

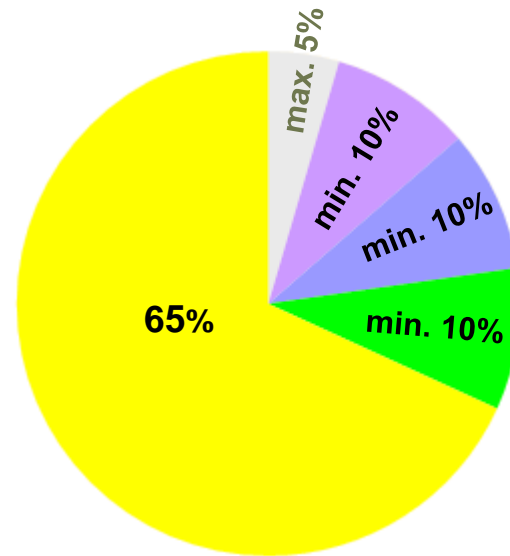
Newton, Massachusetts
COMMUNITY PRESERVATION PROGRAM



PROGRAM OVERVIEW
30 May 2013

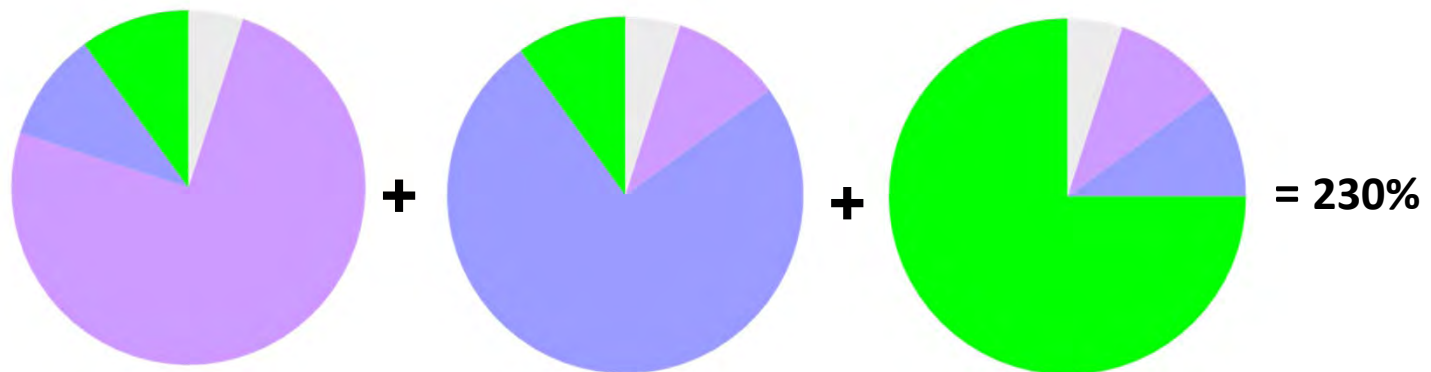
What must be funded under the CPA?

- program administration
- affordable housing
- historic resources
- open space
- recreation land
- general
(any of the above)



No minimum for recreation land, but it can now count toward the open space 10%.

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



What can be funded under the CPA?

NOT EVERY USE for EVERY RESOURCE	Community Housing	Historic Resources	Open Space	Recreation Land
ACQUIRE ^A	YES	YES	YES	YES
CREATE	YES	NO	YES	YES ^B
PRESERVE	YES	YES	YES	YES
SUPPORT	YES ^C	NO	NO	NO
REHABILITATE/ RESTORE	YES ^D	YES ^E	YES ^D	YES

A. real property acquired with CPA funds must be owned by the local government

B. convert land never used for recreation, or not used recreationally for a very long time

C. including funds for an affordable housing trust

D. IF the resource was acquired or created with CPA funds in the first place

E. projects must use National Park Service guidelines

What can be funded under the CPA?

NOT EVERY USE for EVERY RESOURCE	Community Housing	Historic Resources	Open Space	Recreation Land
ACQUIRE	YES	YES	YES	YES
CREATE	YES	NO	NO	NO
PRESERVE	YES	YES	YES	YES
SUPPORT	NO	NO	NO	NO
REHABILITATE/ RESTORE	YES	YES	YES	YES

Real property

- if acquired with CPA funds, must be owned by local government
- the CPA-eligible use must be permanent & protected by a deed restriction

CPA funds are for capital improvements, which

- materially add to or appreciably prolong the useful life of real property
- are permanently affixed so that removal would cause material damage
- are intended to remain for an indefinite period of time

CPA funds shall not replace existing operating funds, only augment them. CPA funds may not be used for

- maintenance = incidental repairs that keep the property in a condition of fitness, efficiency or readiness
- artificial turf; land for horse or dog racing; or a stadium, gymnasium or similar structure

- A. real property acquired with CPA funds
- B. convert land never used for CPA-eligible use
- C. Including funds for an affordable housing project
- D. IF the resource was acquired with CPA funds
- E. projects must use National Park Service

What can be funded under the CPA?

