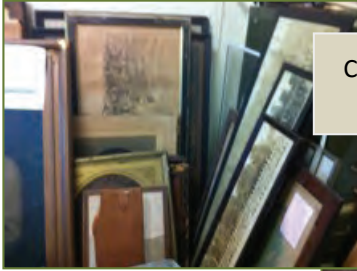


City of Newton



Setti D. Warren
Mayor

Community Preservation Program Combined Annual Reports for Fiscal 2011 & 2012




City Archives
Survey



City Historic Buildings


Jeannette Curtis West Recreation Center





Address: 69 Tyler Terrace
Year of Construction: 1892
Level of Significance: High
Recommended Treatment Level: Preservation/Rehabilitation

City Historic
Buildings Survey

Recreation & Open Space Plan



Recreation &
Open Space
Plan

Civil War
Monument

new
projects



Pearl Street
(housing)



Early Architecture
Survey, to 1850

Adopted 14 March 2013
by Newton Community Preservation Committee

**City of Newton, Massachusetts
 Community Preservation Program
 Fiscal 2011 & 2012 Combined Annual Reports**

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*The front cover of this report features new projects funded in fiscal 2011 & 2012.
 For more information, see pages 5-6.*

Printed Copies

Printed copies of this *Fiscal 2011-12 Combined Annual Report*, of the *Funding Guidelines* for Newton’s program, and of the *Proposal & Project Handbook* (forms & instructions for pre-proposals & full proposals) are available upon request from:

Alice E. Ingerson, Community Preservation Program Manager,
 phone 617.796.1144 or email aingerson@newtonma.gov

Online Resources

All program documents are available from the program web site:
www.newtonma.gov/cpa

City of Newton, Massachusetts Community Preservation Program Fiscal 2011 & 2012 Combined Annual Reports

Acknowledgements

The Community Preservation Committee (CPC) is grateful for the contributions of many groups and individuals, all of whom are critical to the program’s success.

The Board of Aldermen, with the leadership of its President Scott Lennon, and multiple Board committees spend many hours carefully reviewing CPC funding recommendations. The CPC especially thanks Alderman Susan Albright as Chair of the Committee on Community Preservation (which went out of existence in December 2011), Alderman Leonard Gentile as Chair of the Finance Committee, Alderman Ted Hess-Mahan as Chair of the Land Use Committee, Alderman Amy Sangiolo as Chair of the Programs & Services Committee, Alderman Anthony Salvucci as Chair of the Public Facilities Committee, and Alderman Marcia Johnson as Chair of the Zoning and Planning Committee.

The CPC also relies on the close cooperation and support of Mayor Setti Warren and key members of his executive staff, including Chief Operating Officer Robert Rooney, Chief Financial Officer Maureen Lemieux, and many City department heads, including Public Buildings Commissioner Stephanie Gilman as chair of the City’s inter-departmental *Capital Improvement Plan* working group, Planning and Development Director Candace Havens, and City Solicitor Donnalyn Kahn.

Finally, the CPC thanks the five boards who appoint one of their members to serve “double duty” as members of the CPC itself: the Conservation Commission, the Historical Commission, the Housing Authority, the Parks and Recreation Commission, and the Planning and Development Board.

The CPC also appreciates the thoughtful program comments of the League of Women Voters, the Newton Conservators, CAN-DO (Citizens for Affordable Housing in Newton Development Organization), the Newton Historical Society, U-CHAN (Uniting Citizens for Housing Affordability in Newton), and the Newton Housing Partnership.

Cumulative Achievements

through December 2012

CUMULATIVE ACHIEVEMENTS, through December 2012		
<i>resource</i>	<i>projects</i>	<i>description</i>
community housing	17	119 units acquired or created, with a total of 207 bedrooms including 3 group homes, where 1 bedroom = 1 unit
historic resources	32	21 historic buildings or sites preserved or rehabilitated site-specific projects for buildings with a total floor area of 298,468 square feet, and landscapes with a total area of almost 27 acres
		4 first-ever citywide inventories: of historic landscapes, archaeological resources, City archives & City historic buildings; plus surveys of all remaining buildings constructed before 1850
		3 archives & art projects: have preserved irreplaceable documents or works of art and have digitized historic vital records, maps & atlases, and directories
open space	11	over 71 acres acquired or preserved, at 8 sites
recreation land	20	almost 62 acres acquired or preserved, at 19 sites
TOTAL	80 projects	<i>more than 1 project or phase has often been funded at a single site</i>

Special Activities for the Program's 10th Anniversary

Newton adopted the Community Preservation Act by referendum at the very first opportunity, in November 2001, and funded its first project in December 2002. So 2011-12 was the program's 10th anniversary year. In fiscal 2011 the Community Preservation Committee began planning a 10th anniversary community outreach effort more extensive than any since Newton's first CPC held public hearings around the City in 2002, prior to accepting its first funding proposals. The 10th anniversary events aimed not only to celebrate what Newton had accomplished in its first decade with the Community Preservation Act, but also to plan for the next decade – or more.

In fiscal 2011, in addition to its usual annual funding round, the CPC also encouraged submission and successfully recommending funding for several plans or surveys it felt would help to identify long-term CPA funding priorities for: ♦ Newton's CPA-eligible archaeological resources, ♦ City archives, ♦ historic buildings (both City-owned and private), and ♦ land for open space and active recreation (through the new *Recreation & Open Space Plan*).



CPA funds cannot be used for routine operating costs or maintenance, so the CPA is by definition a source of funding only for capital projects. The Committee therefore also applauded and supported the comprehensive, risk-based assessment of all City assets undertaken by City staff and a special consulting team in fiscal 2011, and the early fiscal 2012 publication of Mayor Warren's initial ♦ *Capital Improvement Plan* based on that assessment.

