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Community Preservation Committee

MINUTES

5 November 2015

James Freas
Acting Director

The meeting was held on Thursday, 5 November 2015 at 7:00 pm in City Hall Room 204.

Community Preservation Committee (CPC below) members present: chair Jim Robertson, vice chair Jane Sender, Laura Fitzmaurice, Beryl Gilfix, Don Fishman, and Jonathan Yeo. CPC members Rick Kronish, Joel Feinberg and Mike Clarke were absent.

Community Preservation Program Manager Alice Ingerson served as recorder.

PROGRAM FINANCES OVERVIEW

Alice Ingerson gave a slide presentation summarizing requirements in the Community Preservation Act (CPA) and in state Dept. of Revenue guidelines for financial planning by each community's CPC, Newton's *Community Preservation Plan*, the program's 5-year funding forecast, and known possible future proposals. The list of future proposals allocates far less to both affordable housing and land acquisition, and far more to historic resources (for existing City buildings) and land rehabilitation (for existing City parks), than the targets in the *Community Preservation Plan*. The total cost of future proposals significantly exceeds the funds forecast for the next 5 years. Ingerson asked the Committee to consider more specific funding guidelines to help project sponsors judge which proposals were worth submitting in the next 5 years, vs. farther in the future.

A copy of this presentation is attached to these minutes.

NEWTON HIGHLANDS PLAYGROUND (Parks & Recreation Dept.) –advisory discussion of expected construction request (originally anticipated at \$1.9 million, later revised to \$2.15 million, currently listed in the *Capital Improvement Plan* at \$4.7 million or more)

Parks & Recreation Commissioner Bob DeRubeis explained that the cost estimates for this project in the current *Capital Improvement Plan (CIP)* were incorrect. He now anticipates construction costs of \$3.3 million, which he would like to be 100% CPA funded. The estimated \$1.3 million in donations from private sports leagues anticipated in previous discussions with the CPC were partly for an artificial turf field, which could not be CPA-funded. However, the leagues also wanted access to the park in proportion to their donations. Rather than accept private constraints on access to this public resource, the City opted out of those donations. The field has been designed as natural turf. Solutions required for the site's difficult drainage increased project costs, as did play equipment. Brandon Riley of Weston & Sampson distributed and walked the CPC through a large-scale color design drawing. Design is 100% complete and has been reviewed by all required City bodies.

In response to Laura Fitzmaurice, DeRubeis said that the woodland trails had been limited to address neighbors' concerns about attracting undesirable users or levels of use. Jane Sender supported reserving much of the woods for use by species other than humans and dogs. Fitzmaurice thought there was an opportunity here to replicate the cross-country running and exercise trail at Coldspring Park.

In response to Don Fishman, DeRubeis said neighbors had not objected to installing lights for night games. Fishman felt this was a rare opportunity, which in itself made the project worth funding.

(continued on next page)

website www.newtonma.gov/cpa

contact Alice E. Ingerson, Community Preservation Program Manager

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In response to Jim Robertson, DeRubeis said the private leagues would still contribute toward the maintenance of the field, but maintenance would primarily be funded through the Parks & Recreation operating budget. Robertson was concerned that natural turf could not tolerate the level of use this field was likely to get. DeRubeis felt the Dept. could sustain natural turf at the site. Fitzmaurice said the heavily used natural field at Cold Spring Park was holding up well.

Beryl Gilfix saw this facility as a core City asset. Since the CPC's current guidelines identify such assets as appropriate for non-CPA funding, she felt the CPC should at least press for greater leverage on this project. Robertson noted that the CPC had seen the project as CPA-appropriate when it recommended design funding for the project, but he also felt the City could support playing fields by raising the fees charged to the private leagues to cover the true costs of the wear-and-tear they impose on public fields, since the leagues raise significant private revenue from their own participants.

DeRubeis said the project would seek some non-CPA funding. Regular City funds would be used to improve Upland Road and parking along one side of the park, and up to \$50,000-\$70,000 of CDBG funds would be sought for accessibility features. In response to Robertson, DeRubeis committed to seeking private donations for fixtures or equipment, such as a scoreboard, with a target total of \$25,000-\$40,000. Robertson asked DeRubeis to itemize these additional non-CPA funds in the proposal and presentation.

In response to Robertson, Ingerson noted that this project could be debt-financed, with either CPA or other funds used for debt service. Robertson and Ingerson asked DeRubeis to include information about the schedule of upcoming City bond sales when presenting the proposal.

Ingerson believed it would be unfair to ask the Commissioner whether the City would find another way to fund the project if CPA funds were not made available, but she hoped the CPC would ask itself this question. She pointed out that after originally requesting 100% CPA funding for the second City Hall elevator, the Public Buildings Dept. was now completing that project without any CPA funding.

DeRubeis acknowledged that some other Parks & Recreation projects in the *CIP* were relying on non-CPA City funds. As context for the CPC's consideration of the Newton Highlands Playground construction request, Robertson and Jonathan Yeo asked DeRubeis to provide the CPC with a list of other projects for which Parks & Recreation was planning to request CPA funds over the next few years, and a list of other Parks & Recreation capital projects that the City was undertaking without CPA funds.

VOTE: Sender moved and Fishman seconded agreement to consider a construction funding proposal for Newton Highlands Playground at a public hearing on 10 December 2015, provided that the proposal and presentation together addressed the CPC's concerns about leveraging CPA funds and alternatives to CPA funding. The motion was approved unanimously, 6-0.

MUSEUM ARCHIVES (Public Buildings Dept.), historic resources –request to recommend appropriation of remaining unappropriated funds from prior CPC recommendation

As a member of Historic Newton's Board of Directors, Fitzmaurice recused herself from this discussion.

Public Buildings project manager Rafik Ayoub explained that when the 18th-century ell was opened up for construction, the contractor found significant structural deterioration, including rotted or missing beams. In addition, the Fire Dept. asked that electrically powered heat traces on portions of the wet fire suppression system running through unheated spaces be replaced by a dry system. The total cost of these change orders was about \$99,000. Public Buildings was therefore requesting the remaining funds covered by the CPC's May 2015 \$400,000 recommendation, of which the Board of Aldermen had appropriated \$306,509 in June.