NOT EVERY USE for EVERY RESOURCE	Community Housing	Historic Resources	Open Space	Recreation Land
ACQUIRE				
CREATE				
PRESERVE				
SUPPORT				
REHABILITATE/ RESTORE				

The Community Preservation Act requires thinking long-term.

- A. real property acquired
- B. convert land never used
- C. including funds for an a
- D. IF the resource was acq**
- E. projects must use Natio

How do projects get funded?

Community Preservation Committee

Required by state statute:

- Study the needs & resources of the community.
- Review & recommend projects to local legislature for funding.
- May not appropriate funds directly.

5 members appointed by & representing:

Conservation Commission
Historical Commission
Housing Authority
Parks Commission
Planning Board

Required by Newton's CPA ordinance:

All members limited to two 3-year terms.

4 members appointed by the Mayor to represent:

community housing	1 for each pair of wards:	
historic resources		
open space		1/2, 3/4,
recreation		5/6, 7/8

Board of Aldermen

Required by state statute:

- May only appropriate funds based on CPC recommendations.
- May appropriate up to maximum CPA funds recommended by the CPC (may also appropriate less, or nothing).
- May appropriate additional funds from non-CPA sources.

Required by Newton's Board rules:

All CPC recommendations referred to 2 or more Board committees for reports before full Board votes on funding.

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State law determines what CAN be funded, but Newton decides what SHOULD be funded.

How do projects get funded?

PRE-PROPOSAL

Discuss with **Community Preservation Committee**: at a **public meeting**;
ask CPC staff about other reviews to seek out at this stage.

FULL PROPOSAL

Community Preservation Committee **public hearing**, followed by 1 or more working sessions & funding vote

Board of Aldermen: 1 or more **public meetings** of at least 2 Aldermanic committees (one chosen by topic of proposal, plus Finance), followed by full Board funding vote

FUNDED PROJECT

Convene "kickoff" mtg with the project manager, any City depts. involved, nonprofit or neighborhood sponsors & CPC staff to finalize timeline & responsibilities. Re-confirm & begin meeting requirements set by City of Newton Purchasing Dept. (including for projects managed by private nonprofits).

Respond to CPC staff requests for brief monthly project updates. Final release of funds requires **written & in-person final report to the CPC**.

COMPLETED PROJECT

Organize & publicize opening or other celebration for the community at large. Maintain funded site or resources; respond to inquiries, host site tours, share updates through program website; advise new project managers ...

