

8) Updated CPC funding guidelines, which includes information on the CPC's goals for allocating CPA funding by category and preferred matching amounts. The third and fourth pages include lists of projects currently under consideration and potential future projects identified in the City's most recent CIP report.

Provided by Lara Kritzer, CPA Program Manager



Ruthanne Fuller,
Mayor

Newton, Massachusetts
Community Preservation Committee
COMMUNITY PRESERVATION PLAN

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#458-20
 Telephone (617) 796-1120
 Telefax (617) 796-1142
 TDD/TTY (617) 796-1089
www.newtonma.gov

Barney S. Heath
 Director of Planning
 & Development

Massachusetts' [Community Preservation Act](#) (CPA) provides local and state funds for community housing (affordable housing), historic resources, and land for open space or recreation, within certain constraints:

ALLOWABLE SPENDING PURPOSES under the Community Preservation Act				
RESOURCES → ↓ ACTIVITIES	COMMUNITY HOUSING	HISTORIC RESOURCES	OPEN SPACE	LAND for OUTDOOR RECREATION
ACQUIRE	YES	YES	YES	YES
CREATE	YES	NO	YES	YES
PRESERVE	YES	YES	YES	YES
SUPPORT	YES	NO	NO	NO
REHABILITATE / RESTORE	YES, IF acquired or created with CPA funds	YES	YES, IF acquired or created with CPA funds	YES

The [Guidelines & Forms](#) page of Newton's CPA program website, at www.newtonma.gov/cpa, includes a more detailed [allowable uses of funds](#) chart, with the state statute's full definitions of these eligible resources and activities, as well as Newton-specific proposal instructions and upcoming deadlines. The CPC works with the sponsors of CPA-appropriate proposals to help them meet program requirements.

Like most CPA communities, Newton does not have enough CPA funding for all current and anticipated requests, even those that are both CPA-eligible and CPA-appropriate. The Community Preservation Committee (CPC) uses the following guidelines to decide which projects it will recommend for funding by the City Council.

1. Use Newton's regularly updated community-wide plans to guide funding decisions.

The CPC relies on Newton's *Comprehensive Plan* and other regularly updated community-wide plans to prioritize Newton's CPA-eligible needs. Each funding proposal must cite at least two of these plans, most of which are linked to [Guidelines & Forms](#) at www.newtonma.gov/cpa.

2. Balance funding across all CPA-eligible resources and activities.

The CPA statute requires communities to spend at least 10% of each year's new funds on each of three resources – housing, historic resources, and the combination of open space and land for recreation. Funds may be allocated in the year they are received or retained for future projects. Unless exceptional needs require otherwise, Newton's CPC aims to end each year with a remaining balance of about one year's worth of funds (currently about \$3 million), so the program can respond quickly to unanticipated future opportunities. Unusually expensive projects, such as land acquisition or major capital improvements to public buildings or parks, may also be funded by borrowing – selling bonds that will be repaid from future local CPA revenue.

Newton's allocation targets for CPA funding of the different eligible resources (see next page) are flexible guidelines, not rigid quotas. These targets reflect Newton's past funding patterns, available information about possible future proposals, and feedback the CPC has received through community surveys and public hearings. The targets also reflect cost differences among different types of projects. For example, in Newton projects

website www.newtonma.gov/cpa
 contact Lara Kritzer, Community Preservation Program Manager
 email lkritzer@newtonma.gov phone 617.796.1144

that involve land acquisition, such as creating new affordable housing or a new conservation area, tend to cost more than projects that preserve or rehabilitate buildings and land already in public ownership.

Newton CPA Allocation Targets: Balancing Funds Across Resources	± 5%
affordable housing: development & preservation	35 ±5%
historic resources: all purposes	20 ±5%
open space & recreation land: acquisition	20 ±5%
open space & recreation land: rehabilitation / capital improvements	20 ±5%
total, min. - max.	75-115%

The final two pages of this *Plan* compare the allocation of current and future funding requests to these targets.

