



# COMMUNITY PRESERVATION COMMITTEE AGENDA

August 9, 2022 at 7:00 P.M.

The Community Preservation Committee (CPC) will hold this meeting as a virtual meeting. No in-person meeting will take place at City Hall.

To view and participate in this virtual meeting on your phone, download the “Zoom Cloud Meetings” app in any app store or at [www.zoom.us](http://www.zoom.us). At the above date and time, click on “Join a Meeting” and enter the following Meeting ID: **82456315528**

Ruthanne Fuller  
Mayor

Barney S. Heath  
Director of Planning and  
Development

To join this meeting on your computer, go to:

<https://us02web.zoom.us/j/82456315528>

One tap mobile: **+13017158592,,82456315528#**

At the start of the meeting, CPC members will designate a member to be responsible for reviewing the draft minutes for this meeting.

**7:00 P.M. – General Discussion on Current CPA Program Finances and Potential FY23 Proposals**

## COMMUNITY PRESERVATION COMMITTEE

Jennifer Molinsky, Chair  
Eliza Datta, Vice Chair  
Mark Armstrong  
Dan Brody  
Byron Dunker  
Susan Lunin  
Robert Maloney  
Martin Smargiassi  
Judy Weber

### PROPOSALS AND PROJECTS

**7:30 P.M. - Public Hearing on the [Newton Affordable Housing Trust Funding](#)**  
(Requesting \$1,948,056 in CPA Community Housing Funding)

**7:50 P.M. –Request to include additional work in scope of CPA funding uses for [Nonantum Village Place Senior Housing Preservation Project](#)**

[www.newtonma.gov/cpa](http://www.newtonma.gov/cpa)

### OTHER BUSINESS

Program Staff  
Lara Kritzer  
Community Preservation  
Program Manager  
[lkritzer@newtonma.gov](mailto:lkritzer@newtonma.gov)  
617-796-1144

- 1) Review of Updated Logo Design
- 2) Approval of June 14 and July 12 Minutes
- 3) Other

1000 Commonwealth Ave  
Newton, MA 02459  
T 617.796.1120  
[www.newtonma.gov](http://www.newtonma.gov)

Please note that the times noted above are approximate and discussions may happen earlier or later in the meeting as needed. Pre meeting packets with additional information on each agenda item are posted on the website before each meeting.

The location of this meeting/event is wheelchair accessible and Reasonable Accommodations will be provided to persons with disabilities who require assistance. If you need a Reasonable Accommodation, please contact the city of Newton’s ADA/Section 504 Coordinator, Jini Fairley, at least two business days in advance (2 weeks for ASL or CART) of the meeting/event: [jfairley@newtonma.gov](mailto:jfairley@newtonma.gov) or (617) 796-1253. The city’s TTY/TDD direct line is: 617-796-1089. For the Telecommunications Relay Service (TRS), please dial 711.

# Newton

## Community Preservation Program

### Meeting Materials



#### **Proposals and Project Reviews**

##### **General Discussion on Current CPA Program Finances and Potential FY23 Proposals**

A question came up at the end of the last meeting about funding for future projects, what was out there, and whether bonding should be considered for any of the larger future proposals. Included in the packet is an updated list of the potential future projects that I am aware of – the first half of the list are those projects which I am fairly confident will be coming in within the next year based on past or current conversations with the applicants, while the lower half of the list are potential ideas for future projects which have been discussed. These last items may come up in the future, but I am not expecting them in the foreseeable future.

I have also updated the Finance At A Glance to include our new project recommendations and approvals and have an updated number for the FY22 administrative spending. I have updated the prior year funding amount based on my own numbers, but have a call in to Comptrollers to confirm that I have the right amount. I hope to have that verified by the time of the meeting on Tuesday, but these numbers should give a close idea of where we stand at present.

##### **Public Hearing on the [Newton Affordable Housing Trust Funding](#)**

The new Newton Affordable Housing Trust (NAHT) is now official and its members have started to meet over the summer to develop the programs initial processes and goals. Part of this start up process is to begin the annual transfer of CPA funding to the Trust fund as discussed during the CPC's review of the potential Trust ordinance. At the time, the Committee agreed to consider transferring the annual target amount for Community Housing projects, which is currently 35%, to the Trust. The current funding request is equal to 35% of the CPC's FY23 budget, not including prior year funds.

**Request to include additional work in scope of CPA funding uses for [Nonantum Village Place Senior Housing Preservation Project](#)**

This project is finally getting started and work is now underway to replace the roofs. In the time since the CPA funding was approved, the applicant, CASCAP, has decided to move forward with installing solar panels on the roof – this was discussed with the CPC, but at the time CASCAP did not have a timetable for the work. They are currently requesting other State grant funds to help with the installation of the solar panels, which they hope to install once the roof work is complete and would like the ability to use a portion of the CPA funding as a match for that grant. CPA funding was originally approved to replace the roof, install the new HVAC systems, and repair and replace damaged siding. CASCAP has submitted the attached memo explaining that they believe that they will not need all of the contingency funds and would like to be allowed to use any extra CPA funding for the new solar panel installation. The grant agreement requires that the CPC approve any changes in the use of approved funds. I have spoken with the Law Department and they agree that the solar panels can be considered as an element of the roof work and that if approved by the CPC, this change would not require the City Council’s approval.

**OTHER BUSINESS**

- 1) Review of Updated Logo Design – No new news on this yet – I will bring any new information that I receive before the 9<sup>th</sup> to the meeting.
- 2) Approval of June 14 and July 12 Minutes – These may not be ready to do at this time - I am hoping to have at least one set of draft minutes out to you all before the meeting.
- 3) Other - Just in case.

City of Newton Community Preservation Committee

# Finances At a Glance

As of August 5, 2022

## Fiscal Year 2023

### Revenue

Beginning balance	8,208,939
Local CPA surcharge	3,922,024
State match	
Budget for this FY	765,273
Additional from prior FY	875,618
<b>Total Available Resources</b>	<b>13,771,854</b>

### Expenses

Bond repayment obligations	694,353
New funding authorizations	3,694,502
Administrative costs	179,376
<b>Total Expenses</b>	<b>4,568,231</b>

**Current Fund Balance** **9,203,623**

## Fiscal Year 2024

### Revenue

Beginning balance	9,203,623
Local CPA surcharge	4,069,100
State match	
Budget for this FY	784,405
Additional from prior FY	
<b>Total Available Resources</b>	<b>14,057,128</b>

### Expenses

Bond repayment obligations	694,853
New funding authorizations	-
Administrative costs	179,376
<b>Total Expenses</b>	<b>874,229</b>