YEAR 1

Winter

Spring

Summer

Fall

YEAR 2

Winter

Spring

Summer

Fall

YEAR 3

Winter

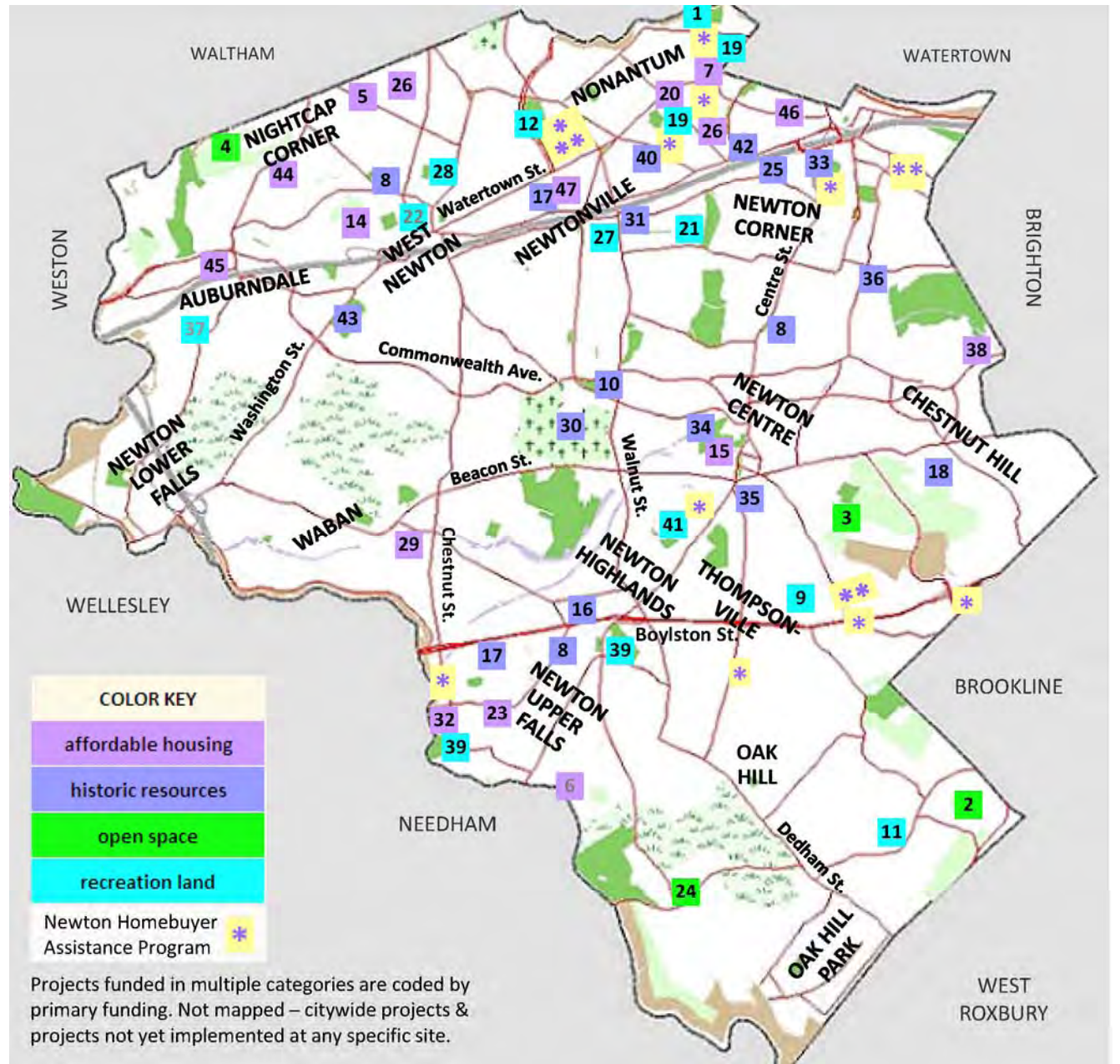
Spring

Summer

