

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.”

A recommended place to start reviewing this document is Chapter 1; in particular, the [table](#) of examples of activity types may be helpful for first-time users.

Table of Contents

1. Introduction & Overview : <i>How do I use this document?</i>	2
2. Activity Types: <i>What do I want to do?</i>	–
A. Developing a Principal Building	5
B. Developing an Accessory Building	10
C. Establishing or Altering a Use	14
D. Lot Splits, Lot Mergers, and Lot Line Adjustments	19
E. Signage	21
F. Developing a Building Component	23
G. Subdivisions	26
H. Parking Relief	28
I. Development on a Steep Slope	30
3. Glossary : <i>What must be included in these documents?</i>	31
4. Document Standards : <i>How do I name, organize, and update documents?</i>	46
5. Pre-Submission Steps	–
A. Guidance for Pre-submittal Meetings	49
B. Guidance for Neighborhood Meetings	50
C. Guidance for Design Review	52
6. Submission Steps: <i>What do I do next?</i>	–
A. Guidance for Submitting a Complete Application	53
B. Required Fees	54
7. Post-Submission Steps: <i>Then what happens?</i>	–
A. Guidance for Public Hearing	55
B. Guidance for Post-Decision Steps	57
8. Other Review Processes	–
A. Hardship Variance	59
B. Plan Revision	61
C. Administrative Appeal	63

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. This manual 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 each addressed separately at www.somervillezoning.com/developmentreview.

By-right projects (those that comply with the requirements of the SZO and do not require any Board review) are also 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. This [chart](#) can also help you determine whether to contact PPZ or ISD regarding your project.

If you have questions after reviewing this manual, please review the FAQ found at [Plan11](#) or submit questions through [AskAPlanner](#). PPZ Staff are happy to assist in any way we can.

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 <https://www.somervillema.gov/departments/ospcd/historic-preservation>.
- 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](#).

The Project Tracking System (PTS)

The Project Tracking System (PTS) is the system that the PPZ Division uses to manage projects and project submissions. The PTS is hosted on the Smartsheet platform, and emails sent from the PTS typically come from automation@app.smartsheet.com.

The first step in beginning the development review process for any project is to submit a form to create a new entry in the PTS. The form that you should submit will vary based on the type of review required. Links to each form can be found in [Chapter 5.A](#) of this manual or at www.somervillezoning.com/developmentreview. Once the relevant form has been submitted, you will receive an automatic reply providing you with the case number for the project. This case number should be included in all subsequent communications regarding the project.

Unless otherwise directed by Staff or this manual, all required documents must be submitted through the PTS. Documents can be submitted to the PTS by attaching them to “update requests” which are emails from Smartsheet that include a link you can use to submit additional

information or documents. Update requests will be sent automatically by the PTS once certain milestones are reached and can also be manually triggered by PPZ Staff. Each update request can be used only once; if additional update requests are needed, please email planning@somervillema.gov or your Case Planner. This email must include the case number and preferably the property address.

Chapter Overviews

In the sections below Staff have briefly summarized the information Applicants can expect to find in this manual. 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.C](#)) will be relevant to your proposal.

Subchapters	Examples: <i>What are you trying to do?</i>
A. Developing a principal building	You want to construct a new or modify an existing primary (main) building.
B. Developing an accessory building	You want to construct an accessory (secondary) building type, such as a Backyard Cottage, on a lot that already has a principal building.
C. Establishing or altering a use	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).
D. Lot splits, lot mergers, and lot line adjustments	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.
E. Signage	You want to add or change the external signage for a commercial building beyond a one-for-one replacement.
F. Developing a building component	You want to construct or modify a building component (such as a bay, porch, or dormer) to a building.
G. Subdivisions	You want to split a lot into two or more lots and a new street is needed to provide access to the individual lots.
H. Parking Relief	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>
I. Development on a Steep Slope	You want to develop a building in a lot with changes in elevation of 25% or greater over a horizontal distance of 30 feet or greater. <i>See the Section 10.10 of the SZO for more information.</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-submission 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](#)) will identify the information which must be included in each required document, including if other City divisions have standards relevant for a specific document. The Document Standards ([Chapter 4](#)) includes general document formatting requirements that apply to all documents, as well as guidance from Staff 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 signage (Chapter 2.E) 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.

Chapter 6 will be relevant to all development activity types identified in Chapter 2, as it provides guidance on submitting a complete application and the fee schedule that is applicable to every project.

Chapter 7 will be relevant to all development activity types identified in Chapter 2, regardless of whether a public hearing is required. Chapter 7.B addresses what Applicants are required to do following the issuance of any decision by a Review Board, and all activity types in Chapter 2 involve a Review Board making a decision.



Pre-Submission Steps (Chapter 5)	Submission Steps (Chapter 6)	Post-Submission Steps (Chapter 7)
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 Section 15.3 of the SZO 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 Section 15.4 of the SZO 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 Section 15.5 of the SZO for more information.

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

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 Article 15.3.2 of the SZO), 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 Chapter 2.F</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 Chapter 2.F</i>

If any information remains unclear after reviewing this document, please visit Plan11 for assistance at <https://tinyurl.com/Plan11>; Staff is happy to assist.