**Projected Fund Balance** **13,182,899**

## Spending Compared to Program Area Targets

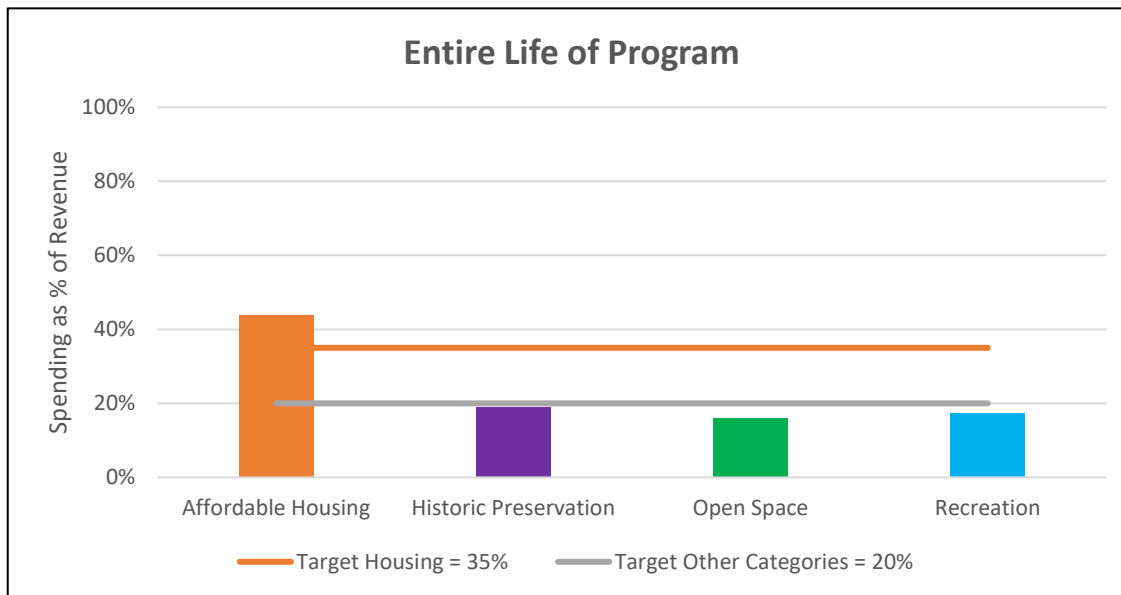
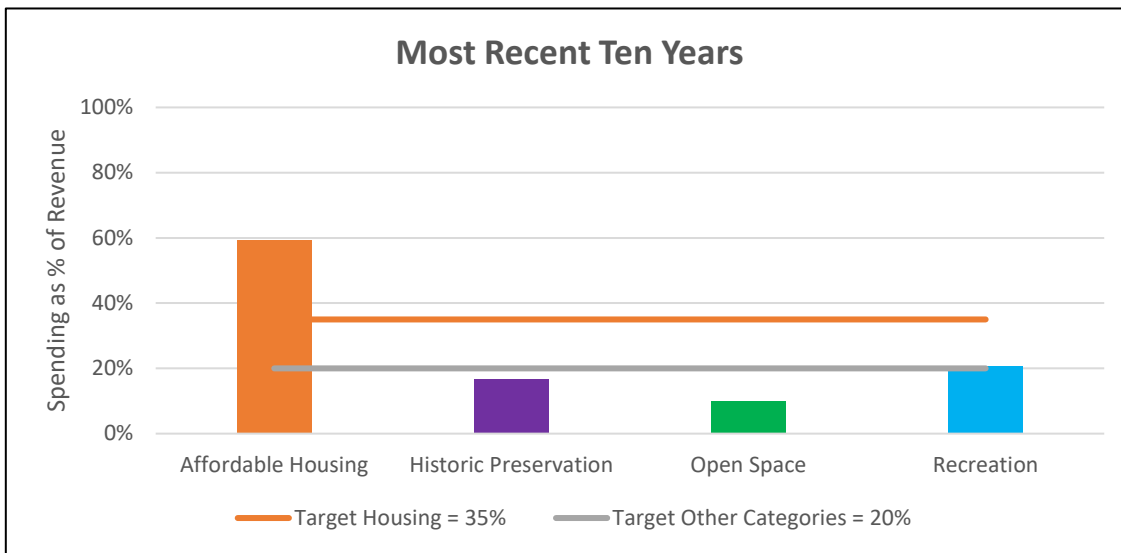
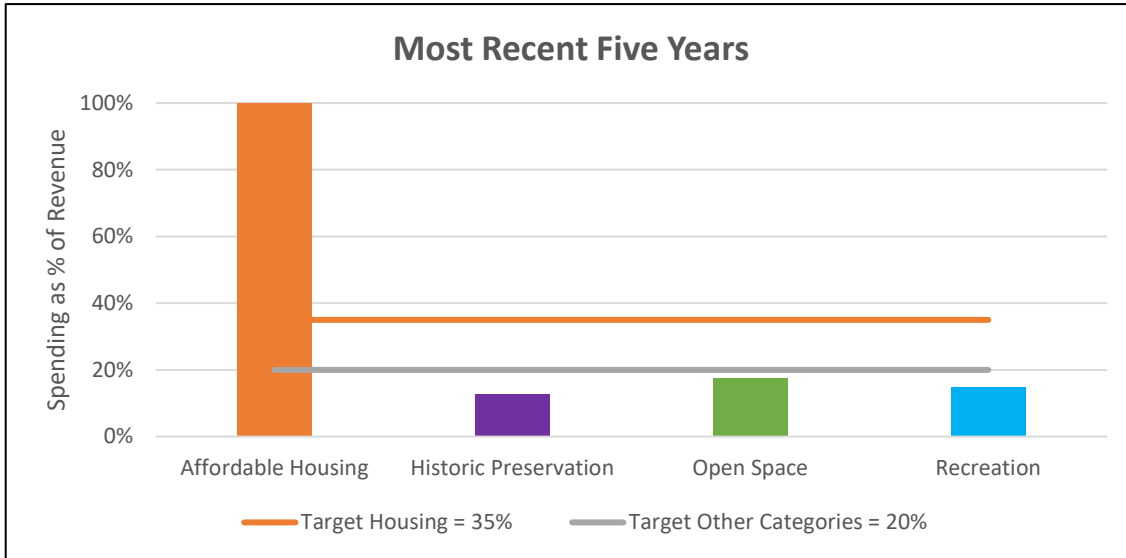
### Comparisons Based on % of Current Revenue

As of August 5, 2022

Note: spending on projects funded through bond issues is recorded as a series of annual debt service payments

	Program Area					Total Spending	Total Current Revenue
	Affordable Housing	Historic Preservation	Open Space	Recreation	Administration		
<b>Most Recent Five Years</b>							
Spending	19,137,773	2,354,528	3,235,723	2,714,277	705,853	28,148,154	18,369,421
% of Total Current Revenue	104%	13%	18%	15%	4%		153%
Target %	35%	20%	20%	20%	5%		100%
Percentage Point Difference Between Actual and Target	69%	-7%	-2%	-5%	-1%		
<b>Most Recent Ten Years</b>							
Spending	22,186,176	6,291,367	3,744,223	7,703,774	1,303,400	41,228,940	37,333,878
% of Total Current Revenue	59%	17%	10%	21%	3%		110%
Target %	35%	20%	20%	20%	5%		100%
Percentage Point Difference Between Actual and Target	24%	-3%	-10%	1%	-2%		
<b>Entire Life of Program</b>							
Spending	34,031,827	14,760,781	12,347,601	13,378,019	2,468,619	76,986,847	77,471,811
% of Total Current Revenue	44%	19%	16%	17%	3%		99%
Target %	35%	20%	20%	20%	5%		100%
Percentage Point Difference Between Actual and Target	9%	-1%	-4%	-3%	-2%		