3. Support projects that are CPA-appropriate and that leverage non-CPA funds.

Newton's CPC prioritizes projects that are not only CPA-eligible but also CPA-appropriate, and that leverage the maximum possible funding from other sources. The CPC also recognizes that a project may need a relatively high share of CPA funding in its initial phases (such as design) in order to raise funds primarily from non-CPA sources for its later phases (such as construction).

project categories	CPA appropriateness & funding leverage
special public resources and public-private partnerships: publicly or privately owned assets that benefit all Newton residents & neighborhoods, including housing that is both deed restricted to ensure permanent affordability and proactively marketed to all eligible households	highest priority for CPA funding, with these minimums from other sources: 30% for public projects, 50% for private projects
limited-benefit special public resources: publicly owned assets that benefit only some Newton residents or neighborhoods	lower priority for CPA funding, with a target of at least 60% non-CPA funding
core public resources: assets already in public ownership and that the City of Newton would be obligated to rehabilitate even if Newton had not adopted the CPA with one primary exception: CPA funding may be appropriate for the <i>difference</i> between lowest-cost and historically appropriate methods or materials for the rehabilitation of publicly owned historic resources	usually not appropriate for CPA funding,
limited-benefit private resources: privately owned assets that benefit only some Newton residents or neighborhoods	not appropriate for CPA funding

4. Support proposal sponsors with a proven capacity for project management and long-term maintenance.

Newton’s CPC requires each proposal to identify both a qualified, available project manager and a reliable source of non-CPA funding for future maintenance. The CPC also considers each proposal sponsor’s past record of project management and maintenance when reviewing new proposals from that sponsor.

These requirements help Newton to avoid repeating past experiences with projects that took far more time or public funding to complete than originally anticipated or promised, and to comply with the state CPA statute’s prohibition on using CPA funds for maintenance and operations.

5. Evaluate completed projects to ensure accountability & improve future projects.

Once a project is funded, the CPC requires regular progress reports. For all non-City projects, the final release of CPA funds is contingent on presentation of a final in-person and written report to the CPC. City departments are also expected to provide final reports to the CPC on CPA-funded City projects.

The CPC monitors completed projects indefinitely, to evaluate the community’s long-term returns on its CPA investments, and to learn how well – and why – different projects are maintained with non-CPA funds.

Current & Future Proposals Compared to Available Funds & Allocation Targets

Total Funded Projects, FY15-FY20 (included debt service)	Affordable Housing	Historic Resources	Open Space	Recreation
\$37,215,223	\$12,298,224	\$5,295,287	\$15,862,500	\$3,759,122
Fy15-Fy20 - Percentage of allocation by resource	33%	14%	43%	10%
CPC target allocations by resource, ± 5%	30%	25%	20%	20%

Current Proposals or Pre-proposals, with Related Future Proposals (in order of submission to CPC)

✓ = Fy20 appropriation ? = recommended by CPC but not yet funded * = cost revised or estimated by CPC staff

CIP = City of Newton Capital Improvement Plan.

In this plan, for "Priority," lower numbers = higher priorities; for "Urgency," 100 = highest, 1 = lowest.

Sources & CIP Priority (Urgency) October 2019	Project Title	Affordable Housing	Historic Resources	Open Space	Recreation
CIP 31 (53.7) CPA proposal on hold	70 Crescent Street <i>(in addition to prior CPA funding already incl. in Fy13-18 totals above: \$100,000 for site assessment, Apr. 2016; \$260,000 for feasibility & design, Mar. 2017)</i>	\$1,481,622			\$1,093,378
CIP 66 (39.9) Pre-proposal discussed by CPC	Fy21 City Hall (Front) & War Memorial Exterior Stairs <i>In April 2019 the CPC voted 9-0 to condition any consideration of a full proposal for initial design (\$68,250) on a commitment of matching non-CPA funds. The CPC has not yet agreed to consider a request for final design or construction funding.</i>		\$2,332,000		
Not City Project	Grace Episcopal Church Tower Restoration <i>(Public Hearing held 9/15/20; Further review on 10/13)</i>		\$1,244,857		
Not on CIP Proposal submitted for review on Nov 10, 2020	Jackson Homestead Fence Replacement		\$18,244		

Current (Pre)Proposals (including debt service)

Not City Project	Coleman House Senior Housing Preservation <i>(Pre-proposal submitted for Dec. 10 meeting)</i>	\$4,214,622			
Not on CIP	Covid-19 Emergency Rental Housing Assistance Additional Funding	\$1,200,000			
FY21 Funds only	Webster Wood Debt Service			\$697,699	
\$12,282,422		\$6,896,244	\$3,595,101	\$697,699	\$1,093,378
Percentage of Allocation by Resource		56%	29%	6%	9%