Ingerson noted that the Aldermanic Public Facilities Committee had unanimously supported this request the previous evening, including release of the \$39,452 Board of Aldermen contingency.

VOTE Robertson moved, and Sender seconded, re-recommending the remaining unappropriated \$93,491 that the CPC first recommended for this project in May 2015. The motion was approved, 5-0.

PUBLIC HEARING

1930s Mural (School Dept./Newton North High School), \$114,900 request for restoration/rehabilitation

Former Newton North Principal Jennifer Huntington and current Newton North History and Social Sciences Chair Jon Bassett presented the proposal. The mural was painted by Maurice Compris, who was born in the Netherlands but by the 1930s was living and painting on Boston's North Shore. Compris created other murals for the New Deal's Works Progress Administration (WPA). The Newton mural is in the style of these works, though its connection with the WPA, if any, has not yet been documented.

The painting was entitled "Citizenship," with a central panel for "Education" and two side panels: one for "Industry," showing steel and metal workers, and "Commerce," with longshoremen loading or unloading an oceangoing vessel. The central panel includes the City of Newton seal and multiple figures, some of whom are wearing the school letter or colors of Newton High School. Huntington and Bassett believe all 3 panels depict Newton's self-perceptions as a community in the 1930s. They may also look into having students do additional research to hone their interpretive skills on these historic images.

The mural was installed in the Newton High School library in 1936 and dedicated to Newton graduate Stafford Leighton Brown, who volunteered for the American Ambulance Field Service and the Lafayette Flying Corps in France during World War I. He was commissioned as a lieutenant in 1918, as a pilot taking reconnaissance photographs and testing experimental planes. He died in a test flight crash in 1918, 6 weeks before the war ended. We know about his experiences from letters saved by his mother, Eugenie Brown, and are now archived online. She paid for the materials used in the mural and also established an annual scholarship in her name, which is still awarded.

The three panels together are over 40 feet long about 15 feet high. When a new high school opened on the same site in the early 1970s, the side panels were stored and the central panel was installed in the cafeteria, where it was protected from flying food by a plastic cover bolted through the canvas. By the time an even newer school was being designed for the same site starting in 2005, Schools staff no longer remembered the two side panels, which were rediscovered just before the 1970s high school was demolished. At this point it was too late to modify the new space already designed to display the central panel alone, so the School Dept. now plans to display the side panels on the opposite side of "Main Street" from the central panel.

The funding request is based on quotes from three qualified restoration conservators, all of whom agreed that the three panels could be restored despite their current badly damaged condition. All requested CPA funds would be used to pay the conservator. The School Dept. will cover the time of procurement manager Cindy Brown to manage bidding and supervise the project.

On behalf of the League of Women Voters, Pia Bertelli considered the project CPA-appropriate and supported it enthusiastically. However, the League wondered how the restored panels would be protected once they were reinstalled, particularly from light damage. In addition, the League would like to see a larger proportion of funding from non-CPA sources, such as the PTOs and alumni, or from the School Dept. itself.

Sender asked for details about how the restored paintings would be installed and protected, given their history of neglect and near-loss. Bassett and Huntington said the paintings would be protected primarily by being installed very high on the walls, in a very public location with significant adult supervision. Light exposure still had to be evaluated for the planned location of the side panels. New Art Center director Dan Elias advised using UV film or other options on nearby windows, to protect the mural from light damage.

Ingerson felt that the School Dept. needed specialized technical assistance to evaluate display options and plan for the mural's future preservation. She recommended including these tasks in the contract with the restoration conservator and asking that conservator to produce a brief "preservation maintenance plan" with cost estimates, as an attachment for the School Dept.'s final project report to the CPC.

Robertson and Gilfix were both glad to see this project going forward. Robertson noted that the CPC would typically look for some non-CPA funding. Gilfix wondered whether some funds might be raised through

Newton's community of currently active artists. Huntington said she was requesting \$2,000 from the Newton Cultural Council for interpretive materials. Yeo and Fitzmaurice both felt it would be hard to raise funds for this project from non-CPA sources. Yeo saw classroom education as a more appropriate focus for PTO and alumni contributions than this kind of extracurricular project.

Ingerson hoped the School Dept. would engage students in considering some of the questions that remain unanswered about the mural. For example, though the central panel was clearly customized for installation in Newton, and a 1936 student newspaper article states that "the materials were provided by Mrs. Eugenie Brown," no clear evidence has yet been found of when, how or why the mural was actually commissioned or funded. It would be surprising and significant if the central panel's high-rise, densely clustered towers, described in the 1936 student article as an "inspiring ... City of the Future," could be shown to represent Newton's own aspirations at that time. In addition, neither the 1936 dedication program nor the 1936 student article even mentions the mural's "Industry" and "Commerce" side panels. This raises questions about whether the early 1970s decision to stop displaying these panels represented a change in community attitudes toward the subject matter of those panels, or instead continued attitudes already present in 1936. Even if a student research project cannot find definitive answers to these questions, simply exploring them might help to inform current debates about community character and economic diversity in Newton. Yeo agreed that further research should be encouraged.

VOTE Gilfix moved and Sender seconded recommending the requested \$114,900, encouraging further research and requiring a professional preservation maintenance plan. The motion was approved 6-0.

PUBLIC HEARING

New Art Center (Washington Park, Newtonville), \$72,652 request for preservation planning

The New Art Center (NAC) building at 61 Washington Park was originally constructed as a church in 1872. It later became a women's club, and after acquisition by the City, was leased to Newton Junior College. It has been a community art center since 1976, with a right of reversion for the City if that use changes. The building is cherished by NAC's staff, faculty and program participants, but its multiple levels will require substantial remodeling to make spaces accessible. Its antiquated and inadequate systems have high operating costs. Finally, the current spaces hamper the Center's ability to serve its students and develop new programs.

The funding requested is to hire a historic preservation architect and cost estimator to determine how and at what cost this historic building can be rehabilitated to address the needs identified by a previously completed Systems Replacement Plan and envelope assessment report, and to satisfy the program aspirations identified in the Strategic Plan that the Center will complete in the winter of 2015-16.