Rather than commit significant funding to new projects before the results of these multiple surveys and plans or its own 10th anniversary outreach were known, the CPC chose not to hold a regular project funding round in fiscal 2012. Instead, the Committee dedicated most of its time in that year to special "Happy 10th Birthday, Newton CPA!" activities, including:

- ♦ Op Eds and articles in the *Newton Tab*
- ♦ an online survey
- ♦ a printed insert in all Newton water bills
- ♦ a "community atlas" of maps illustrating the challenge of setting long-term goals in a constantly changing community



like Newton, and the past and current pressures for change on all of the community's CPA-eligible resources

In addition, the CPC held 5 neighborhood meetings, which it publicized online, through email, and through the newsletters of Newton's parent-teacher and nonprofit organizations:

- ♦ Newton Corner, Nonantum & Newtonville (November 2011, Newton North High School)
- ♦ West Newton, Auburndale & Newton Lower Falls (January 2012, Warren House)
- ♦ Waban, Newton Highlands & Newton Upper Falls (March 2012, Waban Library Center)
- ♦ Newton Centre, Thompsonville & Chestnut Hill (May 2012, Bowen Elementary School)
- ♦ the South Side, including Oak Hill & Oak Hill Park (October 2012, Newton South High School)

The main theme of these meetings was that change is a central part of Newton's character as a community, so community preservation in Newton is less about stopping or resisting change than "making wise choices about change." Each 10th anniversary event included refreshments donated by CPC members and a display of large-

scale maps from the CPC's community atlas. The CPC started each meeting with a presentation summarizing the general funding opportunities and constraints of the CPA, past projects funded in the focus neighborhoods, and past and current pressures for change in those neighborhoods, as illustrated by both the community atlas and historic photographs.



After the presentation, the CPC chair or vice chair facilitated a question-and-answer session, asking attendees to identify their neighborhoods' long-term priorities for future CPA funding.



Happy
10th
Birthday,
Newton
CPA!



Both the multiple citywide surveys and plans underway or completed in 2011-12 (marked with ♦ on the preceding page) and this special 10th anniversary community outreach informed the new *Funding Guidelines* ultimately adopted by the CPC in November 2012 (fiscal 2013).



About the Community Preservation Act & Newton's Program

Sources of Funds

The CPA was signed into law in Massachusetts in September 2000, and has since been amended six times (in 2002, 2003, 2004, twice in 2006, and in the summer of 2012). The Act allows communities to raise funds through a surcharge of up to 3% on local property taxes, and creates a significant state matching fund from fees paid to the state's Registry of Deeds for real estate transactions. Municipalities must adopt the Act by ballot referendum.

Newton voters agreed to raise the local share of their Community Preservation Fund through a 1% surcharge on property taxes. The CPA surcharge is not 1% of a property's value, but 1% of the total local property taxes owed for that property for a given year. For example, in fy12, the owner of a Newton home worth \$650,000 contributed about \$72.60 to Newton's Community Preservation Fund.

Under the Community Preservation Act, locally raised funds are matched by the Commonwealth of Massachusetts from fees paid for the registration of deeds to real property. From fiscal 2003 through fiscal 2007, the Commonwealth matched Newton's local community preservation surcharge revenue dollar for dollar. The state match then began declining fairly steadily, as more local communities adopted the CPA and qualified for a share of the state fund, and as a slowing statewide real estate market reduced revenue to the state's Registry of Deeds.

Although Newton's state match has certainly declined, it has been remarkably stable in recent years: 26.9% for fiscal 2010 local revenue (paid in fiscal 2011), 26.6% for 2011 local revenue (paid in fiscal 2012), and 26.8% for

fiscal 2012 local revenue (paid in fiscal 2013). The cumulative section of this report summarizes all state matching funds received by Newton to date.

Required & Allowable Uses of Funds

The CPA Act allows funding for four resources and five activities, but not all activities are eligible for all resources. The most important restriction is that CPA funds *cannot* be spent - for any resource - on routine maintenance (non-capital or operating costs). The following chart summarizes the CPA’s basic funding rules:

Allowable Uses of CPA Funds	Community Housing	Historic Resources	Open Space	Recreation Land
ACQUIRE	YES	YES	YES	YES
CREATE	YES	NO	YES	YES
PRESERVE	YES	YES	YES	YES
SUPPORT	YES	NO	NO	NO
REHABILITATE/ RESTORE	YES, if	YES	YES, if	YES, if **

Notes on “YES, if”: These uses are only permitted for sites acquired or created with CPA funds in the first place. ******The rehabilitation or restoration of recreation land was “YES, if” during Newton’s fy11-12 but changed to “YES” in July 2012 (the first month of fy13), when the state legislature amended the CPA.

The CPA also requires the funding allocated by each local community that adopts the Act to meet certain minimum and maximum requirements, whether by appropriating funds as soon as they become available or by setting funds aside for future spending. In Newton, the allocation of funds by resource has varied widely from year-to-year, but over the program’s 10-year history Newton has provided significant support for all four CPA-eligible resources:

Funding by Resource	Required by the CPA	Newton Fy11-Fy12	Newton Cumulative Through Fy12
program administration	max. 5%	17.2% **	2.80%
affordable housing	min. 10%	65.20%	31.00%
historic resources	min. 10%	27.30%	21.40%
open space	min. 10%	0.30%	24.50%
recreation land	no min. or max.	0%	20.30%
any resource	min. 65%	As % of all funds appropriated.	

** Since the CPC held no regular project funding round in fy12, program administration was a higher-than-usual percentage of *funds appropriated* for new projects in that year. However, program administration was less than the required maximum 5% of *new funds available* in both years: 3.4% in fy11 and 4.6% in fy12.

Newton’s Proposal & Project Process

The CPA makes two groups responsible for allocating each community’s funds. An appointed Community Preservation Committee (CPC) of volunteers must recommend projects for funding to the local legislature – in Newton, the Board of Aldermen – which has the sole power to appropriate funds. The CPC cannot appropriate funds directly, but the Board of Aldermen can only appropriate the funds recommended by the CPC.

Newton’s CPC typically holds an annual funding round. Compared to accepting proposals one at a time, an annual round helps the CPC weigh the relative merits and urgency of proposed projects. In fy12, the CPC began requiring pre-proposals, which it accepts on a rolling basis for discussion at any of its regular public meetings. These

discussions allow proposal sponsors to hear specific questions the CPC would like their full proposal to cover, and to ask whether the CPC is willing to accept that full proposal before or after the regular annual deadline.

