

# Submittal Requirements Manual

## Change Log

### Planning, Preservation, and Zoning Division

#### City of Somerville

This document provides a brief summary of all substantive changes made as part of each version of the Submittal Requirements Manual.

Version Date	Changes
August 2022	<ul style="list-style-type: none"><li>• Original document.</li></ul>
September 2022	<ul style="list-style-type: none"><li>• Hyperlinks were updated to account for changes to City's website.</li></ul>
October 2022	<ul style="list-style-type: none"><li>• <i>Chapter 2.B: Development of an Accessory Building</i> was deleted; all references and chapter numbers were updated accordingly.</li><li>• "Original Decision &amp; Plans" was added to Chapters 3 and 8.B.</li></ul>
August 2023	<ul style="list-style-type: none"><li>• <b>Application/Materials Submittal:</b> References to the PTS (now defunct) were removed, and references to Citizenserve and updated pre-application procedures were added.</li><li>• Additional hyperlinks were added to aid navigation.</li><li>• <i>Chapter 2.D: Signage</i> was deleted; all references and chapter numbers were updated accordingly.</li><li>• <i>Chapter 3: Glossary.</i> The terms "Land Plat" and "Subdivision Plat" were updated, and the term "Sign Plan(s)" was removed.</li><li>• <i>Chapter 7.B: Guidance for Post Decision Steps</i> was updated to require digital "As Permitted" documents, but no hard copies.</li><li>• <i>Chapter 8.D: Permit Time Extension</i> was added.</li></ul>
February 2024	<ul style="list-style-type: none"><li>• Clarification for Abutters Lists</li><li>• Removed Plan11 links</li><li>• Clarification for Neighborhood Meeting Scheduling</li><li>• Updated Pre-Submittal Meeting document requirements</li><li>• Changed all references of GoToWebinar to Zoom</li><li>• <i>Chapter 2.G: Development on a Steep Slope</i> was deleted</li><li>• Updated submission deadline for design review materials</li><li>• Updated links to the SZO and the Zoning Atlas</li><li>• Digital massing model no longer required for new building applications prior to board review</li><li>• Updated information on posting notice of a public hearing</li><li>• <i>Chapter 8.B: Plan Revision:</i> Changes to the pre-application process to be consistent with SZO requirements</li></ul>

# Submittal Requirements Manual

## Planning, Preservation, and Zoning Division

### City of Somerville

This manual covers the application processes for various zoning requests and permit types found in the [Somerville Zoning Ordinance](#) (SZO) that the Planning, Preservation, and Zoning (PPZ) Division administers. **The manual includes both requirements that must be met and recommendations from Staff that are intended to be helpful for moving through the process as smoothly as possible.** Requirements are indicated by words like “must,” and “required”; recommendations are indicated by words like “should,” “may,” and “encourage.”

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*Note: Clicking on blue links found in the list above will bring you directly to that chapter or chapter subsection. Light blue underlined text is used throughout the document to indicate links which will either take you to other portions of the document (e.g., to a specific chapter) or to take you to a document or form on the City's website.*

## Chapter 1: Introduction & Overview

This manual covers the application processes for various zoning relief requests and permit types that the Planning, Preservation, and Zoning (PPZ) Division administers. It specifically addresses projects which require review by the Planning Board (PB) or Zoning Board of Appeals (ZBA)—collectively, the “Review Boards” or “Boards”—who have directed PPZ to create submittal requirements on their behalf. This manual addresses the most common development activities; it does not address Master Plan Special Permits, Comprehensive Permits, or [Thoroughfares and Civic Spaces](#) which also require Board review but are addressed individually at [www.somervillezoning.com](http://www.somervillezoning.com).

By-right projects (projects that comply with the requirements of the SZO and do not require any Board review) are not addressed by this manual. Those projects should be submitted directly to the Inspectional Services Division (ISD) through [Citizenserve](#). Reviewing the SZO will help you determine whether your project is by-right.

### Before You Begin

- Identify the zoning district that governs your property by reviewing the [Zoning Atlas](#).
- In the [SZO](#) article corresponding to your district, identify the building type or use you are proposing and confirm it is allowed. Requirements of specific zoning districts are addressed in Articles 3 through 8 of the SZO.
- Find out if your property is in a Local Historic District (LHD) or identified on the Massachusetts or National Registers of Historic Places. PPZ Staff maintains a list of many of those properties [here](#).
  - If your property is included on this list, there may be additional requirements and regulations you must follow. More information can be found at [here](#).
- Find out if your property is over 75 years of age. For buildings that are 75 years or older, work that will result in demolition of 50% or more of the exterior surface area (including walls and roof) of a building will require review by the Historic Preservation Commission under the [Demolition Review Ordinance](#).

### Pre-Application Steps

Pre-application steps include Pre-Submittal Meetings, neighborhood meetings, and design review. Not all these steps are required for every application and the timing of these steps may change depending on the activity type and review process. Communication about pre-application steps occurs via email, not through Citizenserve.

The first step in beginning the development review process is to request a Pre-Submittal Meeting, which is done by submitting a [Pre-Submittal Meeting Request Form](#) to [planning@somervillema.gov](mailto:planning@somervillema.gov). Additional information about pre-application steps can be found in [Chapter 5](#).

### Citizenserve

[Citizenserve](#) is the system the PPZ Division uses to manage projects and submissions.

Once all relevant pre-application steps are complete, Applicants can create accounts and submit complete applications through [Citizenserve](#). The application you submit will vary based on the type of review required. Once all required information has been submitted, you will receive an automatic email from the system with the case number for the project. This case number should be included in all subsequent communications regarding the project. Once a

complete application is submitted through Citizenserve, all subsequent communication and document submission occurs through Citizenserve. Please note that, for this reason, the Applicant on Citizenserve should be the main point of contact for the project.

## Chapter Overviews

The information Applicants can expect to find in this manual is summarized below. Each chapter and subchapter work together to provide Applicants with essential information necessary to successfully complete the development review process.

### Chapter 2: Activity Types

An Applicant's first step for using this manual is to identify the type of development activity your project involves. The table below can assist with this task, although it does not provide an exhaustive list of examples. Please note that some proposals may involve more than one activity – for example, if you are proposing a General Building in one of the Mid-Rise districts with both commercial and residential uses, then both “Developing a principal building” ([Chapter 2.A](#)) and “Establishing or altering a use” ([Chapter 2.B](#)) will be relevant to your proposal.

Subchapters	Examples: <i>What are you trying to do?</i>
A. <a href="#">Developing a principal building</a>	You want to construct a new or modify an existing primary (main) building.
B. <a href="#">Establishing or altering a use</a>	You want to establish a use that requires a special permit in your property's district (e.g., a Bed and Breakfast in the NR district, or a residential use in the MR districts) OR you want to alter a nonconforming use (e.g., a Hospital in the NR district).
C. <a href="#">Lot splits, lot mergers, and lot line adjustments</a>	You want to merge two or more lots into one, split or divide a lot, or adjust the line between two or more lots you own.
D. <a href="#">Developing a building component</a>	You want to construct or modify a building component (such as a bay, porch, or dormer) to a building.
E. <a href="#">Subdivisions</a>	You want to split a lot into two or more lots and a new street is needed to provide access to the individual lots.
F. <a href="#">Parking Relief</a>	You want to provide less parking than the minimum required or more parking than the maximum permitted. <i>See the Vehicular Parking Table in the SZO section corresponding to your zoning district for specific requirements.</i>

Once you have identified which portions of Chapter 2 are relevant to your proposal, reading those sections will provide you with directions on the next steps that you need to take to move forward with the development review process, including any required pre-application procedural steps and the documents that must be submitted as part of a complete application.

### Chapter 3 and 4: Glossary and Document Standards

Once you have determined which of the activity types from Chapter 2 are relevant to your proposal and have reviewed the submission requirements for that activity type, these chapters will help you understand what is required for each document. These two chapters are relevant to all development activity types addressed in this manual.


The Glossary ([Chapter 3](#)) identifies the information that must be included in each required document, including if other City divisions have requirements for a document. The Document

Standards ([Chapter 4](#)) includes general requirements that apply to all documents and guidance on how to organize and label required documents to facilitate an efficient review of your application.

### *Chapter 5, 6, and 7: Procedural Steps*

Chapter 5 will be relevant to many, but not all, development activity types identified in Chapter 2; for example, if you are proposing a lot split (Chapter 2.C) only one portion of Chapter 5 will be relevant to you (Chapter 5.A), but if you are proposing to develop a principal building (Chapter 2.A), the entirety of Chapter 5 will be relevant.

Chapters 6 and 7.B are relevant to all development activity types identified in Chapter 2.



Pre-Application Steps ( <a href="#">Chapter 5</a> )	Submission Steps ( <a href="#">Chapter 6</a> )	Post-Submission Steps ( <a href="#">Chapter 7</a> )
A. Guidance for Pre-Submittal Meetings B. Guidance for Neighborhood Meetings C. Guidance for Design Review	A. Guidance for Submitting a Complete Application B. Required Fees	A. Guidance for Public Hearings B. Guidance for Post-Decision Steps

### *Chapter 8: Other Review Processes*

In addition to the development activities found in Chapter 2, the PPZ Division is also involved in administering the review processes for the following:

- A. **Hardship Variances:** You want to request that a zoning requirement or standard not apply to your project due to special circumstances related to your site that create a hardship. See SZO Section 15.3 for more information.
- B. **Plan Revision:** You want to make changes to your project after a decision has been issued but prior to a Certificate of Occupancy. See SZO Section 15.4 for more information.
- C. **Administrative Appeal:** You want to appeal a decision that has been issued by the Director of Planning, Preservation, and Zoning or the Building Official. See SZO Section 15.5 for more information.
- D. **Time Extension:** You want to extend the validity of a previously issued permit.

Unless otherwise noted in Chapter 8, Chapters 3 through 7 are relevant to these proposal types.

If any information remains unclear after reviewing this document, please reach out to [planning@somervillema.gov](mailto:planning@somervillema.gov) for clarification.

## Chapter 2.A: Developing a Principal Building

Developing a principal building is one of the most common development activities and includes both construction of new buildings and modifications to existing buildings. It requires Site Plan Approval in all districts except the Neighborhood Residence (NR) and Urban Residence (UR) districts. In the NR and UR districts developing a principal building can often be done by-right so you should proceed directly to [Citizenserve](#) to apply for any necessary permits from ISD, as the remainder of Chapter 2.A is not applicable to by-right proposals.

While developing a principal building typically requires Site Plan Approval (addressed in SZO §15.3.2), there are specific activities with more limited scopes that may require other types of review. For example, some modifications may require Minor Site Plan Approval instead of Site Plan Approval, while others may require a Special Permit in addition to Site Plan Approval. The table below provides some examples of activities and the type of permit(s) that may be required. If your proposal does not match any of the examples below you can discuss what permits may be required based on the specific details of your project with your Case Planner at the Pre-Submittal Meeting.

Activity	Required Permit(s)
Expanding the floor plate of an existing building	Site Plan Approval
Changing the window and door pattern on a façade	Site Plan Approval
Developing a building component (e.g., a storefront) on the ground story of an existing building	Minor Site Plan Approval <i>For more information see Developing a Building Component in <a href="#">Chapter 2.E</a></i>
Developing a building component (e.g., a balcony) on the upper stories of an existing building	Site Plan Approval
Developing a building component on a building type that is not permitted in the district (e.g., a Detached House in the Mid-Rise districts)	Special Permit <i>For more information see Developing a Building Component in <a href="#">Chapter 2.E</a></i>

### Pre-Application Procedural Requirements

The first steps you should take as an Applicant are to determine the zoning district(s) for a property and develop a general idea of what you want to propose. Once you have these two things, your next step is to complete and submit the [Pre-Submittal Meeting Request Form](#) via email to [planning@somervillema.gov](mailto:planning@somervillema.gov). This form includes a Property Owner Authorization form that must be completed in its entirety to schedule a Pre-Submittal Meeting.

After submission, PPZ Staff will review your request and reach out to schedule a Pre-Submittal Meeting or request any outstanding information, as soon as their schedule allows.

#### Pre-Submittal Meeting

A Pre-Submittal Meeting is required prior to moving forward with any other steps in the review process. Guidance for Pre-Submittal Meetings can be found in [Chapter 5.A.](#).

Applicants are encouraged to submit any available information about their project when they submit PSMR forms.



### ***First Neighborhood Meeting***

Proposals to develop a principal building are required to have two Neighborhood Meetings, with different requirements for what information must be presented at each. The first Neighborhood Meeting must be held at least two weeks after a Pre-Submittal Meeting and at least two weeks prior to Design Review. Additional information about Neighborhood Meetings can be found in [Chapter 5.B.](#)

Applicants are required to present at least the following information at the first Neighborhood Meeting:

- Information regarding the context (neighborhood surroundings), massing, schematic program (sizes and uses), and site strategy for the proposal. Examples of information that fall into this category include the general bulk (massing) of the proposed building, areas of landscaping, concepts for vehicular/pedestrian/bicycle access, and location of trash and storage areas. Discussions of the building materiality or detailed design ideas are not appropriate at this point in the review process.
- Information regarding any proposed changes to the public realm.
- Any additional documents or information to explain the project or required by the Ward Councilor or Director of Planning, Preservation, & Zoning.

Applicants are encouraged to complete these steps prior to the first Neighborhood Meeting:

- If a Transportation Impact Study (TIS) is required, submit a proposed scope to the Mobility Division for review and approval.

### ***Design Review***

Proposals to develop a principal building require Design Review with the Urban Design Commission (UDC). Additional information about Design Review can be found in [Chapter 5.C.](#)

Applicants are required to include at least the following information as part of their submission for Design Review:

- A concise written narrative describing how the proposed building fits within and contributes to the immediately surrounding built context, the sustainability objectives for the building, and, if applicable, any approach to historic preservation.
- Land Title Survey or surveyed site plan showing existing conditions of the area, including existing conditions of any portion of a right-of-way that the lot has frontage. Must identify at least the following features: street trees, sidewalk paving, public furniture, lighting, curb cuts.
- Three (3) viable schematic massing concepts illustrated in axonometric and perspective views. *Buildings of six (6) stories or fewer are only required to present one (1) massing concept.*
- Three (3) viable schematic façade design concepts illustrated in elevation, including details of the building base. Each façade design must indicate ground story and upper story fenestration percentages (openings in the elevation such as windows and doors). *Development limited to only modifications of an existing façade are only required to present one (1) schematic façade design concept for the building.*
- A Zoning Dimensional Standards Table for the building.
- Landscaping plan(s) and any associated illustrations necessary to show proposed changes to the public realm (streets and park areas). Plans must, at a minimum, include the following information:

- Streetscape improvements, including street trees and tree planting pits, sidewalk paving, public furnishings, lighting, etc. Must include dimensions and ADA requirements, when relevant.
- Publicly visible landscaping on private property.
- Publicly accessible on-site open space (e.g., courtyards, forecourts, outdoor seating/beer gardens, roof terraces).
- Plant species anticipated to be used throughout the proposal.
- Any additional diagrams illustrating the proposed satisfaction of the design guidelines applicable to the development proposal.