For design and construction, the Center anticipates falling between the CPC's standards for "more" and "most" leverage of non-CPA funding. Non-CPA sources under consideration include historic tax credits, other grants, a capital campaign, and equity funding or mortgage debt, if the City's interest in the building can be converted from a right of reversion to a standard historic preservation restriction. The Center is confident it can maintain the building once it has been rehabilitated. It currently raises \$300,000-\$400,000 annually in operating funds, primarily but not solely from fees paid by program participants.

On behalf of the League of Women Voters, Pia Bertelli said the proposal was clear and convincing, and the requested modest amount of funding seemed worthwhile, based on the Center's value to the community as a whole. The League thought future design costs might be reduced by working with a pro bono architect. The League was also concerned about a future construction funding request to the CPC, which might be substantial. They suggested hiring a specialist in arts fundraising to begin a capital campaign as soon as possible, with the goal of completing building renovations without any CPA funds.

Gilfix applauded this project's promise to leverage significant non-CPA funding. She hoped that promise would be kept, in contrast to some other recent projects.

Sender asked whether the preservation plan should be deferred until the Strategic Plan was completed. Yeo thought some decisions in the Strategic Plan might depend on work proposed to be done with the requested CPA funds, such as the needs analysis and feasibility study. Ingerson said that the grant agreement that would govern the release of any CPA funds to the Center as a private group could make completion of the Strategic Plan a condition for the initial release of CPA funds. Elias said that would be acceptable to the Center.

Ingerson noted that the project would need to follow the more flexible federal standards for rehabilitation/adaptive re-use, rather than the stricter standards for restoration. She felt that the limited attention to historic preservation in the Center's planning process to date showed the importance of adding to their planning team an architect who is thoroughly familiar with both these federal standards and with related funding sources, such as historic tax credits. All CPC members agreed that it would not be wise to seek this professional assistance on a pro bono basis, however.

VOTE Gilfix moved, and Sender seconded, recommending the requested funding of \$72,652, with the grant agreement conditions discussed above to ensure that the resulting building plan would meet the federal standards for CPA eligibility and for historic tax credits. The motion was approved, 6-0.

NEWTON'S HOUSING STRATEGY

discussion with James Freas, Acting Director of Planning & Development

Ingerson also introduced Elizabeth Valenta, the City's Housing Programs Manager.

Freas explained that the Mayor's Office had initiated the Housing Strategy project early in 2015. The consultants hired, RKG and Sasaki, are both nationally and internationally recognized. The project will identify concrete ways to develop more affordable and diverse housing in Newton, through policy changes (such as zoning), financing recommendations, and identification of potential locations for affordable housing.

The project began with a needs assessment, including the analysis of housing market data in the CPC packet and also online from <http://www.newtonma.gov/gov/planning/housingstrategy.asp>. These data show dramatic demographic change in Newton: in recent years, 15% of the City's households with annual incomes of up to \$125,000 have been replaced by households with annual incomes of over \$200,000. Newton has a deficit of about 2,000 units for households that are "cost-burdened" by federal standards, meaning that they are paying over 30% of their income for their current housing in Newton. To stay economically competitive, the City also needs workforce housing for people taking the new jobs the region is creating. These trends are truly challenging Newton's sense of its own character as a diverse, welcoming, community of opportunity, where people can move in and move up by benefiting from the City's high-quality amenities and services.

The Housing Strategy is intended to determine how much of these gaps between the housing needed and the housing available can be closed, and how. The project is fostering public engagement through workshops to date and interviews with both relevant City committees and individual housing advocates. On Sunday, November 22 from 1-4 pm in the Newton North High School cafeteria, the consultants and staff will be asking the public to identify help identify potential locations and design considerations for affordable housing. Freas emphasized that this workshop would solicit appropriate locations for housing from residents themselves, rather than provide top-down recommendations. He hoped CPC members would participate in this event.

A workshop in December will then focus on recommended City policies to support a wider range of housing choices. A draft version of the strategy is due in early winter 2016, with a final report expected by February.

Freas explained that the Housing Strategy's financing recommendations, on which the consultants had not yet begun working, would include recommended uses for CPA as well as CDBG and HOME funds. The City is hoping that its planned housing project RFP will allow the City to move more quickly toward its housing goals, by identifying clearer criteria for projects to be funded and by reserving local funds for larger, more efficient projects that can leverage more non-local funding.

Robertson asked how the CPC could best participate in the Housing Strategy, since it does not make housing policy but only responds to proposals as submitted. He pointed out the examples in the CPC packet provided

by CPC member Rick Kronish (not present at this meeting), showing that other high land-cost communities are using local funds to leverage more state or federal funds than Newton typically does. Yeo agreed that many CPC members were interested in getting more leverage for Newton's CPA housing dollars. Robertson said the CPC recognized that the small-scale proposals it typically receives are not efficient and will contribute very slowly to the Mayor's goal of creating 800 new affordable units, but it is hard to turn down these proposals when no alternative housing proposals are being submitted.

Gilfix agreed that larger projects and more density, including apartment buildings, are critical for a more efficient approach to affordable housing. However, she thought the controversy about the Austin Street project suggested that finding locations for such projects in Newton would be difficult. In Brookline, such projects are being proposed for the apartment-heavy north side, rather than for the low-density south side. Yeo saw village centers as a logical location for higher-density housing in Newton, such as housing over stores along streets currently occupied by 1-story commercial buildings. Ingerson supported Yeo's point that these areas used to have taller buildings and more mixed uses than they have now.

Ingerson drew attention to the potential motion from Kronish, also in the CPC packet, for the CPC to hire a consultant to research the mix of funding sources used for affordable housing in other communities with high land costs. Freas expects the Housing Strategy consultants to provide these data, and particularly to identify funding sources that Newton has not been using. In response to Ingerson, he said the CPC would be welcome to submit specific questions they would like the consultants' report and recommendations to cover.

In response to questions from Sender and Yeo, Freas said that no new funding process for affordable housing had yet been designed to go with the planned RFP. Ingerson confirmed Freas's sense that the primary alternative to Newton's current CPA process for housing would be an affordable housing trust. Robertson summarized the CPC's past concerns that, rather than streamline Newton's funding process, a trust might only be a substitute for an existing City body, such as the CPC, or even add steps to the process.