Pre-Submission 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 develop a general idea of what you want to propose. Once you have these three things, your next step is to submit the form found at <https://tinyurl.com/ApplySomSPA>. This will create a new entry in the Project Tracking System (PTS) that PPZ uses to manage development review proposals. You will need to upload the [Property Owner Authorization](#) when you submit this form.

After submission you will automatically receive an email with the case number for your project. This case number should be used in all future communications. PPZ Staff will review the information you submitted to the PTS and may reach out for clarification prior to scheduling the Pre-submittal Meeting.

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 these documents to the Pre-submittal Meeting (see [Chapter 3](#) for definitions and, when available, samples of these materials):

- Land Title Survey
- Proposed Site Plan

Applicants are encouraged to bring these documents to the Pre-submittal Meeting:

- A completed version of the Pre-Submittal Dashboard of the Low Load Buildings Energy Input Form

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.
- The Pre-Submittal Info and Dashboard of Low Load Buildings Energy Input Form submitted to the Office of Sustainability and Environment.
- 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:

- For projects pursuing LEED or Net Zero certification, contact the Office of Sustainability and Environment for information regarding sustainability-related requirements.
- 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 axon 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 ([link](#)) 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 an application. 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 certification 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 to the PTS 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
Abutters List	If within 300' of another municipality. PPZ Staff will generate the list of abutters within Somerville.
Affordable Housing Acknowledgement	If Affordable Dwelling Units are required. <i>Please allow 28 days for review.</i>
Building Elevation(s)	<i>Always required.</i>
Building Section(s)	<i>Always required.</i>
Campaign Contribution Ordinance Mandatory Disclosure and Certification Form	If proposing the construction or renovation of more than 15,000 square feet (See Sec. 15-72 of the Somerville Code of Ordinances).
Certificate of Required Materials from the Housing Division	See Glossary (Chapter 3) for details.
Certificate of Required Materials from the Mobility Division	See Glossary (Chapter 3) for details.
Certificate of Required Materials from the Office of Sustainability & Environment	See Glossary (Chapter 3) for details.
Deed	<i>Always required.</i>
Design Review Report	<i>Always required.</i>
Digital Massing Model	<i>Always required.</i>
Environmental Impact Analysis	If proposing a High-Rise building.
Floor Plan(s)	<i>Always required.</i>
Green Score Calculation	If proposing a substantial renovation (as defined by the SZO) or changes to landscaping.
Gross Floor Area Calculation	<i>Always required.</i>
Land Title Survey	<i>Always required.</i>
Landscape Plan(s)	<i>Always required.</i>

LEED Certifiability Documentation	If proposing new construction or major renovations over 25,000 square feet (See Section 10.11 of the SZO). <i>Please allow 21 days for review.</i>
Low Load Buildings Energy Input Form	<i>Always required. Please allow 21 days for review.</i>
Mobility Management Plan (MMP)	If compliance with Article 11.4 of the SZO is required. <i>Please allow 60 days for review.</i>
Narrative	<i>Always required.</i>
Neighborhood Meeting Report(s)	<i>Always required.</i>
Net Zero Building Documentation	If seeking a Net Zero Ready density bonus <i>OR</i> if proposing a non-Lab Building subject to Article 8.4 of the SZO. <i>Please allow 21 days for review.</i>
Property Owner Authorization	<i>Always required.</i>
Recorded Hardship Variance(s)	If a Hardship Variance was granted for the property.
Required fees (see Chapter 6.B)	<i>Always required. Will be calculated by the City of Somerville once sufficient information has been submitted. Do not send payments until you have been given further instructions. Not required to be submitted through the PTS.</i>
Shadow Study	<i>Always required.</i>
Signage Plan(s)	If proposing one or more commercial spaces.
Site Plan(s)	<i>Always required.</i>
Sustainable & Resilient Buildings Questionnaire	<i>Always required. Please allow 14 days for review.</i>
Transportation Access Plan	<i>Always required. Please allow 21 days for review.</i>
Transportation Impact Study	If the triggers identified in this document are met (link). <i>Please allow 21 days for review.</i>
Tree Plan	If any trees are being removed.
Zoning Dimensional Standards Table(s)	<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: Developing an Accessory Building

The Backyard Cottage is the only accessory building type currently permitted by the SZO. Backyard Cottages are only permitted in the Neighborhood Residence (NR) district and their development requires Site Plan Approval (addressed in Article 15.3.2 of the SZO).

There are specific activities involved in developing an accessory building that may require a different review type than Site Plan Approval. Note that some modification activities involving an accessory building may require Minor Site Plan Approval or a Special Permit, rather than Site Plan Approval. See the table below for reference. If your modification does not fit any of the criteria 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 porch) on the ground story of an existing building	Minor Site Plan Approval <i>For more information see Developing a Building Component in Chapter 2.F</i>
Developing a building component (e.g., a dormer) on an existing building	Site Plan Approval
Developing a building component on a building that is not permitted in the district (e.g., a Backyard Cottage in the Mid-Rise districts)	Special Permit <i>For more information see Developing a Building Component in Chapter 2.F</i>

If any information remains unclear after reviewing this document, please visit Plan11 for assistance at <https://tinyurl.com/Plan11>; Staff is happy to assist.

