers good public policy.

The majority of the Department's work falls into the mandatory category. The table below lists the most significant mandatory responsibilities of the Department. Many of them have their origin in the complex and comprehensive regulatory environment that the Town Meeting has established by enacting by-laws. For the purpose of this assessment the Study Team considers the Department's housing activities as a mandatory function given that they implement long-standing Town policy and/or contractual obligations to funding agencies, and move the Town toward reaching the 40B threshold of 10% affordability.

The extent of mandated responsibilities limits the Town's flexibility with regard to the size of the Department – the risk exists that, even with improvements in technology and processes, at some point staff will be unable to meet the Town's statutory responsibilities creating legal vulnerability in the review of zoning cases and/or risking the loss of grant funding. In recent years, the Town has increased the Department's responsibilities through the expansion of Historic Preservation Districts and the recent adoption of the Neighborhood Conservation Districts ordinance. The level of staff support and the nature of staff support for Neighborhood Conservation Districts are unknown as is the point in time at which support will be required. Nevertheless, the support burden is expected to be significant. Mandatory functions found by the study team include Planning & Zoning Permits, Preservation Permits, Affordable Housing Programs, and the new Neighborhood Conservation Districts, if Brookline's By-Law is validated by the Attorney General. These functions are described below.

- **Planning & Zoning Permits**

The Regulatory Planning staff provides direct support to the Planning Board as it reviews permits within its purview and makes recommendations on cases before the Zoning Board of Appeals. The Planning Board typically meets at least four times per month – two times to review sign and façade permits and two times to review cases before the Zoning Board of Appeals. If a Design Advisory

STATUTORY OR POLICY REQUIREMENT FOR MAJOR ONGOING ACTIVITIES			
Activity	Division	Requirement	Citation
CDBG Recovery Fund Program	Com Plng - CDBG	Federal	FR-509-N-01
Community Development Block Grant program	Com Plng	Federal	CFR 570.501 (applying for sources required under General By-laws 3.13.3)
Energy Efficiency and Conservation Block Grant Program	Reg Plng - Energy	Federal	Title V, Subtitle E of ERISA, Public Law 110-140, ARRA; 10 CFR Part 600
HEARTH Act Compliance	Com Plng - CDBG	Federal	HEARTH Act of 2009 24 CFR 91 & 576
Homeless Prevention and Rapid Rehousing Program	Com Plng - Housing	Federal	ARRA and Federal Notice FR-5307-N-01
HOME Program	Com Plng	Federal	24 CFR 92 (applying for sources required under General By-laws 3.13.3, 3.12.7)
Fair Housing Plans and Reporting	Com Plng - Housing	Federal	Title VIII of the Civil Rights Act of 1968, Fair Housing Amendments Act of 1988
Microenterprise Grant Program	Econ Devt	Federal	24 CFR 570.203(b) and 201(o)
Ongoing Monitoring of Affordable Units	Com Plng - Housing	Fed, State, Local	Federal CDBG and HOME Requirements, Other State and Local Requirements
Staffing refinancing and resale of deed restricted properties	Com Plng - Housing	Fed, State, Local	Federal HOME Requirements, Other State and Local Requirements
Preservation Staff Review of Proposed Proj (Sect 106 et al.)	Reg Plng- Preservatn	Federal, State	36 CFR 800 and 95 CMR 71.00
Administering the Inclusionary Zoning Bylaw	Com Plng - Housing	State, Local	Zoning Bylaw § 4.08 and MGL c. 40B
Response to Comprehensive Permit proposals/applications	Com Plng, Reg Plng	State	MGL c.40B
Adding Units to State Subsidized Housing Inventory	Com Plng - Housing	State	MGL c.40B and associated Guidelines, assumed under Zoning Bylaw 4.08
Capital Improvement Program Review	Com Plng	State	MGL c. 44 § 81J
Certified Local Government Program	Reg Plng – Preservatn	State	National Historic Preserv Act of 1980, 36 CFR 61
Developing Comprehensive Plan and other Planning Studies	Com Plng	State	MGL c. 44 § 81J
Green Community Program	Reg Plng- Energy	State	MGL c. 7 § 9A; MGL c. 25 §10.00
Local Historic District Administration (Preservation Comm)	Reg Plng - Preservatn	State, Local	MGL c. 40C and General Bylaws § 5.6
Preservation Commission Staffing	Reg Plng - Preservatn	State, Local	MGL c. 40C and General Bylaws § 5.6.4
Proposal/Review of Zoning and Other By-Law Amendments	Reg Plng - Planning	State, Local	MGL c. 40A and Zoning Bylaw § 10.00
Subdivision and ANR Review (Planning Board)	Reg Plng - Planning	State, Local	MGL c 41 s 81J-81Y and Plng Board Regulations
Zoning Bylaw Administration (Planning Board)	Reg Plng - Planning	State, Local	MGL c. 40A and Zoning Bylaw § 9.04

STATUTORY OR POLICY REQUIREMENT FOR MAJOR ONGOING ACTIVITIES			
Activity	Division	Requirement	Citation
Demolition Review	Reg PIng - Preservation	Local	General Bylaws § 5.3
Design Advisory Team Administration and Support	Reg PIng - Planning	Local	Zoning Bylaw § 5.09
Economic Development Advisory Board Staffing	Econ Devt	Local	General Bylaws § 3.12.10
Facade Loan Program	Econ Devt	Local	Vote of Town Meeting
Housing Advisory Board Staffing	Com PIng - Housing	Local	General Bylaws § 3.12.8 and 3.13
Administering Housing Trust - revenues and expenditures	Com PIng - Housing	Local	General Bylaws § 3.12.7,8 and 3.13
Working with developers to comply w/Inclusionary zoning	Com PIng - Housing	Local	Gen Bylaws § 3.12.7,8 and 3.13.4, Zoning Bylaw 4.08
Identifying, supporting, funding Afford Hsg Opportunities	Com PIng - Housing	Local	General Bylaws § 3.12.7,8 and 3.13
Studying housing policy, as requested (e.g., accessory units)	Com PIng - Housing	Local	General Bylaws § 3.12.7,8 and 3.13
Neighborhood Conservation District Staffing and Admin	Regulatory Planning	Local	General Bylaws § 5.10 (pending)
Planning Board Staffing	Reg PIng - Planning	Local	MGL c. 30A, Sec. 18-22; General Bylaws § 3.21; Zoning Bylaw § 9.04.5
Sign By-Law Administration (Planning Board)	Reg PIng - Planning	Local	Zoning Bylaw § 7.02
Zoning Board of Appeals Attendance and Testimony	Reg PIng - Planning	Local	Zoning Bylaw § 9.04.5 and General Bylaws § 3.6
Bicycle Sharing Program	Com PIng		Pursuant to Board of Selectmen vote
CDBG Advisory Committee Staffing	Com PIng - CDBG		Pursuant to Board of Selectmen vote
Climate Action Committee Staffing	Reg PIng- Energy		Pursuant to Board of Selectmen vote
Zoning Bylaw Committee Staffing	Reg PIng - Planning		Pursuant to Board of Selectmen vote
Staff Support for Selectmen-Appointed Committees (Olmsted Hill, Hancock Village)	Com PIng/Reg PIng		Pursuant to Board of Selectmen vote
Administering the Town's Housing Trust	Com PIng - Housing		
Project Management of Roadway and Infrastructure Improvements - Village Square	Com PIng		
Climate Change Action Brookline Attendance and Coord	Reg PIng- Energy		
Food Truck Pilot Program	Econ Devt		
Identifying Affordable Development Opportunities	Com PIng - Housing		
Identifying Commercial Development Opportunities	Econ Devt		
Working with Developers on Affordable Opportunities	Com PIng - Housing		

Team⁵ (DAT) is in operation, additional meetings may be held, as occurs when reviewing amendments to the Zoning Ordinance. Staff not only attend these meetings, but undertake considerable preparatory work, including working with applicants to ensure that all needed materials are submitted, preparing required public notices, and writing staff reports in advance of hearings and decision letters after the hearings.