Ingerson explained that under the CPA, the CPC could also commit more than the minimum required 10% each year to Newton's CPA "housing reserve." To date, however, Newton's CPC has always budgeted the required minimum in its restricted reserves (including 10% for historic resources and 10% for open space) and the maximum in the "general reserve," which can be used for any CPA-eligible resource.

COMMITTEE BUSINESS

Based on a motion by Sender, seconded by Gilfix, the minutes of the 9 September 2015 meeting were approved as submitted by a vote of 6-0.

After a motion by Yeo, seconded by Sender, the Committee adjourned by consensus at 9:45 pm.

Newton, Massachusetts
COMMUNITY PRESERVATION PROGRAM



**Program Finances Overview
for
Community Preservation Committee**
5 November 2015

Alice Ingerson, Community Preservation Program Manager,
617.796.1144, aingerson@newtonma.gov

State Requirements for Local Community Preservation Plans

Community Preservation Act (MGL 44B), Section 5

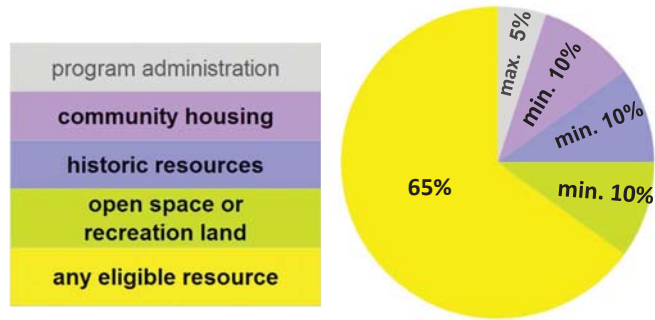
The community preservation committee shall

- ♦ **study the needs, possibilities and resources of the city regarding community preservation ...**
- ♦ [by] consulting with existing municipal boards ... and holding public informational hearings ...

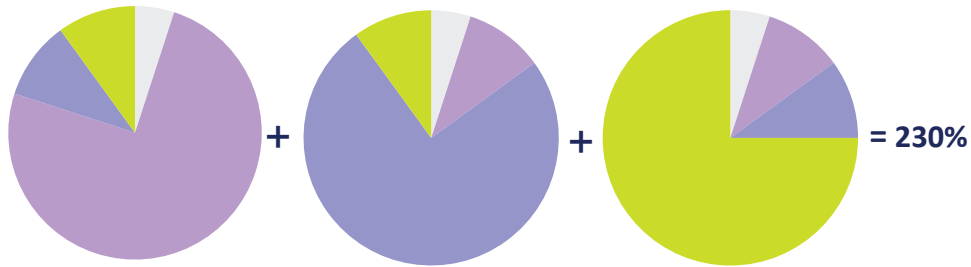
Dept. of Revenue Guidelines (IGR 00-209, IGR 01-207 and IGR 02-208)

- ♦ The community preservation committee ... should develop a ... program and financial plan ... [that] **identify long-term and short-term goals and needs, set criteria for evaluating [proposals], prioritize projects and estimate their costs.**
- ♦ The financial plan should include **a multi-year revenue and expenditure forecast and identify the financing source for each proposed project.**
- ♦ The program and financial plan should be reviewed and updated annually to reflect changes in the community's needs, priorities and resources.

Required Uses of CPA Funds



The "general" 65% can be spent on any resource ... but not on every resource!