# Spending as % of Program Revenue, Compared to Guidelines



# Spending Compared to Program Area Targets

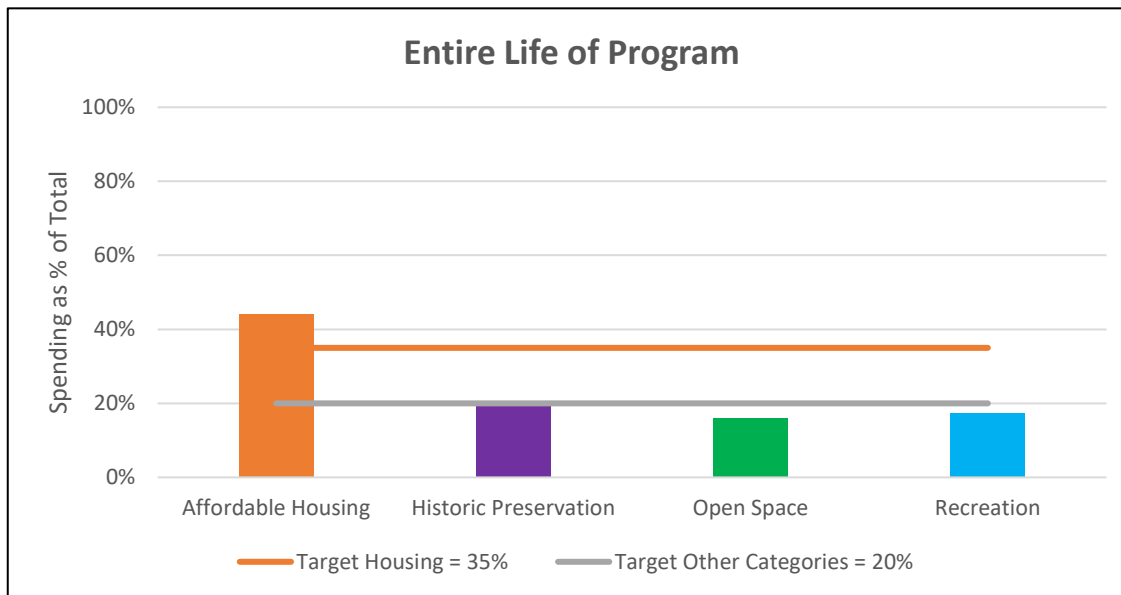
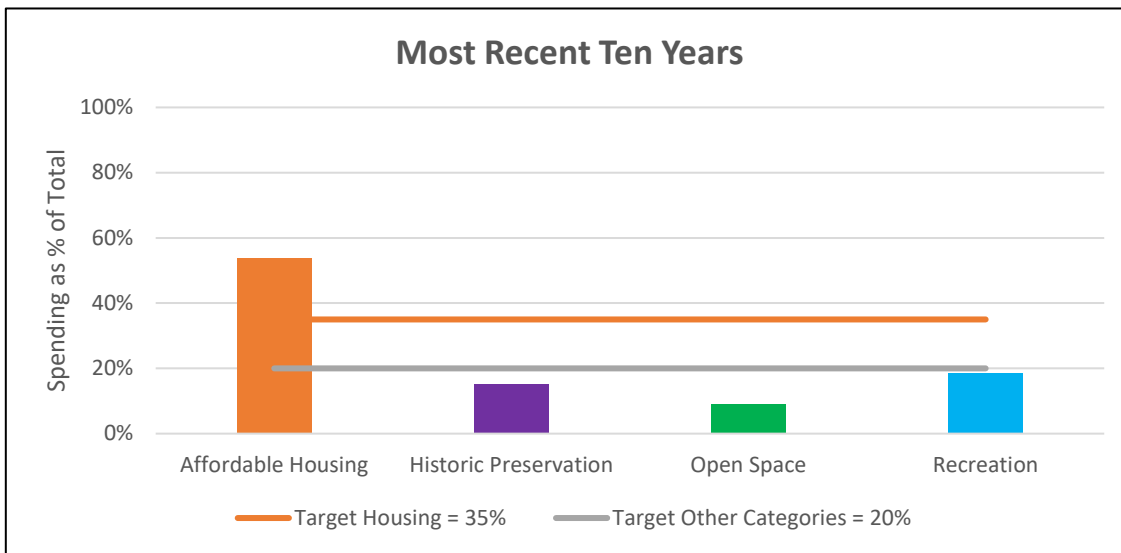
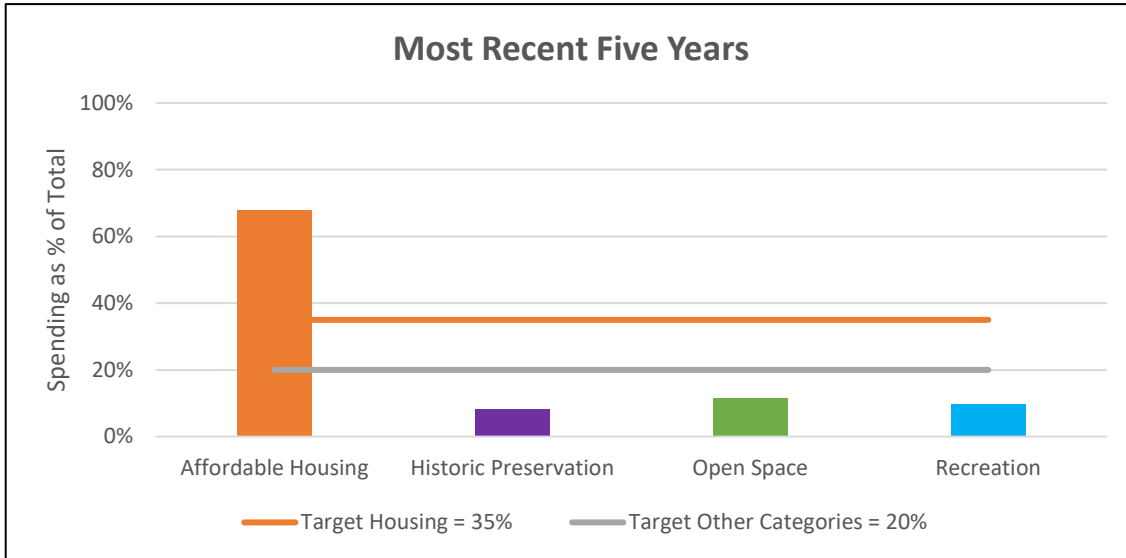
## Comparisons Based on % of Current Spending

As of August 5, 2022

Note: spending on projects funded through bond issues is recorded as a series of annual debt service payments

	Program Area					Total Spending
	Affordable Housing	Historic Preservation	Open Space	Recreation	Administration	
<b>Most Recent Five Years</b>						
Spending	19,137,773	2,354,528	3,235,723	2,714,277	705,853	28,148,154
% of Total	68%	8%	11%	10%	3%	100%
Target %	35%	20%	20%	20%	5%	100%
Percentage Point Difference Between Actual and Target	33%	-12%	-9%	-10%	-2%	
<b>Most Recent Ten Years</b>						
Spending	22,186,176	6,291,367	3,744,223	7,703,774	1,303,400	41,228,940
% of Total	54%	15%	9%	19%	3%	100%
Target %	35%	20%	20%	20%	5%	100%
Percentage Point Difference Between Actual and Target	19%	-5%	-11%	-1%	-2%	
<b>Entire Life of Program</b>						
Spending	34,031,827	14,760,781	12,347,601	13,378,019	2,468,619	76,986,847
% of Total	44%	19%	16%	17%	3%	100%
Target %	35%	20%	20%	20%	5%	100%
Percentage Point Difference Between Actual and Target	9%	-1%	-4%	-3%	-2%	