PLANNING CASELOAD			
Year	Total Cases	Comm. Signs and Facades	ZBA Recommend
2011	163	77	86
2010	167	85	82
2009	144	55	89
2008	158	68	90
2007	158	68	90
2006	155	66	89
2005	155	80	75

The staff role does not end when a case has been decided; staff must also monitor projects while proponents apply for building permits and during construction to ensure that the conditions of approval are met. In calendar year 2011, the Planning Board considered 77 sign and façade cases and made recommendations to the ZBA on 86 applications⁶.

It should be noted that a strict review of the number of cases does not allow for recognition of the varying complexity of individual project proposals. Certain large projects or ones that generate neighborhood sensitivity, such as 2 Brookline Place, will require many hours of staff time and multiple hearings, while less complex projects, such as decks or small residential modifications, may require significantly less staff work and fewer hearings.

- **Preservation Permits**

Preservation staff is responsible for implementation of the Town’s historic preservation regulations and undertaking other efforts to protect the town’s physical historic legacy. Regulations include the six (6)

LOCAL HISTORIC DISTRICTS		
Name	Year Adopted	# Properties
Cottage Farm	1980	150
Pill Hill	1983	410
Graffam-Mckay	2005	150
Chestnut Hill North	2005	120
Harvard Avenue	2005	35
Lawrence	2011	45
TOTAL		910

Historic Districts within which design review guidelines are applied. These regulations specify the kinds of visible changes that require approval by the Preservation Commission and the guidelines articulate the expectations of the Town. The table below shows how the number of properties covered by historic districts has increased over time.

The Demolition Delay By-Law requires the Preservation Commission to review all demolition requests and determine if the demolition delay provisions apply, and, if the provisions do apply, whether the demolition should be delayed. The demolition provisions apply to all properties, whether they are located within a historic district or not.

⁵ A DAT is a committee formed by the Planning Board to review major zoning cases or cases that generate significant community concern.

⁶ On February 10, 2011, the Somerville Board of Aldermen revised the role of its Planning Board so that the board no longer reviewed cases before the ZBA (Ordinance 2011-02). The associated staff report explaining the impetus for this change can be found on the city’s website. Note that professional Planning staff continue to provide direct support to both boards.

In fiscal year 2011, the Preservation Commission considered 146 cases. These consisted of 43 demolition and 103 design review applications. Similar to planning cases, considerable advance work must be performed by staff, with the additional requirement that historic research is often needed for preservation cases. Interestingly, while the workload for preservation staff has increased 25.8% in the

HISTORIC PRESERVATION CASELOAD				
Fiscal Year	LHD Caseload	Demolition Caseload	Determination	
			Significant	Non-Significant
2011	103	43	18	25
2010	98	30	12	18
2009	109	31	7	23
2008	82	38	14	24
2007	89	25	7	18
2006	88	28	3	25

past five years, demolition cases have increased much more significantly (+53.6%) than regular cases (+17.0%). Further investigation into why this shift is occurring may be warranted. It may be that properties that have been vacant for a considerable time have now become economical to develop or that property owners are not as interested in taking on rehabilitation projects and would find it easier to demolish and develop anew.

Addition to case review, Preservation staff regularly seek outside grant resources to assess the conditions of historic resources in town and have secured funding to study the Brookline Arts Center, Brookline Reservoir Gatehouse, and the Fisher Hill Reservoir Gatehouse, among others. Preservation staff also assist property owners seeking to do historic research into their properties and perform the survey and planning work for properties to be on the National or State Registers of Historic Places, designations that can be used by private property owners to get financial assistance as they seek to preserve their properties. Further, they work with the Building Department when exterior maintenance/ modification to buildings owned by the Town is needed.

HISTORIC PRESERVATION STAFFING (FY2012)					
Municipality	FTE	LHD's / NCD's	Properties (est.)	Demo Review?	CDBG Funded?
Brookline	1.53	7	915	Yes	Partially
Cambridge	6.00	6	3,000	Yes	No
Somerville	1.25	*1	460 ⁸	Yes	No
Newton	1.50	4	850	Yes	No

Brookline's Preservation staff level is generally consistent with the sizes of preservation units in other communities in the region (approximately 1 FTE per 500-600 properties). However, unlike Cambridge,

Somerville and Newton, the Town uses CDBG resources to pay for a portion of the personnel costs for its Preservation staff. The table above provides comparative information for Brookline, Cambridge, Somerville and Newton.

- **Affordable Housing Programs**

The Housing Division helps the Town maintain and expand its inventory of affordable housing while also providing housing counseling services to households in need of assistance. Given that in 2010

the median sales price of a single-family home in Brookline was \$1,113,000⁷ and a condominium was \$470,000, maintaining affordability is a steep challenge. Nevertheless, as of 2011, the State Department of Housing and Community Development (DHCD) had certified a substantial number of affordable units in Brookline – 2,122 units or 8.1% of the total housing inventory. These are owned by for-profit businesses, non-profits, the Brookline Housing Authority, or individual condominium owners.

Brookline presently utilizes several tools to increase the affordable housing inventory. These include the use of CDBG, HOME, and Housing Trust Fund resources as direct grants or loans to projects, the Inclusionary Housing By-Law which requires that 15% of units in

AFFORDABLE UNITS BY TYPE	
Brookline Housing Authority	921
Non-Profit Rental	702
Owner-Occupied	79
Privately Owned Rental	403
TOTAL¹	2,105

projects with six or more units be affordable, and the creative use of the Town’s own inventory of land to underwrite the cost of providing affordable housing. Considerable work is required for each additional unit of affordable housing. Housing staff work with the Housing Advisory Board and the Law Office to prepare grant or loan documents allocating funds to affordable housing projects and will also assist with projects seeking to secure DHCD funds, to the extent possible. Staff is responsible for administering the Inclusionary Housing by-law - working with Regulatory Planning staff when a project is under zoning review, managing the lottery for owner-occupied units when they first become available and as the owners prepare to sell the units, and monitoring the income qualifications of renters annually.