Other Potential Future Proposals (in order by highest CIP ranking for each site)

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Sources & CIP Priority (Urgency) October 2019	Project Title	Affordable Housing	Historic Resources	Open Space	Recreation
CIP 30 (53.8)	Fy21 Crystal Lake Levingston Cove (<i>state provided planning funds</i>)				\$700,000
CIP 110, 192, 208 (20.8, 17.9, 33.6)	Waban Library		\$428,500		
CIP 112 (33.1)	Gath Pool (<i>replacement</i>)				\$9,200,000
CIP 113 (33.1)	Forte Park (<i>including synthetic turf, which cannot be purchased with CPA funds</i>)				\$2,000,000
CIP 114 (33.0)	Old Cold Spring Park				\$350,000
CIP 118 (32.2)	Upper Falls/Braceland Playground				\$1,675,000
CIP 121, 145 (31.7, 28.5)	Burr Park Fieldhouse		\$474,000		<i>could also be listed here</i>
CIP 124, 176 (30.6, 24.7)	Kennard Estate (<i>Parks & Rec. Dept. HQ</i>)		\$740,000		
CIP 125, 184 (30.5, 22.7)	Crafts Street Stable (<i>DPW</i>)		\$5,000,000		
CIP 126, 161, 211 (15.4, 26.9, 30.4)	Auburndale Library		\$520,000		
CIP 131, 147, 167, 182 (26.0, 29.9, 23.0, 28.4)	Senior Center (<i>existing, use changing</i>)		\$689,000		
CIP 134, 148 (28.2, 29.6)	West Newton Library (<i>Police Annex</i>)		\$450,500		
CIP 137 (29.3)	* City Hall Archives (<i>facilities</i>) <i>CIP lists only</i>		\$1,500,000		
CIP 141, 166 (26.0, 29.0)	Newton Corner Library (<i>use changing</i>)		\$331,500		
CIP 159 (27.1)	Newton Centre Library (<i>use changing</i>)		\$1,500,000		
CIP 168 (25.7)	Crystal Lake Bathhouse (<i>previously est. full project cost \$8m</i>)				\$5,000,000
CIP 177 (24.7)	City Hall Historic Landscape		\$1,500,000		
CIP 178 (24.4)	Chaffin Park Wall (Fy21) (<i>abutting Farlow Park</i>)		\$200,000		
CIP 180 (23.8)	Nonantum Library		\$204,000		
CIP 181, 204, 207 (23.7, 18.7, 19.2)	Historic Burying Grounds (<i>in addition to ≈ remaining unspent \$84,000 in previously</i>)		\$160,000		
CIP 196, 206 (19.0, 20.7)	Jackson Homestead (<i>basement galleries, doors & windows</i>)		\$342,000		
CIP 202 (20.0)	City Hall Doors & Windows		\$3,000,000		
CIP 205 (19.2)	Nahanton Park (<i>renovate parking areas, path to</i>)				\$150,000
Other Potential Future Proposals Subtotal =					
\$36,114,500		\$0	\$17,039,500	\$0	\$19,075,000
% Allocation by Resource		0%	47%	0%	53%
TOTAL Current (Pre)Proposals + Other Future Proposals =					
\$48,396,922		\$6,896,244	\$20,634,601	\$697,699	\$20,168,378
% Allocation by Resource		14%	43%	1%	42%
CPA Target Allocations by Resource +/-		35% ± 5%	20% ± 5%	20% ± 5%	20% ± 5%
Following amts include current fund balance. For funds available once that balance is spent down, see separate funding forecast.					
FIVE-YEAR FORECAST: Total Available Funds for FY21-FY25 =					
\$22,936,366					
target allocations. – 5%		\$6,880,910	\$3,440,455	\$3,440,455	\$3,440,455
target allocations + 5%		\$9,174,546	\$5,734,092	\$5,734,092	\$5,734,092
TEN-YEAR FORECAST: Total Available Funds for Fy21-FY30 =					
\$60,727,016					
target allocations. – 5%		\$18,218,105	\$9,109,052	\$9,109,052	\$9,109,052
target allocations + 5%		\$24,290,806	\$15,181,754	\$15,181,754	\$15,181,754
Cumulative Debt Service for Webster Woods/300 Hammond Pond Parkway land acquisition (30 year debt):					
First Five Years (FY21-FY25):				\$3,474,609	
First Ten Years (FY21-FY30):				\$6,950,872	