Applicants are encouraged to complete these steps prior to Design Review:

- If compliance with the Green Score is required, contact the Public Space and Urban Forestry Division (PSUF) regarding the proposal's plan for compliance.
- If any changes to existing driveways, curb cuts, or public sidewalks are proposed, contact the Public Space & Urban Forestry Division, Mobility Division, and Engineering Department.
- If a Mobility Management Plan is required, submit it to the Mobility Division for review and approval.
- If compliance with Article 12.2 is required, contact the Economic Development Division.
- Review the Engineering Department's [Site Construction Permit Regulations](#) and contact the Engineering Department if a Site Construction Permit will be required.

### ***Second Neighborhood Meeting***

The second Neighborhood Meeting must be held at least two weeks after Design Review is complete and at least two weeks prior to submitting a complete application with all required materials. Additional information about Neighborhood Meetings can be found in [Chapter 5.B](#).

Applicants are required to present at least the following information at the second Neighborhood Meeting:

- Changes to any information presented at the first Neighborhood Meeting.
- Updated design addressing the Urban Design Commission's recommendations.
- A Shadow Study produced in accordance with the requirements of this manual.
- If LEED certifiability is required, anticipated number of LEED points the project will achieve.
- If a Transportation Impact Study (TIS) is required, the analysis portion of the TIS. It is not necessary to have the mitigation portion of the TIS completed at this point.
- Any additional documents or information required by the Ward Councilor or Director of Planning, Preservation, and Zoning.

Applicants are encouraged to complete these steps prior to the second Neighborhood Meeting:

- Submit all information necessary to receive the Certificate of Materials from the Office of Sustainability and Environment, if required.
- Submit all information necessary to receive the Certificate of Materials from the Housing Division, if required.

## **Application Submission Requirements**

The following documents are required and must be uploaded on [Citizenserve](#) for an application to be deemed complete. Please see the Glossary in [Chapter 3](#) for details on what each document must contain and the Document Standards in [Chapter 4](#) for directions on how to



format and organize all documents. If you have additional questions after reviewing the information presented here, please consult with your Case Planner.

Document	Trigger for requirement
<a href="#">Abutters List</a>	<i>Always required. PPZ Staff will generate the list of abutters within Somerville. The Applicant is responsible for obtaining a list of abutters from other cities, if the 300' radius crosses municipal boundaries.</i>
<a href="#">Affordable Housing Acknowledgement</a>	<i>If Affordable Dwelling Units are required. Please allow 28 days for review.</i>
<a href="#">Building Elevation(s)</a>	<i>Always required.</i>
<a href="#">Building Section(s)</a>	<i>Always required.</i>
<a href="#">Campaign Contribution Ordinance Mandatory Disclosure and Certification Form</a>	<i>If proposing the construction or renovation of more than 15,000 square feet (See Sec. 15-72 of the Somerville Code of Ordinances).</i>
<a href="#">Certificate of Required Materials from the Housing Division</a>	<i>See Glossary (<a href="#">Chapter 3</a>) for details.</i>
<a href="#">Certificate of Required Materials from the Mobility Division</a>	<i>See Glossary (<a href="#">Chapter 3</a>) for details.</i>
<a href="#">Certificate of Required Materials from the Office of Sustainability &amp; Environment</a>	<i>See Glossary (<a href="#">Chapter 3</a>) for details.</i>
<a href="#">Deed</a>	<i>Always required.</i>
<a href="#">Design Review Report</a>	<i>Always required.</i>
<a href="#">Environmental Impact Analysis</a>	<i>If proposing a High-Rise building.</i>
<a href="#">Floor Plan(s)</a>	<i>Always required.</i>
<a href="#">Green Score Calculation</a>	<i>If proposing a substantial renovation (as defined by the SZO) or changes to landscaping.</i>
<a href="#">Gross Floor Area Calculation</a>	<i>Always required.</i>
<a href="#">Land Title Survey</a>	<i>Always required.</i>
<a href="#">Landscape Plan(s)</a>	<i>Always required.</i>
<a href="#">LEED Certifiability Documentation</a>	<i>If proposing new construction or major renovations over 25,000 square feet (See SZO Section 10.11). Please allow 21 days for review.</i>
<a href="#">Mobility Management Plan (MMP)</a>	<i>If compliance with SZO Section 11.4 is required. Please allow 60 days for review.</i>
<a href="#">Narrative</a>	<i>Always required.</i>
<a href="#">Neighborhood Meeting Report(s)</a>	<i>Always required.</i>
<a href="#">Net Zero Building Documentation</a>	<i>If seeking a Net Zero Ready density bonus OR if proposing a non-Lab Building subject to SZO Section 8.4. Please allow 21 days for review.</i>
<a href="#">Property Owner Authorization</a>	<i>Always required.</i>
<a href="#">Recorded Hardship Variance(s)</a>	<i>If a Hardship Variance was granted for the property.</i>

Required fees (see <a href="#">Chapter 6.B</a> )	<i>Always required. Will be calculated by the City of Somerville once sufficient information has been submitted.</i>
<a href="#">Shadow Study</a>	<i>Always required.</i>
<a href="#">Signage Plan(s)</a>	If proposing one or more commercial spaces.
<a href="#">Site Plan(s)</a>	<i>Always required.</i>
<a href="#">Sustainable &amp; Resilient Buildings Questionnaire</a>	<i>Always required. Please allow 14 days for review.</i>
<a href="#">Transportation Access Plan</a>	<i>Always required. Please allow 21 days for review.</i>
<a href="#">Transportation Impact Study</a>	If the triggers identified in this document are met ( <a href="#">link</a> ). <i>Please allow 21 days for review.</i>
<a href="#">Tree Plan</a>	If any trees are being removed.
<a href="#">Zoning Dimensional Standards Table(s)</a>	<i>Always required.</i>

Once all required documents have been gathered and the required fees have been identified by Staff, guidance on submitting a complete application can be found in [Chapter 6.A](#), guidance on preparing for the Public Hearing can be found in [Chapter 7.A](#), and guidance on required steps following the issuance of a decision can be found in [Chapter 7.B](#).

## **Chapter 2.B: Establishing or Altering a Use**

Some uses may require a Special Permit to be established or modified. To make this determination, review the table of permitted uses found towards the end of each district section of the SZO. Uses permitted by Special Permit must receive approval from the Planning Board or Zoning Board of Appeals to be established.

There are also some situations in which a use that would typically be permitted in a zoning district would instead require a Special Permit. These include the following situations:

- Any Formula Businesses (as defined by the SZO)
- Any use in the Small Business Overlay District where the underlying zoning is Neighborhood Residence or Urban Residence, which involves the occupancy of commercial space of more than five thousand (5,000) square feet
- Any use in the Auto-Oriented, Commercial Service, or Retail Sales use categories which is greater than ten thousand (10,000) square feet
- Certain uses occupying a ground story commercial space fronting a Pedestrian Street

If the use already exists but is not permitted in the district (also known as a “non-conforming use”), a Special Permit is required to alter the use or change it to a different use within the same use category. More information about non-conforming uses can be found in SZO §14.1.6.

### **Pre-Application Procedural Requirements**

The first steps you should take as an Applicant are to determine the zoning district(s) for a property and develop a general idea of what you want to propose. Once you have these two things, your next step is to complete and submit the [Pre-Submittal Meeting Request Form](#) via email to [planning@somervillema.gov](mailto:planning@somervillema.gov). This form includes a Property Owner Authorization form that must be completed in its entirety to schedule a Pre-Submittal Meeting.

After submission, PPZ Staff will review your request and reach out to schedule a Pre-Submittal Meeting or request any outstanding information, as soon as their schedule allows.

#### ***Pre-Submittal Meeting***

A Pre-Submittal Meeting is required prior to moving forward with any other aspect of the required review procedures. Additional information about Pre-Submittal Meetings can be found in [Chapter 5.A.](#)

Applicants are encouraged to submit any available information about their project when they submit PSMR forms.

#### ***Neighborhood Meeting***

Proposals that require a Use Special Permit are required to have one Neighborhood Meeting. The Neighborhood Meeting must be held at least two weeks after a Pre-Submittal Meeting and at least two weeks prior to submitting a complete application with all required materials. Additional information about Neighborhood Meetings can be found in [Chapter 5.B.](#)

Applicants are required to present at least the following information at the Neighborhood Meeting:

- Floor plan
- Summary of business plan
- Maps of surrounding area

- Any additional documents or information required by the Ward Councilor or Director of Planning, Preservation, and Zoning

Applicants are encouraged to complete these steps prior to the Neighborhood Meeting:

- If a Transportation Impact Study is required, submit the scope to the Mobility Division for review and approval.

## Application Submission Requirements

The following documents are required and must be uploaded on [Citizenserve](#) for an application to be deemed complete. Please see the Glossary in [Chapter 3](#) for the information that each document must contain and the Document Standards in [Chapter 4](#) for directions on how to format and organize all documents. If you have additional questions after reviewing the information presented here, please consult with your Case Planner.

This section is broken into two tables: the *General Requirements Table*, and the *Use Specific Requirements Table*. Applicants must review both tables and provide all documents required by each table to have a complete application.

Once all required documents have been gathered and the required fees have been identified by Staff, guidance on submitting a complete application can be found in [Chapter 6.A](#), guidance on preparing for the Public Hearing can be found in [Chapter 7.A](#), and guidance on required steps following the issuance of a decision can be found in [Chapter 7.B](#).

### General Requirements Table

Document	Trigger for requirement
<a href="#">Abutters List</a>	<i>Always required. PPZ Staff will generate the list of abutters within Somerville. The Applicant is responsible for obtaining a list of abutters from other cities, if the 300' radius crosses municipal boundaries.</i>
<a href="#">Abutting Context Analysis</a>	If required by the Use-Specific Requirements Table (see pages 17-18) OR if over 5,000 square feet and subject to SZO § 8.3.
<a href="#">Arts Council Certification</a>	If required by the Use-Specific Requirements Table (see pages 17-18).
<a href="#">Certificate of Required Materials from the Mobility Division</a>	See Glossary ( <a href="#">Chapter 3</a> ) for details.
<a href="#">Deed</a>	<i>Always required.</i>
<a href="#">Façade Elevation(s)</a>	If required by the Use-Specific Requirements Table (see pages 17-18).
<a href="#">Floor Plan(s)</a>	<i>Always required.</i>
<a href="#">Infrastructure Capacity Analysis</a>	If required by the Use-Specific Requirements Table (see pages 17-18).
<a href="#">Landscape Plan(s)</a>	If required by the Use-Specific Requirements Table (see pages 17-18).
<a href="#">Maps</a>	If required by the Use-Specific Requirements Table (see pages 17-18), OR if a Formula Business (as defined by the SZO), OR if

	occupying a ground story commercial space fronting a Pedestrian Street.
<a href="#">Narrative</a>	<i>Always required.</i>
<a href="#">Neighborhood Meeting Report(s)</a>	<i>Always required.</i>
<a href="#">Property Owner Authorization</a>	<i>Always required.</i>
Required fees (see <a href="#">Chapter 6.B</a> )	<i>Always required. Will be calculated by the City of Somerville once sufficient information has been submitted.</i>
<a href="#">Site Plan(s)</a>	If required by the Use-Specific Requirements Table (see pages 17-18).
<a href="#">Transportation Access Plan</a>	If required by the Use-Specific Requirements Table (see pages 17-18). <i>Please allow 21 days for review.</i>
<a href="#">Mobility Management Plan</a>	Required for any proposals to establish, change, or expand any use with fifty (50) or more employees. <i>Please allow 60 days for review.</i>
<a href="#">Transportation Impact Study</a>	If required by the Use-Specific Requirements Table (see pages 17-18), <i>OR</i> if any of the <a href="#">TIS Thresholds</a> are met, <i>OR</i> if an Auto-Oriented, Commercial Services, or Retail Sales use over 10,000 square feet. <i>Please allow 21 days for review.</i>

### ***Use-Specific Requirements Table***

Use categories in this table are listed in the same order that they are found in Article 9 of the SZO. All uses that require a Special Permit in some situations are listed, regardless of whether they have additional requirements beyond what is identified in the *General Requirements Table*. For example, the Artisanal Production use requires a Special Permit in some situations but does not have any additional requirements beyond the ones found in the *General Requirements Table*.

Most uses will require at least some additional documents beyond those identified in the *General Requirements Table*. The additional documents that are required can be identified by dots in the relevant column. For example, an application to establish a Commercial Vehicle Repair or Maintenance use would require Landscape Plan(s), Site Plan(s), and a Transportation Access Plan in addition to any documents identified in the *General Requirements Table*.

*[The Use-Specific Requirements Table can be found on the next two pages.]*

Find your proposed use on the left side column and check which documents are needed on the top right header, if the row has a ● it is required. If it is blank it may still be required based on the criteria listed in the General Requirements Table (located in the previous two pages).