With completion of the Olmsted Hill development anticipated this calendar year, Brookline will have the 24 new affordable condominium units to add to its inventory. Housing staff will need to market the units in advance of the lottery to seek a pool of potential buyers to ensure that the lottery is fair and that owners for all of the units can be found. This will require a lot of staff effort in 2012, but the longer-term workload implications of these units remains to be seen. A significant lottery took place in 2009 when the St. Aidan’s project was completed. Between 2007 and 2010, two to three affordable owner-occupied units were available for re-sale and lotteries held for each. In 2011, this increased to four units, which were made available through two lotteries with two units available in each. A factor complicating the anticipation of workload impacts from the new units is that the study team has learned that DHCD is now requiring that households be pre-qualified before they are allowed to enter into a lottery for a unit. This will be a significant burden on all Massachusetts municipalities since the paperwork needed to income-qualify a household as both low income and able to afford a mortgage is substantial. It may also impact the numbers of applicants for vying for units, especially since after completing the paperwork all the household receives is a ticket in a lottery, as opposed to a the guarantee of an affordable unit.

Another complicating factor is that the 40% decline in HOME grant funds significantly diminishes the amount of grant funds Brookline can allocate to new projects from that source.

- **Neighborhood Conservation Districts**

With the recent approval on November 11, 2011 of two articles related to Neighborhood

⁷ *Housing Brookline Affordable Housing Policy & Programs April, 2011, page 1.*

Conservation Districts (NCDs), Brookline Town Meeting created a new regulatory system⁸ for the Town that will require staffing and oversight by the Department. The first article, the Brookline Neighborhood Conservation District By-Law, establishes the process by which a NCD can be created and the framework within which it must operate once created. The second article, the Hancock Village NCD, creates the first NCD in town, describes its boundaries, and establishes the design guidelines by which future development will be evaluated.

If both articles are approved by the Attorney General, a new Neighborhood Conservation District Commission will need to be formed for the Hancock Village NCD, consisting of no less than five members. This Commission will be responsible for reviewing all Reviewable Projects in the NCD “including without limitation new construction, demolition or alterations that affect the landscape or topography, the exterior architectural features of buildings and other structures, or the mass and siting of buildings and other structures” (Section 5.10.4). Although the by-law defines certain exemptions from Commission review, by and large the NCD Commission(s) will have a large oversight responsibility, including design oversight of building modifications that are not visible from the public right-of-way – a jurisdiction more extensive than that of the Preservation Commission⁹. As with the Zoning Board, Planning Board, and Preservation Commission, Departmental staff support will be needed to ensure public notice requirements are met, and to provide materials and analysis to assist the NCD Commission(s) in making an informed decision. Further, it appears that potential exists for projects to require approvals from multiple boards/commissions and sequencing of the reviews will need to be considered to optimally minimize conflict between the decisions and conditions of approval made by the different entities.

Given that the sole NCD approved to date is narrowly described and is largely, if not entirely under one ownership, the study team believes that the Department can undertake the NCD responsibilities of this area without additional staff resources. However, the by-law indicates that new NCDs can be created by majority vote of Town Meeting; as such, potential exists for increasing numbers of districts to be created over time which can ultimately overtax the staff resources presently available to the Department.

Finding #2: The discretionary activities performed by the Department shape and implement good public policies and guide the future of the town. They are important.

The Planning & Development Department is the agency most directly tasked with working with the Board of Selectmen and the community to plan for Brookline’s future. As such, all of its tasks are not written into the Town’s by-laws. It has general as well as specific responsibilities and the general nature of its mandate enables the Department to take on special projects and initiatives that are important to the community and strive to take advantage of grants or other opportunities that benefit the Town when they arise. The discretionary activities of the Department require entrepreneurial activity. In this time of financial constraint, it is understandable that questions arise whether the activities underway

⁸ The Town’s analysis of the merits of the NCD program is documented in the September 2005 *Neighborhood Conservation District Study* and in the materials prepared for the November 15th Town Meeting, so the study team will not repeat that analysis.

⁹ The By-Law indicates that the “authority of the Commission shall be binding except with regard to the categories of structural, landscape or architectural features excepted by Section 5.10.6 or that may be otherwise exempted by the particular design guidelines for a specific district set forth in Section 5.10.3 of this by-law” (Section 5.10.4).

are the best use of resources. The study team views the kinds of discretionary initiatives found in the Department to represent “best practice” in the field of planning and community development. Some of the most significant activities include economic development, long-range planning, sustainable development, and special projects.

- **Economic Development**

For a number of years, Brookline has had two positions assigned to work on economic development initiatives. In 2008, the Board of Selectmen voted to incorporate this function and the positions associated with the function into the Planning & Community Development Department, a change that the Study Team sees as strengthening communication and consistency among units that work with commercial property and businesses.

Real Estate Development

If implemented successfully, a community’s investment in facilitating economic development can generate a multifold return on that investment. Commercial property generates more property tax revenue than residential development on land of equal size while typically using fewer municipal services. This is particularly so when a municipality taxes commercial property at a much higher rate than residential property. In Brookline, the residential rate is \$11.40/thousand and the commercial rate is \$18.58/thousand. This means that a residential property valued a one million dollars yields \$11,400 in property tax revenue and a commercial property valued at one million dollars yields \$18,540¹⁰. Further, hotels and meals tax revenues can be generated in addition to the property taxes generated by commercial development. A single office building can generate several hundred thousand dollars of property taxes each year and, if designed and managed well, will generate limited vehicle trips and few or no calls for service to the police or fire departments. As a result of Brookline’s proximity to Boston, the redevelopment of land for commercial use is attractive to developers and can yield very significant permanent revenues to Brookline.

Given the limited number of potential development sites in Brookline and the close interface between residences and businesses, new construction of commercial property is challenging. Considerable facilitation skills are needed to ensure that all perspectives are heard and taken into account during the complex permitting processes that shape project design. A principal task of economic development staff is to facilitate projects that can meet the Town’s very high design standards. Officials, staff and citizens who were interviewed during this study universally commended the Town for the current economic development staff’s diligence in listening to and considering the perspectives of the residential community. Skilled staff intervention has allowed stalled projects to move forward, benefiting the community through reduction of blight and increases in municipal revenue. Without professionally facilitated discussion early on, interest groups and developers can become entrenched raising risks of litigation and freezing projects that offer considerable net benefits to the Town.

In addition to contributing to the property tax base, commercial districts in Brookline directly affect the quality of life of residents. Although many families move to and remain in Brookline because of

¹⁰ Commercial or industrial property also often has personal property, e.g. equipment, within the facility that is taxed separately and in addition to the base property tax applied to value of the land and building.

the quality of its schools, only approximately 25% of households contain children. So, why might they be convinced to live (or remain) in a town where housing costs are significantly higher for the same housing unit that can be found elsewhere in the Boston metro region? One argument is that those households have made their housing decisions based upon the amenities available to them in Brookline – the vibrant, walkable commercial districts with their diverse business mix ranking highly among those amenities. In fact, data shows some patterning of a relationship between property values and proximity to Brookline’s commercial districts (after the Chestnut Hill neighborhood’s unique home valuation is taken into account) (see Map 2).