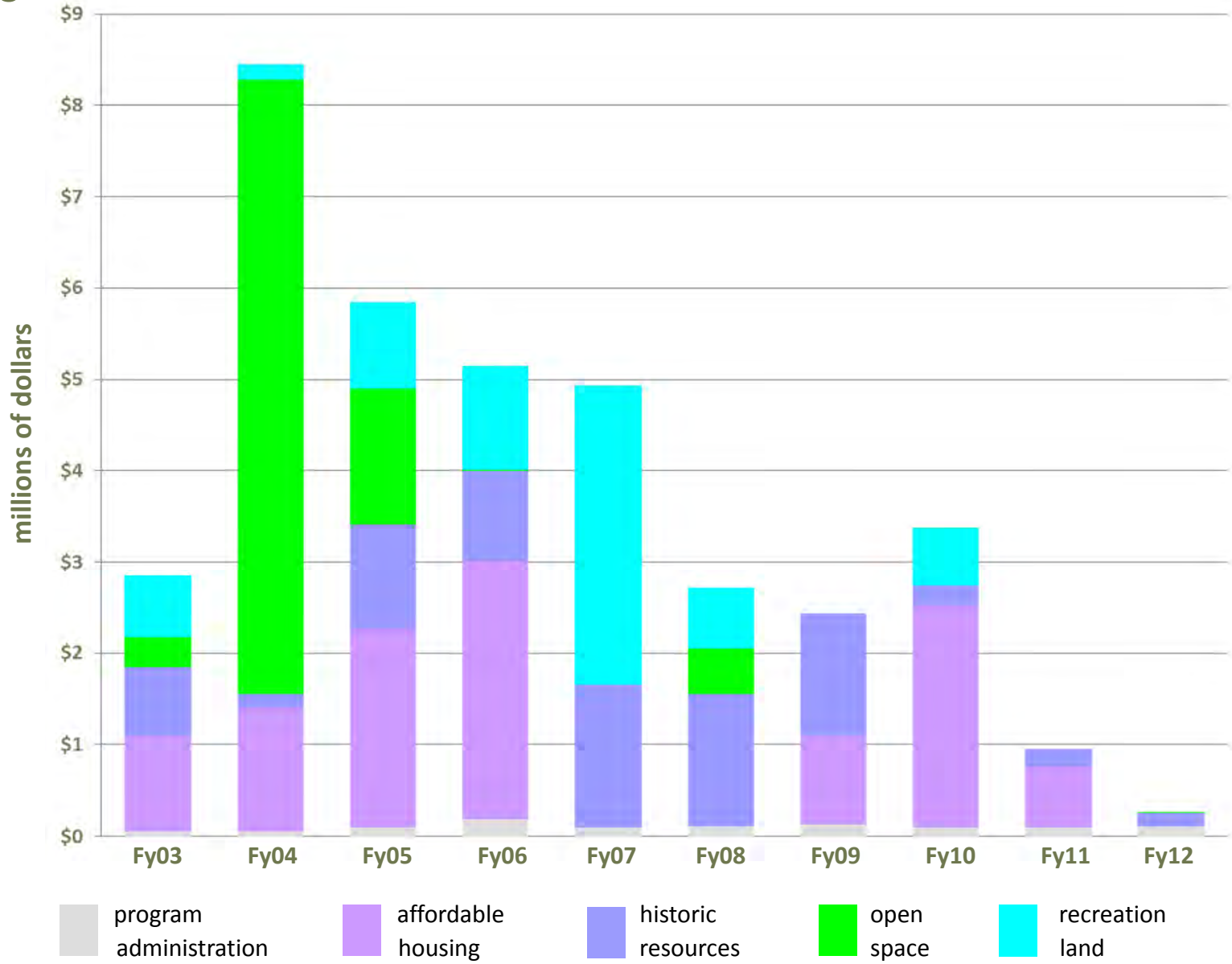
Fall

What has Newton funded?

through December 2012

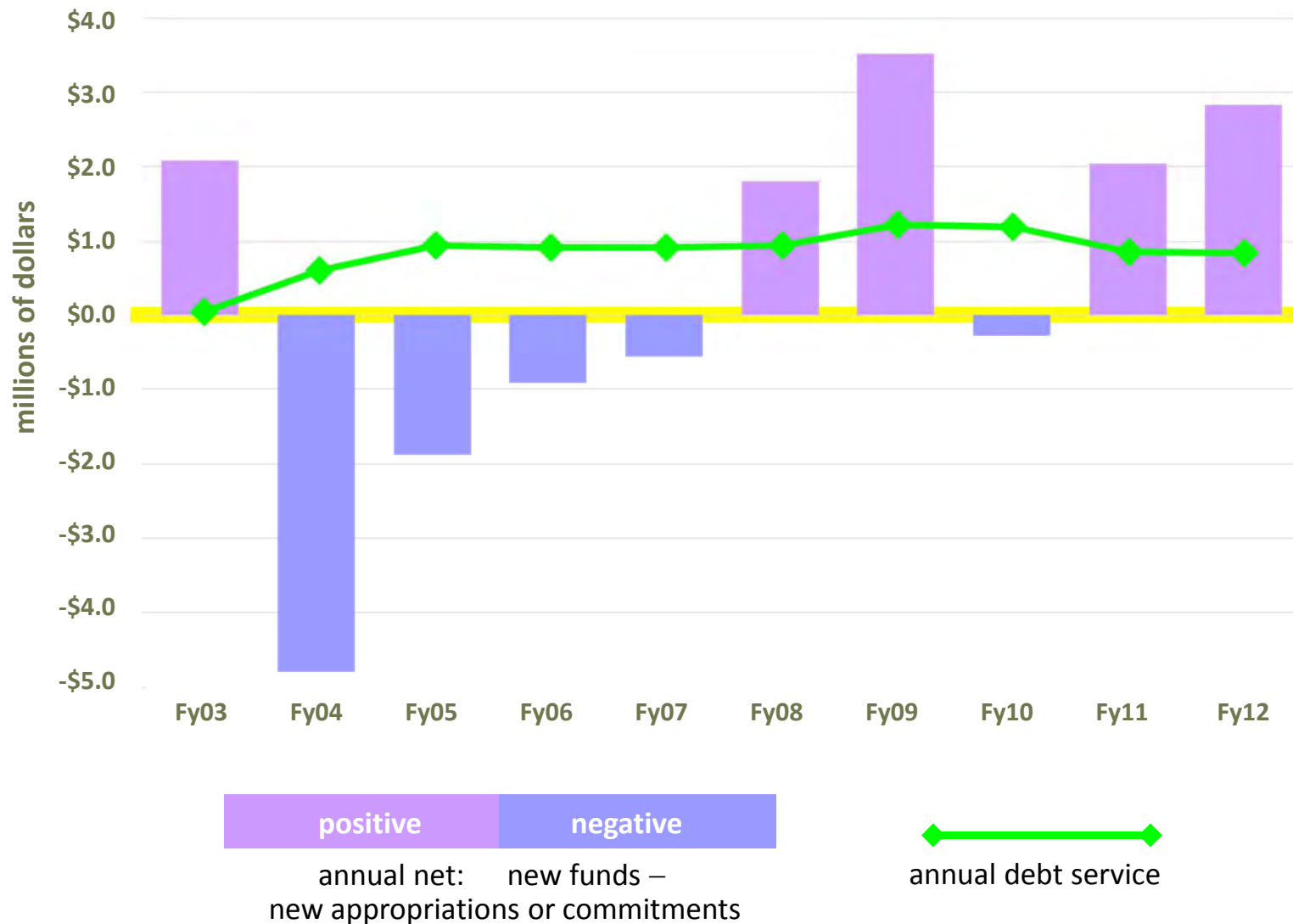


What has Newton funded?