Since the beginning of Newton’s program, the CPC has held a formal public hearing on each proposal before voting on whether to recommend it for funding. The CPC publicizes its meetings and hearings through the *Newton Tab*; monthly emails to all parent-teacher newsletters and to the CPC’s own list of about 700 names; and through the Newton Planning Department’s weekly *Friday Report*. The full text of all proposals is available on the CPC’s website, at www.newtonma.gov/cpa, and through the Newton Free Library’s Reference Department.

If the CPC recommends a project for funding, the Board of Aldermen asks two or more of its own committees to discuss and vote on that recommendation prior to a funding vote by the full Board. For most of the program’s first decade, one of those Aldermanic committees was the Committee on Community Preservation (CCP), and the other was the Finance Committee. In December 2011, the Board abolished the CCP. Each CPC recommendation is now referred first to the existing Board committee that usually works with the subject matter of that particular proposal, and then as before to the Board’s Finance Committee.

Program Summary for Fiscal 2011 & 2012

The tables below summarize the funding available to Newton in these two years and how it was allocated.

Newton, Massachusetts

COMMUNITY PRESERVATION PROGRAM

Fy11 REVENUE	
Local Surcharge Revenue	\$2,349,043.15
State Matching Funds	\$616,589.00
Interest	\$31,230.00
Fund balance forwarded from Fy10	\$3,531,193.00
Total Available Funds	\$6,528,055.15
Fy11 EXPENDITURES	
Program Administration	\$103,045.31
Debt Service (Kessler Woods & 20 Rogers Street)	\$882,788.00
New Projects	
City Archives Survey	\$46,640.00
City Historic Buildings Survey	\$98,780.00
Crystal Lake: 20 Rogers Street	\$452,000.00
Early Architecture Survey, 1830-1850	\$37,500.00
61 Pearl Street (housing)	\$665,500.00
Total Expenditures	\$2,286,253.31

Fy12 REVENUE	
Local Surcharge Revenue	\$2,437,128.00
State Matching Funds	\$625,763.00
Interest	\$23,768.00
Fund balance forwarded from Fy11	\$4,231,027.00
Total Available Funds	\$7,317,686.00
Fy12 EXPENDITURES	
Program Administration {1}	\$122,557.49
Debt Service (Kessler Woods & 20 Rogers Street)	\$857,906.00
New Projects	
Civil War Monument	\$134,000.00
Recreation & Open Space Plan	\$4,000.00
Total Expenditures	\$1,118,463.49

Notes

{1} Fy12 program administration includes: one-time costs incurred for Newton CPA 10th anniversary activities; \$12,000 of fy11 funds forwarded for Newton Historical Commission Historic Preservation Guidelines; and \$6,000 of fy12 funds forwarded to fy13 for website & social media project.

Newton, Massachusetts COMMUNITY PRESERVATION PROGRAM													
project title	project summary	site address	project size	project manager(s)	total project cost	other funds used		FY11 - FY12 CPA appropriations					
						total	notes	total amount	housing	historic	open space	recreation	
FY11 NEW FUNDED PROJECTS Below													
CITY ARCHIVES SURVEY	Survey and set priorities for the preservation of archives held by all 25 City departments.	citywide	survey records of 25 City depts.	David Olson, Newton City Clerk	\$46,640	\$0	none	11/1/2010	\$46,640				
CITY HISTORIC BUILDINGS SURVEY	Identify the City's most historically significant buildings, evaluate their significant features, and make recommendations for their preservation, rehabilitation, and adaptive re-use, as part of the City's overall Capital Needs Assessment.	citywide	approx. 70 City bldgs.	Stephanie Gilman, Public Buildings Commissioner	\$509,000	\$415,000	City Capital Overlay \$395,000, CDBG \$20,000	3/21/2011	\$98,780				
CRYSTAL LAKE, 20 Rogers Street Supplemental	Satisfy the terms of a court judgment adjusting the purchase price for this property as an addition to existing public parkland & swimming facilities at Crystal Lake.	20 Rogers Street, Newton Highlands, MA 02461	acres 1.02	Donnalyn Kahn and Angela Smagula, City of Newton Law Dept.		\$0	\$11,133	9/7/2010	\$452,000			\$452,000	
EARLY ARCHITECTURE SURVEY, to 1850	Correct and expand existing partial surveys of Newton's earliest buildings, to guide regulatory preservation, including the demolition delay, as well as future decisions about preservation funding.	citywide	approx. 140 properties	Brian Lever, Newton Planning Dept.	\$65,333	\$27,833	\$27,833, incl. \$16,700 Mass. Historical Commission grant & contributed Planning Dept. staff time	3/21/2011	\$37,500				
61 PEARL STREET (housing)	Create 3 units of permanently affordable rental housing, each with 2 bedrooms, for households at 60-65 percent of area median income, in a building that dates to approximately 1870.; making first-floor unit fully accessible to persons with mobility impairments.	61 Pearl Street, Newton Corner, MA 02458	3 units, 6 bed-rooms	Josephine McNeil, Executive Director, CAN-DO	\$1,370,500	\$705,000	\$130,000 CDBG; \$350,000 HOME, \$175,000 bank loan, \$50,000 foundation grants	5/2/2011	\$665,500				
FY11 TOTALS					\$4,743,473	\$1,147,833			\$1,900,420	\$665,500	\$182,920	\$0	\$452,000

Newton, Massachusetts COMMUNITY PRESERVATION PROGRAM														
project title	project summary	site address	project size	project manager(s)	total project cost	other funds used		date	FY11 - FY12 CPA appropriations					
						total	notes		total amount	housing	historic	open space	recreation	
FY12 NEW FUNDED PROJECTS Below														
CIVIL WAR MONUMENT Restoration	Update & implement the conservation/ restoration recommendations of the study previously supported with CP funds.	791 Walnut Street, Newton Centre	City-owned monument constructed 1864 in private Newton Cemetery	Frank Nichols, Engineering Division, Dept. of Public Works	\$134,000	none	Newton Cemetery has maintained the grounds around the Monument since 1864, and has voluntarily removed & stored specific elements when they became safety hazards.	6/18/2012	\$134,000					
RECREATION & OPEN SPACE PLAN	Hire a consultant or temporary, part-time staff to complete a new <i>Recreation & Open Space Plan</i> , to guide City acquisition, management & funding decisions; and to qualify the City for state and federal grants.	citywide	NA	Juris Alsknitis, Interim Senior Planner	\$54,000	\$50,000	Estimate includes time contributed by Jennifer Molinsky as full-time Long-Range Planner, summer-fall 2011, \$48,428 for Juris Alsknitis as part-time project mgr fall 2011-summer 2012, and additional direct expenses (copying, etc.)	8/8/2011		\$4,000				
FY12 NEW PROJECTS TOTALS						\$188,000	\$50,000			\$188,000	\$0	\$134,000	\$4,000	\$0