	Abutting Context Analysis	Facade Elevation (s)	Infrastructure Capacity Analysis	Landscape Plan(s)	Maps	Site Plan(s)	Transportation Access Plan	Transportation Impact Study	Arts Council Certification
<b>Arts &amp; Creative Enterprise</b>									
Artisanal Production									
Arts Sales or Services									
Design Services									
Work/Live Creative Studio						●			●
Shared Workspaces or Arts Education									
<b>Auto-Oriented</b>									
Commercial Vehicle Repair or Maintenance				●		●	●		
Towing Service	●			●		●	●		
Off-Site Accessory Parking						●			
Personal Vehicle Repair or Maintenance				●		●	●		
Vehicle Sales				●		●	●		
<b>Cannabis Establishment Categories</b>									
Cannabis Cultivation									
Cannabis Retail Sales		●					●	●	
<b>Civic &amp; Institutional Categories</b>									
Hospital			●				●	●	
Minor Utility Facility	●			●		●			
Private Non-Profit Club or Lodge	●					●			
<b>Food and Beverage Services Categories</b>									
Bar, Restaurant, or Tavern									
Bakery, Café, or Coffee Shop									
<b>Lodging Categories</b>									
Bed & Breakfast									
Hotel or Hostel	●	●				●		●	
<b>Accessory Use Categories</b>									
Hobby Kennel				●		●			
Home-Based Day Care									
Home Business Vehicle Parking				●		●	●		



<p>Find your proposed use on the left side column and check which documents are needed on the top right header, if the row has a ● it is required. If it is blank it may still be required based on the criteria listed in the General Requirements Table (located in the previous two pages).</p>	Abutting Context Analysis	Facade Elevation (s)	Infrastructure Capacity Analysis	Landscape Plan(s)	Maps	Site Plan(s)	Transportation Access Plan	Transportation Impact Study	Arts Council Certification
<b>Commercial Services Categories</b>									
Commercial Kennel	●			●		●			
Pet Day Care or Training	●			●		●			
Veterinarian	●			●		●			
Assembly or Entertainment						●			
Personal Credit					●				
Building or Home Repair Services				●		●			
Caterer or Wholesale Food Production				●		●	●		
Fitness Services					●				
Funeral Services		●					●	●	
Health Care Services		●			●	●			
Recreation Services	●	●						●	
Car Share Parking (4+)	●			●		●			
<b>Residential Categories</b>									
Household Living						●			
Group Living						●			
Dormitory or Chapter House					●				
Homeless Shelter					●				
Nursing Home/Assisted Living Facility						●	●		
Rooming House				●		●			
<b>Retail Sales Categories</b>									
Building/Home Supplies or Equipment							●	●	
Alcohol Sales					●				
Pet Store									
Fresh Food Market or Grocery Store									
<b>Industrial Categories</b>									
Dry Cleaning or Laundry Services							●	●	
Data Center		●				●			
Self Storage		●				●			
Recycling Collection	●			●		●		●	
Trucking or Transportation Depot	●			●		●	●	●	

## Chapter 2.C: Lot Splits, Lot Mergers, and Lot Line Adjustments

Lot splits, lot mergers, and lot line adjustments are changes in the platting of land that do not result in the creation of a new thoroughfare. While any changes to lot boundaries are sometimes casually referred to as a “subdivision”, the term “subdivision” has a specific definition in the SZO and is addressed separately in [Chapter 2.E](#) of this manual. Lot splits, lot mergers, and lot line adjustments generally require Minor Site Plan Approval; this means that the Director of Planning, Preservation, & Zoning reviews the proposal and issues a decision without the need for a Public Hearing. Additional information about Minor Site Plan Approval can be found in the Planning Board and Zoning Board of Appeals’ Rules of Procedure & Policy.

The exception to Minor Site Plan Approval occurs if the lot is within a Local Historic District or identified on the Massachusetts or National Registers of Historic Places, in which case a Special Permit is required.

### Pre-Application Procedural Requirements

The first steps you should take as an Applicant are to determine the zoning district(s) for a property and develop a general idea of what you want to propose. Once you have these two things, your next step is to complete and submit the [Pre-Submittal Meeting Request Form](#) via email to [planning@somervillema.gov](mailto:planning@somervillema.gov). This form includes a Property Owner Authorization form that must be completed in its entirety to schedule a Pre-Submittal Meeting.

After submission, PPZ Staff will review your request and reach out to schedule a Pre-Submittal Meeting or request any outstanding information, as soon as their schedule allows.

#### Pre-Submittal Meeting

A Pre-Submittal Meeting is required prior to moving forward with any other aspect of the required review procedures. Additional information about Pre-Submittal Meetings can be found in [Chapter 5.A](#).

Applicants are encouraged to submit any available information about their project when they submit PSMR forms.

Applicants are strongly encouraged to bring the following documents to the Pre-Submittal Meeting:

- Proposed site plan showing dimensions of new lots

### Application Submission Requirements

The following documents are required and must be uploaded on [Citizenserve](#) for an application to be deemed complete. Please see the Glossary in [Chapter 3](#) for the information that each document must contain and the Document Standards in [Chapter 4](#) for directions on how to format and organize all documents. If you have additional questions after reviewing the information presented here, please consult with your Case Planner.

Document	Trigger for requirement
<a href="#">Abutters List</a>	If the lot is designated as a Local Historic District or identified on the Massachusetts or National Register of Historic Places. PPZ Staff will generate the list of abutters within Somerville. The Applicant is responsible for obtaining a list of abutters from other cities, if the 300’ radius crosses municipal boundaries.

<a href="#">Deed</a>	<i>Always required.</i>
<a href="#">Land Plat</a>	<i>Always required.</i>
<a href="#">Land Title Survey</a>	<i>Always required.</i>
<a href="#">Narrative</a>	<i>Always required.</i>
<a href="#">Property Owner Authorization</a>	<i>Always required.</i>
<a href="#">Recorded Hardship Variance(s)</a>	If a Hardship Variance was granted for the property.
Required fees (see <a href="#">Chapter 6.B</a> )	<i>Always required. Will be calculated by the City of Somerville once sufficient information has been submitted.</i>
<a href="#">Somerville Historic Preservation Commission Recommendation</a>	If the lot is designated as a Local Historic District or identified on the Massachusetts or National Registers of Historic Places.
<a href="#">Transportation Access Plan</a>	If modifying any transportation elements in a right-of-way. <i>Please allow 21 days for review.</i>

Once all required documents have been gathered and the required fees have been identified by Staff, guidance on submitting a complete application can be found in [Chapter 6.A](#), guidance on preparing for the Public Hearing can be found in [Chapter 7.A](#), and guidance on required steps following the issuance of a decision can be found in [Chapter 7.B](#).

## Chapter 2.D: Developing a Building Component

Buildings are composed of a main massing and various additional building components. Building components are accessory elements attached to the main massing of the building. Examples of building components include storefronts, balconies, porches, dormers, and rear additions. Not every building component is permitted in every district or for every building type; the building components that are permitted for each building type can be found in a table titled “Building Components.” This table exists towards the end of each zoning district, following the sections for the permitted Building Types.

Development of a principal building (as outlined in [Chapter 2.A](#)) may, or may not, include the development of building components. If you are developing a principal or accessory building and not just a building component, you should review Chapter 2.A. If, however, your proposal is limited to constructing or modifying only a building component, you can review this subsection instead of Chapter 2.A.

*In general, developing a building component requires the same level of review as developing the principal building that the component is being attached to requires.* This means that if your property is zoned as NR or UR and the principal building is permitted in that district, developing building components can be done by-right and your project should be submitted directly to ISD. There are, however, some exceptions to this general rule.

First, for buildings not in the NR or UR districts, developing a building component requires Minor Site Plan Approval (rather than Site Plan Approval) if the proposal falls under one of the categories identified in the Planning Board’s or Zoning Board of Appeals’ Rules of Procedure & Policy. These categories include building components on the ground story (e.g., storefronts for commercial spaces) of buildings that have already been established.

Second, developing a building component requires a Special Permit if the building type is not one of the building types permitted in the district. For example, adding a building component to a Detached House in one of the Mid-Rise districts (where the Detached House building type is not permitted) would require a Special Permit. This Special Permit is required in addition to any other review processes required for the building itself.

### Pre-Application Procedural Requirements

The first steps you should take as an Applicant are to determine the zoning district(s) for a property and develop a general idea of what you want to propose. Once you have these two things, your next step is to complete and submit the [Pre-Submittal Meeting Request Form](#) via email to [planning@somervillema.gov](mailto:planning@somervillema.gov). This form includes a Property Owner Authorization form that must be completed in its entirety to schedule a Pre-Submittal Meeting.

After submission, PPZ Staff will review your request and reach out to schedule a Pre-Submittal Meeting or request any outstanding information, as soon as their schedule allows.

#### Pre-Submittal Meeting

A Pre-Submittal Meeting is required prior to moving forward with any other aspect of the required review procedures. Additional information about Pre-Submittal Meetings can be found in [Chapter 5.A](#).

Applicants are encouraged to submit any available information about their project when they submit PSMR forms.

## Neighborhood Meeting

Proposals that require a Special Permit to develop a building component are required to have one Neighborhood Meeting. The Neighborhood Meeting must be held at least two weeks after a Pre-Submittal Meeting and at least two weeks prior to submitting a complete application with all required materials. Additional information about Neighborhood Meetings can be found in [Chapter 5.B](#).

Applicants are required to present at least the following information at the Neighborhood Meeting:

- Building Elevations
- Site Plan
- Any additional documents or information required by the Ward Councilor or Director of Planning, Preservation, and Zoning.

## Application Submission Requirements

The following documents are required and must be uploaded on [Citizenserve](#) for an application to be deemed complete. Please see the Glossary in [Chapter 3](#) for the information that each document must contain and the Document Standards in [Chapter 4](#) for directions on how to format and organize all documents. If you have additional questions after reviewing the information presented here, please consult with your Case Planner.

Document	Trigger for requirement
<a href="#">Abutters List</a>	<i>Always required. PPZ Staff will generate the list of abutters within Somerville. The Applicant is responsible for obtaining a list of abutters from other cities, if the 300' radius crosses municipal boundaries.</i>
<a href="#">Building Elevation(s)</a>	<i>Always required.</i>
<a href="#">Building Section(s)</a>	<i>Always required.</i>
<a href="#">Deed</a>	<i>Always required.</i>
<a href="#">Floor Plan(s)</a>	<i>Always required.</i>
<a href="#">Green Score Calculation</a>	<i>If proposing a substantial renovation (as defined by the SZO) or changes to landscaping.</i>
<a href="#">Land Title Survey</a>	<i>Always required.</i>
<a href="#">Narrative</a>	<i>Always required.</i>
<a href="#">Neighborhood Meeting Report(s)</a>	<i>If a Neighborhood Meeting is required.</i>
<a href="#">Property Owner Authorization</a>	<i>Always required.</i>
<a href="#">Recorded Hardship Variance(s)</a>	<i>If a Hardship Variance was granted for the property.</i>
Required fees (see <a href="#">Chapter 6.B</a> )	<i>Always required. Will be calculated by the City of Somerville once sufficient information has been submitted.</i>
<a href="#">Site Plan(s)</a>	<i>Always required.</i>
<a href="#">Tree Plan</a>	<i>If any trees are being removed.</i>

<a href="#">Zoning Dimensional Standards Table(s)</a>	<i>Always required.</i>
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Once all required documents have been gathered and the required fees have been identified by Staff, guidance on submitting a complete application can be found in [Chapter 6.A](#), guidance on preparing for the Public Hearing can be found in [Chapter 7.A](#), and guidance on required steps following the issuance of a decision can be found in [Chapter 7.B](#).



## Chapter 2.E: Subdivisions

A subdivision is defined as “The division of a lot, tract, or parcel of land into two (2) or more lots, building sites, or other divisions for the purpose of sale, legacy, or development at any time, where a new thoroughfare or way is needed to provide access to the lots which would otherwise be landlocked.” A lot is considered landlocked if it does not have at least one lot line abutting a civic space or throughfare. Developing a subdivision requires Subdivision Plan Approval which is addressed in SZO §15.3.1.

If a new thoroughfare is not needed to provide access to landlocked lots, the land platting changes would be considered lot splits, lot mergers, or lot line adjustments which are addressed in [Chapter 2.C](#).

### Pre-Application Procedural Requirements

The first steps you should take as an Applicant are to determine the zoning district(s) for a property and develop a general idea of what you want to propose. Once you have these two things, your next step is to complete and submit the [Pre-Submittal Meeting Request Form](#) via email to [planning@somervillema.gov](mailto:planning@somervillema.gov). This form includes a Property Owner Authorization form that must be completed in its entirety to schedule a Pre-Submittal Meeting.

After submission, PPZ Staff will review your request and reach out to schedule a Pre-Submittal Meeting or request any outstanding information, as soon as their schedule allows.

#### Pre-Submittal Meeting

A Pre-Submittal Meeting is required prior to moving forward with any other aspect of the required review procedures. Additional information about Pre-Submittal Meetings can be found in [Chapter 5.A](#).

Applicants are encouraged to submit any available information about their project when they submit PSMR forms.

### Application Submission Requirements

The following documents are required and must be uploaded on [Citizenserve](#) for an application to be deemed complete. Please see the Glossary in [Chapter 3](#) for the information that each document must contain and the Document Standards in [Chapter 4](#) for directions on how to format and organize all documents. If you have additional questions after reviewing the information presented here, please consult with your Case Planner.

Document	Trigger for requirement
<a href="#">Abutters List</a>	<i>Always required. PPZ Staff will generate the list of abutters within Somerville. The Applicant is responsible for obtaining a list of abutters from other cities, if the 300' radius crosses municipal boundaries.</i>
<a href="#">Certificate of Required Materials from the Mobility Division</a>	See Glossary ( <a href="#">Chapter 3</a> ) for details.
<a href="#">Deed</a>	<i>Always required.</i>
<a href="#">Land Title Survey</a>	<i>Always required.</i>

<a href="#">Narrative</a>	<i>Always required.</i>
<a href="#">Property Owner Authorization</a>	<i>Always required.</i>
<a href="#">Recorded Hardship Variance(s)</a>	If a Hardship Variance was granted for the property.
Required fees (see <a href="#">Chapter 6.B</a> )	<i>Always required. Will be calculated by the City of Somerville once sufficient information has been submitted.</i>
<a href="#">Subdivision Plat</a>	<i>Always required.</i>
<a href="#">Transportation Access Plan</a>	If modifying any transportation elements in a right-of-way. <i>Please allow 21 days for review.</i>

Once all required documents have been gathered and the required fees have been identified by Staff, guidance on submitting a complete application can be found in [Chapter 6.A](#), guidance on preparing for the Public Hearing can be found in [Chapter 7.A](#), and guidance on required steps following the issuance of a decision can be found in [Chapter 7.B](#).