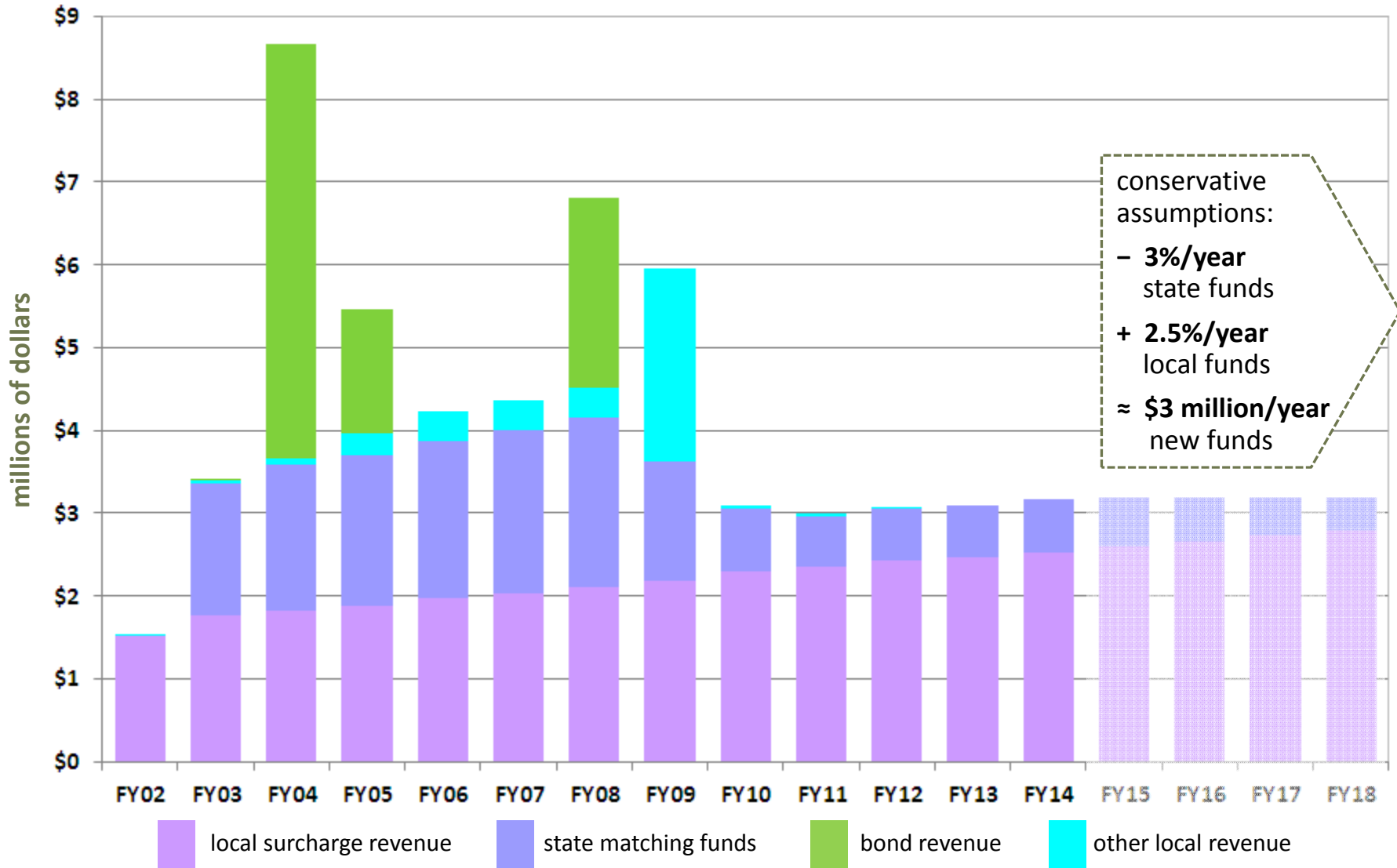
Newton's Community Preservation Funds

Debt Financing



Newton's Community Preservation Funds

Past vs. Future



Newton's CPA Local Surcharge 2012



median-value
single-family house \$686,000.00
annual property taxes \$ 7,662.62
1% CPA surcharge \$ 76.62



What do we want to fund?