Business Development

Given the long-standing health of Brookline’s commercial districts, it may not generally be recognized that not all municipalities have healthy commercial districts. Retail establishments, in particular, are facing significant challenge from internet-based businesses that have lower overhead costs and are not subject to sales tax. Throughout the region many retail businesses have closed. Many restaurants are also struggling due to limited discretionary funds that households have today. Brookline also faces challenges from other communities that would love to recruit some of the businesses found in town today. The owner of an iconic business in Brookline said that he/she was recruited last month to move elsewhere and he/she is aware of at least one other signature business that is receiving similar recruitment pressure. At some point, despite an owner’s commitment to Brookline, a competing community may come up with a package so enticing that a signature business relocates.

Additionally, local, small businesses face competition with chain stores and restaurants that have significant built-in expertise in working with municipal permit and licensing requirements – plus they often have the ability to out-compete local businesses on rent. Brookline is unique in the limited number of corporate chains found in its commercial districts, however, it is the Study Team’s understanding that there is no regulatory framework in place that guarantees this for the future.

Over the past few years, questions have arisen relative to the Commercial Areas Coordinator (CAC) position – whether this function was appropriately within the town government, whether the resources committed produced outcomes that merited the investment, and whether the relationship with the business community was too close or at least perceived as being too close. It is not unusual for municipalities to offer technical assistance and facilitation to businesses seeking to grow and/or expand. Recognition exists that frequently municipal permitting and licensing processes can be confusing and convoluted, and only someone with an extensive local permitting background can effectively weave their way through a town or city’s requirements. The more complex the local regulatory system is, the more it benefits corporate chains which have in-house legal and permitting staff and impedes small, locally owned businesses that do not have this capacity. Not only do municipalities provide technical assistance to local businesses, some engage in active marketing and recruitment to connect businesses that residents prefer with vacancies in commercial districts. For example, the town of Westborough, Massachusetts, with the Massachusetts Office of Business Development, used Enhanced Expansion Project (EEP) tax incentives to relocate 250 Mellon Investment Servicing, Inc. jobs from Pawtucket, RI, and retain 900 existing jobs.

Town of Brookline

Recent Home Sales: Cost per Bedroom

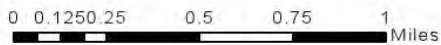
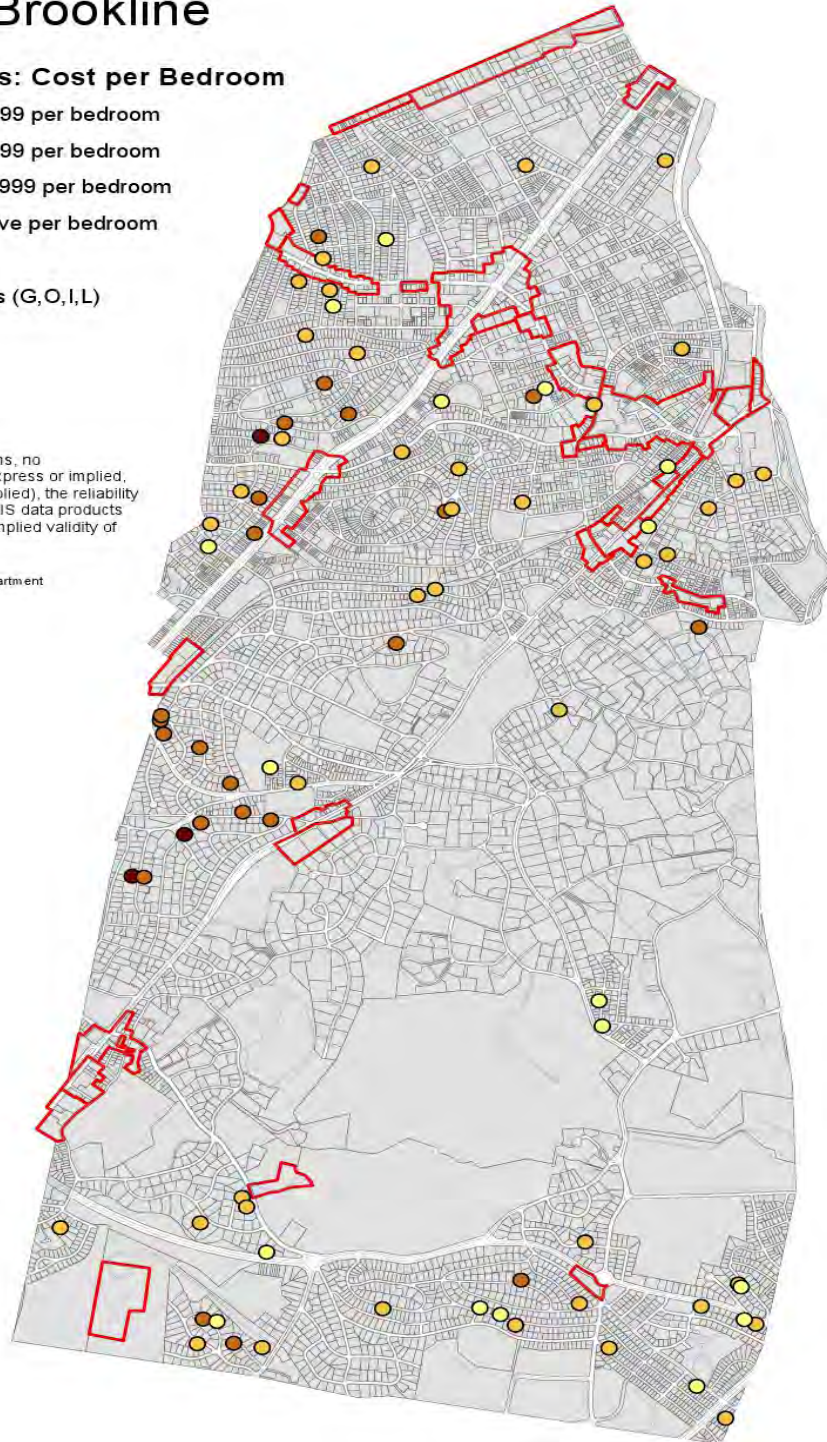
- \$100,000 - \$199,999 per bedroom
- \$200,000 - \$299,999 per bedroom
- \$300,000 to \$399,999 per bedroom
- \$400,000 and above per bedroom

- Street Edges
- ▭ Commercial Zones (G,O,I,L)
- ▭ Parcels

Disclaimer

The Town of Brookline makes no claims, no representations, and no warranties, express or implied, concerning the validity (express or implied), the reliability or the accuracy of the GIS data and GIS data products furnished by the Town, including the implied validity of any uses of such data.

Map created by the Town of Brookline IT Department
Creation date: 2/22/2012



The outcomes achieved by the former CAC position cannot be quantified, but the business people interviewed spoke eloquently about the significance the position had to the local business community and it is study team's understanding that a significant number of local business owners attended budget meetings to support continued funding for the position. Given the number of hours small business owners spend working each week, their presence at budget meetings is testimony to the importance of the topic to them. Evidence of the businesses' support for Town government is the fact that they did not voice strong opposition to the increases in parking meter rates that took place in FY2010; the same was not true in other communities facing rate increases.