Pre-Submission 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 develop a general idea of what you want to propose. Once you have these three things, your next step is to submit the form found at <https://tinyurl.com/ApplySomSPA>. This will create a new entry in the Project Tracking System (PTS) that PPZ uses to manage development review proposals. You will need to upload the [Property Owner Authorization](#) when you submit this form.

Once you have submitted the form to create a new entry in the PTS, you will automatically receive an email with the case number for your project. This case number should be used in all future communications. PPZ Staff will review the information you submitted to the PTS and may reach out for clarification prior to scheduling the 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 required to bring the following documents to the Pre-submittal Meeting (see [Chapter 3](#) for definitions and, when available, samples of these materials):

- Land Title Survey
- Sketch showing proposed conditions

First Neighborhood Meeting

Proposals to develop an accessory 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 dimensions, basic design, and intended use of the accessory building.
- Any additional documents or information required by the Ward Councilor or Director of Planning, Preservation, and Zoning.

Design Review

Proposals to develop an accessory 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.
- 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 facade design concepts illustrated in elevation, including details of the building base. Each façade design must indicate ground story and upper story fenestration percentages.
- Zoning Dimensional Standards Table for building massing.
- Landscaping plan(s) and any associated illustrations necessary to show proposed changes to the public realm. 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.
 - Landscaping that is visible from a public right-of-way.
 - 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 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 and Engineering Department for guidelines.

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 an application. 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.
- 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 to the PTS 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
Abutters List	If within 300' of another municipality. PPZ Staff will generate the list of abutters within Somerville.
Affordable Housing Acknowledgement	If Affordable Dwelling Units are required. <i>Please allow 28 days for review.</i>
Building Elevation(s)	<i>Always required.</i>
Building Section(s)	<i>Always required.</i>
Certificate of Required Materials from the Housing Division	See Glossary (Chapter 3) for details.
Certificate of Required Materials from the Mobility Division	See Glossary (Chapter 3) for details.
Certificate of Required Materials from the Office of Sustainability and Environment	See Glossary (Chapter 3) for details.
Deed	<i>Always required.</i>
Design Review Report	<i>Always required.</i>
Floor Plan(s)	<i>Always required.</i>
Green Score Calculation	If proposing a substantial renovation (as defined by the SZO) <i>OR</i> changes to landscaping.
Gross Floor Area Calculation	<i>Always required.</i>

Land Title Survey	<i>Always required.</i>
Landscape Plan(s)	<i>Always required.</i>
Narrative	<i>Always required.</i>
Neighborhood Meeting Report(s)	<i>Always required.</i>
Property Owner Authorization	<i>Always required.</i>
Recorded Hardship Variance(s)	If a Hardship Variance was granted for the property.
Required fees (see Chapter 6.B)	<i>Always required. Will be calculated by the Case Planner once sufficient information has been submitted. Not required to be submitted through the PTS.</i>
Site Plan(s)	<i>Always required.</i>
Transportation Access Plan	<i>Always required. Please allow 21 days for review.</i>
Tree Plan	If any trees are being removed.
Zoning Dimensional Standards Table(s)	<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.C: 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 which is greater 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 Article 14.1.6 of the SZO.

If any information remains unclear after reviewing this document, please visit Plan11 for assistance at <https://tinyurl.com/Plan11>; Staff is happy to assist.

Pre-Submission 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 submit the form found at <https://tinyurl.com/ApplySomSPA>. This will create a new entry in the Project Tracking System (PTS) that PPZ uses to manage development review proposals. You will need to upload the [Property Owner Authorization](#) when you submit this form.

Once you have submitted the form to create a new entry in the PTS, you will automatically receive an email with the case number for your project. This case number should be used in all future communications. PPZ Staff will review the information you submitted to the PTS and may reach out for clarification prior to scheduling the 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 required to bring the following information to the Pre-submittal Meeting (see [Chapter 3](#) for definitions and, when available, samples of these materials):

- Floor plan
- Verbal summary of business plan

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 an application. 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 to the PTS 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
Abutters List	If within 300' of another municipality. PPZ Staff will generate the list of abutters within Somerville.
Abutting Context Analysis	If required by the Use-Specific Requirements Table (see pages 17-18) <i>OR</i> if over 5,000 square feet and subject to Article 8.3 of the SZO.
Arts Council Certification	If required by the Use-Specific Requirements Table (see pages 17-18).
Certificate of Required Materials from the Mobility Division	See Glossary (Chapter 3) for details.
Deed	<i>Always required.</i>
Façade Elevation(s)	If required by the Use-Specific Requirements Table (see pages 17-18).
Floor Plan(s)	<i>Always required.</i>

Infrastructure Capacity Analysis	If required by the Use-Specific Requirements Table (see pages 17-18).
Landscape Plan(s)	If required by the Use-Specific Requirements Table (see pages 17-18).
Maps	If required by the Use-Specific Requirements Table (see pages 17-18), <i>OR</i> if a Formula Business (as defined by the SZO), <i>OR</i> if occupying a ground story commercial space fronting a Pedestrian Street.
Narrative	<i>Always required.</i>
Neighborhood Meeting Report(s)	<i>Always required.</i>
Property Owner Authorization	<i>Always required.</i>
Required fees (see Chapter 6.B)	<i>Always required. Will be calculated by the Case Planner once sufficient information has been submitted. Not required to be submitted through the PTS.</i>
Site Plan(s)	If required by the Use-Specific Requirements Table (see pages 17-18).
Transportation Access Plan	If required by the Use-Specific Requirements Table (see pages 17-18). <i>Please allow 21 days for review.</i>
Mobility Management Plan	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>
Transportation Impact Study	If required by the Use-Specific Requirements Table (see pages 17-18), <i>OR</i> if any of the TIS Thresholds 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.]