## **Chapter 2.F: Parking Relief**

There are four types of parking relief that require Special Permits:

- Relief from minimum or maximum number of vehicle parking space requirements;
- Modifying the provisions of Section 11.1 Bicycle Parking;
- Modifying the provisions of Section 11.2 Motor Vehicle Parking; and
- Permitting parking spaces that are directly accessible from a rear alley.

### **Pre-Application Procedural Requirements**

The first steps you should take as an Applicant are to determine the zoning district(s) for a property and develop a general idea of what you want to propose. Once you have these two things, your next step is to complete and submit the [Pre-Submittal Meeting Request Form](#) via email to [planning@somervillema.gov](mailto:planning@somervillema.gov). This form includes a Property Owner Authorization form that must be completed in its entirety to schedule a Pre-Submittal Meeting.

After submission, PPZ Staff will review your request and reach out to schedule a Pre-Submittal Meeting or request any outstanding information, as soon as their schedule allows.

For Applicants seeking a Special Permit to modify the provisions of Section 11.1 or 11.2 or to establish parking spaces with direct alley access, the next step is to gather all documents required by the next section (*Application Submission Requirements*) and submit an application on [Citizenserve](#) with all required documents included as attachments. No other pre-application steps are required, including but not limited to the Pre-Submittal Meeting.

For Applicants seeking a Special Permit to modify the minimum or maximum parking requirements, the next step is to complete and submit the [Pre-Submittal Meeting Request Form](#) via email to [planning@somervillema.gov](mailto:planning@somervillema.gov). This form includes a Property Owner Authorization form that must be completed in its entirety to schedule a Pre-Submittal Meeting.

### **Pre-Submittal Meeting**

A Pre-Submittal Meeting is required prior to moving forward with any other aspect of the required review procedures. Additional information about Pre-Submittal Meetings can be found in [Chapter 5.A](#).

Applicants are encouraged to submit any available information about their project when they submit PSMR forms.

### **Neighborhood Meeting**

Proposals that require a Special Permit for relief from parking minimum or maximum requirements must have one Neighborhood Meeting. The Neighborhood Meeting must be held at least two weeks after a Pre-Submittal Meeting and at least two weeks prior to submitting a complete application with all the required materials. Additional information about Neighborhood Meetings can be found in [Chapter 5.B](#).

Applicants are required to present at least the following information at the Neighborhood Meeting:

- Justification for requested parking relief.
- Plans for mitigating potential traffic and parking impacts on surrounding neighborhood.
- Any additional documents or information required by the Ward Councilor or Director of Planning, Preservation, and Zoning.

## Application Submission Requirements

The following documents are required and must be uploaded on [Citizenserve](#) for an application to be deemed complete. Please see the Glossary in [Chapter 3](#) for the information that each document must contain and the Document Standards in [Chapter 4](#) for directions on how to format and organize all documents. If you have additional questions after reviewing the information presented here, please consult with your Case Planner.

Document	Trigger for requirement
<a href="#">Abutters List</a>	<i>Always required. PPZ Staff will generate the list of abutters within Somerville. The Applicant is responsible for obtaining a list of abutters from other cities, if the 300' radius crosses municipal boundaries.</i>
<a href="#">Certificate of Required Materials from the Mobility Division</a>	See Glossary ( <a href="#">Chapter 3</a> ) for details.
<a href="#">Deed</a>	<i>Always required.</i>
<a href="#">Illustrative Site Plan</a>	If requesting relief from minimum or maximum parking requirements
<a href="#">Land Title Survey</a>	<i>Always required.</i>
<a href="#">Narrative</a>	<i>Always required.</i>
<a href="#">Neighborhood Meeting Report(s)</a>	If requesting relief from minimum or maximum parking requirements
<a href="#">Property Owner Authorization</a>	<i>Always required.</i>
Required fees (see <a href="#">Chapter 6.B</a> )	<i>Always required. Will be calculated by the City of Somerville once sufficient information has been submitted.</i>
<a href="#">Site Plan(s)</a>	<i>Always required.</i>
<a href="#">Transportation Access Plan</a>	If requesting relief for parking spaces with direct alley access or modifying any transportation elements in a right-of-way. <i>Please allow 21 days for review.</i>
<a href="#">Transportation Impact Study</a>	If requesting relief from minimum or maximum parking requirements. <i>Please allow 21 days for review.</i>

Once all required documents have been gathered and the required fees have been identified by Staff, guidance on submitting a complete application can be found in [Chapter 6.A](#), guidance on preparing for the Public Hearing can be found in [Chapter 7.A](#), and guidance on required steps following the issuance of a decision can be found in [Chapter 7.B](#).

If any information remains unclear after reviewing this document, please reach out to [planning@somervillema.gov](mailto:planning@somervillema.gov) for clarification.

## Chapter 3: Glossary

Each required document has specific information that must be included. The definitions are organized in alphabetical order, and you can navigate through this section by clicking on the name of the document you are looking for in the list below, or by using ctrl+f (command+f on Macs) and searching for the word you wish to find.

[Abutters List](#)

[Abutting Context Analysis](#)

[Administrative Appeal Narrative](#)

[Affordable Housing Acknowledgement  
\(AHA\)](#)

[Arts Council Certification](#)

[Building Elevation\(s\)](#)

[Building Section\(s\)](#)

[Campaign Contribution Ordinance  
Mandatory Disclosure and Certification  
Form](#)

[Certificate of Required Materials, Various](#)

[Conceptual Grading & Drainage Plan](#)

[Deed](#)

[Design Review Report](#)

[Environmental Impact Analysis](#)

[Façade Elevation\(s\)](#)

[Floor Plan\(s\)](#)

[Green Score Calculation](#)

[Gross Floor Area Calculation](#)

[Hardship Variance Narrative](#)

[Illustrative Site Plan\(s\)](#)

[Infrastructure Capacity Analysis](#)

[Key Plan](#)

[Land Plat](#)

[Land Title Survey](#)

[Landscape Plan\(s\)](#)

[Layout Plan](#)

[LEED Certifiability Documentation](#)

[Lighting Plan\(s\)](#)

[Maps](#)

[Mobility Management Plan \(MMP\)](#)

[Narrative](#)

[Neighborhood Meeting Report\(s\)](#)

[Net Zero Building Documentation](#)

[Original Decision & Plans](#)

[Plan Revision Narrative](#)

[Property Owner Authorization](#)

[Recorded Hardship Variance\(s\)](#)

[Shadow Study](#)

[Signage Plan](#)

[Site Plan\(s\)](#)

[Somerville Historic Preservation  
Commission Recommendation](#)

[Subdivision Plat](#)

[Sustainable & Resilient Buildings  
Questionnaire](#)

[Street Tree Planting Details](#)

[Transportation Access Plan \(TAP\)](#)

[Transportation Impact Study \(TIS\)](#)

[Tree Plan\(s\)](#)

[Zoning Dimensional Standards Table\(s\)](#)

[Zoning Requirement Summary Table\(s\)](#)

### **Abutters List**

A list of property owners for any lots within three hundred feet (300') of the development site.

If the development site is within three hundred feet (300') of a neighboring municipality (Cambridge, Boston, Medford, or Arlington), abutters lists are required from those municipalities. The abutters lists must be certified by the respective neighboring municipality and must be provided in Excel format.

The Excel document must be editable by City Staff and must include at least the following columns: Property Address; Owner's Name; Owner 2, if any; Owner's Street Address; Owner's City; Owner's State; Owner's Zip Code; Owner's Country (if not the United States).

### **Abutting Context Analysis**

Analysis reviewing existing conditions of the property, types of surrounding uses (both ground level and upper story), vehicular and pedestrian access, traffic and transit environment, and existing streetscape. Can be presented in any reasonable format and may include written explanations, maps, and/or photos.

### **Administrative Appeal Narrative**

A succinct but thorough written narrative explaining the enforcement order(s) or ordinance interpretation(s) being appealed and the basis or grounds for contesting the decision. The narrative should include any graphics, illustrations, or other information that will aid the Board in its review of the appeal.

### **Affordable Housing Acknowledgement (AHA)**

A form through which Applicants formally acknowledge the number of Affordable Dwelling Units (ADUs) and/or the fractional buyout that must be provided to comply with SZO Sections 12.1 and 12.3. Information required by the form includes the tenure of the project (i.e., ownership or rental), building type, zoning district, property owner, and address. The form is available [here](#).

The form must be submitted directly to the Housing Division at [housing@somervillema.gov](mailto:housing@somervillema.gov). A signed Certificate of Required Materials from the Housing Division must be submitted along with the Affordable Housing Acknowledgement as part of a complete application. Contact the Housing Division with questions.

*Note: Applicants should allow at least 28 days for staff review prior to the Certificate of Required Materials being issued.*

### **Arts Council Certification**

Evidence that the Applicant has received an Artist Certification (or Artist Housing Certification) from the Somerville Arts Council.

Contact information for the Somerville Arts Council can be found at <https://somervilleartscouncil.org/staff>.

### **Building Elevation(s)**

Orthographic projections (2-dimensional (flat) drawings) of every exterior face of the building. Provide separate drawings of existing and proposed conditions. Must also include a solid-void



analysis of the façade(s) to show compliance with minimum and maximum fenestration requirements, if applicable.

If establishing a new building or modifying the ground story of an existing building in the Mid-Rise, High Rise, or Commercial Districts the building elevations must include drawings that distinguish between the building's framing for storefronts and lobby entrances and the storefronts and lobby entrances themselves. See the graphic titled "Storefront Framing" in the Façade Design section of each District of the SZO for which this is applicable.

### **Building Section(s)**

Cut section drawings (i.e., a view of a structure as though it had been sliced in half or cut along an imaginary plane) showing the interior of the building. Multiple sections may be necessary if the height of a story heights varies. Provide separate drawings of existing and proposed conditions.

Must visually depict and clearly label the height of each story and the building overall and must identify the average finished grade that is being used to calculate those numbers. Must clearly indicate which part of the building the section was taken from.

### **Campaign Contribution Ordinance Mandatory Disclosure and Certification Form**

A form which confirms compliance with the City of Somerville Campaign Contribution Ordinance (Sec. 15-72). Required for new construction and renovations greater than 15,000 square feet. The Mandatory Disclosure and Certification Form can be found here ([link](#)).

### **Certificate of Required Materials, Various**

A Certificate of Required Materials (CRM) is a short document, generally one page in length, signed by the staff of the relevant department or division, and acknowledges that the division has received all documents that are required to be submitted to them in connection with a specific application. CRMs are issued once complete versions of all required materials are submitted to the relevant department. The CRM must be attached to the relevant documents and all must be submitted as part of a complete application to the Review Boards.

A Certificate of Required Materials is required from the Housing Division if any of the following documents are required:

- Affordable Housing Acknowledgement

A Certificate of Required Materials is required from the Mobility Division if any of the following documents are required:

- Mobility Management Plan
- Transportation Access Plan
- Transportation Impact Study

A Certificate of Required Materials is required from the Office of Sustainability & Environment (OSE) if any of the following documents are required:

- LEED Certifiability Documentation
- Net Zero Building Documentation
- Sustainable & Resilient Buildings Questionnaire

### **Conceptual Grading & Drainage Plan**

A conceptual plan for how the project will comply with relevant ADA requirements and will manage on-site stormwater, including grading and drainage. This plan must be stamped by an MA registered Landscape Architect or Civil Engineer.

### **Deed**

The official legal record and proof of ownership of land. Must include evidence of having been recorded with the Middlesex South Registry of Deeds.

### **Design Review Report**

A detailed response to the Urban Design Commission's recommendations and a description of any changes to the proposed development made based on the feedback. The report may include graphics.

If any recommendations made by the Urban Design Commission have not been incorporated into the proposal, the report should identify those items and explain the reasoning for not accepting the recommendation.

### **Environmental Impact Analysis**

Proposals to develop any high-rise building (as defined by the SZO) must submit an Environmental Impact Analysis including analysis of winds at the pedestrian/street level and solar glare.

Pedestrian level wind analysis must determine the suitability of locations around the building for various activities (e.g., walking, sitting, standing, etc.) as indicated on the table below. Mean wind speed and effective gust velocity should not be exceeded more than one percent of the time without mitigation. The analysis must be conducted for the annual and seasonal wind climates individually, based on long term meteorological data recorded at Boston's Logan International Airport and must be conducted for build and no build conditions. Wind speeds must be measured and labeled in miles per hour. Estimated wind comfort in various locations must be graphically depicted and the data must be provided in tabular format. Maps of the project site overlaid with a wind rose (an illustration of the directional distribution (%) of winds) for the annual and seasonal wind climates must be included.

<b>MEAN WIND SPEED FOR VARIOUS ACTIVITIES†</b>	Wind Speed
Sitting (outdoor cafes, benches, etc.)	12 mph
Standing (bus stops, building entrances, etc.)	15 mph
Walking Sidewalks and other pedestrian walkways	19 mph
<b>EFFECTIVE GUST VELOCITY‡</b>	Wind Speed
All activities	31 mph
† 1-hour mean wind speed exceeded 1% of the time (i.e., the 99-percentile mean wind speed)	
‡ Hourly mean wind speed +1.5 times the root-mean-square wind speed	

Solar glare analysis must illustrate any visual impairment or discomfort caused on nearby thoroughfares, civic spaces, or pedestrian areas and any solar heat buildup caused in any nearby buildings due to reflective spot glare.

### **Façade Elevation(s)**

A subset of building elevations that are only required to show the façade(s) of a building, as defined in Article 2 of the SZO. Provide separate drawings of existing and proposed conditions.

### **Floor Plan(s)**

Must show all floors, including mezzanines, basements, and attics and must be clearly labeled accordingly. All dwelling units must be numbered (e.g., Unit 1, Unit 2, Unit 3) and identified by bedroom count and square footage.

For modifications to existing buildings, provide separate side-by-side plans for existing and proposed conditions, or if changes are limited, use dashed lines to show what will be demolished and solid lines to show what the proposed end conditions will be.

### **Green Score Calculation**

A completed version of Table 10.4.1 found in Article 10.4 of the SZO and any drawings or illustrations necessary to provide support for claimed credits.

The Public Space and Urban Forestry (PSUF) Division has a [Green Score Guide](#), [Green Scorecard](#), and [list of high-value trees](#). Contact the PSUF Division at [publicrealm@somervillema.gov](mailto:publicrealm@somervillema.gov) with questions.