Lastly, regarding the relationship between the position and the business community, it appears that over time the incumbents in the position became somewhat detached from the original core mission – technical support for the business community – and instead shifted into more of an advocacy role. Serving on the Board of Directors of the Chamber of Commerce seemed particularly problematic.

- **Long Range Planning**

To its credit, in 2004-2005 the Town of Brookline voluntarily adopted a Comprehensive Plan. This document, while not a quick read, represents the vision the town has for its future and identifies a number of actions to be undertaken to make that vision a reality. In recognition of how valuable long range planning can be for a community, the Legislature is currently considering a law that will require municipalities to prepare comprehensive plans. If enacted, Brookline would have a head start considering that few municipalities have comprehensive plans in place.

Optimally, long range planning will guide the prioritization of limited municipal resources, clearly articulate community expectations to the development community so that they do not present projects that will be unacceptable, and help residents and business owners put change in their neighborhoods into context. Time spent in Brookline building consensus about development and putting zoning in place now before the economy changes will make the permit review process much easier when project demand increases. The study team observed that even though a few rezoning studies have been completed in recent years (111 Boylston Street, a.k.a., Red Cab site) and at least one is under way (Circle Cinema site), relatively limited time appears to be allocated to long range planning in Brookline – a function the study team recommends become higher profile in the future.

- **Sustainable Development**

The historic fabric of Brookline in many ways epitomizes the principles of sustainable development, which are gaining increasing traction in communities across the country. The concept behind sustainable development is to engage in community building in a way that does not increase and optimally decreases the use of non-renewable natural resources and reduces harm to the natural environment. Brookline's ready access to transit, the walkability of its neighborhoods and commercial districts, and its extensive tree canopy are all elements of the built environment that other cities and towns are striving to create. Despite this, more can be done to reduce natural resource utilization.

Through the efforts of Department staff, Brookline has been fortunate to receive \$494,400 in ARRA EECBG (Energy Efficiency and Conservation Block Grant) funds in 2009 to increase energy efficiency

in municipal buildings and homes through the Green Homes Brookline program. Other sustainability initiatives such as increasing bicycle lanes and bicycle parking, securing Hubway bicycle sharing stations, and installing electric charging stations for vehicles are being implemented, consistent with the Town's focus on sustainability.

- **Special Projects**

As seen with the ARRA (American Recovery & Reinvestment Act of 2009) funds – at times opportunity arises unexpectedly and those communities that are prepared to take advantage can position themselves to benefit. ARRA was created by President Obama and the Congress as a means to stimulate the U.S. economy by providing funding for “shovel-ready” projects. The Commonwealth was able to secure several hundred million dollars for infrastructure improvements in cities and towns across the state. Only those municipalities that had substantially complete design plans were able to pursue this funding, leading to the recognition that even when funding is uncertain it is worthwhile to proceed with planning and design for needed projects because enables the Town to be opportunistic.

Unanticipated projects and opportunities like the examples cited may be brought forward by community members, members of the Board of Selectmen, or Town staff. For example, the Town received and expended the bulk of its EECBG funds far earlier than other nearby communities as a result of its collaborative relationship with the Climate Action Committee and everyone's ability to rapidly respond to the grant application. Often times, they need to be researched, evaluated, and implemented in a short time period. To be effective, departments need to the flexibility and staff capacity to create and/or seize opportunities as they occur.

Finding #3: Staff of the Department are well trained, know their jobs and possess considerable institutional knowledge.
--

The Department's staff is well educated and seasoned. Many of the staff have been employed by the Department for a considerable period of time. Staff as a whole possesses a great deal of knowledge about Brookline's development and regulatory system. Recent staff hires (only a few) have brought new energy and new perspectives to the Department.

The Boston metro region houses a remarkable number of talented planners due to the tremendous educational programs found at nearby universities and Brookline today reaps the benefit. As of summer 2011, before two positions became vacant, ten staff members, had masters degrees and one had a doctorate. This is a high proportion of the sixteen member staff. Further, three staff members have received their AICP (American Institute of Certified Planners) certification. This requires submission and acceptance of an application outlining professional and educational experience, plus an extensive written examination. To maintain certification, individuals must undertake thirty-two hours of training in each two-year reporting period. The Town has clearly benefited from the depth of experience, education, and training currently found within Department staff.

Finding #4: Significantly greater flexibility in the organizational structure and position descriptions is needed to meet current and future service demands.

The current staff functions in specialized divisions and virtually all of their work is focused nearly exclusively on the tasks of their divisions. As a result, the Department is a somewhat siloed structure in which opportunity for cross training and the reallocation of staff resources to respond to changing workload demands is difficult. Obstacles to changing this pattern include the organizational structure and the way position descriptions are written. Position descriptions tend to emphasize skill and tasks in a specific functional area, rather than establishing general planning skills as the primary qualification, with specific skills being a secondary requirement.

The study team saw some impact of the narrowness of work responsibilities on some staff within the Department. The narrowness of work responsibilities can have a direct impact on worker morale in that many persons starting their careers are interested in building the skills and abilities in order to grow and eventually promote to higher-level positions. If they are unable to secure a breadth of experience within their assignments in Brookline, the only option available to them is to apply for a position with another city or town that can give them new challenges. This means that ultimately Brookline may not benefit from their years of experience and the Department will not be able to maintain the level of historic knowledge found within the staff today.

Cross training and collaboration between the zoning review staff and preservation planning staff, in particular, could benefit to the Department and the staff. At times, projects are subject to both sets of regulations and one case planner could be assigned instead of two, reducing the potential for conflicting decisions or conditions of approval, improving customer service, and providing a single point of contact for community inquiries regarding the project. Further, it would increase the knowledge base in the Department regarding the Town's numerous historic resources. The Assistant Director for Regulatory Planning will need to play a major role in implementing this kind of integration.

Finding #5: CDBG funding allocations in Brookline align with other cities and towns.

The study team compared Brookline's FY2012 CDBG Action Plan with those of Cambridge, Newton, and Somerville (see Appendix 2) to determine whether the choices made in Brookline were similar to those of other municipalities and found quite a bit of consistency between all four. The ratio of funds committed to personnel costs (including fringe benefits) as compared to direct expenses ranged from 31.5% for personnel in Newton to 41.9% in Somerville. Brookline's allocation of 38.2% fell in the middle along with Cambridge at 35.9%.

In terms of prioritization of the use of funds by category, Brookline, Cambridge and Newton have each committed over 50% of funds to affordable housing activities. This includes personnel costs and project costs. With an allocation of 62% of funding for housing, Brookline was the municipality with the greatest commitment to affordable housing, followed by Cambridge (55.5%) and Newton (52.9%). Somerville's CDBG housing allocation of 13.2% does not take into account \$430,000 in carryforward and \$1.1 million in HOME funds.

All four municipalities committed the maximum allowed to public service grants; the maximum is 15% of entitlement funds.