<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
Arts & Creative Enterprise									
Artisanal Production									
Arts Sales or Services									
Design Services									
Work/Live Creative Studio						●			●
Shared Workspaces or Arts Education									
Auto-Oriented									
Commercial Vehicle Repair or Maintenance				●		●	●		
Towing Service	●			●		●	●		
Off-Site Accessory Parking						●			
Personal Vehicle Repair or Maintenance				●		●	●		
Vehicle Sales				●		●	●		
Cannabis Establishment Categories									
Cannabis Cultivation									
Cannabis Retail Sales		●					●	●	
Civic & Institutional Categories									
Hospital			●				●	●	
Minor Utility Facility	●			●		●			
Private Non-Profit Club or Lodge	●					●			
Food and Beverage Services Categories									
Bar, Restaurant, or Tavern									
Bakery, Café, or Coffee Shop									
Lodging Categories									
Bed & Breakfast									
Hotel or Hostel	●	●				●		●	
Accessory Use Categories									
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
Commercial Services Categories									
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+)	●			●		●			
Residential Categories									
Household Living						●			
Group Living						●			
Dormitory or Chapter House					●				
Homeless Shelter					●				
Nursing Home/Assisted Living Facility						●	●		
Rooming House				●		●			
Retail Sales Categories									
Building/Home Supplies or Equipment							●	●	
Alcohol Sales					●				
Pet Store									
Fresh Food Market or Grocery Store									
Industrial Categories									
Dry Cleaning or Laundry Services							●	●	
Data Center		●				●			
Self Storage		●				●			
Recycling Collection	●			●		●		●	
Trucking or Transportation Depot	●			●		●	●	●	

Chapter 2.D: 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.G](#) 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 which are available online at [MuniCode](#).

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.

If any information remains unclear after reviewing this document, please visit Plan11 for assistance at <https://tinyurl.com/Plan11>; Staff is happy to assist.

Pre-Submission 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 develop a general idea of what you want to propose. Once you have these three things, your next step is to submit the form found at <https://tinyurl.com/ApplySomLand>. This will create a new entry in the Project Tracking System (PTS) that PPZ uses to manage development review proposals. You will need to upload the [Property Owner Authorization](#) when you submit this form.

Once you have submitted the form to create a new entry in the PTS, you will automatically receive an email with the case number for your project. This case number should be used in all future communications. PPZ Staff will review the information you submitted to the PTS and may reach out for clarification prior to scheduling the 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 required to bring the following documents to the Pre-submittal Meeting (see [Chapter 3](#) for definitions and, when available, samples of these materials):

- Land Title Survey
- Information regarding whether the property is in a Local Historic District or identified on the Massachusetts or National Registers of Historic Places

Applicants are 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 to the PTS 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
Abutters List	If within 300' of another municipality <u>and</u> the lot is designated as a Local Historic District or identified on the Massachusetts or National Registers of Historic Places.
Deed	<i>Always required.</i>
Land Plat	<i>Always required.</i>
Land Title Survey	<i>Always required.</i>
Narrative	<i>Always required.</i>
Property Owner Authorization	<i>Always required.</i>
Recorded Hardship Variance(s)	If a Hardship Variance was granted for the property.
Required fees (see Chapter 6.B)	<i>Always required. Will be calculated by the Case Planner once sufficient information has been submitted. Not required to be submitted through the PTS.</i>
Somerville Historic Preservation Commission Recommendation	If the lot is designated as a Local Historic District or identified on the Massachusetts or National Registers of Historic Places.
Transportation Access Plan	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.E: Signage

Commercial signage is regulated in Article 10.9 of the SZO where eleven (11) commercial sign types are permitted. Adding or changing signage requires 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 which are available online at [MuniCode](#).

If any information remains unclear after reviewing this document, please visit Plan11 for assistance at <https://tinyurl.com/Plan11>; Staff is happy to assist.

Pre-Submission 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 things, your next step is to submit the form found at <https://tinyurl.com/ApplySomSPA>. This will create a new entry in the Project Tracking System (PTS) that PPZ uses to manage development review proposals. You will need to upload the [Property Owner Authorization](#) when you submit this form.

Once you have submitted the form to create a new entry in the PTS, you will automatically receive an email with the case number for your project. This case number should be used in all future communications. PPZ Staff will review the information you submitted to the PTS and may reach out for clarification prior to scheduling the 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 required to bring the following documents to the Pre-submittal Meeting:

- Images of existing signage, if any

Application Submission Documents

The following documents are required and must be uploaded to the PTS 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
Deed	<i>Always required.</i>
Façade Elevation(s)	<i>Always required.</i>
Narrative	<i>Always required.</i>
Property Owner Authorization	<i>Always required.</i>
Recorded Hardship Variance(s)	<i>If a Hardship Variance was granted for the property.</i>
Required fees (see Chapter 6.B)	<i>Always required. Will be calculated by the Case Planner once sufficient information has been submitted. Not required to be submitted through the PTS.</i>
Sign Plan(s)	<i>Always required.</i>

Zoning Dimensional Standards Table(s) for Awning or Canopy building component	If proposing an Awning or Canopy Sign.
Zoning Dimensional Standards Table(s) for proposed sign(s)	<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.F: 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 each permitted Building Types.