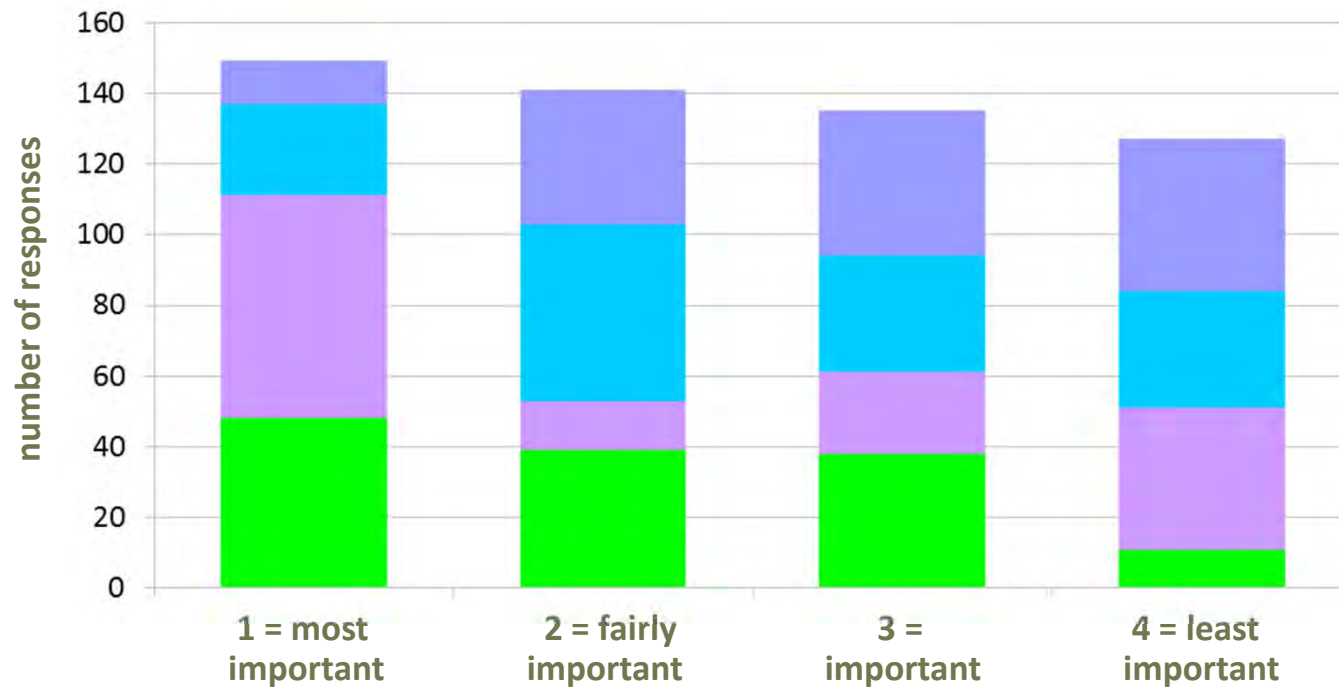
**Happy 10th
Birthday, Newton
CPA!
Neighborhood
Meetings &
Community Survey**



What's most important to preserve about Newton?

2012-12 Survey Results

		Forced Ranking	average rank (descending order)
from 1 = most important		open space	2.1
		affordable housing	2.3
to 4 = least important		recreation land	2.5
		historic resources	2.9



What's most important to preserve about Newton?

Why did *you* move here?

Its diversity, both economically and ethnically - we all learn different things from each other, and this is important for the richness of our community.

affordable housing is sorely needed ... the wisdom of Seniors is an important contribution to the diversity of the community

Our school and park infrastructure is a shambles. The city was reputed to be a great place to raise a family, and it is, but our space doesn't match our spirit.

Newton's unique character is in its history *and* integration with modern times.

the old houses, the trees along the streets, the open space, the many active community groups, the library, and the schools

vibrant and diverse community with a good mix of open space and local small businesses

We are very impressed with Newton's effort to promote sustainable living and a sustainable environment. The people of Newton are well educated, friendly, understanding, and down to earth.

quality school system, inclusiveness, open spaces, access to historic and natural resources and liberal political persuasions

the democratic nature of the community with people of different wealth [levels] and the natural areas

Newton should not become a "gated community" but should remain a welcoming city with some affordable housing, attractive public space, some wildlife habitat and a sense of history.

The neighborhood I moved into 26 years ago was far more diverse and mixed. It has changed dramatically and will change even further with tear downs and McMansions. At least in areas closer to the centers, allow more density for more affordable housing, so newer generations can have the same opportunity we had to live in this city.

Crystal Lake, trails, Library, schools are what attracted us. But the historic homes, Newton Centre, the library and City Hall cluster- all of these contribute to Newton.

the mixture of town and country ... the villages and the open spaces

Newton's Funding Guidelines

adopted by the Community Preservation Committee,
14 November 2012



Angino Farm

- 1. Use community-wide plans to guide funding decisions.**
- 2. Balance the allocation of funds across all the eligible resources & allowable uses.**
- 3. Require proven capacity for project management & long-term maintenance.**
- 4. Evaluate results to ensure accountability & improve future projects.**

Newton's Funding Guidelines

adopted by the Community Preservation Committee,
14 November 2012



Linden Green

1. Use community-wide plans to guide funding decisions.

- *Comprehensive Plan*
- CPA-funded surveys of eligible resources: archaeology, City archives, City & non-City historic buildings, heritage landscapes
- *Capital Improvement Plan*
- *Consolidated Plan for Housing & Community Development*
- *Recreation & Open Space Plan*
- *Ramping Up: Planning for a More Accessible Newton*
(more than legally required minimum accessibility, where appropriate)
- other plans created in the future ... ?