Somerville committed a significantly greater share of resources to economic development and parks than the comparison communities which is recognition of the fact that 24 of the city’s 67 census tracts are income-qualified under HUD regulations – a circumstance that provides greater flexibility than found in other municipalities like Brookline with fewer neighborhoods in which to expend funds on physical improvements or job creation.

All of the municipalities included in this study pointed out that they, like Brookline, are facing a 15% cut in the upcoming fiscal year.

Finding #6: The Town’s reliance upon residential property taxes directly affects its ability to meet community service demands.

Today Brookline is a highly popular community to live in, a fact evidenced by the high cost of housing. Trends are showing that increasing number of households are choosing to live in urban environments – whether these be empty nesters or younger households that are forming families in urban areas instead of moving to the suburbs. Given that Brookline’s opportune location within the urban core and with its access to 14 transit stations – more than any city or town other than Boston –demand for housing will likely remain high, if not increase over time. Absent new construction, housing costs will escalate even further than today’s levels, making Brookline increasingly unaffordable. This is a significant policy issue facing the Town today and housing pressure will only increase as the economy improves. With additional housing, however, come service needs and municipal costs.

One mechanism to address the tension that exists – market pressure for housing construction vs. cost to provide needed services to residents, is to consider how the commercial tax base can increasingly help contribute to the cost of services. As mentioned above, the Town applies a higher tax rate to commercial property thereby generating greater financial return per equivalent land area. Despite this, in FY2011, the levy on commercial and industrial property only constituted 16%¹¹ of the total property tax levy (approximately \$25.2 million); with residential property generating the remaining 84% of the levy (approximately \$132.6 million)¹². This does not take into account the additional \$2.16 million generated by the hotel and meals tax in FY2011.

A contributing factor is that under Prop 2 ½, “new growth” or new construction can contribute significantly to growth in property tax. Although the impacts of the economic downturn can be seen in the new growth revenues which have declined in recent years, it is evident that property owners have continued to make improvements to their property, thereby growing the Town’s tax base. Going forward it should be recognized that the greatest leap in property tax revenue

ANNUAL REVENUE INCREASE FROM NEW GROWTH	
Year	New Growth
FY2005	\$2,386,251
FY2006	\$2,232,945
FY2007	\$1,989,683
FY2008	\$2,584,680
FY2009	\$1,828,261
FY2010	\$1,762,212
FY2011	\$1,829,084
FY2012	\$1,984,224

¹¹ The data presented at the Tax Classification Hearing on November 29, 2011, indicated that the total assessed value of commercial, industrial, and personal property for FY2012 (\$1.44b) is less than the value of tax exempt property (\$1.872b).

¹² *Tax Classification Hearing, November 29, 2011, presentation materials, page 19 and 2012 Financial Plan, page 6.*

occurs when significant rehabilitation or new construction occurs.

In the FY2005 through FY2012 period new growth has increased Brookline's annual property tax revenue by approximately \$16.5 million. That is, Brookline is collecting \$16.5 million more in revenue in FY2012 than it would without new growth. The cumulative revenue generated by the FY2005-FY2012 new growth is \$77.8M. Since 1983, the Town has voted only one operating override. In 2009, an override for \$6.2 million was approved by voters.

Finding #7: The Department has good working relationships with the Building Department and the Department of Public Works (DPW) and those relationships need to be sustained.

The Town is in a unique situation presently as the Building Commissioner was previously the zoning administrator in the Department. On appointment to the position of Building Commissioner he took the zoning administrator duties with him. The physical location of the building and planning functions opposite each other in Town Hall makes for convenient interaction between the Building Commissioner and the regulatory planners. However, the existing collaboration is the result of positive working relationships between the Commissioner and department staff – relationships that did not exist under the prior Commissioner. With the impending departure of the current Commissioner, it will be important that the Town Administrator emphasize the need for continued collaboration during the recruitment and hiring process.

RECOMMENDATIONS

Recommendation #1: Increase flexibility within the Planning & Community Development Department.

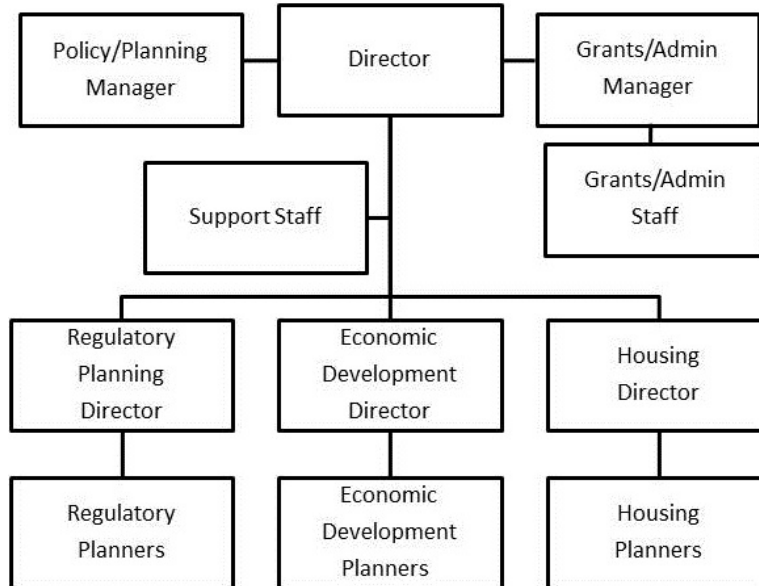
- Enable broader utilization of staff by creating generalized Planner and Senior Planner position descriptions and applying them throughout the Department.
- Move toward a new organizational structure with: 1) a senior-level policy/planning position and 2) an Administrative Manager/Grants Administrator and administrative group reporting to Director.

If the Town implemented generalized Planner and Senior Planner position descriptions, the Director and the management team would have greater capacity to allocate staff and work assignments in response to changing workload demands. Given current and anticipated constraints on resources, the Department will be best able to respond to community demands with a multi-faceted, flexible team of staff and managers.

In terms of overall organizational structure, at present, the Director is separated from the largest grant program in the Department by another layer of management and when he is out in the field meeting with individuals and groups, there is no clear second in command that can respond to staff needs. Further, due to the active workload within the Regulatory Planning group, limited time exists to focus on long-range planning and policy development. As a result, it is recommended that the Department be restructured over time to create a senior policy/planning position and a financial position reporting directly to the Director. This would support a team approach to tackling unforeseen or significant workload demands. For example, if a significant policy issue arose, the policy/planning leader could convene a group of staff across divisions to address the challenge. Further, if a new grant opportunity was identified, the financial position could bring together fiscal and program staff to prepare the application. This recommendation does not necessarily require that new positions be created or new hiring take place; the Study Team believes this structure can be implemented utilizing existing staff resources, making modest organizational changes and broadening job descriptions.

The senior policy/planning position would be responsible for long-range planning, policy development, and would lead special projects. He/she would also serve as the Acting Director when the Director is on vacation or otherwise out of the office. The Administrative Manager/Grants Administrator would manage the CDBG program and would also pursue other grants in collaboration with Department staff to supplement local funding available to meet the Town's goals. He/she would also oversee other departmental administrative needs including budget and fiscal management, human resources, procurement, etc. in support of the Director and Department staff. Depending upon workload, this position could potentially be permanent, part-time so long as it is supported by strong fiscal staff.