Development of a principal or accessory building (as outlined in Chapters [2.A](#) and [2.B](#)) 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 either Chapter 2.A or Chapter 2.B. If, however, your proposal is limited to constructing or modifying only a building component, you can review this subsection instead of Chapter 2.A or Chapter 2.B.

In general, developing a building component requires the same level of review as developing the principal or accessory 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 which are available online at [MuniCode](#). 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.

If any information remains unclear after reviewing this document, please visit Plan11 for assistance at <https://tinyurl.com/Plan11>; Staff is happy to assist.

Pre-Submission 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 develop a general idea of what you want to propose. Once you have these three things, your next step is to submit the form found at <https://tinyurl.com/ApplySomSPA>. This will create a new entry in the Project Tracking System (PTS) that PPZ uses to manage development review proposals. You will need to upload the [Property Owner Authorization](#) when you submit this form.

Once you have submitted the form to create a new entry in the PTS, you will automatically receive an email with the case number for your project. This case number should be used in all future communications. PPZ Staff will review the information you submitted to the PTS and may reach out for clarification prior to scheduling the 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 required to bring the following documents to the Pre-submittal Meeting (see [Chapter 3](#) for definitions and, when available, samples of these materials):

- Land Title Survey
- Site Plan

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 an application. 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 to the PTS 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
Abutters List	If within 300' of another municipality. PPZ Staff will generate the list of abutters within Somerville.
Building Elevation(s)	<i>Always required.</i>
Building Section(s)	<i>Always required.</i>
Deed	<i>Always required.</i>
Floor Plan(s)	<i>Always required.</i>
Green Score Calculation	If proposing a substantial renovation (as defined by the SZO) or changes to landscaping.
Land Title Survey	<i>Always required.</i>
Narrative	<i>Always required.</i>
Neighborhood Meeting Report(s)	If a Neighborhood Meeting is required.
Property Owner Authorization	<i>Always required.</i>
Recorded Hardship Variance(s)	If a Hardship Variance was granted for the property.
Required fees (see Chapter 6.B)	<i>Always required. Will be calculated by the Case Planner once sufficient information has been submitted. Not required to be submitted through the PTS.</i>

Site Plan(s)	<i>Always required.</i>
Tree Plan	If any trees are being removed.
Zoning Dimensional Standards Table(s)	<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.G: 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 Article 15.3.1 of the SZO.

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.D](#).

If any information remains unclear after reviewing this document, please visit Plan11 for assistance at <https://tinyurl.com/Plan11>; Staff is happy to assist.

Pre-Submission 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 develop a general idea of what you want to propose. Once you have these three things, your next step is to submit the form found at <https://tinyurl.com/ApplySomLand>. This will create a new entry in the Project Tracking System (PTS) that PPZ uses to manage development review proposals. You will need to upload the [Property Owner Authorization](#) when you submit this form.

Once you have submitted the form to create a new entry in the PTS, you will automatically receive an email with the case number for your project. This case number should be used in all future communications. PPZ Staff will review the information you submitted to the PTS and may reach out for clarification prior to scheduling the 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 required to bring the following documents to the Pre-submittal Meeting (see [Chapter 3](#) for definitions and, when available, samples of these materials):

- Land Title Survey
- Proposed Subdivision Plat

Application Submission Requirements

The following documents are required and must be uploaded to the PTS 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
Abutters List	If within 300' of another municipality. PPZ Staff will generate the list of abutters within Somerville.

Certificate of Required Materials from the Mobility Division	See Glossary (Chapter 3) for details.
Deed	<i>Always required.</i>
Land Title Survey	<i>Always required.</i>
Narrative	<i>Always required.</i>
Property Owner Authorization	<i>Always required.</i>
Recorded Hardship Variance(s)	If a Hardship Variance was granted for the property.
Required fees (see Chapter 6.B)	<i>Always required. Will be calculated by the Case Planner once sufficient information has been submitted. Not required to be submitted through the PTS.</i>
Subdivision Plat	<i>Always required.</i>
Transportation Access Plan	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.H: 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.

If any information remains unclear after reviewing this document, please visit Plan11 for assistance at <https://tinyurl.com/Plan11>; Staff is happy to assist.

Pre-Submission 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 develop a general idea of what you want to propose. Once you have these three things, the path for your proposal will vary based on the type of parking relief you are seeking.

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 the form found at <https://tinyurl.com/ApplySomSPA> with all required documents included as attachments. No other pre-submission 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 submit the form found at <https://tinyurl.com/ApplySomSPA>. Submitting this form will create a new entry in the Project Tracking System (PTS) that PPZ uses to manage development review proposals. You will need to upload the [Property Owner Authorization](#) when you submit this form.