# Spending as % of Annual Spending, Compared to Guidelines





**August 2022 Potential Future Project List**

Potential Project Name	Applicant	Potential Funding Request	Category	Description	Timeline	Other
Adams Street Shul	Adams Street Shul	\$10,000 (or less)	Historic Resources	Restoration of Historic Front Doors, possible masonry work	TBD	Initial discussion Aug. 2022
Albemarle Park Renovations	Parks, Recreation and Culture	\$5 million	Recreation	Reconfigure and Rehabilitate all fields including pathways based on study currently underway	Fall 2023	Rough Estimate of \$7 million for all four parks projects
Brown and Oak Hill Fields Restoration	Parks, Recreation and Culture	\$500,000	Recreation	Restore/Rehabitate/Reconfigure based on study currently underway	TBD	Rough Estimate of \$7 million for all four parks projects
Burr School Fields Restoration	Parks, Recreation and Culture	\$500,000	Recreation	Restore/Rehabitate/Reconfigure based on study currently underway	TBD	Rough Estimate of \$7 million for all four parks projects
Gath Pool Construction	Parks, Recreation and Culture, Public Buildings	\$5 million	Recreation	Potential future request for funding to implement results of current Gath Pool Feasibility Plan including replacement, restoration, and/or repair	Fall 2023	Holding \$6 million in budget with \$1 million anticipated from other City sources
Jackson Homestead Basement Restoration/ Rehabilitation	City of Newton, Historic Newton	TBD	Historic Resources	Construction funding for work to remediate water and humidity issues, address accessibility, preserve historic artifacts	TBD	Funding and timing information will be available following completion of current study
McGrath Park Restoration	Parks, Recreation and Culture	\$600,000	Recreation	Restore/Rehabitate/Reconfigure based on study currently underway	TBD	Rough Estimate of \$7 million for all four parks projects
Municipal Historic Structure Building Envelope Study	Public Buildings	\$100,000	Historic Resources	Funding to review and assess building envelope on up to 15 city owned historic structures	TBD	Invitation issued for full proposal Oct. 2021 - Project on hold
Pellegrini Field House Restoration	Public Buildings	TBD	Historic Resources	Funding to restore exterior of existing Fieldhouse at Pellegrini Playground	TBD	
First Baptist Church Bell Tower Restoration	First Baptist Church, Newton Center	TBD - initial discussion anticipated work to be in millions	Historic Resources	Restoration of badly deteriorated bell tower	TBD	Emergency work already underway to prevent tower's collapse. Study in progress to develop plan and estimates for restoration
<b>Estimated Funding Requests At This Time: \$12,000,000 - \$15,000,000</b>						
New Trail	Conservation Committee	TBD	Open Space/ Recreation	Create Trail from Harwich Road to Lagrange		City has some funding but not anticipated to be enough for boardwalk and bridge needed in area
Newton Highlands Women's Club Building	Newton Highlands Women's Club	\$60,000	Historic Resources	Restoration work on existing historic building	?	Initial email conversations with Alice in 2019, me in 2020 - no specifications on work to be done as of March 2020
Norumbega Conservation Area	Conservation Committee	TBD	Open Space/ Recreation	Convert the main oval path at Norumbega Conservation Area and the path at the Upper Falls Riverwalk Conservagtion Area to stone dust or crushed stone for accessibility		
Potential Accessible Affordable Housing Project	55 Chinian Path	?	Community Housing	Purchase existing property and construct fully accessible affordable group home.	Unknown	ca. 1940s House currently used as affordable group home. CT organization contacted City interested in purchasing and redeveloping site
Historic Properties Grant Program	TBD		Historic Resources	Grant Fund to pay for difference between repairs and historically correct rehabilitations/repairs on eligible properties		Cambridge has similar program - others?
Small Scale Affordable Housing Projects	TBD	\$300,000	Community Housing	Funding to restore, rehab, and/or preserve existing affordable housing units in Newton		Funding to restore, rehab, and/or preserve existing affordable housing units in Newton
Affordable Housing Plan	Affordable Housing Trust	TBD	Community Housing	Community Affordable Housing Plan to assist new Affordable Housing Trust on determining needs of community, potential uses for Trust funds		
Upper Falls Greenway	Conservation Committee	TBD	Open Space/ Recreation	Install steps between the Upper Falls Greenway to conservation land in south and Braceland Park in north	?	

## Newton, Massachusetts Community Preservation Program FUNDING REQUEST

City of Newton



Ruthanne Fuller  
Mayor

PRE-PROPOSAL

PROPOSAL

(For staff use)  
date rec'd:

Please submit this completed file directly – do not convert to PDF or other formats.

For full instructions, see [www.newtonma.gov/cpa](http://www.newtonma.gov/cpa) or contact us:

Lara Kritzer, Community Preservation Program Manager,  
City of Newton Planning & Development Department, 1000 Commonwealth Ave., Newton, MA 02459  
[lkritzer@newtonma.gov](mailto:lkritzer@newtonma.gov) 617.796.1144

You may adjust the space for each question, but the combined answers to all questions on this page must fit on this page.

<b>Project TITLE</b>	Newton Affordable Housing Trust Funding		
<b>Project LOCATION</b>	Full street address (with zip code), or other precise location. Citywide		
<b>Project CONTACTS</b>	Name & title or organization	Email	Phone
<b>Project Manager</b>	Ann Houston, Chair Newton Affordable Housing Trust	<a href="mailto:lkritzer@newtonma.gov">lkritzer@newtonma.gov</a>	617-796-1144  Newton City Hall 1000 Commonwealth Ave. Newton, MA 02459
<b>Other Contacts</b>	Lara Kritzer, Community Preservation Program Manager	<a href="mailto:lkritzer@newtonma.gov">lkritzer@newtonma.gov</a>	617-796-1144  Newton City Hall 1000 Commonwealth Ave. Newton, MA 02459
<b>Project FUNDING</b>	<b>A. CPA funds requested:</b> \$1,948,056	<b>B. Other funds to be used:</b> \$0	<b>C. Total project cost (A+B):</b> \$1,948,056
<b>USES OF FUNDS</b>	<input checked="" type="checkbox"/> Rental Assistance		<input checked="" type="checkbox"/> Mortgage Assistance
<b>TARGET POPULATION, TYPE OF HOUSING, SPECIAL FEATURES</b>			
Individuals <input checked="" type="checkbox"/>	Families <input checked="" type="checkbox"/>	Seniors <input checked="" type="checkbox"/>	Homeless/At Risk of Homelessness <input checked="" type="checkbox"/>
Rental <input checked="" type="checkbox"/>	Ownership (including condominiums) <input checked="" type="checkbox"/>	% Area Median Income:	Up to 100% AMI
<b>Project SUMMARY</b>	Explain how the project will use the requested CPA funds. You may provide more detail in attachments, but your PROJECT SUMMARY MUST FIT IN THE SPACE BELOW.		
<p>In December 2021, the City of Newton established its first Affordable Housing Trust for the purposes of preserving the City's existing affordable housing units and creating new units that are affordable to low and moderate income households. During the review process for the ordinance, the Community Preservation Committee expressed its support for the creation of the new affordable housing tool and agreed to support the allocation of 35% of the City's annual CPA funding to the Trust for use in any affordable housing project that is allowable under the Community Preservation Act. This proposal is the Newton Affordable Housing Trust's first application for CPA funding to provide the initial funds to establish the Affordable Housing Trust Fund and begin the work of developing and furthering projects that further the City's affordable housing goals.</p> <p>The Trust is anticipated to be ready to accept new proposals for the use of its funding as soon as the CPA funding is in place. The goal of the Trust is to establish a simplified process for the allocation of these funds so that the funds can be quickly put to use to meet the affordable housing needs of the community. While the Trust has a stated goal of focusing funding on low and very low income households, the current proposal is for the use of the funding up to the 100% AMI allowed by the Community Preservation Act to allow the Trust with the greatest flexibility in using the funds to meet the affordable housing goals.</p>			