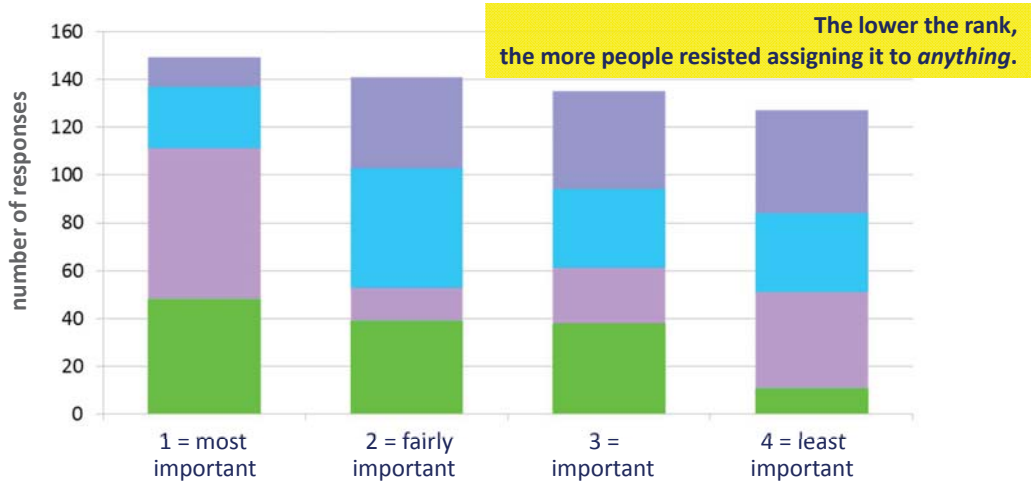


Newton's Community Preservation Priorities

2011-12 Community Survey Results

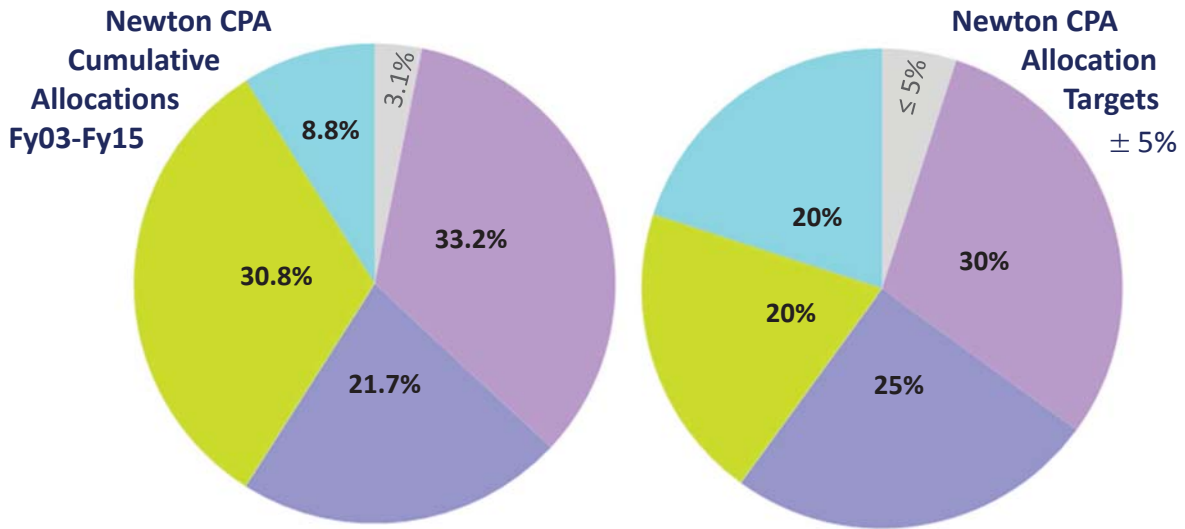
Forced Ranking
from 1 = most important to 4 = least important

	average rank (descending order)
open space	2.1
affordable housing	2.3
recreation land	2.5
historic resources	2.9



Newton's CPA Allocations

Past & Future



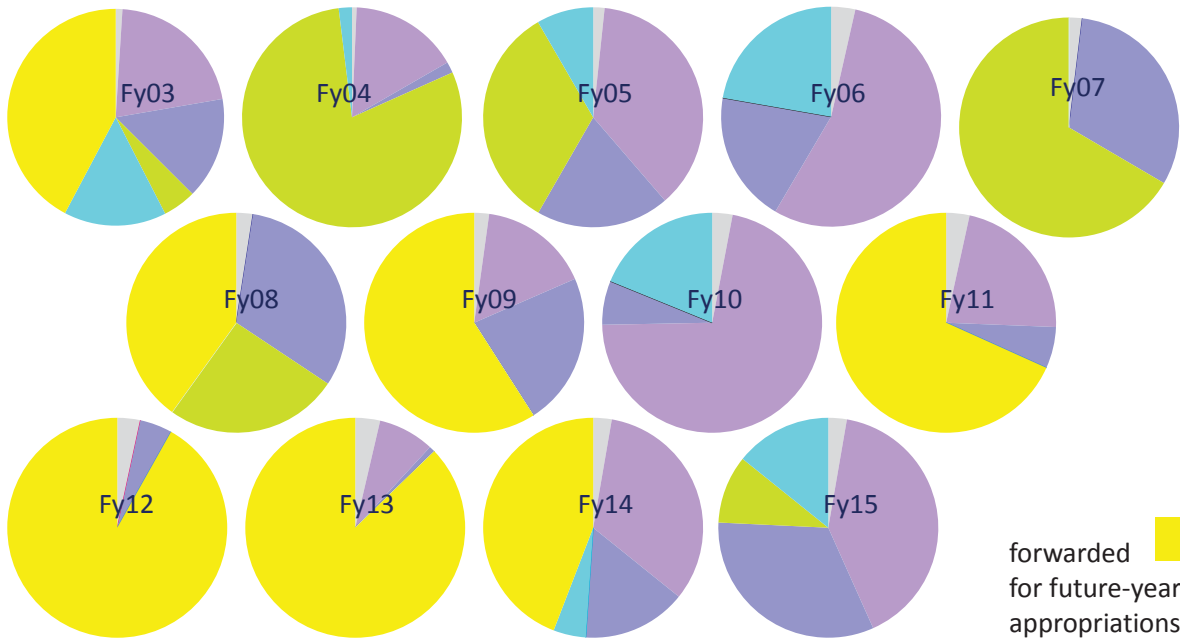
KEY

- program administration
 - affordable housing
 - historic resources
 - acquisition
 - rehabilitation
- either open space or recreation land

Newton's CPA Program

Past Allocations

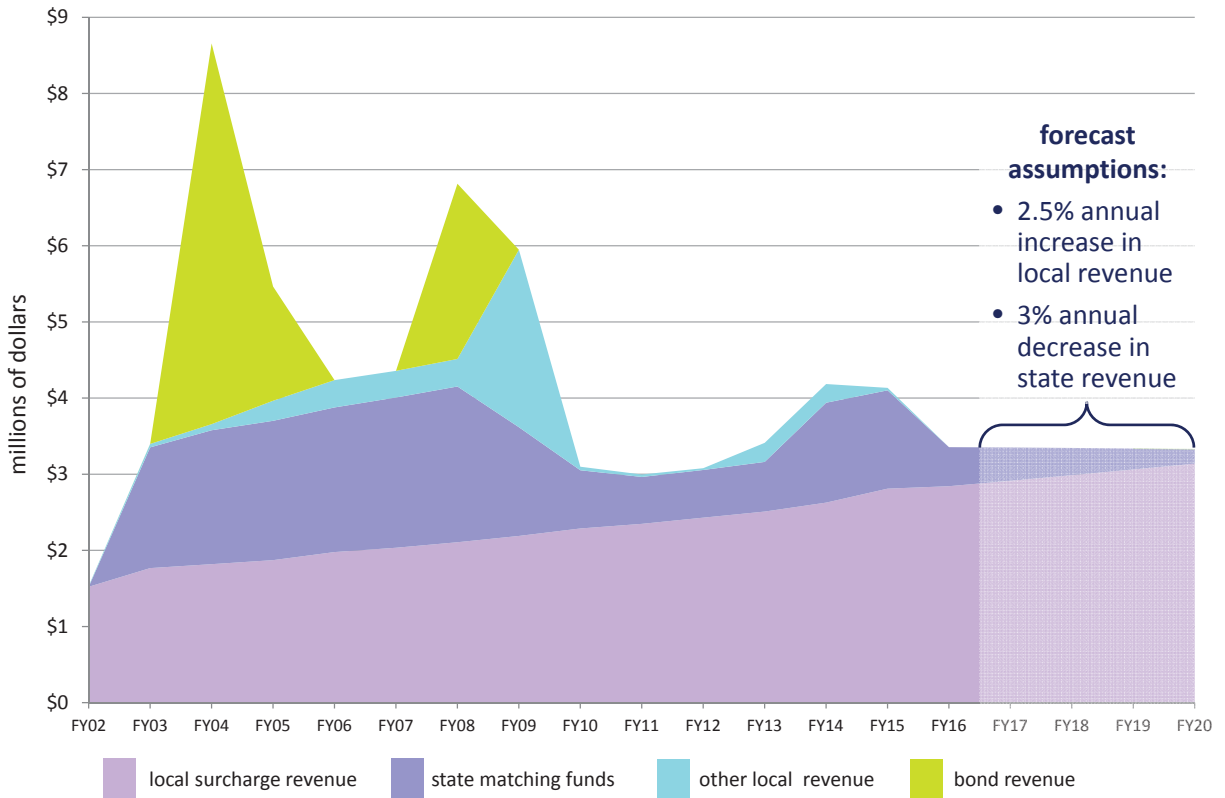
The CPC's allocation targets allow for as much year-to-year variation in the future as in the past.