Newton's Funding Guidelines

adopted by the Community Preservation Committee,
14 November 2012



Mayor Hyde Portrait

2. Balance the allocation of funds across all eligible resources and allowable uses.

all projects

public benefits & access

leverage non-CPA funds

historic resources

both already regulated

& previously unprotected

housing

both rental & homeownership

expedite funding through a trust

open space & recreation land

acquisitions prioritized in
Recreation & Open Space Plan

improvements for sustainability
& ease of maintenance

Newton's Funding Guidelines

adopted by the Community Preservation Committee,
14 November 2012



2. Balance the allocation of funds across all eligible resources and allowable uses.

encourage
planning & phasing

build a reserve
for unpredictable opportunities
(usually real estate acquisition)
– to minimize debt financing



Historic Burying Grounds

*Target funding ranges are covered
at the end of this presentation ...*

Newton's Funding Guidelines

adopted by the Community Preservation Committee,
14 November 2012



Historic Burying Grounds

3. Require proven capacity for project management & long-term maintenance.

Process

- Use pre-proposals to screen & strengthen proposals.
- Accept most proposals in an annual funding round, but consider proposals that involve real estate acquisition on a rolling basis, upon request.

Newton's Funding Guidelines

adopted by the Community Preservation Committee,
14 November 2012



Pelham House

3. Require proven capacity for project management & long-term maintenance.

Major Requirements

- qualified, available project manager – avoid “diffuse responsibility”
- financial transparency & capacity – development & 10-year operating budgets, summary of assets & liabilities (private & public)
- professional designs & cost estimates – aim to minimize supplemental funding requests

Newton's Funding Guidelines

adopted by the Community Preservation Committee,
14 November 2012



4. Evaluate results to ensure accountability & improve future projects.

- require regular progress reports
- final release of funds *after* final report to the CPC
- monitor after completion – which projects perform best over the long term, and why?
- when reviewing new proposals, consider the sponsor's past record of project management & maintenance



Dolan Pond
&
Webster Park

Newton's Community Preservation Needs

Some Cost Estimates



	total estimated cost	years' worth of projects at Newton's current annual rate of new CPA funding
from	<u>\$127,221,389</u>	<u>42</u>
to	<u>\$228,419,782</u>	<u>76</u>
		... or more

based on

- full *Capital Improvement Plan* (all years)
- *Recreation & Open Space Plan* "action plan" of recommended acquisition & rehabilitation projects
- inquiries or suggestions to the CPC
- phased projects that have already received CPA funding for early phases

Newton's Community Preservation Needs

Past vs. Future



Crystal Lake – 20 Rogers Street



owned or proposed for ownership by City govt.

affordable housing

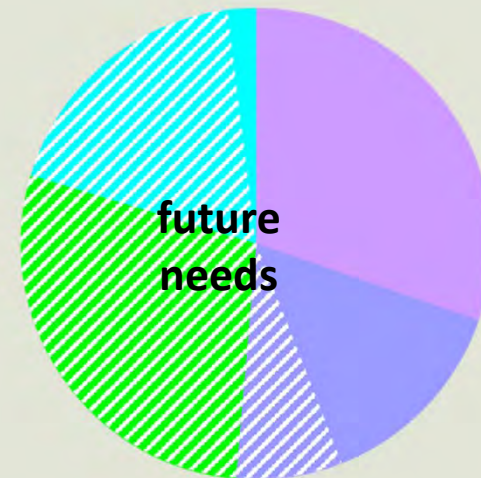
historic resources

open space or recreation land - acquisition

open space or recreation land - rehabilitation

Real property acquired with CPA funds must be owned by local government.

Other than housing and some historic resources, most projects have involved and will involve public ownership.