<b>Project TITLE</b>		<b>Newton Affordable Housing Trust</b>	
<b>USE of CPA FUNDS</b>		<b>COMMUNITY HOUSING</b>	
<b>(To be completed by CPC staff.)</b>	<b>Acquire</b>	X	
	<b>Create</b>	X	
	<b>Preserve</b>	X	
	<b>Rehabilitate/ Restore</b>	X	
	<b>Support</b>	X	
<b>COMMUNITY NEEDS</b>	<p>From each of at least 2 plans linked to the <a href="#">Guidelines &amp; Forms</a> page of <a href="http://www.newtonma.gov/cpa">www.newtonma.gov/cpa</a>, provide a brief quote with plan title, year, and page number, showing how this project meets previously recognized community needs. You may also list other community benefits not mentioned in any plan.</p> <p>The NAHT supports affordable housing as recognized in the following plans:</p> <p><b>Comprehensive Plan:</b> Funding of the NAHT meets the goals of the Comprehensive Plan for affordable housing by consolidating the City’s available funding resources in a single location which provides affordable housing advocates and developers with a simplified, one-stop process for future funding. The Comprehensive Plan called for CPA funding to be a leading resource in the preservation of existing and creation of new affordable housing (Page 5-9) and the Trust provides the City with opportunities to work with the Plan’s Strategic Action for Strengthening Financial Resources (Page 5-16).</p> <p><b>Consolidated Plan FY21-FY25:</b> Funding of the NAHT will assist the City in meeting the Strategic Plan Goals for Newton (Page 182) by providing funding for the production of new units and the preservation and rehabilitation of existing units. Trust funding can also be used to support affordable housing units and programs and to further the goals of Fair Housing in Newton.</p> <p><b>Community Outreach:</b> The Mayor, City Councilors, and numerous City residents and affordable housing advocates took part in the discussions surrounding the development of the Affordable Housing Trust Ordinance in 2020 and 2021 and its approval in December 2021.</p>		
<b>COMMUNITY CONTACTS</b>	<p>List at least 3 Newton residents or organizations willing and able to comment on the project and its manager’s qualifications. No more than 1 should be a supervisor, employee or current work colleague of the project manager or sponsor. Consult staff on the community contacts required for your specific proposal.</p>		
<b>Name &amp; title or organization</b>		<b>Email</b>	<b>Phone</b>
Fran Godine, Engine 6		<a href="mailto:godine@comcast.net">godine@comcast.net</a>	617-969-2625
Jeanne Strickland, Exec. Director Newton Community Development Foundation		<a href="mailto:jstrickland@ncdfinc.org">jstrickland@ncdfinc.org</a>	617-244-4035
Lizbeth Heyer, Chair Newton Housing Partnership		<a href="mailto:lheyer@2lifecommunities.org">lheyer@2lifecommunities.org</a>	617-912-8400
<b>Mailing Address</b>			

You may adjust the space for each question, but the combined answers to all questions on this page must fit on this page.  
**Full proposals must include separate, detailed budgets in addition to this page.**

Project TITLE	<b>Newton Affordable Housing Trust</b>	
<b>SUMMARY CAPITAL/DEVELOPMENT BUDGET</b>		
<b>Uses of Funds</b>		
To fund future affordable housing projects that acquire, create, preserve, restore, rehabilitate, and support affordable housing in Newton as allowed in the Community Preservation Act Legislation.		\$1,948,056
<b>D. TOTAL USES</b> (should equal C. on page 1 and E. below)		<b>\$1,948,056</b>
<b>Sources of Funds</b>	<b>Status</b> (requested, expected, confirmed)	
CPA funding	Requested	\$1,948,056
<b>E. TOTAL SOURCES</b> (should equal C. on page 1 and D. above)		<b>\$1,948,056</b>
<b>SUMMARY ANNUAL OPERATIONS &amp; MAINTENANCE BUDGET (cannot use CPA funds)</b>		
<b>Uses of Funds</b>		
Not Applicable - Staff Support to come from Community Preservation Act Administrative Funds (Community Preservation Program Manager Position)		\$0
<b>F. TOTAL PROGRAM ADMINISTRATION COST</b> (should equal G. below)		<b>\$0</b>
<b>Sources of Funds</b>		
		\$0
		\$0
<b>G. TOTAL ANNUAL FUNDING</b> (should equal F. above)		<b>\$ 0</b>
<b>Project TIMELINE</b>	<b>Phase or Task</b>	<b>Season &amp; Year</b>
	Application submitted for CPC Public Hearing	August 2022
	CPC and City Council review and approval process	August – October 2022
	City Council vote	September – October 2022
	Funding available for use by Trust	November 2022

Newton Community Preservation Program  
**CPC Staff *READER'S GUIDE* to New Proposal**  
**Newton Affordable Housing Trust Funding**

**CPA REQUEST:** \$1,948,056

**TOTAL COSTS:** \$1,948,056

This proposal is the first request for annual CPA funding for the newly established Newton Affordable Housing Trust Fund. The funds will be used for future projects which meet one or more of the CPA eligible funding categories.

**RECOMMENDED CONDITIONS for CPC FUNDING**

1. Funding is to be used at the discretion of the Newton Affordable Housing Trust (NAHT) for any project which acquires, creates, preserves, rehabilitates/restores, or supports affordable housing as defined in the Community Preservation Act.
2. The CPC shall receive copies of all relevant plans, drawings, schematics, budget and marketing materials, etc. associated with the use of the CPA funding.
3. The CPC shall receive regular updates from the NAHT on the status of the Trust funds, how they are being used, and any plans for future projects or initiatives which might involve CPA funding.
4. Any CPA funds appropriated but not used for the purposes stated herein shall be returned to the Newton Community Preservation Fund.

**DETAILED NOTES & QUESTIONS**

This proposal is eligible for CPA funding as any future project using the funds will be required to meet at least one of the CPA allowable funding uses including acquiring, creating, preserving, rehabilitating/restoring, or supporting affordable housing. The proposal states that the funding will be used for projects assisting households up to 100% AMI, which is the maximum allowed under the Community Preservation Act. While this is added to ensure that the Trust has all the flexibility allowed under the CPA, it is likely that the Trust will focus spending on projects that provide deeper levels of affordability.

**COMMUNITY NEEDS**

The City spent several years studying the potential benefits of establishing a municipal affordable housing trust fund before passing the enabling ordinance in December 2021. The new Trust is intended to assist the City in meeting its affordable housing goals by providing a streamlined process for funding new projects and developments. Funding of the Trust meets the goals of the Comprehensive Plan by creating a resource for preserving and creating affordable housing while also strengthening the City's financial resources for these goals. Funding of the Trust will also address the goals of the City's Consolidated Plan for FY21-FY25 by providing a funding resource for projects that produce new units, preserve existing units, support affordable housing, and further the goals of Fair Housing in Newton.