Once you have submitted the form to create a new entry in the PTS, you will automatically receive an email with the case number for your project. This case number should be used in all future communications. PPZ Staff will review the information you submitted to the PTS and may reach out for clarification prior to scheduling the 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 required to bring the following documents to the Pre-submittal Meeting (see [Chapter 3](#) for definitions and, when available, samples of these materials):

- Land Title Survey

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 an application. 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 to the PTS 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
Abutters List	If within 300' of another municipality. PPZ Staff will generate the list of abutters within Somerville.
Certificate of Required Materials from the Mobility Division	See Glossary (Chapter 3) for details.
Deed	<i>Always required.</i>
Illustrative Site Plan	If requesting relief from minimum or maximum parking requirements
Land Title Survey	<i>Always required.</i>
Narrative	<i>Always required.</i>
Neighborhood Meeting Report(s)	If requesting relief from minimum or maximum parking requirements
Property Owner Authorization	<i>Always required.</i>
Required fees (see Chapter 6.B)	<i>Always required. Will be calculated by the Case Planner once sufficient information has been submitted. Not required to be submitted through the PTS.</i>
Site Plan(s)	<i>Always required.</i>
Transportation Access Plan	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>
Transportation Impact Study	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](#).

Chapter 2.I: Development on a Steep Slope

Development on any lot with a Steep Slope—defined as “[a]ny change in elevation of twenty-five percent (25%) or greater over a horizontal distance of thirty (30) feet or greater”—requires a Special Permit, except as identified by the Article 10.9 of the SZO.

If any information remains unclear after reviewing this document, please visit Plan11 for assistance at <https://tinyurl.com/Plan11>; Staff is happy to assist.

Pre-Submission Procedural Requirements

There are no pre-submission procedural requirements for a Steep Slope Special Permit. Once you have gathered all documents required by the next section (*Application Submission Requirements*), you should submit the form found at <https://tinyurl.com/ApplySomSPA> and include all relevant documents as attachments. Submitting this form will create a new entry in the Project Tracking System (PTS) that PPZ uses to manage development review proposals. 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.

PPZ Staff will review the information you submitted to the PTS and may reach out for clarification or additional information.

Application Submission Requirements

The following documents are required and must be uploaded to the PTS 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
Abutters List	If within 300' of another municipality. PPZ Staff will generate the list of abutters within Somerville.
Deed	<i>Always required.</i>
Land Title Survey	<i>Always required.</i>
Landscape Plan(s)	<i>Always required.</i>
Narrative	<i>Always required.</i>
Property Owner Authorization	<i>Always required.</i>
Required fees (see Chapter 6.B)	<i>Always required. Will be calculated by the Case Planner once sufficient information has been submitted. Not required to be submitted through the PTS.</i>
Site Plan(s)	<i>Always required.</i>
Tree Plan	If any trees are being removed.

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 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](#)

[Digital Massing Model](#)

[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\(s\)](#)

[Low Load Buildings Energy Input Form](#)

[Maps](#)

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

[Narrative](#)

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

[Net Zero Building Documentation](#)

[Plan Revision Narrative](#)

[Property Owner Authorization](#)

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

[Shadow Study](#)

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

[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 that are located within the borders of any other municipality (i.e., Cambridge, Boston, Medford, or Arlington). The abutters list must be certified by the neighboring municipality and must be provided in both text and Excel or Comma-Separated Value (CSV) format.

The text format document may be a PDF, Word Document, or other document type, and must be submitted exactly as it was received from the neighboring municipality.

The Excel or CSV format 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 Articles 12.1 and 12.3 of the SZO. 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. 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

- Low Load Buildings Energy Input Form

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.

Digital Massing Model

A simple digital model of only the buildings massing in SketchUp format (.skp) that is properly geo-located and oriented for use in placing and viewing the project within the City's digital model of existing buildings in the city.

The model should be the main mass only and should not include any detailed architectural features of the proposed building, including building components or materiality.

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.

MEAN WIND SPEED FOR VARIOUS ACTIVITIES†	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

EFFECTIVE GUST VELOCITY†	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 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 Article 2.5.b.viii. of the SZO)

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.