The recommended structure is shown in the organizational chart below.



Recommendation #2: Prepare for continued reduction in CDBG funding.

Over the near term the Department should engage in the following activities:

- Streamline CDBG processes to the extent possible and eliminate practices that are not required by HUD, but have gradually been added in Brookline.
- Actively pursue outside funding to support departmental activities.
- Bring resources committed to CDBG administration into alignment with the reduced funding for this program while building capacity to secure other grants as they become available.¹³

The Study Team has observed that the Department undertakes processes that are not required by HUD and given the declining level of CDBG funds, the Town should consider whether to continue to undertake these extra efforts.

First, as noted above, the public involvement process only requires hosting two noticed public hearings. In addition, Brookline has established the CDBG Advisory Committee to provide input into the decision-making process.

Second, HUD does not require that the public service grants awardees be pre-identified in the Action Plan, as Brookline does. What HUD does require is that a competitive selection process occur and the final decision be made by the community’s chief executive officer which in the case of Brookline’s form

¹³ As this assessment was carried out the Department, to its credit, decided not to fill the vacant CDBG Fiscal Assistant position.

of government is the Board of Selectmen. While Brookline is accustomed to undertaking additional steps, reducing the approval process to the required level is an option.

Third, CDBG administrative staff prepares written contract agreements not only with sub-recipients (non-profits, etc), which is appropriate, but with Department staff as well. This means entering into a written agreement with the Historic Preservation, Planning, and Housing units. Given that it is all one department, under the oversight of one Director, this is unnecessary.

As CDBG resources decline and processes are reevaluated, the staffing needed to administer the program should also be considered. One option outlined above is to expand the responsibilities of the positions administering CDBG today, so the incumbents perform more tasks than they do today; the second is to reduce, eliminate, or otherwise restructure the positions engaged in CDBG grant administration. The Department appears to be moving in this direction, as the now vacant Fiscal Assistant position seems likely to remain unfilled.

Recommendation #3: Retain and potentially expand the number of positions dedicated to Economic Development.

- Abolish the position of Commercial Areas Coordinator and create a new Planner position under the supervision of the Economic Development Officer to participate in a broad spectrum of the Town’s economic development efforts. This will produce cost savings as the salary is aligned with other Planner positions.
- As the economy improves and resources become available, consider adding a third position to the division if workload demands increase.

Resources allocated to increasing economic development in a community can more than pay for themselves. This requires a talented staff that can work equally successfully with the resident community, the business community, and the development community and facilitate a balancing of the needs and expectations of each group with the end goal of improving and enhancing the Town of Brookline.

The absence of (or reduction in) economic development staff will not serve to reduce development pressure, instead developers will have fewer opportunities to consult with someone internal to the Town that understands the community’s perspectives and small business owners will have less assistance as they strive to open businesses and grow in Brookline.

Recommendation #4: More extensively utilize the skills and expertise of the Economic Development Advisory Board (EDAB).

Through a public and collaborative process, the Town should identify opportunities for contextually-sensitive economic development that will help the Town “grow” out of its current and projected future financial imbalances, and to facilitate said projects. This can include construction of new buildings; floors added to existing buildings, ways to increase hotel and meals tax receipts, among other activities.

Recommendation #5: Move toward making Regulatory Planning function more self-sustaining.

Brookline charges less in fees than Cambridge and Somerville and as CDBG resources diminish; consideration should be given to increasing revenue generated by permit fees. In recent years, the land use permit operations, including the ZBA, have generated between \$15,000 and \$54,000 per year, excluding the additional \$28,000 to \$81,000 in plan review fees that the Building Department collects for performing zoning review. Nevertheless, the total cost to operate the Regulatory Planning Division in the current fiscal year is approximately \$350,000. While some of the operations of the Regulatory Planning Division is for long term planning and is a cost to be borne across the community, it does appear that the Town’s General Fund is subsidizing at least part of the cost for planning and zoning permit review.

PERMIT FEES COLLECTED BY DEPARTMENT					
FY	Sign / Façade	Subdivision / ANR	Preservation	ZBA	TOTAL
2007	NA	NA	\$4,812	\$15,300	\$20,112
2008	NA	NA	\$4,605	\$10,125	\$14,730
2009	NA	\$1,200	\$5,565	\$15,095	\$21,860
2010	\$19,695	\$1,235	\$4,268	\$20,650	\$45,848
2011	\$18,514	\$2,235	\$5,675	\$27,600	\$54,024
2012 (YTD)	\$7,175	\$600	\$2,607	NA	\$10,382

While municipalities often seek to remain competitive in terms of permit costs with nearby communities, a comparison of planning and zoning permit fees with other communities reveals that Brookline is definitely on the low end of fees and possibly has room to grow. However, it should be noted that Brookline’s building permit fees are on the high side.

BROOKLINE FEE SCHEDULE (Planning & Zoning Permits)		
PERMIT TYPE	FEE	MIN PAYMENT
<i>ZBA CASES</i>		
Alteration	\$75 per 1,000 s.f. of floor area	\$100
New Construction	\$150 per 1,000 s.f. of floor area	\$150
Off Street Parking Relief	\$25 per space	\$100
Subdivision	\$200	\$200
Illuminated Sign	\$200	\$200
Non-Illuminated Sign (<10 s.f.)	\$75	
Non-Illuminated Sign (> 10 s.f.)	\$100	\$100
<i>PLANNING CASES</i>		
Awnings	\$200	\$200
Commercial Façade Other	\$300	\$300

A few examples of fees from other municipalities include:

Cambridge:

- \$50 per parking space requiring relief
- \$500 per subdivision plus \$100 per new lot proposed
- \$100 base fee for special permit or alteration or enlargement of non-conforming use plus cost per square foot of project ranging from 5 cents per sq.ft. for institutional to 25 cents per square foot for heavy industry

Zoning permit fees in Cambridge are capped at \$1,000.

Somerville:

- \$2,500 per wireless communication facility
- \$225 per subdivision of recorded land plus \$50 per new lot proposed
- \$185 base fee for parking relief plus \$100 per space

In Somerville, review of a PUD Master Plan is capped at \$7,500, with a \$12,500 cap for special permits for each phase of the Master Plan.

In contrast, the fees in the City of Newton are lower than Brookline and include:

- \$500 per variance petition
- \$400 per appeal of determination of Commissioner of Inspectional Services
- \$350 per residential special permit
- \$750 per commercial special permit

Recommendation #6: Recognize that the Department enables the proper functioning of the Town's regulatory system.

During preparation of the annual budget, the Town should ensure that the Department's role in supporting Boards and Commissions is explicitly taken into account. The current high level of functionality of the regulatory system would not be possible without the level of support the Department provides. If, in future, the Department suffers significant budget reductions (CDBG or Local) support for existing locally mandated processes may be at risk.

Recommendation #7: Cease functioning as public affairs representative for public construction projects.