Fiscal 2011 Projects Funded

City Archives Survey A professional archivist visited all 25 City departments and interviewed staff to assess current condition and storage spaces for both permanent and temporary records, evaluate threats to archives, and recommend priority actions for archives preservation.

City Historic Buildings Survey A team of preservation architects and engineers visited and photographed all buildings currently owned by the City of Newton, interviewed City staff, and consulted historical records to rank the overall historic significance of these 77 buildings in four categories, from highest to lowest. For each building in the top two categories, the team identified character-defining historic features, assessed the building's current condition, and provided detailed recommendations in priority order for the building's preservation or restoration, based on the Secretary of the Interior's *Standards for the Treatment of Historic Buildings*.

Crystal Lake, 20 Rogers Street Supplemental Funding This appropriation satisfied the terms of a court judgment adjusting the purchase price for this property, which was acquired by eminent domain as an addition to existing public parkland & swimming facilities at Crystal Lake.

Early Architecture Survey, to 1850 This project is correcting and expanding existing partial surveys of Newton's earliest buildings, to guide regulatory preservation, including application of the demolition delay, as well as future decisions about potential preservation funding. The project also received funds through the Massachusetts Historical Commission. Historic buildings owned by the City of Newton were evaluated in a separate survey (see above).

61 Pearl Street (housing) This project created 3 units of permanently affordable rental housing, each with 2 bedrooms, for households at 60-65 percent of area-wide median income, in a Newton Corner building from approximately 1870. The first-floor unit is fully wheelchair-accessible. The project is within walking distance of public transit, schools, shopping, and several houses of worship. The project also received federal funds through Newton's Community Development Program, and a small private foundation grant.

Fiscal 2012 Projects Funded

Civil War Monument This monument on a City-owned plot in the private Newton Cemetery was one of the first in the state to commemorate the lives sacrificed in the Civil War. The monument was erected in 1864 with contributions from Newton citizens. This project is updating and implementing 2007-08 restoration recommendations supported with CPA funds. The monument will be fully restored in time for its 150th anniversary.

Recreation & Open Space Plan This project allowed the Planning Department to pay for assistance in updating and replacing Newton's expired 2007-11 *Recreation & Open Space Plan*. The new *Plan* will guide City acquisition, management & funding decisions for parks and conservation areas, and will allow the City to qualify for certain state and federal grants.

Program Cumulative Summary

The tables on the following pages summarize the cumulative funds available to Newton and how they have been allocated. More detailed tables are available online from the *Reports – Cumulative* link on www.newtonma.gov/cpa.

Newton, Massachusetts COMMUNITY PRESERVATION PROGRAM Annual Revenue by Source (*\$ in millions*)

Fiscal Year	local revenue from CPA surcharge	state matching funds	local investment & other income	proceeds from the sale of bonds	fund balance (forwarded from previous year) {1}	TOTAL available within each year {1}
FY02 {2}	\$1.52	\$0.00	\$0.01	\$0.00	\$0.00	\$1.53
% of annual revenue	99.26%	0.00%	0.74%	0.00%	0.00%	100.00%
FY03 {2}	\$1.77	\$1.59	\$0.05	\$0.00	\$1.53	\$4.93
% of annual revenue	35.87%	32.16%	0.92%	0.02%	31.03%	100.00%
FY04 {2}	\$1.82	\$1.76	\$0.08	\$5.00	\$2.08	\$10.74
% of annual revenue	16.94%	16.37%	0.74%	46.54%	19.40%	100.00%
FY05 {2}	\$1.87	\$1.83	\$0.26	\$1.50	--	\$5.47
% of annual revenue	34.25%	33.49%	4.82%	27.44%	0.00%	100.00%
FY06 {2}	\$1.98	\$1.90	\$0.36	\$0.00	--	\$4.24
% of annual revenue	46.71%	44.83%	8.45%	0.00%	0.00%	100.00%
FY07 {2}	\$2.03	\$1.97	\$0.35	\$0.00	--	\$4.36
% of annual revenue	46.69%	45.29%	8.02%	0.00%	0.00%	100.00%
FY08 {3}	\$2.11	\$2.05	\$0.36	\$2.30	--	\$6.81
% of annual revenue	30.92%	30.01%	5.32%	33.75%	0.00%	--
FY09 {3}	\$2.19	\$1.43	\$2.33	\$0.00	--	\$5.95
% of annual revenue	36.81%	24.02%	39.17%	0.00%	0.00%	100.00%
FY10	\$2.29	\$0.76	\$0.05	\$0.00	\$4.54	\$7.64
% of annual revenue	29.95%	10.00%	0.61%	0.00%	59.45%	100.00%
FY11	\$2.35	\$0.62	\$0.03	\$0.00	\$3.53	\$6.53
% of annual revenue	35.98%	9.45%	0.48%	0.00%	54.09%	100.00%
FY12	\$2.43	\$0.63	\$0.02	\$0.00	\$4.23	\$7.31
% of annual revenue	33.24%	8.56%	0.33%	0.00%	57.87%	100.00%
FY13 (projected)	\$2.47	\$0.63	\$0.00	\$0.00	\$6.34	\$9.43
%	26.21%	6.63%	0.00%	0.00%	67.16%	100.00%

NOTES



State matching funds are calculated as a percentage of the *previous* year's certified local surcharge revenue. Newton's state match was 100% until Fy09, when it began to decline as revenue to the state trust fund declined (which comes from Registry of Deeds fees) and as a growing number of local communities adopted the Community Preservation Act, thereby qualifying for a share of state funds. Newton's state match for Fy13 was confirmed by the state Dept. of Revenue on 13 October 2012 as 26.83% of certified Fy12 local surcharge revenue.