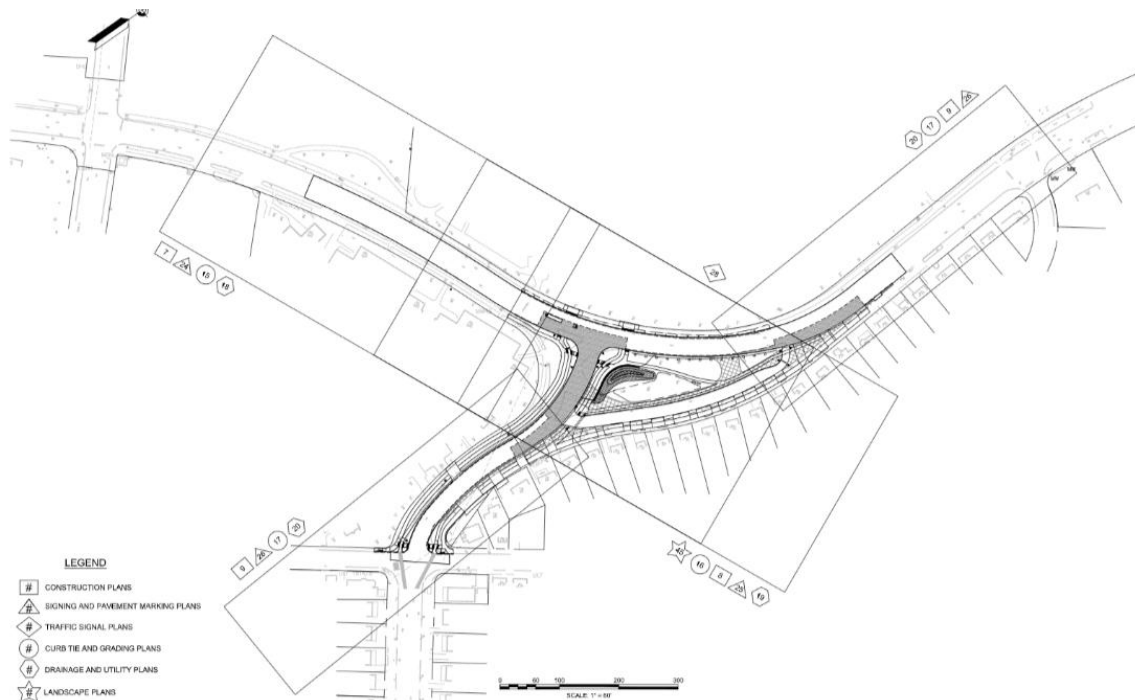
Key Plan

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 in a 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 Article 10.10.1 of the SZO [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 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 Article 10.6 of the SZO, 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.

Low Load Buildings Energy Input Form

This form is used to assess the energy load for a proposed building and identify possible ways to reduce that load and can be found [here](#). It 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 Low Load Buildings Energy Input Form as part of a complete application.

Contact the Office of Sustainability and Environment at 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.

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 Article 11.4 of the SZO.

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 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 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.

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.somervillezoning.com/developmentreview.

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.

	March 21 (Vernal Equinox)	June 21 (Summer Solstice)	September 21 (Autumnal Equinox)	December 21 (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	9:00 AM	9:00 AM	9:00 AM
	10:00 AM	10:00 AM	10:00 AM	10:00 AM
	11:00 AM	11:00 AM	11:00 AM	11:00 AM
	12:00 PM	12:00 PM	12:00 PM	12:00 PM
	1:00 PM	1:00 PM	1:00 PM	1:00 PM
	2:00 PM	2:00 PM	2:00 PM	2:00 PM
	3:00 PM	3:00 PM	3:00 PM	3:00 PM
		4:00 PM	4:00 PM	
		5:00 PM	5:00 PM	
		6:00 PM	6:00 PM	

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			

Sign Plan(s)

A Sign Plan includes detailed drawings of every proposed sign in plan and in elevation and must identify all regulated dimensions. If any portion of a proposed sign projects over a property line, that must be clearly indicated. When viewed in conjunction with the associated Zoning Dimensional Standards Table for the proposed sign, the Sign Plan(s) must include sufficient information to confirm compliance with Article 10.9.10 of the SZO.

Note: A Sign Plan is distinct from a Signage Plan as the former shows detailed information about specific signs while the latter shows the general approach to signage for a building.

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.

Must include the following information in a 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 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 Article 13.2.6 of the SZO.

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 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 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 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 (Article 10.8.11 of the SZO) is below:

Commercial Signs: Wall Sign				
Project Address				Case #
Sign Type	Wall Sign			
	Min Required	Max Required	Existing	Proposed
Size				
Area		40 sf	sf	sf
Width (% of façade width)		90 %	%	%
Height	1 ft	4 ft	ft	ft
Lettering				
Width (of sign width)		75 %	%	%
Height (of sign width)		75 %	%	%
Projection from Façade		6 in	in	in
Raceway Height (of letter height)		50 %	%	%
Location				
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.

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 should be named as "Street Name Street Number - Description - YYYY MM DD.pdf". For example, "Highland Ave 93 - Narrative - 2021 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
- Digital Massing Model (.skp)
- 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
 - Low Load Building Energy Input Form
 - 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 through the PTS. 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.

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 Article 15.1.2 of the SZO.

Scheduling the Meeting

Applicants with projects which require Site Plan Approval, Special Permit(s), Hardship Variance(s), or Plan Revisions must begin by submitting the relevant PTS form found at www.somervillezoning.com/developmentreview. Links to specific PTS forms can also be found here:

- Site Plan Approval & Special Permits – <https://tinyurl.com/ApplySomSPA>
- Hardship Variances – <https://tinyurl.com/ApplySomHV>
- Land Platting – <https://tinyurl.com/ApplySomLand>
- Plan Revision – <https://tinyurl.com/ApplySomRevise>

Once you have submitted the relevant PTS form your project will be assigned to a Case Planner who will complete an initial review of the submitted information. 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 through the PTS. 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-Submission 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.
- 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 Article 15.1.3 of the SZO. 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 Section 15.1 of the SZO. 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-Submission 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).

- 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 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.

Preparing for the Meeting

- Submit a request to AskAPlanner (<https://tinyurl.com/AskAPlanner>) 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 Article 15.1.4 of the SZO. 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 2nd and 4th Tuesday of every month.

