

Community Preservation Program

Our Mission

To preserve and renew Newton's cultural, economic and environmental diversity with our Community Preservation Act funds.

In 2001, Newton voters adopted the Massachusetts Community Preservation Act (CPA) by accepting a 1% surcharge on City real estate taxes. This local funding qualifies Newton for state matching funds from fees collected by the Registry of Deeds.

The CPA state statute limits the use of these special funds to:

- affordable housing (including for families, residents with disabilities or special needs, seniors, ...)
- historic resources (including archives, art, buildings, landscapes, ...)
- open space (including land for trails, wildlife habitat, watershed protection, ...) or
- recreation (including land for parks, playgrounds, playing fields, ...)

CPA funds also have other special requirements. For example, real estate acquired with CPA funds must be restricted to its CPA-eligible use in perpetuity. In addition, CPA funds may be used only for capital improvements, not for maintenance or operations; must augment regular public funds, not replace them; and may be saved and combined over multiple years for major projects.

Only the City Council may appropriate CPA funds, but those appropriations must be based on recommendations made by the all-volunteer Community Preservation Committee (CPC). In Newton, the nine member Committee includes five members appointed from other City boards and the maximum four non-statutory members appointed by the Mayor. Newton's CPA ordinance aims to ensure that the CPC represents all neighborhoods and all CPA-eligible resources, and Newton's CPC strives to make its recommendations to the Council unanimous whenever possible.

These requirements and practices allow Newton's CPA program to take a collaborative approach to community needs that in other settings are often seen as competing.

As of late February 2020, the Community Preservation Committee (CPC) and the City Council had approved the following new CPA project funding in Fiscal 2020:

- \$15,940,000 to the City of Newton for the acquisition of 300 Hammond Pond Parkway (“Webster Woods”) which will preserve 17.4 acres of wooded open space and vernal pools situated between two existing conservation areas.
- \$15,000 to the Newton Conservators for the costs of holding the conservation restrictions required by the Community Preservation Act for the purchase of Kessler Woods.
- \$50,000 to the Riverside Greenway Working Group to complete the 100% design of the Pigeon Hill Trail in Auburndale along the Charles River.

The CPC has also recommended funding in FY20 for the following project which has yet to be reviewed by the City Council:

- \$1,105,000 to the Newton Housing Authority for their acquisition of CAN-

DO’s 33- unit permanently affordable rental housing portfolio

Unless additional new projects are funded in Fiscal 2020, Newton’s Community Preservation Fund will have over \$13.6 million in forwarded fund balances and new local and state funds available for future project funding at the start of Fiscal 2021. Some of these funds are restricted to a specific resource as required by the state CPA statute, but over \$12.6 million is available for any CPA-eligible use.

After twelve years working with the CPC, Community Preservation Program Manager Alice Ingerson retired from the City in January 2020. Lara Kritzer succeeded Alice as the new Community Preservation Program Manager in February and looks forward to her new role in Newton.

Barney S. Heath

Director, Newton Department of Planning & Development

Community Preservation Program

Fiscal Year 2021 Outcomes and Strategies

Outcome 1

Promote the CPA Program and its Benefits

core functions, with approximately two-thirds of its funding equally divided between community housing and open space projects, and the remaining third nearly equally divided between historic resource and recreation programs.

In recent years, the CPC has noticed that fewer and fewer new organizations are applying for CPA funding, and that the core functions and accomplishments of the program are not always well known. This has suggested that despite its successes in the community, more efforts are needed to increase both the visibility of the program and how it impacts neighborhoods across the City. The Committee and its staff will work over the next year to promote and publicize the CPA program and its successes, as well as its possibilities for future use. These efforts may take several forms, including mailings to residents and local organizations, meeting with neighborhood groups and City departments to discuss the program, new signage and informational materials, and taking advantage of future opportunities for social media promotions and other public awareness opportunities.

Newton was an early adopter of the Community Preservation Program and over the last nineteen years, the program has provided approximately \$74 million in CPA funding to over 80 projects. CPA funding has been used to accomplish the program's

Outcome 2

Design and purchase new CPA project site signs and implement outreach initiatives to improve the program's recognition and visibility

The CPC proposes to work in Fiscal 2021 to improve the community's understanding of the program and its possibilities by improving its visibility in the community. The Committee plans to design and purchase new signs to be installed at CPA funded projects throughout Newton. The CPC will also work on additional outreach efforts to increase awareness of the program and encourage potential new project applications.

Since its adoption in 2001, Newton's CPA program has provided funding which might otherwise not be available for projects involving community housing, historic resources, open space, or recreation. The recent acquisition of the Webster Woods parcel has brought the CPA back into the news, and many residents are curious to know more about the program and what it can achieve.