The previous incumbent of the CAC position played this role. It is a role that needs to be played, but it should not be the responsibility of the Department. The Town's Capital Budget should anticipate the cost of addressing the needs of residents and businesses during major public works projects. Either contractors should be required to undertake these responsibilities within their scopes of work and budget to the satisfaction of the Town, or staff costs associated with this outreach should be included in

the project's capital budget, not absorbed by departmental operating budgets. A "clerk of the works" position can be tasked with this responsibility.

Recommendation #8: Assign Department to serve as staff to the Zoning Board of Appeals and ensure that budgetary resources account for this new responsibility.

The Town should evaluate the merits of having the Regulatory Planning Division provide technical support the Zoning Board of Appeals and alleviate the burden of having the Building Commissioner and Town Clerk perform these responsibilities. This will help ensure consistency between planning and zoning decisions and facilitate the economic development goals of the Town. Over the long term, if the Town wished to streamline permitting functions, having both boards staffed by a single work unit would facilitate this effort. This may be particularly important if the Neighborhood Conservation District program expands given that there may be three to four boards reviewing a single project, if a DAT is created. Given that taking responsibility for another board would increase the overtime cost to the Department, consideration should be given to increasing the budget a modest amount to cover this cost.

Recommendation #9: Seek an outside partner to help support the ongoing health and vitality of Brookline's business districts.

Determine whether a business organization might be interested in forming to provide support local storefront businesses and associated commercial districts in Brookline. While Brookline has an active Chamber of Commerce, focused attention is needed toward storefront businesses, whether these are restaurants, retail shops or services. Across the country, recognition of the benefits of "shopping local" is increasing and Brookline could capitalize on this movement if it had an outside partner to work with. Optimally, this organization could take a leadership role on festivals and events that highlight the commercial districts, although it should be recognized that some facilitation by Town staff would still be needed.

Recommendation #10: Closely monitor workload impacts in the Housing Division as the inventory of affordable units increases but funding for future units declines.

It is difficult to make a firm recommendation regarding personnel resources needed in the Housing Division today as two opposite trends are taking place at the same time:

1. The inventory of affordable units the Town must manage is increasing as units in Olmsted Hill come on line¹⁴; and,
2. A reduction in resources available from the federal government to create new affordable units.

¹⁴ Once the units are built, the Town retains several responsibilities relative to their utilization. If the units are rental, the Town must validate the tenant's household income annually. If they are owner-occupied and the owner wishes to sell, the Town is responsible for managing the lottery to find a new buyer. Finally, the Town is also responsible for ensuring that owner-occupied units remain owner-occupied and are not leased to others.

As FY2013 and FY2014 unfold attention should be paid to workload demands for this unit as budgets are prepared. Resources available for the creation of additional affordable units will affect the optimum configuration of this unit.

Recognize that change is not easy...

The process of revising roles and responsibilities of Department staff and shifting the organizational structure to meet future conditions will be stressful, but it will be less stressful if the Town prepares for anticipated changes through the development of an organizational and operational plan that is both tactical and strategic, as proposed in this report.

CONCLUSION

The Planning and Development Department in Brookline reflects the political culture of the Town and its civic values. Brookline is known for its high standards and the Department's staff and operations meet those standards. However, the main outside funding source for the Department (CDBG) is shrinking and most observers expect this to continue. Development pressures will continue to impinge on the Town as a consequence of both its location and its "brand". The Department needs to do two things simultaneously that pull in different directions:

1. Adjust staffing resources to the anticipated erosion of federal funding while maintaining essential services.
2. Enhance its capacity to support economic development by ensuring it has the staff resources to foster real estate development that is beneficial to the Town and attracts and retains the mix of local businesses that make Brookline so popular. Both of these are directly linked to the Town's revenue stream through the property tax (in the case of real estate development) and through the hotel and meals tax, (in the case of local business development).

Based on the Town's historic commitment to exemplary planning the Town can make incremental adjustments to staffing the Department to adjust to emerging demands, likely reductions in CDBG funding and demands for service driven by the Town's regulatory structure. The most significant threat to the capacity of the Department is the probable continued erosion of CDBG funding. The most significant hedge to the adverse consequences of this possibility is putting regulatory planning functions on a de facto self-sustaining basis and to seek increased grant opportunities and property tax revenues.

APPENDIX – Officials, Staff and Residents Interviewed

The Collins Center team members had the fortune to meet with many staff and community members who provided important information and insights into the preparation of this report. Overall, we were struck by the level of commitment they had toward improving the community and the numbers of hours spent thoughtfully considering how best to serve the Town – this was true of residents and business persons who volunteered their time, as well as members of the staff. Interviewees included:

Board of Selectmen

Betsy DeWitt, Chair
Richard W. Benka, Member
Nancy Daly, Member
Kenneth Goldstein, Member
Jesse Mermell, Member

Members of Boards and Commissions and Non Profits

Jim Batchelor, Member, Preservation Commission
Roger Blood, Chair, Housing Advisory Board
Kate Bowditch, Chair, Conservation Commission.
Sean Lynn Jones, Former Chair, Brookline Neighborhood Association
Anne Meyers, Co-Chair, Economic Development Advisory Committee
Paul Saner, Co-Chair, Economic Development Advisory Committee
Janet Selcer, Director, Steps To Success
David Trietsch, Chair, Brookline Housing Authority
Mark Zarillo, Chair, Planning Board

Members of Business Community

Dana Brigham, Brookline Booksmith
Harry Bravman, Brookline Hub

Town Staff

Bill Lupini, Superintendent of Schools
Michael Shepard, Building Commissioner
Jennifer Dopazo Gilbert, Town Counsel

Department Staff

Jeff Levine, AICP, Director
Polly Selkoe, Assistant Director for Regulatory Planning
Joe Viola, Assistant Director for Community Planning
Kara Brewton, PE, Economic Development Director
Linda Hickey, Head Clerk
Derick Yung, Secretary
Gail M. Lewis, Community Development Administrator
Fran Price, Housing Development Manager
Bruce Genest, Housing Project Planner
Virginia Bullock, Housing Project Planner
Greer Hardwicke, Preservation Planner
Jean Innamorati, Preservation Planner
Lara Curtis, AICP, Senior Planner
Courtney Synowiec, AICP, Planner
Marge Amster, previous incumbent of Commercial Areas Coordinator position
Erwana Lindo, previously incumbent of Fiscal Assistant position

Trends and/or observations made by the study team based on the interviews include:

- Board members described their board's work with the Department staff as very collaborative. Each board member interviewed expressed appreciation for the work of the specific staff members that support their Board. In the interviews Board members stated that their Board would not function effectively without strong professional support from the Department.
- Members of the Board of Selectmen voiced support for the Department, each in their own way, although they also expressed questions regarding the allocation of staff resources – questions that served as impetus for this report.
- Most Department staff voiced appreciation for the professionalism and commitment of the people they worked with, characterizing the Department as a good place to work. Some staff expressed concerns about the future of the Department in general and their desire for more communication as a team across all divisions.
- Senior management of other Town Department's (Law, Building, DPW) described their relationship with the Department and its staff as professional and collaborative.
- Members of the local business community expressed their appreciation for the Town's efforts in supporting its commercial districts.