*Note: if a proposal reduces the amount of permeable area documentation of the existing Green Score must be submitted to confirm that the proposal will not increase a nonconformity.*

### **Gross Floor Area Calculation**

Floor plans that identify the areas being counted towards gross floor area, as defined in Article 2 of the SZO, and includes a table calculating the gross floor area subtotals for each of the four categories found here. The floor plans must be color coded by the following categories:

- Commercial areas
- Residential areas
- Mechanical areas
- Parking areas excluded from the Density Factor calculation (see SZO §2.5.b.viii.)

It is up to the discretion of the Applicant what colors are used for each category, provided that the colors are clearly differentiated, are colorblind-friendly, and are used consistently. A legend identifying the color used for each category must be provided.

If dwelling units are proposed and the Density Factor is a regulated standard, the document must clearly indicate the areas being included in the numerator when calculating the Density Factor.

### **Hardship Variance Narrative**

A succinct but thoroughly written narrative, accompanied by graphics and illustrations as necessary, identifying all Hardship Variances requested for a proposal. The narrative must include a summary of all relief requested (i.e., what is required by the SZO versus what is being proposed) and identification of the specific sub-section(s) of the Ordinance that relief is being requested from.

Must specifically address all the following review criteria for each requested Hardship Variance:

- Special circumstances exist relating to the soil conditions, shape, or topography of a parcel of land or the unusual character of an existing structure but not affecting generally the zoning district in which the land or structure is located.
- Literal enforcement of the provision of this Ordinance for the district where the subject land or structure is located would involve substantial hardship, financial or otherwise, to the petitioner or appellant due to said special circumstances.
- Desirable relief could be granted without causing substantial detriment to the public good and without nullifying or substantially derogating from the intent and purpose of a specific district in this Ordinance or the Ordinance in general.

For example, if two Hardship Variances are requested, the narrative should address each of the three required criteria for the first Hardship Variance, and then address each of the three required criteria for the second Hardship Variance.

### **Illustrative Site Plan(s)**

One or more site plans that provide an illustrated depiction of the site without technical details or dimensions. The plan(s) should visually identify important features of the site including building footprints, planted areas, sidewalks, bicycle infrastructure, paved areas, and any other relevant features.

### **Infrastructure Capacity Analysis**

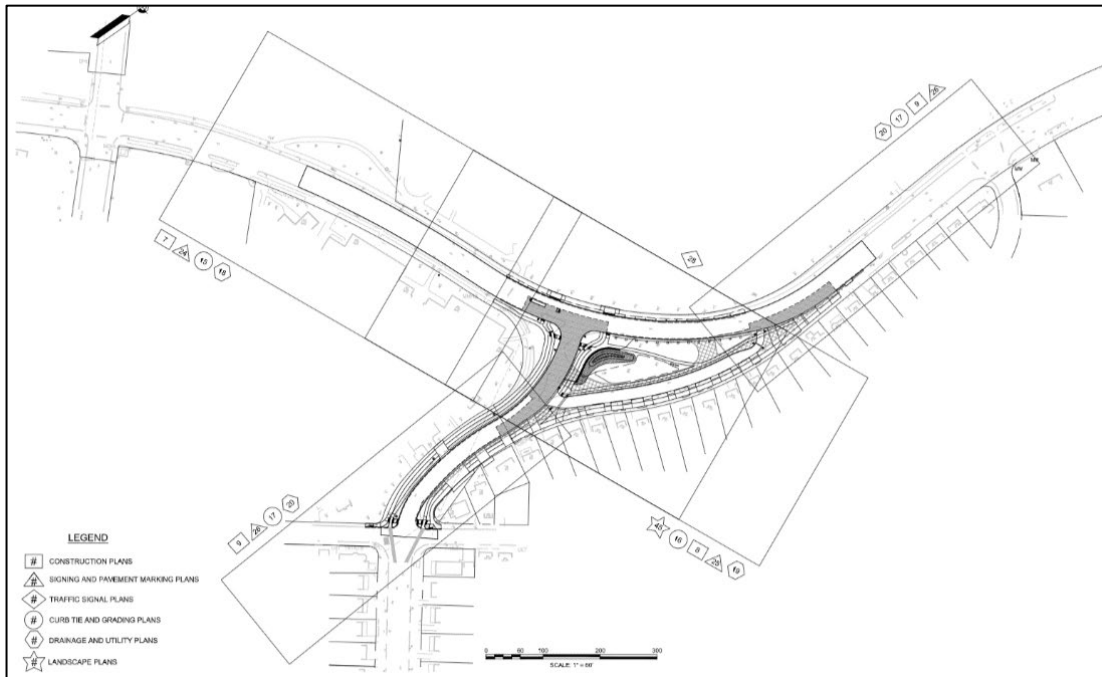
A multi-disciplinary report regarding public infrastructure in the surrounding area. The analysis must identify the location and adequacy of existing public utilities (gas, electrical) to serve the proposed uses, and identify the existing capacity of, expected impact on, and any changes proposed to the sanitary sewer, storm drainage, and public water systems.

### **Key Plan**

A plan that includes sheet number references for distinct areas of construction in one project. Each distinct area of construction is highlighted and the corresponding plan sheets, as applicable, are noted for the following:

- construction plans
- signing and pavement marking plans
- traffic signal plans
- curb tie and grading plans
- drainage and utility plans
- landscape plans

In more complex or larger construction projects, there may be multiple Key Plans. An example of a Key Plan is below:



### **Land Plat**

A plan that shows the proposed platting of land as a result of lot mergers, lot splits, and/or lot line adjustments. The proposed land platting must be shown overlain on a Land Title Survey of the property.

The Land Plat must be drafted in accordance with the Code of Massachusetts Regulations Title 250 CMR 6: Land surveying procedures and standards and the Deed Indexing Standards of the Commonwealth of Massachusetts, latest edition.

The document must include the following information in a signature box for use by the Director of PPZ:

- *If in the NR, UR, or CI districts:* “Name of PPZ Director, Director of Planning, on behalf of the Somerville Zoning Board of Appeals”
- *If in any other district:* “Name of PPZ Director, Director of Planning, on behalf of the Somerville Planning Board”
- “Approved per Articles 10.1 and 15 of the Somerville Zoning Ordinance”
- Blank Line (for future signature)
- Blank Line (for the date of signature)

### **Land Title Survey**

Sometimes informally referred to as a “plot plan,” this plan shows the location of existing buildings and structures on the parcel and their relationship to other buildings and structures and to lot boundaries.

A Land Title Survey must be stamped and signed by a MA registered Land Surveyor and accurately show existing conditions of the property as determined by a survey and contain the following information at a minimum:

- Street name and house number
- Dimensions and boundary lines of the parcel
- Dimensions of all existing structure(s) and their locations in relation to all lot lines, curb lines, and other structures
- Lot coverage percentages
- Easements on the lot, if any
- Existing trees, including species and Diameter Breast Height (DBH)

### **Landscape Plan(s)**

A plan that shows the proposed landscaping including, at a minimum, a planting plan, plant schedule, plant list, tree soil area plan (if applicable), and paving/depaving plan and details. Must be signed and stamped by a MA registered Landscape Architect.

### **Layout Plan**

A plan of the layout of a proposed Civic Space which includes information on regulated dimensions. Must include information on dimensions regulated by the SZO for the relevant Civic Space type including, but not limited to, the following:

- lot lines
- lot size (area)
- frontage area
- permeable surface area
- landscape area
- trees
- furnishings (tables & chairs, benches, etc.)
- building footprints (identify floor plate area)
- any commercial café or sales areas

### **LEED Certifiability Documentation**

The Office of Sustainability and Environment identifies the information required to confirm compliance with SZO §10.10.1 [here](#). Required documents must be submitted directly to the Office of Sustainability and Environment.

A signed Certificate of Required Materials from the Office of Sustainability and Environment must be submitted along with the LEED Certifiability Documentation as part of a complete application.

Only Stage 1 documentation is required as part of a complete application for Board review; Stage 2 and 3 documentation is not required until later in the process, after Board review is complete.

Contact the Office of Sustainability and Environment at [ose@somervillema.gov](mailto:ose@somervillema.gov) with questions.

*Note: Applicants should allow at least 21 days for staff review prior to the Certificate of Required Materials being issued.*



### **Lighting Plan(s)**

Lighting plans must contain all information necessary to confirm compliance with SZO Section 10.6 Outdoor Lighting, if applicable, or to show/explain how a civic space or throughfare will be lit for safety.

The site photometric plan must include a keyed site plan identifying the location of all luminaires; total site lumen table; lighting fixture schedule indicating the fixture type, description, lamp type, lumens, color temperature (in Kelvin), color rendering index, BUG rating, mounting height, and wattage of all luminaires; and notation of any timing devices used to control the hours set for illumination.

### **Maps**

An annotated aerial view of the subject property and surrounding areas. The aerial view imagery may come from Google Maps or any similar software and annotations may be done using any software. A design professional's stamp is not required for this document.

Must provide sufficient information for the Review Board to make findings regarding the review criteria identified by the SZO for the proposed use. Your Case Planner can help identify the findings required for the proposed use. The scope of the map and the information included on it will vary depending on the proposed use.

Relevant annotations to add to the map may include, but not be limited to, the following:

- Identifying any parcels that contain the same use and/or use category as is being applied for on the subject property
- Identifying any comparable commercial spaces in the surrounding neighborhood

### **Mobility Management Plan (MMP)**

A Mobility Management Plan (MMP) is required in accordance with SZO Section 11.4.

An MMP establishes commitments by a property owner or employer to implement mobility management programs and services that reduce motor vehicle trips and encourage residents, employees, and visitors to walk, ride a bike, or take transit. MMPs are required by the SZO for buildings with fifty thousand (50,000) square feet or more of commercial space; employers with fifty (50) or more employees; multi-tenant buildings where the tenants, in combination, have fifty (50) or more employees; residential buildings with twenty (20) or more dwelling units; and commercial parking facilities.

MMPs must be submitted directly to the Mobility Division through the Mobility Development Review Submission Form found [here](#). A signed Certificate of Required Materials from the Mobility Division must be submitted along with the approved Mobility Management Plan and Final Decision Letter as part of a complete application.

The Mobility Division has published [MMP Submittal Requirements](#) on the Development Review tab of <http://www.somervillema.gov/mobility>.

Contact the Mobility Division at [transportation@somervillema.gov](mailto:transportation@somervillema.gov) with questions.

*Note: Applicants should allow at least 60 days for staff review prior to the Certificate of Required Materials being issued.*

### **Narrative**

A succinct but thorough written summary describing the scope of the proposed development to the Review Board. Must specifically identify and address any review criteria identified in the SZO that are applicable to the proposal. May be accompanied by graphics and illustrations as necessary.

### **Neighborhood Meeting Report(s)**

A separate report must be submitted for each Neighborhood Meeting and each report must include the following:

- A detailed response to concerns raised at the meeting.
- A description of any changes to the proposed development made as a result of the feedback.
- A list of the persons and organizations contacted about the meeting, along with the manner and date of contact.
- A roster or signature sheet of attendees at the meeting.
- Copies of all materials provided by the Applicant at the meeting (may be provided as a separate PDF from the Neighborhood Meeting Report).

### **Net Zero Building Documentation**

The Office of Sustainability and Environment identifies the information necessary to confirm that a building is Net Zero [here](#). Required information must be submitted directly to the Office of Sustainability and Environment.

A signed Certificate of Required Materials from the Office of Sustainability and Environment must be submitted as part of a complete application when Net Zero Building density bonus is being pursued.

Contact the Office of Sustainability and Environment at [ose@somervillema.gov](mailto:ose@somervillema.gov) with questions.

Only Stage 1 documentation is required as part of a complete application for Board review; Stage 2, 3, and 4 documentation is not required until later in the process, after Board review is complete.

*Note: Applicants should allow at least 21 days for staff review prior to the Certificate of Required Materials being issued.*

### **Original Decision & Plans**

A copy of the original decision issued by the Review Board and any approved plans (including but not limited to architectural, site, and landscape plans) that are relevant to the revision request.

### **Plan Revision Narrative**

A succinct but thorough written narrative, accompanied by graphics and illustrations as necessary, describing the scope of the proposed revisions to a previously approved permit. The narrative must clearly identify the permit and case number for which a revision is requested and must specifically identify all changes to be considered as part of the Plan Revision.

### **Property Owner Authorization**

The Property Owner Authorization (POA) provides evidence that the Applicant has the necessary permission to propose a project. The Property Owner Authorization must be completed and signed by both the Applicant and Property Owner. The Applicant and Property Owner may be the same person, or they may be different. The Agent, if any, must also be identified.

The Applicant is the person applying for the project. The Property Owner is the property's owner of record. The Agent is an authorized representative for the Applicant and Property Owner; attorneys and architects frequently act as Agents.

The Property Owner Authorization form can be found at [www.somervillema.gov/propertyownerauthorization](http://www.somervillema.gov/propertyownerauthorization).

If any information required by the POA changes throughout the development review process, a new POA must be submitted.

### **Recorded Hardship Variance(s)**

Copies of any Hardship Variances that have been granted for a property and are relevant to the current proposal. Must include evidence of having been recorded with the Middlesex South Registry of Deeds.

### **Shadow Study**

A Shadow Study must illustrate the existing plus net new shadows and cumulative daily shadows cast over the development site and surroundings for the times of day and solar altitude/azimuth identified below (Somerville, Massachusetts; W 71.07, N 42.23). Verification of latitude, longitude, time zone, and model orientation must be provided for studies generated using an automated program, such as SketchUp, where solar altitude/azimuth data is not entered manually. All thoroughfares, civic spaces, transit stops, and outdoor seating areas must be clearly labeled. Net new shadows must be shown in a dark, contrasting color distinguishable from existing shadows. The opacity of cumulative daily shadows must be adjusted for each hour to create an effect that darkens where shadows from each hour overlay each other. For example, each shadow should be illustrated at ten percent (10%) opacity for a study reviewing ten (10) hours of shadows.