{1}

Each year, CPA funds may either be spent or reserved for spending in future years. The forwarded fund balance is not budgeted but is calculated at the close of the prior fiscal year. Fund balances and annual totals should *not* be totaled across years, because that would often count the same forwarded revenue multiple times.

{2}

In Fy02 only local revenue was collected, all of which was forwarded for spending in Fy03. Fund balances in other years with this note are calculated as prior-year annual net (new funds - new spending). If the prior year's net was negative, no fund balance is shown.

{3}

In Fy08, Newton financed the purchase of land at Crystal Lake (20 Rogers Street) with a short-term note, which was retired with revenue from bonds sold early in Fy09. Because the state Dept. of Revenue does not count notes, but does count bonds, as "local revenue," Newton's Community Preservation Fund was considered to be in deficit at the end of Fy08, but the repaid note also produced a one-time-only unusually large amount of "local investment and other local income" in Fy09.

Newton, Massachusetts COMMUNITY PRESERVATION PROGRAM Annual Expenditures (\$ in millions)									
New project appropriations by year, with full cost of debt-financed projects, including issuance & interest, attributed to year of first appropriation.								annual debt service	
Fiscal Year	program administration	affordable housing	historic resources	open space	recreation land	open space & recreation land combined		all debt-financed projects	as % of annual new funds
						acquisition	rehabilitation		
FY03	\$0.05	\$1.05	\$0.75	\$0.32	\$0.68	\$0.25	\$0.75	\$0.07	1.33%
% of annual new funds	1.00%	21.29%	15.20%	6.47%	13.79%	4.97%	15.30%		
FY04	\$0.06	\$1.35	\$0.14	\$6.74	\$0.16	\$6.74	\$0.16	\$0.63	17.10%
% of annual new funds	1.56%	37.00%	3.74%	184.14%	4.49%	184.14%	4.49%		
FY05	\$0.10	\$2.16	\$1.15	\$1.49	\$0.94	\$1.95	\$0.49	\$0.96	24.33%
% of annual new funds	2.47%	54.51%	28.93%	37.61%	23.82%	49.12%	12.31%		
FY06	\$0.18	\$2.83	\$0.99	\$0.01	\$1.13	\$0.00	\$1.15	\$0.95	22.31%
% of annual new funds	4.30%	66.71%	23.43%	0.29%	26.74%	0.00%	27.03%		
FY07	\$0.09	\$0.00	\$1.55	\$0.00	\$3.28	\$3.28	\$0.00	\$0.95	21.68%
% of annual new funds	2.18%	0.00%	35.62%	0.00%	75.25%	75.25%	0.00%		
FY08	\$0.11	\$0.00	\$1.44	\$0.50	\$0.67	\$1.16	\$0.00	\$0.97	21.55%
% of annual new funds	2.44%	0.00%	31.90%	10.97%	14.73%	25.59%	0.01%		
FY09	\$0.13	\$0.97	\$1.34	\$0.00	\$0.00	\$0.00	\$0.00	\$1.26	21.10%
% of annual new funds	2.19%	16.28%	22.46%	0.00%	0.00%	0.00%	0.00%		
FY10	\$0.10	\$2.42	\$0.22	\$0.00	\$0.64	\$0.00	\$0.64	\$1.22	39.30%
% of annual new funds	3.25%	78.11%	7.03%	0.00%	20.51%	0.00%	20.51%		
FY11	\$0.10	\$0.67	\$0.18	\$0.00	\$0.00	\$0.00	\$0.00	\$0.88	29.46%
% of annual new funds	3.43%	22.19%	6.10%	0.00%	0.00%	0.00%	0.00%		
FY12	\$0.10	\$0.00	\$0.15	\$0.00	\$0.00	\$0.00	\$0.00	\$0.86	27.85%
% of annual new funds	3.39%	0.00%	4.74%	0.01%	0.00%	0.00%	0.01%		
Fy03-12 TOTALS	\$1.29	\$14.41	\$9.69	\$11.45	\$9.30	\$16.75	\$3.99		
FY13 (budeeted)	\$0.14	\$0.30	\$0.30	\$0.53	\$0.31	\$0.00	\$0.00	\$0.83	26.82%
% of annual new funds	4.59%	9.81%	9.81%	16.95%	9.88%	0.00%	0.00%		
ANNUAL AVERAGES	\$0.10	\$1.14	\$0.79	\$0.91	\$0.75	\$1.34	\$0.32	\$0.87	22.60%
	2.62%	29.61%	17.92%	23.95%	17.93%	33.91%	7.97%		

NOTES

CPA funds may either be spent each year or "saved" for future years. Years when prior-year "savings" were spent, when funds were first committed to debt-financed projects, or both, may show allocations of more than 100% of annual new funds and/or negative net funds. Annual net funds should *not* be totaled across years, because that would count the same "savings" multiple times.

Debt-Financed Projects: Total Cost

last updated 11 September 2011, A. Ingerson

City of Newton, Massachusetts						
DEBT-FINANCED COMMUNITY PRESERVATION PROJECTS						
Project Title	Individual Board Orders	Date(s) of Board Orders	Total Appropriated by Individual Board Orders {1}	Debt Authorized	Total Principal + Interest	TOTAL PROJECT COST
Angino Farm {2}	392-04, 214-06, 41-10	12/6/2004, 5/15/2006, 3/15/2010	\$3,073,000	\$1,500,000	\$1,649,700	\$3,222,700
Kessler Woods {3}	95-03, 95-03(2), 227-03, 227-03(2), 227-03(3), 506-03, 507-03	3/6/2003, 6/2/2003, 11/17/2003, 3/15/2004	\$5,218,375	\$5,000,000	\$5,788,740	\$6,007,115
20 Rogers St. (Crystal Lake) {4}	88-07, 88-07(2), 88-07(3), 88-07(4)	5/21/2007, 9/7/2010	\$2,786,500	\$2,300,000	\$2,793,213	\$3,279,713
TOTALS			\$11,077,875	\$8,800,000	\$10,231,653	\$12,509,528

NOTES

{1} Individual Board orders usually appropriate funds for initial project costs, including bond issuance costs and sometimes first interest payment; subsequent payments of interest + principal are appropriated as part of the annual program budget, rather than through individual Board orders.