Community Preservation Program

Fiscal Year 2021 Outcomes and Strategies

Outcome 3

Analyze community feedback on CPA funding priorities and develop/implement Program Recommendations

The Community Preservation Act requires that the CPC “study the needs, possibilities and resources of the city or town regarding community preservation.” These studies provide the CPC with direction on the goals of the community and how residents would like to see the City’s CPA funds spent. As a result of this work, the Committee has established the following guidelines for funding targets:

Newton CPA Allocation Targets: Balancing Funds Across Resources			± 5%
affordable housing (statutory minimum 10%)			35 ±5%
historic resources (statutory minimum 10%)			20 ±5%
open space & recreation land	acquisition	(combined statutory minimum 10%)	20 ±5%
	rehabilitation / capital improvements		20 ±5%
total, min. (-5%) – max. (+5%)			75-115%

The need for clear funding guidelines which reflected the goals of the community became particularly important in 2019 when the Committee eliminated its annual funding round and agreed to consider all pre and full proposals on a rolling basis. As part of these changes, the Committee developed an online survey and met with local boards, commissions and nonprofits to update its guidelines and develop a better understanding of what Newton as a community wants and expects from its CPA program. In FY21, the CPC and its staff will analyze these survey results to determine whether the funding targets and program goals still represent the needs and goals of the City. Based on the results of this survey analysis and responses to additional public outreach, the CPC anticipates that changes may be recommended, including to the funding targets noted above and “appropriateness” standards as stated below. While the eligibility of a CPA project is determined by the state CPA statute, Newton’s CPC has also adopted the following criteria for determining whether eligible projects are also CPA-appropriate. It is possible that this could also be amended based on the results of the community outreach survey:

Newton CPA project categories	CPA appropriateness & leverage
special public resources and public-private partnerships: publicly or privately-owned assets that benefit all Newton residents & neighborhoods, including permanently affordable housing	highest priority for CPA funding , with at least 30% non-CPA funding for public projects, 50% for private projects
limited-benefit special public resources: publicly owned assets that benefit only some residents or neighborhoods	lower priority for CPA funding , with at least 60% non-CPA funding
core public resources: assets already in public ownership and that the City of Newton would be obligated to rehabilitate even if Newton had not adopted the CPA	usually not appropriate for CPA funding except for the incremental additional cost of using historically appropriate materials and methods
limited-benefit private resources: privately owned assets that benefit only some residents or neighborhoods	not appropriate for CPA funding

This budget was adopted by the Newton Community Preservation Committee on March 10, 2020 by a vote of 6-0 with 3 members absent.

City of Newton, Massachusetts COMMUNITY PRESERVATION FUND	Fiscal 2020 FINAL	Fiscal 2021 PROVISIONAL
Program Budget	approved by CPC 10 Sept 2019, by City Council 22 Oct 2019	Draft updated Feb 20, 2020
REVENUE		
local CPA surcharge	\$3,568,921	\$3,658,144
state matching funds (<i>in Fy20, DoR allowed budgeting up to 11.75% of Fy19 surcharge revenue; for Fy21, this sample estimates DoR allowance as 20% of Fy20 surcharge revenue</i>)	\$383,309	\$713,784
unrestricted fund balance (previously called "undesignated fund balance")	\$360,816	\$425,445
additional local revenue: (assume \$0 in budget)		
TOTAL REVENUE	\$4,313,046	\$4,797,373
EXPENDITURES		
Program Administration (<i>max. 5% of annual new funds</i>)	(\$215,456)	(\$200,044)
Debt Service: Webster Woods (in addition to Open Space Budget Reserve) <i>Estimated amount of principal and interest minus funding taken from Open Space Reserve</i>		(\$425,263)
BUDGETED RESERVES		
Community Housing Reserve (<i>min. 10% of annual new funds</i>)	(\$431,305)	(\$479,737)
Historic Resources Reserve (<i>min. 10% of annual new funds</i>)	(\$431,305)	(\$479,737)
Open Space Reserve (<i>min. 10% of annual new funds</i>)	(\$431,305)	(\$479,737)
General Reserve (unrestricted, any CPA purpose) (<i>all annual new funds not budgeted for debt service, program administration or restricted reserves</i>)	(\$2,803,676)	(\$2,732,855)
TOTAL EXPENDITURES	(\$4,313,046)	(\$4,797,373)