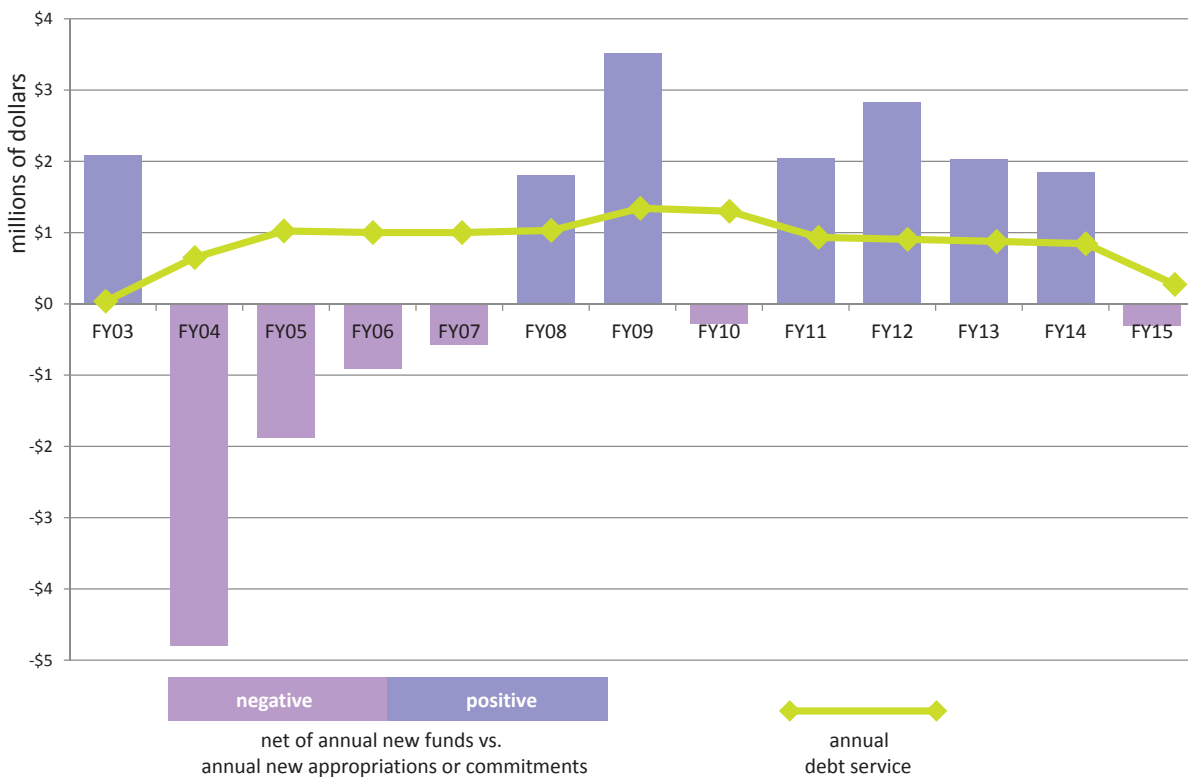
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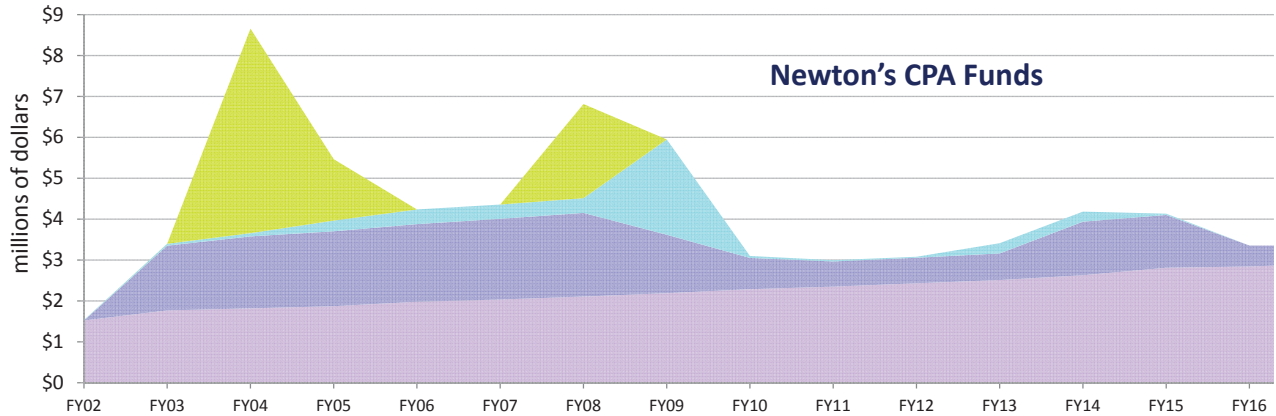
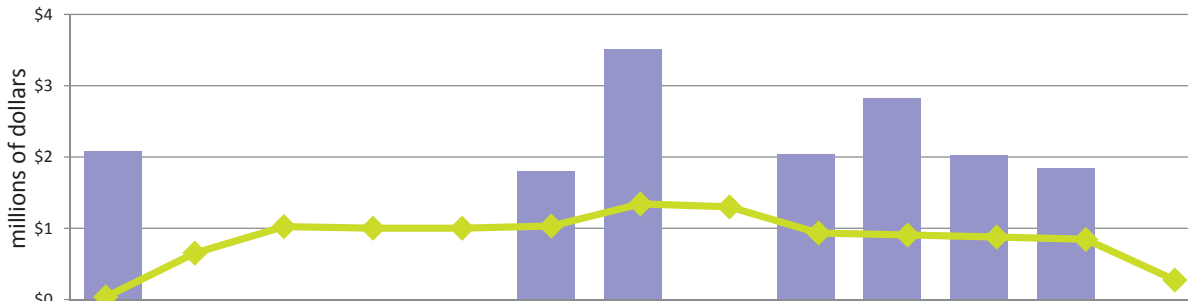
Newton's CPA Funds, by Source