**DEVELOPMENT USES & SOURCES**

This proposal will use the CPA funds to establish the Trust Fund and begin to build a reserve for future affordable housing projects. Any future project requesting these funds from the Trust will be required to meet all of the requirements of the Community Preservation Act.

## **PROJECT FINANCES**

CPA funding was noted to be the primary funding source for the Trust Fund during the review process for the enabling ordinance. As part of these discussions, the CPC agreed to set aside its annual target amount for affordable housing, currently 35% of the program's annual funding, to the Trust once it was established. The Trust will also receive Inclusionary Zoning funds from time to time, but this is not anticipated to be a regular or reliable funding source.

## **SPONSOR QUALIFICATIONS & FINANCES**

The project has the support of Mayor Fuller as well as the Newton Housing Partnership, Engine 6, and the Newton Community Development Foundation.

To: CPA Committee  
Cc: Lara Kritzer  
RE: Request for Extension and Clarification for use of CPA funding  
Date: July 25, 2022

.....

Cascap Inc. is very appreciative of the funding we received from the Community Preservation Act (CPA) Committee for Nonantum Village Place (NVP), 35 units of affordable housing for seniors at 241 Watertown Street. The Committee approved \$500,000 on July 13, 2021. The funding is for capital improvements, energy conservation measures, and decarbonization measures to decrease the building's greenhouse gas emissions. The CPA approval included siding work, roof work, HVAC to install Air Source Heat Pumps for all units, as well as installation of new roof top units. Siding work for the building has been completed, and we will begin roofing work shortly. We have entered into agreements with an HVAC contractor to install the new equipment. All this work has been in concert with New Ecology Inc., (NEI) that has overseen the Net Zero Over Time plan for Nonantum Village Place. NEI also developed the scope of work for the HVAC equipment installation, including a hybrid thermostat system that will make use of the existing condensing boilers at very low outdoor temperatures. We have secured the HVAC equipment for the apartments. Our HVAC contractor is securing the Roof Top Unit (RTU) equipment. Suppliers have stated that the RTU equipment will be available March 2023. Construction completion is expected to be April 2023.

We are asking the Committee to extend the CPA approval and to clarify that the installation of a solar photovoltaic (PV) roof system is an eligible use of these funds. We have CPA funded construction contingency, to address potential unforeseen conditions in replacing the three roofs at NVP and potential equipment increases. Should we not use all the contingency funding, we would like to use these funds towards installation of a solar PV roof system. We are currently seeking additional grant funding for a solar array plus storage system, and the CPA clarification that this would be an eligible use would be helpful in this process.



Ruthanne Fuller,  
Mayor

Newton, Massachusetts  
**Community Preservation Committee**  
**COMMUNITY PRESERVATION PLAN**  
 Revised December 14, 2021

Telephone  
 (617) 796-1120  
 Telefax  
 (617) 796-1142  
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Massachusetts' [Community Preservation Act](#) (CPA) provides local and state funds for projects in community housing (affordable housing), historic resources, open space, and recreation, within certain constraints:

ALLOWABLE SPENDING PURPOSES under the Community Preservation Act				
	COMMUNITY HOUSING	HISTORIC RESOURCES	OPEN SPACE	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 [About the CPA](#) page in Newton's CPA program website includes a more detailed [Allowable Uses of Funds](#) chart, including the full definition of each eligible resource and its CPA fundable activities. On the website's [CPA Funding Process and Materials](#) page there is Newton-specific information on the project proposal process, proposal instructions and upcoming deadlines. The CPC regularly works with CPA funding applicants to ensure that their proposals meet the requirements and goals of Newton's CPA program.

Like most CPA communities, Newton will not always have enough CPA funding for all of its current and anticipated funding proposals. The Community Preservation Committee (CPC) relies on the following guidelines in determining which project proposals to recommend to the City Council for funding.

**1. Project is drawn from or guided by Newton's regularly updated community-wide plans**

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 can be found on the [CPA Funding Process and Materials](#) page on the City of Newton's website.

**2. Project helps to balance funding across all of the eligible CPA funding categories**

The CPA legislation allows funding to be used for projects in Community Housing, Historic Resources, Open Space, and Recreation. It also requires communities to spend at least 10% of each year's new funds on each of three of those categories – Community Housing, Historic Resources, and Open Space. 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 approximately one year's worth of funds (currently about \$4.5 million) in reserve so that the program can respond quickly to unanticipated future opportunities. Unusually expensive projects, such as land acquisition or major capital

website [www.newtonma.gov/cpa](http://www.newtonma.gov/cpa)  
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improvements to public buildings or parks, may also be funded by selling bonds that will be repaid from future local CPA revenue.

Newton's allocation targets for CPA funding in each eligible project category are intended to be flexible guidelines, not rigid quotas. These targets reflect Newton's past funding patterns, available information about possible future proposals, and feedback on the City's priorities received through community surveys and public hearings.

Newton CPA Allocation Targets: Balancing Funds Across Resources	
Community Housing (statutory minimum 10%)	35%
Historic Resources (statutory minimum 10%)	20%
Open Space (statutory minimum 10%)	20%
Recreation	20%
CPA Program Administration	5%

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

### 3. Projects leverage non-CPA funds to achieve community goals

The CPC prioritizes projects that are not only eligible for CPA funding but which also leverage their CPA funding to achieve 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). In reviewing the CPA fund's financial contribution to a project, the CPC may choose to look at individual project phases or the project as a whole. The CPC prefers to see a minimum of 50% funding match for all CPA projects whenever possible, but may allow for a lower percentage match depending on the project and its overall benefits to the community. Municipal projects will be given more flexibility and have a lower preferred target match of 30%.

### 4. Extent to which the Project benefits the Community

The CPC will take into consideration the location of the project and its impact both on its surrounding neighborhood and the City as a whole. Projects which involve publicly (municipal) or privately owned assets that benefit all Newton residents and neighborhoods may be given more weight than projects which will have a more limited impact on the community. Community Housing is generally considered as having a wide public benefit to the City as a whole when it is both deed-restricted to ensure permanent affordability and proactively marketed to all eligible households.

When existing municipal assets, whether it be buildings or landscapes, are considered for CPA funding, the CPC must be careful to distinguish between projects which might be considered general maintenance, and therefore are not eligible for CPA funding, and projects which are capital improvements to the site and may be funded. There is no set definition of general maintenance vs. capital improvement, and the CPC will make decisions on the eligibility of projects on a case by case basis. When appropriate, the CPC may recommend dividing the cost of an improvement so that the CPA funding is used to provide an additional benefit which the City might otherwise not be able to fund. For example, CPA funding could be used to pay the difference between replacing an historically significant slate roof with the more appropriate but more expensive slate rather than a less costly asphalt shingle alternative.

Projects which have a limited or no public benefit to the community are generally considered to not be eligible for CPA funding.