{2} Individual Board orders included direct appropriations for: part of acquisition cost, deleading the farmhouse, and rehabilitating the interior of the barn.

{3} Individual Board orders included appropriations for planning consultants and legal work.

{4} Individual Board orders included appropriations for appraisal and legal work. Final Board order in 2010 made additional direct appropriation of \$452,000 (not debt-financed) to meet terms of a court-ordered adjustment in the purchase price.

See full debt service schedules on next page.

Debt-Financed Projects: Debt Service Schedules

updated 18 January 2013, A. Ingerson

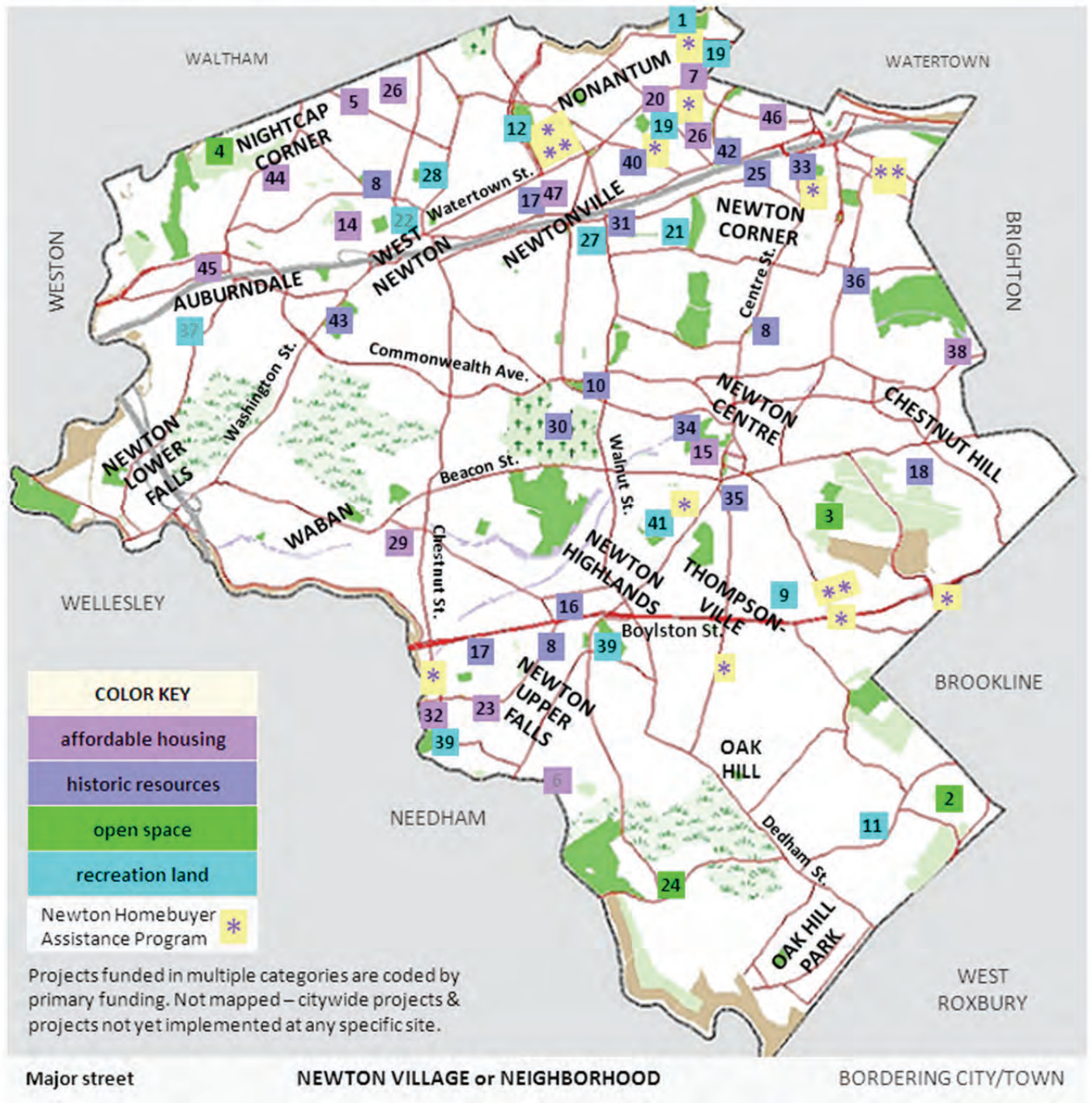
City of Newton, Massachusetts							
DEBT-FINANCED COMMUNITY PRESERVATION PROJECTS							
Project Title	DEBT SERVICE SCHEDULES						
	fy04	fy05	fy06	fy07	fy08	fy09	fy10
Angino Farm {2}	no payments yet		\$349,050	\$339,300	\$329,550	\$320,550	\$311,250
Kessler Woods {3}	\$65,375	\$625,750	\$615,750	\$605,750	\$594,490	\$582,000	\$569,500
20 Rogers St. (Crystal Lake) {4}	no payments yet				\$48,869	\$352,538	\$337,238
TOTALS	\$65,375	\$625,750	\$964,800	\$945,050	\$972,909	\$1,255,088	\$1,217,988

City of Newton, Massachusetts								
DEBT-FINANCED COMMUNITY PRESERVATION PROJECTS								
Project Title	DEBT SERVICE SCHEDULES							
	fy11	fy12	fy13	fy14	fy15	fy16	fy17	fy18
Angino Farm {2}	paid off							
Kessler Woods {3}	\$555,750	\$540,750	\$525,125	\$508,500	paid off			
20 Rogers St. (Crystal Lake) {4}	\$327,038	\$317,156	\$306,000	\$293,250	\$281,000	\$269,844	\$260,281	paid off
TOTALS	\$882,788	\$857,906	\$831,125	\$801,750	\$281,000	\$269,844	\$260,281	paid off

See numbered notes in braces { } on previous page.