Newton's Past Annual CPA Balance & Debt Service



Newton's Past Annual CPA Balance & Debt Service



Newton's Currently Available CPA Funds

	Fiscal 2015	Fiscal 2016
REVENUE		
local CPA surcharge (1% of Newton's total property tax levy)	\$2,811,676	\$2,843,904
state matching funds		
confirmed & budgeted in listed year	\$622,706	\$499,417
confirmed late in prior year, budgeted in listed year	\$668,257	\$229,184
additional sources:		
fund balance (unspent funds forwarded from prior year; should not be totaled across years)	\$8,214,318	\$8,223,464
TOTAL REVENUE	\$12,349,360	\$11,795,970
EXPENDITURES		
PROGRAM ADMINISTRATION & DEBT SERVICE		
program administration (max 5% of current-yr new funds)	-\$109,760	-\$150,505
debt service for 20 Rogers St. (final payment in fy17)	-\$280,500	-\$269,344
AVAILABLE FUNDS after program administration & debt service	\$11,959,100	\$11,376,121
PROJECT APPROPRIATIONS by Board of Aldermen (chronological order)		
in FISCAL 2015		
in FISCAL 2016		
TOTAL Appropriations (Current Year)	-\$3,932,325	\$0
AVAILABLE FUNDS after new appropriations	\$8,026,775	\$11,376,121
CPC RECOMMENDATIONS SUBMITTED to Board of Aldermen		
Museum Archives - recommended in Fy15 but not yet appropriated		-\$93,491
AVAILABLE FUNDS if all current recommendations were funded in full	\$8,026,775	\$11,282,630

Continued on next page. →

Newton's Currently Available CPA Funds

← Continued from previous page.

updated 28 October 2015, A. Ingerson

	Fiscal 2015	Fiscal 2016
EXPENDITURES		
AVAILABLE FUNDS if all current recommendations were funded in full	\$8,026,775	\$11,282,630
FULL PROPOSALS SUBMITTED to CPC		
Allen House (historic resources) <i>remaining phases of full proposal (previously est. \$1.7 m)</i>		-\$1,850,000
Cambria Road (housing)		-\$471,117
1930s Mural (Newton North High School)		-\$114,900
New Art Center		-\$72,652
AVAILABLE FUNDS if all submitted proposals were funded in full	\$8,026,775	\$8,773,961
Pre-PROPOSALS SUBMITTED to CPC * = estimates by CPC staff		
(full proposal expected in Fiscal 2016 or later)		
Affordable Housing Trust or RFP		-\$1,500,000
City Hall - Historic Windows (<i>per CIP</i>)		-\$1,100,000
Newton Highlands Playground (construction) *		-\$3,200,000
	or ≈ \$4,500,000 per <i>Capital Plan</i> ?	
TOTAL Pre-Proposals		-\$5,800,000
AVAILABLE FUNDS if all pre-proposals were funded in full	\$8,026,775	\$2,973,961
Option for debt financing?		

Newton's CPC aims to maintain a reserve equal to about one year's worth of new funds (≈ \$3 million). ↑

Newton's CPA Funding Forecast

Last revised 14 October 2015, A. Ingerson

	Fiscal 2016	Fiscal 2017	Fiscal 2018	Fiscal 2019	Fiscal 2020	Estimated Totals for Fy16-20
NEW REVENUE						
local CPA surcharge	\$2,843,904	\$2,915,002	\$2,987,877	\$3,062,574	\$3,139,138	\$14,948,495
state matching funds:						
confirmed & budgeted in listed yr	\$499,417	\$426,586	\$349,800	\$268,909	\$183,754	\$1,728,467
confirmed late in prior yr, budgeted in listed yr	\$229,184					\$229,184
forwarded fund balance	\$8,223,464					
TOTAL REVENUE	\$11,795,970	\$3,341,587	\$3,337,677	\$3,331,483	\$3,322,893	\$25,129,609
BUDGETED EXPENDITURES						
Program Administration & Debt Service						
program administration (<i>fy 16 as budgeted; other years 4.5% of annual new funds; statutory max. 5%</i>)	(\$150,505)	(\$150,371)	(\$150,195)	(\$149,917)	(\$149,530)	(\$750,519)
debt service for 20 Rogers St.	(\$269,344)	(\$259,781)	\$0	\$0	\$0	(\$529,125)
AVAILABLE FUNDS after program administration + debt service	\$11,376,121	\$2,931,435	\$3,187,482	\$3,181,566	\$3,173,362	\$23,849,966
Required Reserves (min. allocation of annual new funds under the CPA)						
affordable housing (10%)	\$357,251	\$334,159	\$333,768	\$333,148	\$332,289	\$1,690,615
historic resources (10%)	\$357,251	\$334,159	\$333,768	\$333,148	\$332,289	\$1,690,615
open space & recreation (10%)	\$357,251	\$334,159	\$333,768	\$333,148	\$332,289	\$1,690,615
general (<i>for any CPA-eligible resource</i>)	\$10,304,369	\$1,928,959	\$2,186,179	\$2,182,121	\$2,176,495	\$18,778,122

Newton's Community Preservation Plan

Future Proposals Compared to Future Funds

Project Titles	Affordable Housing	Historic Resources	Open Space or Recreation Land	
			Acquisition	Rehabilitation
Recently Funded Projects FY12-Fy15 (including debt service) = \$9,274,785	\$3,026,208	\$2,113,296	\$3,178,081	\$957,200
actual % allocation by resource	33%	23%	34%	10%
compare to CPC target allocations by resource, ± 5%	30%	25%	20%	20%
Current Pre- and Full Proposals (including construction funding for projects that have only requested design funds to date) = \$12,487,260	\$1,971,117	\$5,766,143	\$0	\$4,750,000
% Allocation by Resource	16%	46%	0%	38%

The allocation of funds for recently funded projects has been fairly close to the CPC targets.