## **5. Extent to which the Project includes Sustainable Development Design Elements**

The CPC supports the City's goal to reach carbon neutrality by 2050 and encourages all applicants to incorporate sustainability into their projects through design decisions such as: eliminating or reducing fossil fuel use; reducing embodied carbon, especially by reusing existing resources, prioritizing energy efficiency through methods like the Passive House standard, incorporating EV charging stations and/or solar panels, etc. CPA funding applicants should also consider that any projects over 20,000 sq. ft of new construction or substantial reconstruction will be expected to meet the City's Sustainable Development Design requirements as outlined in Section 5.13 of the Zoning Ordinance as the project goes through the Special Permit process. Additional information on these requirements is available on the City's website at: <https://www.newtonma.gov/home/showpublisheddocument?id=29553>

The CPC feels strongly that new CPA funded projects should move the City forward in meeting its sustainable energy goals and is aware that by adding in energy-saving measures a project may have higher upfront costs, particularly for renovations. The CPC encourages projects to incorporate all relevant energy efficiency and electrification measures into their proposals to be included in their discussions with the CPC. Any project which does not include these elements will be expected to provide a written explanation as to why they cannot be incorporated into the project with their funding proposal.

## **6. Project managers have 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.

## **7. Evaluate completed projects to ensure accountability and 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 a final in-person presentation and written report to the CPC. City project managers 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.

# Newton Community Preservation Plan

Current & Future Proposals Compared to Available Funds & Allocation Targets					
	Affordable Housing	Historic Resources	Open Space	Recreation	
<b>Total Funded Projects, FY16-FY21 = \$22,641,369</b>	\$15,986,349	\$2,438,874	\$2,253,302	\$1,962,844	
<b>Fy15-Fy20 - Percentage of allocation by resource</b>	<b>68%</b>	<b>10%</b>	<b>10%</b>	<b>8%</b>	
<b>CPC target allocations by resource, ± 5%</b>	<b>35%</b>	<b>20%</b>	<b>20%</b>	<b>20%</b>	
<b>Current Proposals or Pre-proposals, with Related Future Proposals</b> (in order of submission to CPC) ✓ = Fy20 appropriation    ? = recommended by CPC but not yet funded    * = cost revised or estimated by CPC staff <b>CIP = City of Newton Capital Improvement Plan.</b> In this plan, for "Priority," lower numbers = higher priorities; for "Urgency," 100 = highest, 1 = lowest.					
Sources & CIP Priority October 2021	Project Title	Affordable Housing	Historic Resources	Open Space	Recreation
CIP 25, 31, 81 (54) 37.2 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 &amp; design, Mar. 2017)</i>				
CIP 90 (35.2) 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>				
Multiple CIP listing for individual properties included in project	Municipal Historic Exterior Building Envelope Study <i>In September 2021, Public Buildings submitted a pre-proposal to study 15 existing municipal buildings. CPC invited a full proposal at their Oct. meeting.</i>		\$100,000		
CIP 44	Gath Memorial Pool Renovations - <i>Request for Phase II funding submitted May 2022. Pre-Proposal review June 2022</i>				\$486,500
CIP 198 (19)	Jackson Homestead Basement Rehabilitation <i>Pre-Proposal submitted for April 2022 review. Request for design and construction funds to remediate water issues and create climate controlled gallery space.</i>		\$75,000		
NA	Webster Wood Debt Service (FY22 Funds Only)			\$693,103	
<b>Total Requested Funding by Category</b>		<b>\$0</b>	<b>\$175,000</b>	<b>\$693,103</b>	<b>\$486,500</b>
<b>Percentage of Allocation by Resource</b>		<b>0%</b>	<b>13%</b>	<b>51%</b>	<b>36%</b>
Future Funding Target Allocations					
<b>FIVE-YEAR FORECAST: Total Available Revenue for FY22-FY26 = \$24,483,113</b>					
<b>Target Allocation over Five Years:</b>	\$8,569,090	\$4,896,623	\$4,896,623	\$4,896,623	
<b>TEN-YEAR FORECAST: Total Available Revenue for Fy22-FY31 = \$76,335,984</b>					
<b>Target Allocation over Ten Years:</b>	\$26,717,594	\$15,267,197	\$15,267,197	\$15,267,197	
<i>Cumulative Debt Service for Webster Woods/300 Hammond Pond Parkway land acquisition (30 year debt):</i>					
<i>Next Five Years (FY22-FY26):</i>			\$3,470,513		
<i>Next Ten Years (FY22-FY31):</i>			\$6,947,875		

## Newton Community Preservation Plan

Other Potential Future Proposals (in order by highest CIP ranking for each site)					
CIP Priority (Urgency) Oct. 2021	Project Title	Affordable Housing	Historic Resources	Open Space	Recreation
CIP 33 (53.3)	Pellegrini Park Field House Exterior Impmts		\$200,000		<i>could also be listed here</i>
CIP 38 (52.9)	New Park at 150 Jackson Road				TBD
CIP 40 (52.7)	Gath Memorial Pool Project ( <i>replacement</i> )				\$5,060,000
CIP 44 (51.9)	Brown/Oak Hill Middle Schools Fields				\$1,000,000
CIP 45 (49.8)	Burr Elementary School Fields Development				\$1,000,000
CIP 46 (48.3)	McGrath Park Fields Redesign and Development				\$1,000,000
CIP 47 (47.9)	Marty Sender path Phase 2 - Boardwalk and Trail Improvements				\$150,000
CIP 51 (46.9)	Halloran Field Lights and Field Reconfiguration Phase I (at Albemarle)				\$3,270,000
CIP 76 (37.9)	Crystal Lake Beach Improvements				\$500,000
CIP 1717 (30.3)	Jeanetter Curtis West Rec Ctr (The Hut)		<i>Could also be listed here</i>		\$2,500,000
CIP 122 (29.7)	Waban Library Accessibility Upgrades		\$150,000		
CIP 123 (29.7)	Old Cold Spring Field				\$350,000
CIP 132 (28.9)	Burr Park Fieldhouse Accessibility/Site Upgrades		\$250,000		<i>could also be</i>
CIP 134 (28.6)	Forte Park Lighting and Accessibility ( <i>including synthetic turf, which cannot be purchased with CPA funds</i> )				\$2,000,000
CIP 140 (28.1)	Kennard Estate Accessibility, gutters, plumbing		\$500,000		
CIP 142 (28.1)	Crafts Street Stable ( <i>DPW</i> )		\$3,000,000		
CIP 144 (27.8)	Auburndale Library - Windows and Doors		\$200,000		
CIP 151(29.6)	West Newton Police Annex Building Envelope, Windows, Doors		\$200,000		
CIP 151 (26.9)	Police Annex - Exterior Windows and Doors, Building Envelope		\$200,000		
CIP 153 (27.5)	Crystal Lake Bathhouse		<i>could also be listed here</i>		\$5,000,000
CIP 154 (26.8)	City Hall - Clerks OfficeArchives ( <i>facilities</i> )		\$100,000		
CIP 155 (26.4)	Vernon Street Building - Building Envelope		\$335,850		
CIP 160 (25.6)	Burr Park Fieldhouse Building Envelope and Window Restoration		\$313,500		<i>could also be listed here</i>
CIP 163 (25.6)	West Newton Police Annex Roof Restoration/Repair		\$255,825		
CIP 167	City Hall Exterior Restoration		\$3,000,000		
CIP 168 (24.7)	Pellegrini Field Lights				\$250,000
CIP 172 (23.7)	Upper Falls/Braceland Playground				\$1,675,000
CIP 176 (22.7)	Former Newton Centre Library Building Envelope		\$1,500,000		
CIP 178 (22.2)	Auburndale Library - Accessibility and Site Upgrades		\$265,000		
CIP 180 (21.4)	Newton Corner Library - Exterior Windows and Doors		\$217,000		
CIP 185 (20.8)	Nonantum Library - Accessibility/Site		\$204,000		
CIP 188 (20.7)	Kennard Estate Building Envelope, Windows and Doors		\$240,000		
CIP 189 (20.7)	City Hall Historic Landscape		\$1,500,000		
CIP 190 (20.7)	Chaffin Park Wall ( <i>Fy21</i> ) ( <i>abutting Farlow Park</i> )		\$200,000		
CIP 194 (20.0)	Crafts Street Stable Building Envelope Restoration, Windows, Roof		\$2,000,000		
CIP 199 (17.9)	Waban Library Building Envelope and Entrance		\$325,000		
CIP 204 (15.1)	Jackson Homestead Doors & Windows		\$250,000		
CIP 207 (9.6)	Nahanton Park Accessibility ( <i>renovate parking areas, path to Nature Center</i> )				\$150,000
CIP 209 (9.4)	City Hall Doors & Windows		\$3,125,000		
CIP 213 (9.0)	Waban Library Exterior Windows and Doors		\$118,500		
CIP 214 (8.0)	City Hall Cupola/Roof Repair/Replacement		\$1,700,000		
CIP 215 (8.7)	Auburndale Library Building Envelope and Roof		\$260,900		
<b>Other Potential Projects Total By Category</b>		<b>\$0</b>	<b>\$20,610,575</b>	<b>\$0</b>	<b>\$23,905,000</b>
<b>% Allocation by Resource</b>		<b>0%</b>	<b>46%</b>	<b>0%</b>	<b>54%</b>