All Projects Map & List

Newton, Massachusetts Community Preservation Program All Projects Funded through December 2012



Projects are numbered in roughly chronological order.
A list in alphabetical order by project title begins on the next page.

As noted above, some projects were funded in multiple resource categories. See *Reports – Cumulative* from www.newtonma.gov/cpa for lists with project funding amounts by resource, plus project descriptions and addresses.

Newton, Massachusetts COMMUNITY PRESERVATION PROGRAM		
Funded Projects		
MAP NO.	project title	CPA funds appropriated date
ACTIVE PROJECTS Below		
18	ANGINO FARM Barn Interior Rehabilitation	3/15/2010
30	CIVIL WAR MONUMENT Restoration	6/18/2012
36	DURANT-KENRICK HOMESTEAD 1: Building Restoration & Rehabilitation	6/4/2007
36	DURANT-KENRICK HOMESTEAD 2: Landscape Preservation	8/13/2007
--	EARLY ARCHITECTURE SURVEY, 1830-1850	3/21/2011
47	54 EDDY STREET (housing)	12/17/2012
8	HISTORIC BURYING GROUNDS 1: Gravestone Repair & Conservation	4/22/2003
8	HISTORIC BURYING GROUNDS 2A: Tomb Repair & Conservation	4/19/2005
42	MUSEUM ARCHIVES - Plan	7/21/2008, 5/17/2010
*	Newton HOMEBUYER ASSISTANCE Program	5/17/2004, 3/20/2006, 10/6/2008
--	RECREATION & OPEN SPACE PLAN	8/8/2011
ACTIVE PROJECTS TOTALS		
COMPLETED PROJECTS Below		
12	ALBEMARLE COMMUNITY COMMONS	7/14/2003
18	ANGINO FARM	12/6/2004, 5/15/2006
--	ARCHAEOLOGY SURVEY	6/15/2009
9	BOWEN FIELD Irrigation	5/5/2003
9	BOWEN PARK Initiative	3/6/2006
16	BRIGHAM HOUSE Plan	3/15/2004
16	BRIGHAM HOUSE Preservation & Rehabilitation	6/19/2006, 12/21/2009
22	CABOT COMMUNITY PARK Outdoor Classroom	5/17/2004
6	11-13 CAMBRIA ROAD (housing)	4/18/2006
6	18-20 CAMBRIA ROAD (housing)	4/9/2003
12	CHEESE-CAKE BROOK GREENWAY Plan	6/5/2006
32	1039 CHESTNUT STREET - Millhouse Commons (housing)	8/8/2005
--	CITY ARCHIVES - City Clerk	4/17/2007, 5/19/2008
--	CITY ARCHIVES - Combined	3/15/2010
--	CITY ARCHIVES - Survey	11/1/2010
10	CITY HALL Balustrade	5/19/2003, 5/17/2004
10	CITY HALL Historic Art	5/17/2010
10	CITY HALL Landscape Preservation Plan	6/20/2005, 8/8/2005
10	CITY HALL Lighting	5/19/2003, 5/17/2004
10	CITY HALL WAR MEMORIAL AUDITORIUM STAIRS Plan	5/16/2005

Newton, Massachusetts COMMUNITY PRESERVATION PROGRAM		
Funded Projects		
MAP NO.	project title	CPA funds appropriated date
10	CITY HALL WINDOWS Rehabilitation 1	5/19/2003
--	CITY HISTORIC BUILDINGS SURVEY	3/21/2011
30	CIVIL WAR MONUMENT Plan	5/16/2005
38	33 COMMONWEALTH AVENUE - Covenant Residences (housing)	5/1/2006
45	2148-55 COMMONWEALTH AVENUE - Veteran House (housing)	5/3/2010
40	CRAFTS STREET STABLE Plan	9/18/2006
41	CRYSTAL LAKE 20 Rogers Street	5/21/2007, 9/7/2010
41	CRYSTAL LAKE 230 Lake Avenue	4/7/2008, 11/17/08
14	DOLAN POND & 76 Webster Park/Forte Property (open space & housing)	7/14/2003, 9/7/2003
36	DURANT-KENRICK HOMESTEAD Plan	4/18/2006
3	ELGIN STREET Conservation Restriction	4/7/2003
24	248 ELLIOT STREET - Linden Green (housing)	11/15/2004, 3/20/2006
26	20-22 FALMOUTH & 163 JACKSON ROADS (housing)	4/4/2005
33	FARLOW & CHAFFIN PARKS Historic Landscape Plan	8/8/2005
33	FARLOW PARK Pond Restoration Study	7/14/2008
4	FLOWED MEADOW 30 Wabasso Street	10/15/2007
4	FLOWED MEADOW Improvements	4/7/2003
1	FORTE PARK	12/16/2002
12	GATH POOL	6/20/2005, 8/8/2005
--	HERITAGE LANDSCAPE INVENTORY	4/22/2008
19	HOUGHTON GARDEN	3/15/2004, 4/19/2005
2	KESSELER WOODS	3/6/2003, 6/2/2003, 11/17/2003, 3/15/2004
44	192 LEXINGTON STREET - Parkview Homes (housing)	10/5/2009
17	LOCAL HISTORIC DISTRICTS Newtonville and Newton Upper Falls	3/15/2004
11	MEMORIAL-SPAULDING SCHOOL - Kayla's Garden Outdoor Classroom	6/16/2003
42	MUSEUM EXTERIOR Preservation	5/18/2009
34	NEWTON CENTRE PLAYGROUND Plan	8/8/2005
13	NEWTON CORNER LIBRARY	7/14/2003, 4/4/2005, 9/19/2005
35	NEWTON HEALTH DEPARTMENT BUILDING Plan	3/6/2006
27	NEWTON SENIOR CENTER PARK	4/4/2005
39	NEWTON UPPER FALLS & NEWTON HIGHLANDS PLAYGROUNDS Plan	6/5/2006
46	61 PEARL STREET (housing)	5/2/2011
15	45 PELHAM STREET - Pelham House (housing)	8/11/2003, 11/15/2004
21	STEARNS & PELLEGRINI PARKS Plan	4/20/2004