The allocation of funds for all current pre- and full proposals differs significantly from the CPC targets.

Newton's Community Preservation Plan

Future Proposals Compared to Future Funds

Project Titles	Affordable Housing	Historic Resources	Open Space or Recreation Land	
			Acquisition	Rehabilitation
Possible Future Proposals (primarily from Capital Improvement Plan)				
Branch Libraries (Current or Former)		\$2,866,500		
City Archives		\$1,000,000		
City Hall		\$2,100,000		
Crafts Street Stable (Public Works,		\$1,450,000		
70 Crescent Street (housing & park)	\$4,000,000			\$1,000,000
Jackson Homestead (Historic Newton)		\$292,000		
Historic Burying Grounds (Historic		\$702,600		
Parks & Recreation (Buildings & Sites)				\$7,013,500
Senior Center		\$519,000		
Not Listed in CIP				
Conservation Land Acquisition			\$5,000,000	
New Local Historic Districts (Studies)		\$75,000		

placeholder amount added by CPC staff

Newton's Community Preservation Plan

Future Proposals Compared to Future Funds

Project Titles	Affordable Housing	Historic Resources	Open Space or Recreation Land	
			Acquisition	Rehabilitation
Current Pre- & Full Proposals + Possible Future Proposals ≈ \$38,505,860	\$5,971,117	\$16,471,243	\$5,000,000	\$11,063,500
% Allocation by Resource	16%	43%	13%	29%

The allocation of funds for all known future projects differs significantly from CPC targets, even with \$5 million added as a placeholder for land acquisition at no specific location.

compare to CPC target allocations by resource, ± 5%:	30%	25%	20%	20%
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FIVE-YEAR FORECAST: Total Available Funds for Fy16-20 ≈ \$25,125,000

target allocations – 5%	\$7,160,625	\$5,967,188	\$4,773,750	\$4,773,750
target allocations + 5%	\$7,914,375	\$6,595,313	\$5,276,250	\$5,276,250

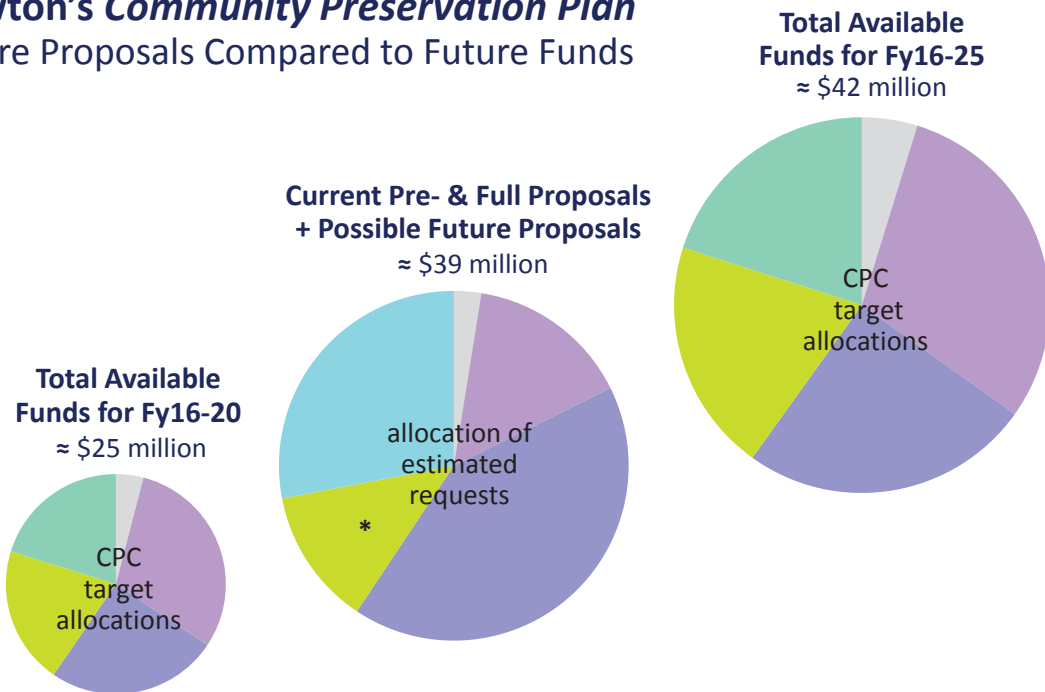
TEN-YEAR FORECAST: Total Available Funds for Fy16-25 ≈ \$42,750,000

target allocations – 5%	\$12,183,750	\$10,153,125	\$8,122,500	\$8,122,500
target allocations + 5%	\$13,466,250	\$11,221,875	\$8,977,500	\$8,977,500

The total cost of all known future projects is closer to the program's 10-year funding forecast than its 5-year funding forecast.

Newton's Community Preservation Plan

Future Proposals Compared to Future Funds



KEY

- program administration
 - affordable housing
 - historic resources
 - * acquisition placeholder amount added by CPC staff
 - rehabilitation
- either open space or recreation land

Newton's Community Preservation Plan

Funding Guidelines

CPA Appropriateness	
core public services & assets:	appropriate for funding from core public revenue (not CPA)
special public or community projects:	appropriate for major CPA funding
public-private partnerships:	appropriate for partial CPA funding that will leverage other funds
philanthropy:	appropriate for entirely private funding (not CPA)

Expected Share of Non-CPA Funding	
projects on public property, with broad or City-wide public benefits	less
projects on public property, with narrower or mostly single-neighborhood benefits	more
projects on private property, with broad public benefits (including affordable housing)	
projects on private property, with narrower but still significant public benefits	most

To guide decisions about which of Newton's CPA-eligible needs to fund and when, the CPC may need more specific, concrete guidelines.