All required plans and illustrations must be submitted by 4:30 pm seven (7) calendar days prior to the meeting date by uploading a PDF of all required materials to the PTS. The PTS will automatically email Applicants an update request once the project is eligible for a design review meeting. This update request can be used to upload the required materials. If additional update requests are needed, please reach out to planning@somervillema.gov and include the case tracking number in your request.

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, 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-Submission 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 unnecessarily 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 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.

Chapter 6.A: Guidance for Submitting a Complete Application

After completing all required pre-submittal steps, an application must be submitted as required by Article 15.1.5 of the SZO. An application will be deemed complete by Staff only once all the following statements are true:

- All pre-submission 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 to a PTS update request unless directed otherwise by Staff or required by this manual.

In addition to submitting all required documents digitally to the PTS, 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 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. If submitting checks is not feasible, Applicants may submit cash, although this is not recommended. Cards cannot be accepted at this time.

The required fees must be put in an envelope which may either be dropped off 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

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 by no later than 4:30 pm a week prior to the meeting.
 - If a continuance request is not received by 4:30pm a 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

- Staff Memos are posted online at <https://tinyurl.com/SomervilleRandD>. 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 GoToWebinar works on their computer prior to the meeting. GoToWebinar provides directions for doing this [here](#).
- 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.
 - 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 physical copies of all submittal materials "as permitted" by the Review Boards for the public record once the Review Board has issued a decision.

Written materials must be 8.5"x11" portrait-oriented pages. Plans and illustrations must be 11"x17" or 12"x18" landscape-oriented pages.

- Ten (10) or less total pages may be bound by a single staple.
- More than ten (10) total pages must be submitted as a booklet with a plastic comb, plastic coil, or wire lay flat binding. Booklets over two hundred (200) pages must have a plastic comb binding. Multiple booklets are permitted.
- Physical copies of any landscape-oriented pages must be tri folded into 8.5"x11" or 8.5"x12" size.

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 LEED, Net Zero, or Passive House certifiability or certification is required, continued coordination with the Office of Sustainability & Environment is needed.

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 Article 15.2.3 of the SZO.

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.

If any information remains unclear after reviewing this document, please visit Plan11 for assistance at <https://tinyurl.com/Plan11>; Staff is happy to assist.

Pre-Submission 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 submit the form found at <https://tinyurl.com/ApplySomHV>. This will create a new entry in the Project Tracking System (PTS) that PPZ uses to manage development review proposals. You will need to upload the [Property Owner Authorization](#) when you submit this form.

Once you have submitted the form to create a new entry in the PTS, you will automatically receive an email with the case number for your project. This case number should be used in all future communications. PPZ Staff will review the information you submitted to the PTS and may reach out for clarification prior to scheduling the Pre-submittal Meeting.

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 to the PTS 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
Abutters List	If within 300' of another municipality. PPZ Staff will generate the list of abutters within Somerville.
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>
Campaign Contribution Ordinance Mandatory Disclosure and Certification Form	If proposing the construction or renovation of more than 15,000 square feet (See Sec. 15-72 of the Somerville Code of Ordinances).
Deed	<i>Always required.</i>
Hardship Variance Narrative	<i>Always required.</i>
Land Title Survey	<i>Always required.</i>
Property Owner Authorization	<i>Always required.</i>
Required fees (see Chapter 6.B)	<i>Always required. Will be calculated by the Case Planner once sufficient information has been submitted. Not required to be submitted through the PTS.</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 Article 15.2.4 of the SZO. 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 through the PTS, 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.

If any information remains unclear after reviewing this document, please visit Plan11 for assistance at <https://tinyurl.com/Plan11>; Staff is happy to assist.

Pre-Submission Procedural Requirements

There are no pre-submission procedural requirements. Once you have gathered all documents required by the next section (*Application Submission Requirements*), you should submit the form found at <https://tinyurl.com/ApplySomRevise> and include all relevant documents as attachments. Submitting this form will create a new entry in the Project Tracking System (PTS) that PPZ uses to manage development review proposals. 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.

PPZ Staff will review the information you submitted to the PTS 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.

Application Submission Requirements

The following documents are required and must be uploaded to the PTS 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
All necessary documents to clearly indicate proposed changes to original approval.	<i>Always required.</i>
Deed	<i>Always required.</i>
Land Title Survey	<i>Always required.</i>
Plan Revision Narrative	<i>Always required.</i>
Property Owner Authorization	<i>Always required.</i>
Required fees (see Chapter 6.B)	<i>Always required. Will be calculated by the Case Planner once sufficient information has been submitted. Not required to be submitted through the PTS.</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 form found here:
<https://tinyurl.com/ApplySomSPA>

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 Article 15.5.2 of the SZO.

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 for clarification.

Pre-Submission Procedural Requirements

There are no pre-submission procedural requirements.

Application Submission Requirements

The following documents are required and must be submitted 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.

Document	Trigger for requirement
Abutters List	If within 300' of another municipality. PPZ Staff will generate the list of abutters within Somerville.
Administrative Appeal Narrative	<i>Always required.</i>
Property Owner Authorization	<i>Always required.</i>
Required fees (see Chapter 6.B)	<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 Article 15.5.2 of the SZO. 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.