	<b>March 21</b> (Vernal Equinox)	<b>June 21</b> (Summer Solstice)	<b>September 21</b> (Autumnal Equinox)	<b>December 21</b> (Winter Solstice)
Existing and Net New Shadows (individual diagrams)	9:00 AM 12:00 PM 3:00 PM	9:00 AM 12:00 PM 3:00 PM 6:00 PM	9:00 AM 12:00 PM 3:00 PM 6:00 PM	9:00 AM 12:00 PM 3:00 PM
Cumulative New Shadows (single diagram/day)	9:00 AM 10:00 AM 11:00 AM 12:00 PM 1:00 PM 2:00 PM	9:00 AM 10:00 AM 11:00 AM 12:00 PM 1:00 PM 2:00 PM	9:00 AM 10:00 AM 11:00 AM 12:00 PM 1:00 PM 2:00 PM	9:00 AM 10:00 AM 11:00 AM 12:00 PM 1:00 PM 2:00 PM

	3:00 PM	3:00 PM 4:00 PM 5:00 PM 6:00 PM	3:00 PM 4:00 PM 5:00 PM 6:00 PM	3:00 PM
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March 21	Altitude	Azimuth	September 21	Altitude	Azimuth
9:00 AM	33.2	125.6	9:00 AM	35.2	129.2
12:00 PM	48.2	183.2	12:00 PM	47.7	188.4
3:00 PM	30.7	238.4	3:00 PM	28.2	241.3
			6:00 PM	-4.0	274.0
June 21	Altitude	Azimuth	December 21	Altitude	Azimuth
9:00 AM	50.8	105.5	9:00 AM	14.3	141.9
12:00 PM	70.8	189.6	12:00 PM	24.1	184.3
3:00 PM	45.9	260.3	3:00 PM	10.1	224.9
6:00 PM	13.2	289.8			

### **Signage Plan**

A Signage Plan is a Façade Elevation(s) that visually depicts the anticipated location, type, and approximate size of signage to be installed on the building at a future date. A Signage Plan may use generic signs (e.g., a wall sign that reads “Wall Sign”) if the details of future signage have not yet been determined.

### **Site Plan(s)**

A Site Plan shows the location of proposed buildings and structures on the parcel and their relationship to existing buildings, structures, required setbacks, and lot boundaries. Site plans should also include existing streets, sidewalks, and curb cuts as well as dimensions for each. Significant pavement markings such as bike lanes, bus lanes or bus stops within the public right-of-way in front of the property should be included. Existing street trees and the location of bike parking, if any, should be called out.

### **Somerville Historic Preservation Commission Recommendation**

A written recommendation issued by the Somerville Historic Preservation Commission (HPC) regarding the proposal to modify the lot lines of any lot that is designated as a Local Historic District or identified on the Massachusetts or National Register of Historic Places.

### **Subdivision Plat**

A plan that shows the proposed platting of land as a result of a subdivision. The proposed land platting must be shown overlain on a Land Title Survey of the property.

The Subdivision Plat must be drafted in accordance with the Code of Massachusetts Regulations Title 250 CMR 6: Land surveying procedures and standards and the Deed Indexing Standards of the Commonwealth of Massachusetts, latest edition.

The document must include the following information in a signature box for use by the Planning Board:

- “Approved by the Somerville Planning Board at their \_\_\_\_\_ meeting per Article 15 of the Zoning Ordinance. Case Number \_\_\_\_\_”
- 7 blank lines (for use by the Planning Board)
- Blank line (for the date)

### **Sustainable & Resilient Buildings Questionnaire**

The [questionnaire](#) can be found on the Office of Sustainability & Environment’s page of the City website.

The completed questionnaire must be submitted directly to the Office of Sustainability and Environment. A signed Certificate of Required Materials from the Office of Sustainability and Environment must be submitted along with the Sustainable & Resilient Buildings Questionnaire as part of a complete application.

Contact the Office of Sustainability and Environment at [ose@somervillema.gov](mailto:ose@somervillema.gov) with questions.

*Note: Applicants should allow at least 14 days for staff review prior to the Certificate of Required Materials being issued.*

### **Street Tree Planting Details**

Plan and section views of planting details for trees within a Thoroughfare. These drawings must include sufficient information to confirm compliance with SZO §13.2.6.

### **Transportation Access Plan (TAP)**

A document that reviews and illustrates access to a building by pedestrians, bicyclists, and motor vehicles, including delivery and garbage trucks, and identifies any transportation and streetscape improvements associated with a development proposal.

Must be submitted directly to the Mobility Division. A signed Certificate of Required Materials from the Mobility Division must be submitted along with the Transportation Access Plan as part of a complete application.

The Mobility Division has published [TAP Standards](#) on the Development Review tab of the Mobility Division’s page on the City website.

Contact the Mobility Division at [transportation@somervillema.gov](mailto:transportation@somervillema.gov) with questions.

*Note: Applicants should allow at least 21 days for staff review prior to the Certificate of Required Materials being issued.*

### **Transportation Impact Study (TIS)**

An analysis of existing transportation infrastructure and anticipated transportation impacts from a proposed development project. Identifies the baseline conditions that a Mobility Management Plan (if required) improves upon and proposes mitigation measures appropriate to the project’s size and impacts. **The scope of all TIS must be approved prior to analysis taking place.**

Must be submitted directly to the Mobility Division. A signed Certificate of Required Materials from the Mobility Division must be submitted along with the Transportation Impact Study as part of a complete application. The TIS itself and associated appendices must be submitted as separate PDFs. Physical copies of the appendices are not required when submitting the application materials for the public record.

The Mobility Division has published [TIS Thresholds](#) and [TIS Standards](#) on the Development Review tab of the Mobility Division's page on the City website. If a TIS is required only for relief from the minimum or maximum vehicle parking requirements the Mobility Division may approve a narrower scope than typically required of a TIS.

Contact the Mobility Division at [transportation@somervillema.gov](mailto:transportation@somervillema.gov) with questions.

*Note: Applicants should allow at least 30 days for staff review prior to the Certificate of Required Materials being issued. Applicants are strongly encouraged, but not required, to review transportation impacts with the Mobility Division and discuss proposed mitigation to be included in the TIS before submittal of the complete TIS.*

### **Tree Plan(s)**

A site plan identifying the locations of all existing trees and indicating whether they will remain or be removed. Must include a table with species, Diameter Breast Height (DBH), health condition, and tree protection details.

Applicants should be aware of the [Tree Preservation Ordinance](#) which applies to trees on both private and public property. If trees within the public right-of-way are proposed to be removed, contact the Tree Warden at [trees@somervillema.gov](mailto:trees@somervillema.gov) as early in the process as is feasible to ensure compliance with relevant laws.

### **Zoning Dimensional Standards Table(s)**

Table(s) listing the dimensional standards and other regulated standards for any building, building component, and/or signage to be modified as part of a project. Tables must include at least the following information for each regulated dimension and standard:

- The Ordinance's requirement for the dimension or standard, including whether that requirement is a minimum or a maximum.
- The existing dimension, if applicable.
- The proposed dimension.

When both a building and one or more building components are proposed as part of one project, separate dimensional standards tables are required for the building component and the main massing of the building. Guidance for understanding the difference between the main massing of a building and any building components which are attached to the main massing can be found in Article 2.3 of the SZO.

An example of a blank dimensional table for a Wall Sign (SZO §10.8.11) is below:

<b>Commercial Signs: Wall Sign</b>				
Project Address		Case #		
Sign Type	Wall Sign			

	Min Required	Max Required	Existing	Proposed
<b>Size</b>				
Area		40 sf	sf	sf
Width (% of façade width)		90 %	%	%
Height	1 ft	4 ft	ft	ft
<b>Lettering</b>				
Width (of sign width)		75 %	%	%
Height (of sign width)		75 %	%	%
Projection from Façade		6 in	in	in
Raceway Height (of letter height)		50 %	%	%
<b>Location</b>				
Number of Signs				
Per Tenant		1		
Per Corner Tenant		2		

### **Zoning Requirement Summary Table(s)**

A table listing the zoning requirements for a Civic Space found in Article 13.1 of the SZO. This summary must include both the requirements found in the dimensional table and the requirements found in the written development standards. This table is also strongly encouraged to address the written design guidelines relevant to the proposed civic space type.

If any information remains unclear after reviewing this document, please reach out to [planning@somervillema.gov](mailto:planning@somervillema.gov) for clarification.



## Chapter 4: Document Standards

### Document Format Requirements

Unless otherwise specified, all documents must be submitted in PDF format. Each PDF should generally be less than 40MB. If a PDF is larger than 40MB it may be broken into multiple documents labeled consecutively (e.g., Part 1, Part 2, etc.).

- Written materials must be 8.5"x11" portrait-oriented pages.
- Plans and illustrations must be landscape-oriented pages.
  - Digital copies of all plan drawings must be full size for the appropriate scale of each drawing. See Guidance on Post-Decision Steps in Chapter 5.B. for size requirements for physical copies of all plan drawings.
  - All plan sheets must have a graphic scale and north arrow.
  - All regulated dimensions and features must be properly illustrated and labeled on submitted plans.
    - i. All setbacks, step backs, and building separation must be indicated on all floor plans and building elevations.
  - All plans must be prepared by an MA registered design professional and every page must bear a seal and signature of the responsible registered design professional.
  - All plans must include dates of preparation and revision.
  - All plans must be clearly labeled.

### Naming & Organization

Digital Files must be named as "StreetNameStreetNumber\_PermitNumber\_Description\_YYYY-MM-DD.pdf". No spaces or special characters should be used. For example, "HighlandAve93\_ZP23-000001\_Narrative\_2023-12-31.pdf".

Submissions that are not clearly organized and labeled may take longer to review for completeness and compliance. Applicants should expect that the documents will be posted on the website and transmitted to the Review Board exactly as they are submitted.

When one or more pages within a required document are updated, the entire document must be resubmitted.

Digital files should be grouped in any reasonable manner. If unsure of the best method to organize documents, one approach recommended by Staff is to follow the outline below for grouping required documents. Bolded lines are the description to be used when naming the file and format of the document, with the items listed below it being the documents that should be included in the file, ideally in the order listed here. If a document is included in the list but not required for a particular application (e.g., a Subdivision Plan in the "Site plans," but a Subdivision is not proposed), it may be excluded.

- Submission forms (.pdf)
  - Property Owner Authorization
  - Deed
  - Campaign Contribution Ordinance Mandatory Disclosure and Certification Form
  - Certified copy of Abutters List
  - Recorded Hardship Variance(s)
- Abutters List (.csv or .xlsx)

- Narrative (.pdf)
  - Narrative (or Administrative Appeal Narrative, Plan Revision Narrative, or Hardship Variance Narrative, as applicable)
  - Somerville Historic Preservation Commission Recommendation
  - Neighborhood Meeting Report(s)
  - Design Review Report
  - Maps
- Architectural plans (.pdf)
  - Cover page with locus map
  - Zoning Dimensional Standards Table(s)
  - Building Elevation(s)
  - Façade Elevation(s)
  - Building Section(s)
  - Floor Plan(s)
  - Gross Floor Area Calculation
  - Signage Plan
  - Sign Plan(s)
  - Lighting Plan(s)
- Site plans (.pdf)
  - Land Title Survey
  - Land Plat
  - Subdivision Plat
  - Site Plan(s)
  - Illustrative Site Plan(s)
- Landscape plans (.pdf)
  - Tree Plan
  - Green Score Calculation
  - Landscape Plan(s)
- Context analysis (.pdf)
  - Abutting Context Analysis
  - Environmental Impact Analysis
  - Infrastructure Capacity Analysis
  - Shadow Study
- Mobility Division Documents (.pdf)
  - Certificate of Required Materials from the Mobility Division
  - Transportation Access Plan (TAP)
  - Mobility Management Plan (MMP)
  - MMP Approval Letter signed by the Director of Mobility
  - Transportation Impact Study (TIS)
- TIS Appendices (.pdf)
- Housing Division Documents (.pdf)
  - Certificate of Required Materials from the Housing Division
  - Affordable Housing Acknowledgement
- OSE Documents (.pdf)
  - Certificate of Required Materials from the Office of Sustainability & Environment
  - Sustainable & Resilient Buildings Questionnaire
  - LEED Certifiability Documentation
  - Net Zero Building Documentation

For example, an Applicant would submit one PDF titled “Highland Ave 93 – Submission forms – 2021 12 31” which contains the Property Owner Authorization, the Campaign Contribution Ordinance Mandatory Disclosure and Certification Form, the certified copy of the Abutters List, and any Recorded Hardship Variances for the property. If a particular project did not require the Abutters List or a Hardship Variance, for example, then those documents would not be included.

## Updating Documents

If updates to one or more documents are required, it is the responsibility of the Applicant to make sure that they clearly indicate to Staff what the final set of documents to be shared with the Board are. To assist in this effort, Staff strongly recommends that Applicants avoid changing the grouping of documents following initial submission.

Each time any component of the document is updated, the entire document must be resubmitted on Citizenserve. Changes to the document must be clearly indicated and the date of revision must be noted on each page of the document.

For example, if the original document submitted was “Highland Ave 93 – Architectural plans – 2021 12 31” and the floor plans of the building were updated the following month, the entire document must be resubmitted and titled “Highland Ave 93 – Architectural plans – 2022 01 31.” The individual pages that were updated must also include a revision date of the most recent changes and include some method of clearly identifying the changes.

If any information remains unclear after reviewing this document, please reach out to [planning@somervillema.gov](mailto:planning@somervillema.gov) for clarification.

## Chapter 5.A: Guidance for Pre-Submittal Meetings

If a Pre-Submittal Meeting is required, it must be held prior to moving forward with any other required steps in the review process. The purpose and procedure for Pre-Submittal Meetings can be found in SZO §15.1.2.

### Scheduling the Meeting

Most projects, including those that require Site Plan Approval, Special Permit(s), and/or Hardship Variance(s), require a Pre-Submittal Meeting as the first step of the application process. To begin the application process, Applicants must download, complete, and submit the [Pre-Submittal Meeting Request Form](#) to the Planning, Preservation, and Zoning (PPZ) Division via email to [planning@somervillema.gov](mailto:planning@somervillema.gov). The form, which includes a Property Owner Authorization form, must be completed in its entirety for a Pre-Submittal Meeting to be scheduled.

Once a request for a Pre-Submittal Meeting is received, the PPZ Division assigns a Case Planner to the project to assist the Applicant through the permitting process. Cases are generally assigned every other week. Your Case Planner may contact you before scheduling a Pre-Submittal Meeting if the scope of your proposal is not clear based on the information submitted on your Pre-Submittal Meeting Request Form. Pre-Submittal Meetings are generally held every other Tuesday and are scheduled in 50-minute increments.