Newton, Massachusetts COMMUNITY PRESERVATION PROGRAM		
Funded Projects		
MAP NO.	project title	CPA funds appropriated date
43	WARREN HOUSE Historic Preservation	6/15/2009
31	WASHINGTON PARK Historic Lighting	5/16/2005
7	1241 WATERTOWN STREET - Nonantum Village Place (housing)	4/9/2003
28	WELLINGTON PARK	4/4/2005
20	19 WEST STREET (housing)	4/20/2004
25	WEST SUBURBAN YMCA Window Restoration	2/7/2005
29	52-54 WYMAN STREET (housing)	4/19/2005
CLOSED or CANCELLED PROJECTS Below		
--	ACCESSORY APARTMENT INCENTIVE PROGRAM	3/6/2006, 2/19/2008
5	ALBEMARLE PARK CENTRAL CORRIDOR Plan	6/5/2006
12	90 CHRISTINA ST. Municipal Employee Homebuyer Assistance (housing)	4/9/2003, 4/20/2004
4	FLOWED MEADOW - Boardwalk Design	4/19/2005
21	STEARNS & PELLEGRINI PARKS 1: Improvements	5/15/2006
23	WEST NEWTON COMMON Irrigation	5/17/2004
37	WILLIAMS SCHOOL OUTDOOR CLASSROOM Plan	4/18/2006

Newton's Fiscal 2011 & 2012 Community Preservation Committee

Walter Bernheimer II (Fy11 Vice Chair) Wally is the Newton Parks and Recreation Commission appointee. He has served as the Ward 5 representative on that commission for more than 20 years. In real life, he is a management consultant, serving the direct marketing industry. Having lived in Newton since 1946, he attended Newton public schools, as did his 4 children. He has been active in many community activities and served on many business and not-for-profit boards

Zack Blake Zack is the appointee of the Newton Historical Commission. He is a project manager & financial management analyst for the Massachusetts Department of Revenue, Division of Local Services, a state agency that provides technical assistance and identifies best practices in the management of municipal finances for cities and towns.

Leslie Burg (Fy12 Chair) Leslie is the Planning and Development Board appointee. She was a faculty member in Education at Northeastern University. As an at-large member of Newton's Board of Aldermen, she served on the Zoning and Planning Committee and worked on a wide range of environmental and land use issues. She read and commented on many past community preservation proposals as a member of the Local Action Committee for Newton's League of Women Voters.

Michael Clarke Mike is the Mayoral appointee from Wards 5/ 6, for open space. He is a Professor of Chemistry at Boston College and a former President of the Newton Conservators, Inc. Mike also serves as an Alternate Member of the Parks and Recreation Commission and as a member of Newton's Bicycle-Pedestrian Taskforce.

Joel Feinberg (Fy12 Vice Chair) Joel is the Mayoral appointee from Wards 7/ 8, for community housing. He is the primary real estate partner in the law firm of Bartlett Hackett Feinberg P.C., Boston, where he has focused on affordable housing and community development. The firm has represented many nonprofit housing developers and community organizations and also serves as counsel for the Massachusetts Department of Housing and Community Development on many housing projects financed with its funds.

Dan Green Dan is the Conservation Commission appointee. He is a real estate developer specializing in creating environmentally sensitive communities of homes, which his company has built throughout New England. Dan is involved with Build Green Massachusetts, an effort to augment the state's offerings in addition to LEED. Dan has lived in Newton for almost 40 years, with a few years away for education and work. He is also a Board member for the Newton Conservators.

Nancy Grissom (Fy11 Chair) Nancy is the Mayoral appointee from Wards 3/4, for historic preservation. Nancy is a Realtor® with Hammond Residential, selling residential real estate. She serves on the Grievance Committee and the Forms Committee of the Greater Boston Real Estate Board. In Newton, she serves on the Newton Historical Commission, the Newtonville local historic district commission, and the Auburndale local historic district commission, and as president of the Friends of the Newton Free Library.

James Robertson Jim is the Mayoral appointee from Wards 1/2, for recreation. He is a real estate developer with 20 years of experience in building and managing low-income and market-rate housing in Boston. The vast majority of his projects have met the historical standards set by the Boston Landmarks Commission. Jim is a state-licensed real estate broker and builder as well as a lifelong resident of Newton.

Thomas Turner Tom is the Newton Housing Authority appointee. He has been a commissioner with the authority for over 10 years. He is a retired Deputy Director of Railroad Operation at the MBTA. Tom also has experience with real estate development and renovation.

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TDD/TTY 617.796.1089



City of Newton, Massachusetts Community Preservation Program

Projects completed in Fiscal 2011 and 2012

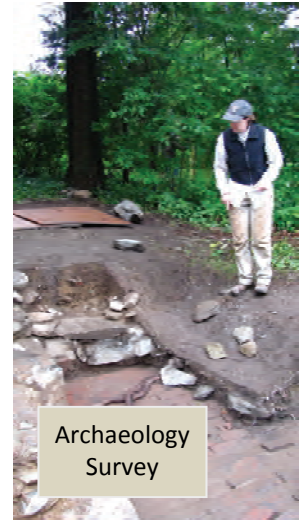
Historic Burying Grounds –
Gravestone & Tomb Restoration



before



after



Archaeology
Survey



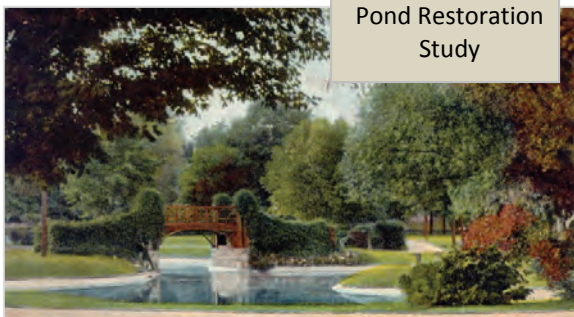
Parkview Homes/Lexington Street
(housing)



Veterans
House
(housing)



Museum
Exterior



Farlow Park –
Pond Restoration
Study

City Archives
Combined
(preservation
scanning)