future needs

Funding Guidelines

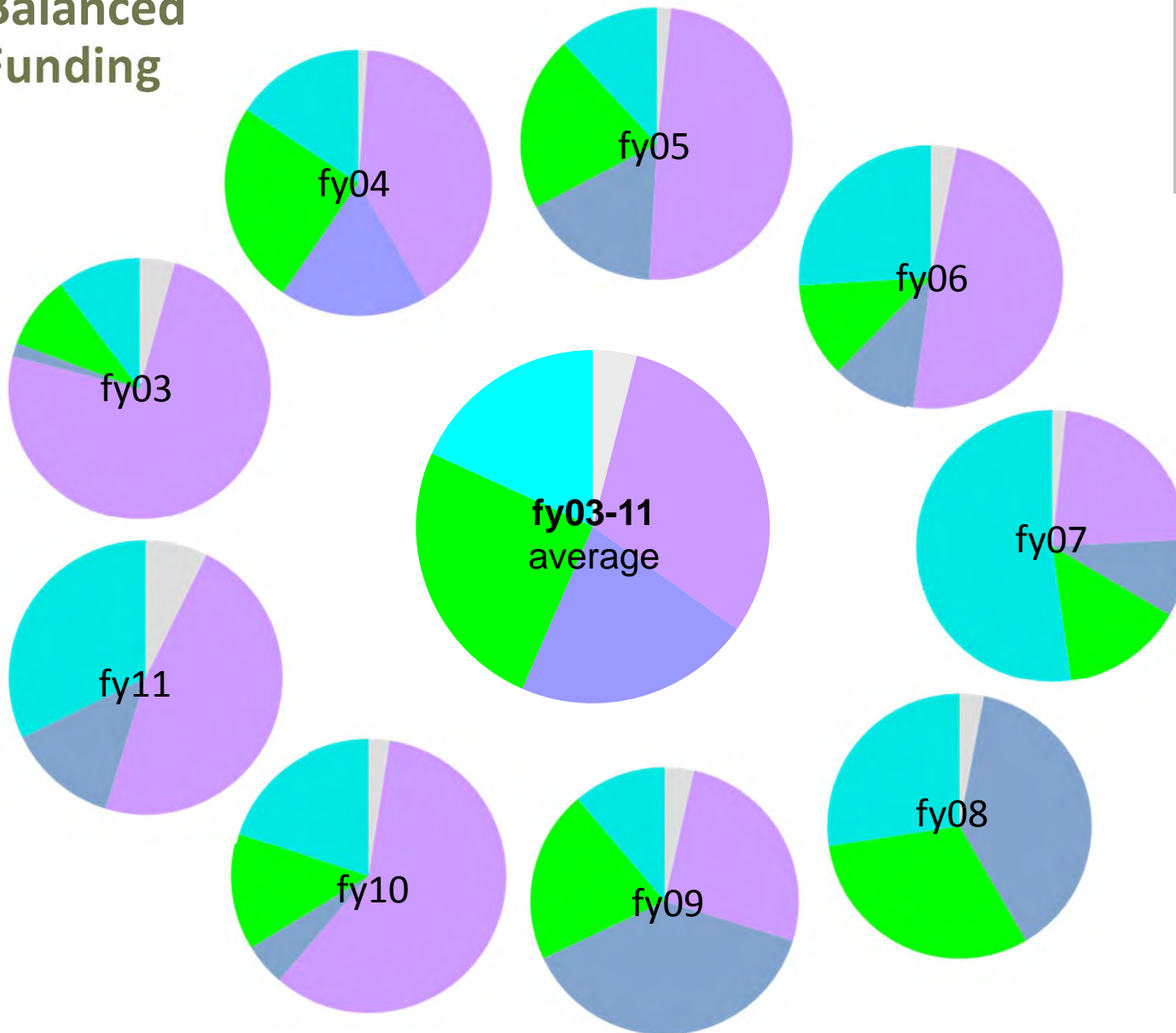
adopted by
Newton
Community
Preservation
Committee
14 November 2012

Past	10-yr averages
program administration	4%
affordable housing: development	31%
historic resources: all purposes	22%
open space & recreation land: acquisition	36%
open space & recreation land: rehabilitation	7%
total	100%

Future flexible ranges min. max.

program administration	3%	5%
affordable housing: development	25%	40%
historic resources: all purposes	15%	20%
open space & recreation land: acquisition	20%	30%
open space & recreation land: rehabilitation	15%	20%
total	78%	115%

Balanced Funding



In the past, each year's balance looked very different from the cumulative average.

The same will be true in the future, although the CPC will aim for a cumulative average in line with the new target funding ranges.

NAVIGATION

News, Calendar, Contact ▶

Community Preservation Program

NAVIGATION

News, Calendar, Contact ▶

About the CPA

Committees & Meetings ▶

Guidelines & Forms

Proposals & Projects ▶

Reports & Presentations ▶

News ... deadlines for upcoming CPC meetings & for proposals

About ... full text of the CPA & Newton's CPA ordinance, link to statewide Community Preservation Coalition

Committees ... agendas, packets, minutes, members of CPC & Board committees

Guidelines ... funding guidelines & deadlines, links to community plans proposals should cite, forms (*read-only, ask for fillable ones!*)

Proposals ... photos, full text of all major documents in chronological order (*essentially a history of each project*)

Reports ... *updated monthly:* current status of pending proposals, funded projects & available funds; *updated annually:* funding forecast, cumulative project map & lists; ... plus survey results, Community Atlas, PowerPoints ...