### Requirements for the Meeting

The list of required information for each activity type can be found in the relevant subsection of Chapter 2 under the *Pre-Application Procedural Requirements: Pre-Submittal Meeting* heading.

### Preparing for the Meeting

- Consider what questions you have about how to make your proposal compliant with the SZO and/or the required process for your proposal. Please note that Staff cannot confirm compliance until a complete application has been submitted in Citizenserve.
- *Do not* develop highly detailed plans for the proposal prior to the Pre-Submittal Meeting.
- Prepare a brief verbal summary of the proposal to provide Staff not familiar with the project an idea of the development activities proposed. Suggested information, if known, to provide in your summary includes:
  - Whether an existing structure will be demolished
  - Whether existing trees will be removed
  - Approximate total square footage of the building
  - Approximate commercial gross floor area
  - Approximate number of residential units
  - Approximate number of motor vehicle and bicycle parking
  - General plans for incorporating sustainability into the proposal
    - i. This [flow chart](#) from the Office of Sustainability and Environment may be useful for understanding sustainability-related requirements
  - Anticipated types of ground floor commercial tenants
  - Anticipated changes to the public right-of-way (e.g., curb cuts, sidewalks, parking regulations)

## Chapter 5.B: Guidance for Neighborhood Meetings

Neighborhood Meetings are required for some applications, as identified by Article 15 of the SZO. Their purpose and procedure can be found in SZO §15.1.3. Generally, they are required for Site Plan Approval and some Special Permits. However, Applicants should review the relevant sections of the SZO to confirm whether a neighborhood meeting is required based on the details of the project.

### Requirements for the Meeting

It is the Applicant's responsibility to schedule the meeting in compliance with SZO §15.1. The SZO includes requirements (some of which have also been included in this subchapter) for scheduling and advertising neighborhood meetings.

The information and materials that Applicants must bring to a neighborhood meeting will vary based on the type of development activity proposed. The list of required information for each activity type can be found in the relevant subsection of Chapter 2 under the *Pre-Application Procedural Requirements: Neighborhood Meeting* heading(s).

### Scheduling the Meeting

It is the Applicant's responsibility to schedule neighborhood meetings in consultation with the Ward Councilor (or their designee), the Case Planner, and any neighborhood council for the area where the development site is located (ask your Case Planner if a neighborhood council exists for the relevant area). City Councilor emails can be found on the city website. It is the Applicant's responsibility to reach out to Ward Councilors and (if applicable) neighborhood councils to set a date for neighborhood meetings. Case Planners must be copied on all correspondence.

- The first neighborhood meeting can be held no earlier than fourteen (14) days after the required Pre-Submittal Meeting has been held.
- The second neighborhood meeting (if required) can be held no earlier than fourteen (14) days after the Design Review recommendation has been issued. The written recommendation will be issued no later than forty-five (45) days after the Urban Design Commission votes on a proposal.
- As soon as Applicants have completed the previous step, Applicants are encouraged to reach out promptly to all relevant groups and individuals to begin scheduling the meeting, as it can take time to find a date that is acceptable to all parties.
  - For example, Applicants should reach out soon after the required Pre-Submittal Meeting to begin scheduling a neighborhood meeting; while the neighborhood meeting itself cannot be held until at least 14 days after the Pre-Submittal Meeting, Applicants can begin working during that time to schedule it for a future date.
- Applicants should plan to begin distributing the flyer for the meeting no later than fourteen (14) days prior to the meeting date.
- Applicants must submit a copy of the flyer for the neighborhood meeting to the City by 12pm (noon) seven (7) calendar days prior to the meeting. The flyer must be submitted as a Microsoft Word document and emailed to both the Case Planner and [planning@somervillema.gov](mailto:planning@somervillema.gov).
- **Please note: If the flyer for a neighborhood meeting is not posted with the City (through PPZ) by 12pm (noon) seven (7) calendar days prior to the meeting, and if the Case Planner or another PPZ representative cannot attend the neighborhood**

**meeting, the meeting will not comply with zoning requirements and will have to be repeated.**

## **Preparing for the Meeting**

- Submit a request to [planning@somervillema.gov](mailto:planning@somervillema.gov) to request a list of abutters within three hundred feet (300') of the property.
- For all required neighborhood meetings, consult with the Ward Councilor to determine what, if any, additional steps the Applicant should take to advertise the meeting beyond the SZO's requirements. Ward Councilors may also provide advice or instructions on the information necessary to provide when advertising the meeting.
- If two Neighborhood Meetings are required, Applicants are encouraged to prepare and submit all information required to receive the Certificate of Receipt of Materials from the Office of Sustainability and Environment prior to the second Neighborhood Meeting. Applicants should not expect to receive the Certificate of Receipt of Materials from the Office of Sustainability and Environment until after the second Neighborhood Meeting.

## **During the Meeting**

- Provide an overview of next opportunities for public input on the proposal at the beginning of the meeting. This information will vary depending on the review procedures that a proposal requires.
- Take detailed notes and/or record the meeting to assist with creating the required Neighborhood Meeting Report.

## Chapter 5.C: Guidance for Design Review

Design Review is conducted by the Urban Design Commission (UDC) and is required for all proposals that require Site Plan Approval. The purpose and procedure can be found in SZO §15.1.4. Design Review occurs during a public meeting, rather than a public hearing. This means that there is no requirement to allow public testimony at UDC meetings, unlike during a public hearing with a Review Board. Please be aware that it may take more than one meeting to receive a vote from the Commission.

### Scheduling the Meeting

UDC meetings are typically held on the second and fourth Tuesday of every month at 6:00 p.m.

All required plans and illustrations must be submitted **by 12:00 pm seven (7) calendar days prior to the meeting date** by emailing a PDF of all required materials to your assigned Case Planner. When submitting Design Review materials, please make sure to include the official address and the words “Design Review Submission” in the email subject line. If you are uncertain who your assigned Case Planner is, please contact [planning@somervillema.gov](mailto:planning@somervillema.gov).

The UDC schedules requests for Design Review on a first come, first served basis. Incomplete Design Review submissions will not be scheduled. Once all required materials have been submitted, PPZ Staff will notify the Applicant regarding the next available UDC meeting date.

### Requirements for the Meeting

The list of required information for each activity type can be found in the relevant subsection of Chapter 2 under the *Pre-Application Procedural Requirements: Design Review* heading.

### Preparing for the Meeting

- Presentations should be consistent with the information submitted to the Commission prior to the meeting but should avoid unnecessary duplication.
- All drawings and materials must be clearly labeled.
- If multiple massing options are required, the differences between massing options should be clear and their façade designs should be similarly developed.
- For projects that must comply with the Green Score, reach out to the Public Space and Urban Forestry Division (PSUF) to confirm the project is on track to compliance.
- For projects that include any changes to the public realm, reach out to the Public Space and Urban Forestry and Mobility Divisions to review changes and receive feedback. Any changes to the public realm require City approval prior to implementation.

### During the Meeting

- Provide an overview presentation of no more than 20 minutes.
- All relevant design professionals (i.e., architects, landscape architects, etc.) must be present to answer questions.
- The focus of the Commission’s review is on the proposal design and its relationship to the public realm. The Commission does not confirm zoning compliance.

If any information remains unclear after reviewing this document, please reach out to [planning@somervillema.gov](mailto:planning@somervillema.gov) for clarification.



## **Chapter 6.A: Guidance for Submitting a Complete Application**

After completing all required pre-application steps, an application must be submitted on [Citizenserve](#) as required by SZO §15.1.5. An application will be deemed complete by Staff only once all the following statements are true:

- All pre-application procedural steps required by the SZO have been completed.
- All documents and information required by this manual have been submitted, including any fees.
- All documents comply with the requirements in the Glossary ([Chapter 3](#)) and Document Standards ([Chapter 4](#)).
- All documents have been submitted to the location and in the format identified in this manual.

Once Staff confirms that the submitted application is complete, the Applicant will be notified, and Staff will perform the necessary next steps to move the application forward. If a Public Hearing is required, Staff will review the application, coordinate with other City departments and divisions, write a Staff Memo, and schedule the case for a Public Hearing; if a Public Hearing is not required, Staff will review the application and issue a Decision.

### **What to submit**

The information that must be submitted is identified under the *Application Submission Requirements* section of the relevant chapter subsection in this manual.

### **How to submit**

#### ***Documents & Plans***

All documents and plans must be submitted digitally by attaching them on [Citizenserve](#) unless directed otherwise by Staff or required by this manual.

In addition to submitting all required documents digitally on Citizenserve, some application types also require physical copies of required materials to be submitted as part of a complete application:

- Once directed to do so by Staff, applications for lot splits, lot mergers, and lot line adjustments must submit physical copies of the following documents:
  - One (1) 11"x17" scaled bond copy of the Land Plat
  - One (1) 24"x36" scaled mylar copy of the Land Plat
  - One (1) narrative

When physical copies are required, they may either be dropped off to the drop box on School Street at City Hall or mailed to the following address:

Board Review Application  
c/o Planning, Preservation & Zoning Division  
City of Somerville  
93 Highland Avenue  
Somerville, MA 02143

***Fees (see Ch 6.B for directions on how to submit required fees)***

## Chapter 6.B: Required Fees

Once sufficient information has been submitted, PPZ Staff will determine what discretionary or administrative permits are necessary and determine the required fees that the Applicant must submit. Fees are based on the scale of proposed development and the magnitude of the relief required. All fees must be paid for an application to be advanced through the permitting process.

REQUIRED FEES FOR EACH PERMIT TYPE	
Site Plan Approval (Buildings)	\$250 plus \$0.08 per square foot of new gross floor area or plus \$0.06 per square foot of new gross floor area if subject to a Master Plan Special Permit
Site Plan Approval (Civic Spaces or Thoroughfares)	\$250 plus \$0.08 per square foot
Minor Site Plan Approval	\$125
Special Permit (each)	\$250
Wireless Communications Special Permit	\$2,700
Hardship Variance (each)	\$250 plus \$0.50 per square foot of relief
Plan Revision	\$125
Permit Time Extension	\$250
Master Plan Special Permit	\$1,000 plus \$0.02 per new gross square foot
Comprehensive Permit	\$300 plus \$150 per DU
Subdivision Plan Approval	\$500 plus \$200 per new lot
Administrative Appeal	\$125

REQUIRED FEES FOR PUBLIC NOTICE	
Public Notice	\$250
Additional Public Notice (each)	\$350

Check(s) for all required fees must be made out to the City of Somerville and include the property address and case tracking number in the memo line of the check. Cards cannot be accepted at this time.

The required fees must be put in an envelope, which may either be dropped off at the drop box on School Street at City Hall or mailed to the following address:

Board Review Application  
c/o Planning, Preservation & Zoning Division  
City of Somerville  
93 Highland Avenue  
Somerville, MA 02143

If any information remains unclear after reviewing this document, please reach out to [planning@somervillema.gov](mailto:planning@somervillema.gov) for clarification.

## Chapter 7.A: Guidance for Public Hearing

The Public Hearing for a development proposal will be held by the Planning Board or the Zoning Board of Appeals, depending on the property's zoning district.

### Scheduling the Hearing

- Zoning Board of Appeals meetings are typically held on the first and third Wednesday of each month. Planning Board meetings are typically held on the first and third Thursday of each month.
- Cases will be scheduled for a Public Hearing in accordance with MGL c.40A after review and analysis by Staff has been completed. Unless told otherwise by Staff, all Applicants should assume that the case will be scheduled for a public hearing approximately 65 days after the submission of a complete application.

### Requirements for the Hearing

- Access information for all hearings is posted on the [City Calendar](#) at least 48 hours in advance.
- Applicants and all relevant design professionals (i.e., architects, landscape architects) must be present for all Public Hearings for their proposal. Failure to do so may result in administrative delays or eventual unfavorable action by the Review Board.
- If a proposal is on the agenda for a particular hearing and the Applicant wishes to request a continuance, they must do so by emailing a written request to continue to [planning@somervillema.gov](mailto:planning@somervillema.gov) by no later than 4:30pm one week prior to the meeting.
  - If a continuance request is not received by 4:30pm one week prior to the meeting, the Applicant must appear at the Public Hearing and request a continuance directly from the Board.

### Preparing for the Hearing

- Applicants are responsible for posting notice of a Public Hearing in a conspicuous place at the subject property at least fourteen (14) days prior to the scheduled hearing.
  - Once a case has been scheduled for a Public Hearing, the Case Planner will share a public hearing poster with the Applicant through their application on Citizenserve.
  - The Applicant is responsible for printing the poster, posting it in a conspicuous place at the subject property, and uploading a picture of the posted notice to Citizenserve.
- Staff Memos are posted online at [Reports and Decisions](#). Applicants are encouraged to review the Staff Memo for their case prior to the hearing. Staff Memos are typically posted by the Friday afternoon prior to the hearing.
- If the hearing will be held virtually, Applicants are encouraged to test that Zoom works on their computer prior to the meeting.
- If your case was heard at a previous meeting and continued to a future date, contact the Case Planner with any questions about the Board's requests and for deadlines to submit updated or revised documents.

### During the Hearing

Planning Board and Zoning Board of Appeals meetings typically follow the outline below:

- Opening the meeting
- General business, including voting on minutes and continuing any cases that have requested a continuance
- Public Hearings for individual cases. Each case typically follows the outline below:
  - Opening the hearing
  - Presentation from the Applicant
  - Presentation from Staff, if any
  - Board's questions for the Applicant and/or Staff
  - Public comment (if not previously closed)
  - Deliberation and voting, or continuing to a future date
- Other business
- Adjourning the meeting

When Applicants attend the Public Hearing for their case, they should:

- Be respectful to all Board Members, Staff, and other attendees.
- Present a thorough but concise overview of the proposal.
- Be realistic about timelines if requesting a continuance. Updated or additional information must be submitted prior to the meeting in accordance with the Board's Rules of Procedure & Policy.
  - Consult the Case Planner for specific deadlines depending on the scope of information to be submitted and whether Staff review is necessary.

## Chapter 7.B: Guidance for Post-Decision Steps

After the Review Board has voted on an application, several steps must occur before an Applicant can obtain a building permit from the Inspectional Services Department. These steps are outlined below along with their associated timeframes, when possible.