# Newton Community Preservation Plan

CPA Target Allocations by Resource	35%	20%	20%	20%
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**Community Preservation Act Funds  
Current Status of Active Funded Projects**

Fiscal Year	Project Title	Address	Funding Category	CPA Funding Appropriated	Total Expended to Date	CPA Funds Remaining	Notes on Progress
FY22	Athletic Fields Improvements	Four to Six Sites (See Project Website)	Recreation	\$420,000	\$0	\$420,000	Parks and Rec working on contracts with two consulting firms who will share the design work
FY18	AUBURN STREET (affordable housing & historic preservation)	236 Auburn Street, Auburndale, MA 02466	Community Housing/Historic Preservation (\$677,700/\$300,000)	\$977,700	\$977,700	\$0	Preservation Restriction signed and sent to MHC for final signatures
FY21	Coleman House Senior Housing Preservation	677 Winchester Street, Newton Highlands	Community Housing	\$4,214,622	\$3,708,399	\$506,223	In Progress
FY21	Commonwealth Avenue Carriageway Redesign	Auburndale - Charles River to Lyons Field	Recreation	\$390,000	\$193,724	\$196,276	Design work in progress - Adnl Funding recommended May 2022 and under City Council Review
FY16, FY17	Crescent Street Site Assessment, Feasibility and Design	70 Crescent Street, Auburndale	Community Housing/Recreation	\$360,000	\$225,403.00	\$134,597.00	Project on hold since 2018.
FY21	Gath Memorial Pool Feasibility Study	256 Albemarle Road Newtonville	Recreation	\$60,000	\$49,000	\$11,000	Project Underway - Bargmann Hendrie + Archetype chosen to complete work.
FY19, FY21	Golda Meir House Senior Housing Expansion (Stanton Avenue)	160 Stanton Ave, Auburndale, MA 02466	Community Housing	\$4,494,857	\$4,045,371	\$449,486	Project underway - Four requisitions to date and have used all funding except 10% retainage
FY21	Grace Episcopal Church Tower Restoration	70-76 Eldredge Street, Newton Corner	Historic Resources	\$1,433,000	\$386,442	\$1,046,558	Scaffolding and building protection elements are in place and beginning interior work - Next Requisition Submitted June 2022
FY19, FY21	Haywood House Senior Housing Development	Jackson Road (behind 83-127 Kennedy Circle), Newton Corner, MA 02458	Community Housing	\$3,077,900	\$2,761,180	\$316,720	Project 25% complete - have used all funding except 10% holdback to date
Multiple	HISTORIC BURYING GROUNDS 3, East Parish Burying Ground	Newton Corner, MA 02458	Historic Resources	\$208,700	\$132,502	\$76,198	CPC approved the reallocation of funds to the South Burying Ground fence replacement project in Oct. 2020.
FY21	Jackson Homestead Fence Replacement	537 Washington Street, -2458	Historic Resources	\$28,990	\$0	\$28,990	Project delayed to 2022 - contractor unable to get adequate materials to complete custom job
FY22	Levingston Cove Improvements Project	Crystal Lake, Lake Avenue, Newton Highlands	Open Space/Recreation	\$1,440,344	\$0	\$1,440,344	Funding Approved Oct. 2021 - Work to begin Summer 2022
FY14	Myrtle Village Affordable Housing Development	12 and 18-20 Curve Street, West Newton, MA 02465	Community Housing	\$910,179	\$910,179	\$0	Waiting for Final Report - Reached out to Applicants Spring 2020
FY22	New Art Center/Church of the Open Word Restoration	19 Highland Avenue, Newtonville	Historic Resources	\$94,600	\$0	\$94,600	Funding Approved Oct. 2021, Grant Agreement to be signed
FY22	Newton Architectural Survey, 1940-1972	Various	Historic Resources	\$17,500	\$0	\$17,500	Grant funding received from Mass. Historical Commission - March 25, 2022
FY18	NEWTON CEMETERY Whipple-Beal Cast Iron Fence	791 Walnut Street, Newton Center, MA 02459	Historic Resources	\$60,000	\$54,000	\$6,000	Final Report Approved; Preservation Restriction under review with MHC as of 9/13/21
FY20	NEWTON CONSERVATORS, Conservation Restrictions (Kessler Woods)	200 Vine Street (bordered by La Grange St.), Chestnut Hill, MA 02467	Open Space	\$15,000	\$0	\$15,000	On hold pending completion of Conservation Restriction
FY04, FY06, FY09, FY14, FY15	Newton HOMEBUYER ASSISTANCE Program, Phases 1-5	Citywide	Community Housing	\$3,209,050	\$2,584,958	\$624,092	In Progress
FY22	Nonantum Village Senior Housing Preservation	241 Watertown Street	Community Housing	\$500,000	\$0	\$500,000	Grant Agreement complete - project moving forward this summer
FY20	PIGEON HILL TRAIL (Riverside Greenway) Design	Connecting Evergreen Street to Lasell Boathouse to Charles Street in Auburndale, including two underpasses under Interstate 90	Recreation	\$50,000	\$3,737.93	\$46,262	Design work complete and working with DCR on design and future maintenance responsibility for pathway. Expect to be back to CPC in future to reallocate funding to construction work
FY20	Webster Woods/ 300 Hammond Pond Parkway (Land Acquisition)	300 Hammond Pond Parkway, Chestnut Hill, MA 02467	Open Space	\$15,740,000	\$15,219,426	\$520,574	Includes both purchase funds and legal fees. Remaining funds include legal fees and discount received from bond sale; Conservation Restriction in Progress.
<b>Project Totals</b>				<b>\$37,702,442.00</b>	<b>\$31,252,021.94</b>	<b>\$6,450,420.06</b>	