Budget Detail for Program Administration	Fiscal 2020 FINAL	Fiscal 2021 PROVISIONAL
	approved by CPC 10 Sept 2019, by City Council 22 Oct 2019	Draft Updated Feb 20, 2020
PERSONNEL		
Program Manager (salary plus benefits)	\$136,805.97	\$118,544.00
Work by Other Depts.	\$7,000.00	\$7,500.00
SUBTOTAL Personnel	\$143,805.97	\$126,044.00
OTHER		
Consultants	\$52,500.00	\$50,000.00
Advertising/ Publications	\$2,500.00	\$3,000.00
Audiovisual Equipment	\$500.00	\$1,000.00
Computer Software	\$500.00	\$1,000.00
Computer Supplies	\$1,000.00	\$1,000.00
Dues & Subscriptions	\$7,900.00	\$7,900.00
In-State Conferences	\$1,000.00	\$2,100.00
Office Supplies & Equipment	\$1,000.00	\$1,000.00
Postage	\$1,000.00	\$1,000.00
Printing	\$3,000.00	\$3,000.00
Signs	\$750.00	\$2,500.00
SUBTOTAL Other Expenses	\$71,650.00	\$74,000.00
TOTAL All Expenses	\$215,455.97	\$200,044.00

This budget was adopted by the Newton Community Preservation Committee
on March 10, 2020 by a vote of 6-0 with 3 members absent.

City of Newton, Massachusetts Community Preservation Program Budget	Fiscal 2020 Budgeted	Fiscal 2021 Approved by CPC March 10, 2020
REVENUE		
Local CPA surcharge	\$3,568,921	3,658,143.69
State Matching Funds (this estimates DoR allowance is 20% of Fy20 surcharge revenue)	\$383,309	713,784.13
Undesignated Fund Balance ("lagged" state funds - amount of state funding match confirmed after FY20 budget was approved)	\$360,816	425,445.33
TOTAL REVENUE	\$4,313,046	4,797,373.15
EXPENDITURES		
PROGRAM ADMINISTRATION & DEBT SERVICE		
Program Administration <i>(max. 5% of annual new funds)</i>	-215,455.97	-200,044.00
Debt Service: Webster Woods (in addition to Open Space Budget Reserve)		-217,961.77
BUDGETED RESERVES		
Community Housing Reserve <i>(min. 10% of annual new funds)</i>	-431,304.58	-479,737.31
Historic Resources Reserve <i>(min. 10% of annual new funds)</i>	-431,304.58	-479,737.31
Open Space Reserve <i>(min. 10% of annual new funds)</i>	-431,304.58	-479,737.31
General Reserve <i>(all annual new funds not budgeted for debt service, program administration or restricted reserves)</i>	-2,803,676.10	-2,940,155.45
TOTAL EXPENDITURES	-4,313,045.81	-4,797,373.15
COMMUNITY PRESERVATION PROGRAM		
Program Administration Details	Fiscal 2020 Budgeted	Fiscal 2021 Approved by CPC March 10, 2020
PERSONNEL		
Program Manager total (salary plus benefits)	\$136,805.97	\$118,544.00
Work by Other Depts.	\$7,000.00	\$7,500.00
SUBTOTAL Personnel	\$143,805.97	\$126,044.00
OTHER		
Consultants	\$52,500.00	\$50,000.00
Advertising/ Publications	\$2,500.00	\$3,000.00
Audiovisual Equipment	\$500.00	\$1,000.00
Computer Software	\$500.00	\$1,000.00
Computer Supplies	\$1,000.00	\$1,000.00
Dues & Subscriptions	\$7,900.00	\$7,900.00
In-State Conferences	\$1,000.00	\$2,100.00
Office Supplies & Equipment	\$1,000.00	\$1,000.00
Postage	\$1,000.00	\$1,500.00
Printing	\$3,000.00	\$3,000.00
Signs	\$750.00	\$2,500.00
SUBTOTAL Other Expenses	\$71,650.00	\$74,000.00
TOTAL ALL EXPENSES	\$215,455.97	\$200,044.00

FUND: 5800 - CPA FUND RESERVE AND ADMIN
 DEPARTMENT: ALL DEPARTMENTS

CITY OF NEWTON BUDGET
 PERSONNEL DETAIL

Account	Position Title Employee Name	Benefits Date			Holiday		Grade	F.Y.	FTE	GROSS
		Hire Date	Yrs. Service	Longevity	OPEB	Add Comp				
114 - PLANNING										
58Z11400 - CPA ADMINISTRATION										
511001	CPA PROGRAM MANAGER	2/11/2020				0		FY 2020	1.00	103,586
	KRITZER, LARA	2/11/2020	0.39	0	0	0	H9-27	FY 2021	1.00	74,505
Account Totals:										
					0	0	0	FY 2020	1.00	103,586
								FY 2021	1.00	74,505
TOTAL CPA ADMINISTRATION										
					0	0	0	FY 2020	1.00	103,586
								FY 2021	1.00	74,505
TOTAL PLANNING										
					0	0	0	FY 2020	1.00	103,586
								FY 2021	1.00	74,505