### Filing & Certification of Decision

The filing and certification of a decision takes approximately 34 calendar days after the Board's vote and includes completion of the following steps:

- Writing and filing the Decision with the City Clerk's Office. Staff have up to 14 calendar days to do this. The Applicant will receive an unofficial copy of the Decision once it is filed.
- Expiration of the appeal period required by MGL c.40A. The appeal period lasts 20-calendar days, and any noticed abutter can file an appeal of the Decision during this time.

Once the appeal period ends, the Applicant may pick up the certified Decision from the City Clerk's Office. Until the appeal period has ended no work should be done on the property and no permits will be issued.

### Final Plat Approval

Following the conclusion of the appeal period of the preliminary plat approval, applications for **subdivisions** must submit physical copies of the following documents for final plat approval:

- One (1) 11"x17" scaled bond copy of the Subdivision Plat
- One (1) 24"x36" scaled mylar copy of the Subdivision Plat
- One (1) narrative

### Recording of Decision

The certified Decision must be recorded with the Registry of Deeds to be valid.

The information for the Middlesex South Registry of Deeds is below:

Location: 208 Cambridge Street, Cambridge, MA 02141  
Phone: 617.679.6300  
Hours: Monday – Friday, 8:00am – 3:45pm

Once recorded, a digital copy of the recorded Decision must be submitted to the Planning, Preservation, & Zoning Division for the public record.

### "As Permitted" Documents

Development that requires Site Plan Approval or one (1) or more Special Permits or Hardship Variances must produce digital of all submittal materials "as permitted" by the Review Boards for the public record once the Review Board has issued a decision.

## Continued Coordination with Other Divisions

Many projects will require Applicants to continue working with various divisions after the Review Board has issued a decision. Examples of situations in which Applicants must continue working with City Staff after the Review Board has issued a decision include:

- If any permit conditions require working with or receiving approval from a division, the Applicant must work with that division to satisfy the condition.
- If Affordable Dwelling Units are required, continued coordination with the Housing Division is needed.
  - Applicants should contact the Housing Division eight (8) months prior to applying for a full (non-foundation) building permit to allow time to negotiate and execute the required Affordable Housing Implementation Plan (AHIP). Applicants will need to provide the following information when reaching out to the Housing Division:
    - i. Updated project plans if there were changes (including parking w/ assigned space numbers, storage spaces, bicycle parking etc.)
    - ii. A completed Schedule of Units that will be provided by the Housing Division approximately 8 months out (used for selection of affordable units)
    - iii. Master Deed, Declaration of Trust, Condo Docs

If any information remains unclear after reviewing this document, please reach out to [planning@somervillema.gov](mailto:planning@somervillema.gov) for clarification.

## **Chapter 8.A: Hardship Variance**

A Hardship Variance is a type of discretionary permit that authorizes development that would otherwise be prohibited by the SZO and is required for any aspect of a development proposal that does not comply with the SZO. The procedure for a Hardship Variance can be found in SZO §15.2.3.

Applicants are encouraged to avoid the need for Hardship Variances whenever possible, as Hardship Variances have a much higher bar for approval than other types of discretionary permits identified in the SZO.

If a proposal requires one or more Hardship Variances in addition to any other discretionary (e.g., Special Permit) or administrative permits (e.g., Site Plan Approval), Applicants are encouraged to apply for the Hardship Variances as early in the process as possible to avoid unnecessary delay and expense. If Hardship Variances and any administrative permits are required for a proposal, the Hardship Variances must be granted prior to submitting an application for the administrative permits.

### **Pre-Application Procedural Requirements**

The first steps you should take as an Applicant are to determine the zoning district(s) for a property, obtain a Land Title Survey for the property, and identify the Hardship Variance(s) required for a proposal. Once you have these things, your next step is to complete and submit the [Pre-Submittal Meeting Request Form](#) via email to [planning@somervillema.gov](mailto:planning@somervillema.gov). This form includes a Property Owner Authorization form that must be completed in its entirety to schedule a Pre-Submittal Meeting.

After submission, PPZ Staff will review your request and reach out to schedule a Pre-Submittal Meeting or request any outstanding information, if necessary. PPZ Staff reach out to Applicants within two (2) weeks of receiving a Pre-Submittal Meeting Request Form.

#### ***Pre-Submittal Meeting***

A Pre-Submittal Meeting is required prior to moving forward with any other required steps in the review process. Guidance for Pre-Submittal Meetings can be found in [Chapter 5.A](#).

Applicants are required to bring the following documents to the Pre-Submittal Meeting:

- Land Title Survey

Applicants are encouraged to bring the following information to the Pre-Submittal Meeting:

- Any documents necessary to depict the requested Hardship Variance(s) accurately and completely
- Preliminary arguments for all criteria for each Hardship Variance requested

#### ***Neighborhood Meeting***

A Neighborhood Meeting may be required at the discretion of the Director of Planning, Preservation, and Zoning or the Review Boards. If required, talk to the Case Planner for more information.



## Design Review

Design Review may be required at the discretion of the Director of Planning, Preservation, and Zoning or the Review Boards. If required, talk to the Case Planner for more information.

## Application Submission Requirements

The following documents are required and must be uploaded on [Citizenserve](#) for an application to be deemed complete. Please see the Glossary in [Chapter 3](#) for the information that each document must contain and the Document Standards in [Chapter 4](#) for directions on how to format and organize all documents. If you have additional questions after reviewing the information presented here, please consult with your Case Planner.

Document	Trigger for requirement
<a href="#">Abutters List</a>	<i>Always required. PPZ Staff will generate the list of abutters within Somerville. The Applicant is responsible for obtaining a list of abutters from other cities, if the 300' radius crosses municipal boundaries.</i>
All documents necessary to depict the required Hardship Variance(s) accurately and completely. Review the relevant development activity checklist(s) to determine what documents may be necessary.	<i>Always required.</i>
<a href="#">Campaign Contribution Ordinance Mandatory Disclosure and Certification Form</a>	If proposing the construction or renovation of more than 15,000 square feet (See Sec. 15-72 of the Somerville Code of Ordinances).
<a href="#">Deed</a>	<i>Always required.</i>
<a href="#">Hardship Variance Narrative</a>	<i>Always required.</i>
<a href="#">Land Title Survey</a>	<i>Always required.</i>
<a href="#">Property Owner Authorization</a>	<i>Always required.</i>
Required fees (see <a href="#">Chapter 6.B</a> )	<i>Always required. Will be calculated by the City of Somerville once sufficient information has been submitted.</i>

Once all required documents have been gathered and the required fees have been identified by Staff, guidance on submitting a complete application can be found in [Chapter 6.A](#), guidance on preparing for the Public Hearing can be found in [Chapter 7.A](#), and guidance on required steps following the issuance of a decision can be found in [Chapter 7.B](#).

## Chapter 8.B: Plan Revision

When an Applicant wishes to revise any aspect of an approval issued by a Review Board, the process for doing so is to submit a Plan Revision. The procedure for a Plan Revision can be found in SZO §15.2.4. A Plan Revision is a two-step process.

First, the Director of Planning, Preservation, and Zoning will review the submission for a Plan Revision. Based on the SZO's criteria for Plan Revisions and the information submitted, the Director will issue a decision determining whether the proposed revisions are minor (***de minimis***) or a **major amendment**. This document identifies the information that must be submitted for the Director to make this determination.

If the Director determines that the plan revision is ***de minimis***, the second step is that the Director will issue a Decision and approve or deny the changes.

If the Director determines that the plan revision is a **major amendment**, the second step is that the Applicant will need to submit a new form for Board Review on [Citizenserve](#) and may need to provide additional information depending on the scope of the project and the revisions proposed. Additional procedural steps may also be required. Once all required information has been submitted and all required procedural steps have been completed, the Review Board will consider the major amendment at a public hearing and decide whether to approve or deny the changes.

### Pre-Application Procedural Requirements

The first steps you should take as an Applicant are to determine the original case number and related address for a property and a summary of any proposed changes. Once you have this information, your next step is to complete and submit the [Pre-Submittal Meeting Request Form](#) via email to [planning@somervillema.gov](mailto:planning@somervillema.gov). This form includes a Property Owner Authorization form that must be completed in its entirety to schedule a Pre-Submittal Meeting.

After submission, PPZ Staff will review your request and reach out to schedule a Pre-Submittal Meeting or request any outstanding information, as soon as their schedule allows.

#### ***Pre-Submittal Meeting***

A Pre-Submittal Meeting is required prior to moving forward with any other steps in the review process. Guidance for Pre-Submittal Meetings can be found in [Chapter 5.A.](#)

Applicants are required to bring the following documents to the Pre-Submittal Meeting:

- Land Title Survey
- Original Decision, with signed Clerk's Certificate

Applicants are encouraged to bring the following information to the Pre-Submittal Meeting:

- Site or architectural plans that show proposed changes, with changes clouded

Applicants are encouraged to submit any available information about their project when they submit PSMR forms.

## Application Submission Requirements

The following documents are required and must be uploaded on [Citizenserve](#) for an application to be deemed complete. Please see the Glossary in [Chapter 3](#) for the information that each document must contain and the Document Standards in [Chapter 4](#) for directions on how to format and organize all documents. If you have additional questions after reviewing the information presented here, please consult with your Case Planner.

PPZ Staff will review the information you submitted on Citizenserve and may reach out for clarification or additional information prior to issuing a decision deeming the changes to be *de minimis* or a major amendment.

Document	Trigger for requirement
All necessary documents to clearly indicate proposed changes to original approval.	<i>Always required.</i>
<a href="#">Original Decision &amp; Plans</a>	<i>Always required.</i>
<a href="#">Deed</a>	<i>Always required.</i>
<a href="#">Land Title Survey</a>	<i>Always required.</i>
<a href="#">Plan Revision Narrative</a>	<i>Always required.</i>
<a href="#">Property Owner Authorization</a>	<i>Always required.</i>
Required fees (see <a href="#">Chapter 6.B</a> )	<i>Always required. Will be calculated by the City of Somerville once sufficient information has been submitted.</i>

If a Plan Revision is determined to be a Major Amendment a new application will be required. Please begin that process by submitting the online application on [Citizenserve](#).

## Chapter 8.C: Administrative Appeal

An Administrative Appeal is a petition to rectify a failure to act, denial of a permit, decision, or enforcement action taken by the Building Official or Director of Planning, Preservation, and Zoning in an administrative development review case when an alleged error or misinterpretation has been made in the enforcement or application of the provisions of the SZO. The procedure for an Administrative Appeal can be found in SZO §15.5.2.

Through the Administrative Appeal process an Applicant asks the Zoning Board of Appeals (ZBA) to review the facts of the situation and come to a different conclusion than Staff came to. The ZBA can agree either with the Applicant's interpretation of the situation and grant the appeal or with the previous interpretation of the situation and deny the appeal. The Administrative Appeal is the final word at the local level on a situation or interpretation.

If any information remains unclear after reviewing this document, please reach out to [planning@somervillema.gov](mailto:planning@somervillema.gov) for clarification.

### Pre-Application Procedural Requirements

There are no pre-application procedural requirements.

### Application Submission Requirements

The following documents are required and must be submitted on [Citizenserve](#) for an application to be deemed complete. Please see the Glossary in [Chapter 3](#) for the information that each document must contain and the Document Standards in [Chapter 4](#) for directions on how to format and organize all documents. If you have additional questions after reviewing the information presented here, please email [planning@somervillema.gov](mailto:planning@somervillema.gov).

Document	Trigger for requirement
<a href="#">Abutters List</a>	<i>Always required. PPZ Staff will generate the list of abutters within Somerville. The Applicant is responsible for obtaining a list of abutters from other cities, if the 300' radius crosses municipal boundaries.</i>
<a href="#">Administrative Appeal Narrative</a>	<i>Always required.</i>
<a href="#">Property Owner Authorization</a>	<i>Always required.</i>
Required fees (see <a href="#">Chapter 6.B</a> )	<i>Always required.</i>

### Method of Submission

Chapter 6.A. of this manual does not apply to Administrative Appeals; Applicants must instead follow the directions found here.

Applicants must submit one (1) physical copy of all application materials, including all required fees, to the City Clerk's Office to be stamped as required by SZO §15.5.2. Failure to submit the application to the City Clerk's Office within the required time period may result in unfavorable action by the Zoning Board of Appeals.

## Chapter 8.D: Permit Time Extension

When an Applicant wishes to extend the validity of a Special Permit or Hardship Variance issued by a Review Board, the process for doing so is to submit a Permit Time Extension. The procedure for a Permit Time Extension can be found in SZO §15.2.

Through the Permit Time Extension process, an Applicant asks the Review Board to review the facts of the situation and extend the validity of the permit. For a Special Permit, this requires the Review Board to make a finding that a demonstrated hardship has prevented the utilization of the rights authorized by the Special Permit. No such finding is required to extend the validity of a Hardship Variance; however, the Zoning Board of Appeals may only extend the validity of a Hardship Variance for up to six (6) months.

### Pre-Application Procedural Requirements

There are no pre-application procedural requirements. Once you have gathered all documents required by the next section (*Application Submission Requirements*), you should submit an application on [Citizenserve](#) and include all relevant documents as attachments. Following submission of the form, you will automatically receive an email with the case number for your project. This case number should be used in all future communications.

### Application Submission Requirements

The following documents are required and must be uploaded on [Citizenserve](#) for an application to be deemed complete. Please see the Glossary in [Chapter 3](#) for the information that each document must contain and the Document Standards in [Chapter 4](#) for directions on how to format and organize all documents. If you have additional questions after reviewing the information presented here, please consult with your Case Planner.

Document	Trigger for requirement
<a href="#">Abutters List</a>	<i>Always required. PPZ Staff will generate the list of abutters within Somerville. The Applicant is responsible for obtaining a list of abutters from other cities, if the 300' radius crosses municipal boundaries.</i>
<a href="#">Original Decision &amp; Plans</a>	<i>Always required.</i>
<a href="#">Deed</a>	<i>Always required.</i>
<a href="#">Narrative</a>	<i>Always required.</i>
<a href="#">Property Owner Authorization</a>	<i>Always required.</i>
Required fees (see <a href="#">Chapter 6.B</a> )	<i>Always required. Will be calculated by the City of Somerville once sufficient information has been submitted.</i>

If any information remains unclear after reviewing this document, please reach out to [planning@somervillema.gov](mailto:planning@somervillema.gov) for clarification.