



Town of Needham

Community Preservation Committee Application Workshop

September 11, 2024

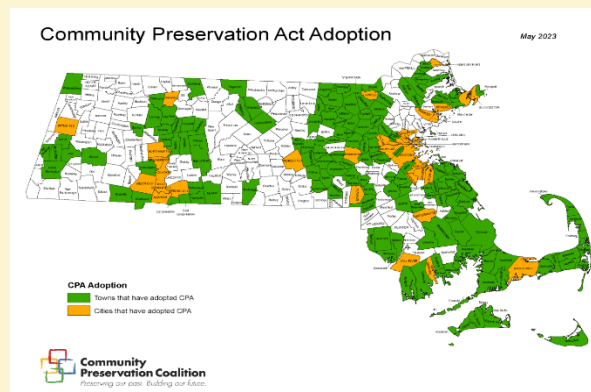
Community Preservation Act Overview

Enacted by legislation in 2000 (M.G.L. Ch. 44B)

Enables cities and towns to raise money through a real estate tax surcharge and create a local dedicated fund to:

- ◆ Acquire, Create & Preserve **Open Space**
- ◆ Acquire, Create, Preserve & Restore **Historic Sites**
- ◆ Acquire, Create, Preserve & Support **Affordable Housing**
- ◆ Acquire, Create, Preserve & Restore **Outdoor Recreational Facilities**

Also established the **Massachusetts Community Preservation Trust Fund** that provides matching distributions to participating communities.



*As of August 2024
196 Massachusetts communities
have adopted the CPA*

Community Preservation Act in Needham

ADOPTION

Approved at the May 2004 Town Meeting and adopted by a 58% “yes” vote at the November 2004 Town Election

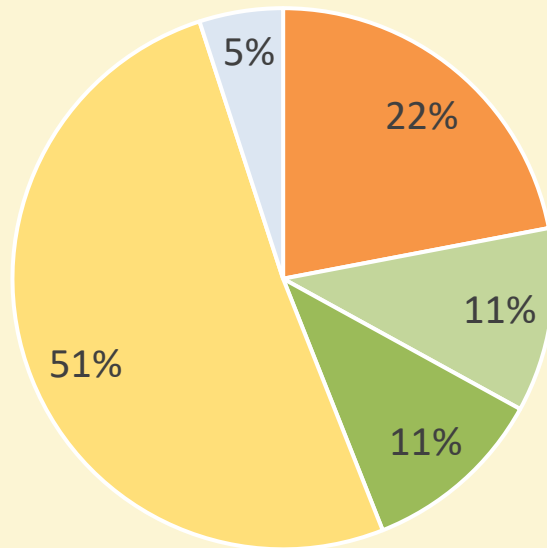
FUNDING

Needham’s CPA funding is derived from two sources:

- **2.0% surcharge on real estate property taxes** (*except for the first \$100,000 of taxable value, and properties owned/occupied by qualified low-income or low-moderate income seniors*)
- **Massachusetts Community Preservation Fund Annual Match** (*varies from year to year*)

CPA Reserve Fund Allocations

We are required to spend (or set aside for future spending) a minimum of 10% of annual CPA revenues for Open Space, Historic Preservation & Community Housing.



Needham's Reserve Allocations

- Community Housing
- Historic Preservation
- Open Space
- Annual Reserve
- Administrative

Needham increased its
Community Housing
allocation to 22%

Up to 5% may be used
for administrative
expenses

The Annual Reserve may
be used for any
allowable project in any
category

Needham CPA Revenue & Reserve Balances

FY2024 CPA Revenue

Local Tax Receipts:	\$ 3,247,000
Trust Fund Match:	<u>\$ 656,397</u>
Total:	\$ 3,903,397

FY2025 Reserve Balances

Available for Funding as of July 1, 2024

Community Housing Reserve:	\$ 872,545
Historic Resources Reserve:	\$ 106,669
Open Space Reserve:	\$ 2,838,167
FY2025 General Reserve:	\$ 1,187,215
CPA Free Cash:	TBD*

**CPA Free Cash total will be certified this Fall*

ALLOWABLE USES OF CPA FUNDS

	OPEN SPACE	HISTORIC	RECREATION	HOUSING
ACQUIRE	YES	YES	YES	YES
CREATE	YES	NO	YES	YES
PRESERVE	YES	YES	YES	YES
SUPPORT	NO	NO	NO	YES
REHABILITATE and/or RESTORE	YES, if acquired or created with CPA funds	YES	YES	YES, if acquired or created with CPA funds

Application Process & Timeline

November	Applicants submit Initial Eligibility Application
December	If project is eligible, CPC liaisons are assigned and additional due diligence information is requested from Applicant
January	Applicants respond to due diligence questions and provide supporting documentation, work with CPC liaisons
January-February	CPC reviews projects, invites applicants to present at a CPC meeting (may be asked to present more than once)
Mid-March	CPC consults with Select Board and Finance Committee
Mid-March	CPC holds a Public Hearing to obtain community input
End of March	CPC recommends projects to Town Meeting (majority vote required)
May	Town Meeting votes on funding CPC articles

Due Diligence Process

Questionnaires

Respond to standard due diligence questions applicable to the CPA category as well as project specific questions from the Committee

Documentation

Provide supporting documentation (e.g. deeds, site plans, design renderings, maps, photographs, studies, cost estimates)

Site Visits

Applicants may be asked to conduct one or more site visits with CPC liaisons

Presentations

Attend one or more CPC meetings to present the project to the Committee and answer questions

Public Hearing

Attend the CPC Public Hearing to present the project to the community, answer questions, and receive feedback

Factors for Consideration

The CPA Plan outlines several factors for consideration which provide guidance with respect to the Committee's evaluation of project applications. Examples include, but are not limited to:

- Is the project consistent with the goals of the CPC Plan?
- Will the project have substantial positive impact on the community based on needs being addressed and number of community members benefited? Is there strong community support?
- Does the project have support from departments, boards or commissions with direct or indirect jurisdiction over the project?
- Does the Applicant have site control or the written consent of the property owner?
- Is the project economically or otherwise reasonably feasible to implement, operate and maintain on a long-term basis?
- Is the project "fully baked" (i.e. if it requires variances, special permits, studies, etc., has the Applicant completed those processes)?

Role of CPC Liaisons

One or more Committee members will be assigned as a project liaison. They are a resource with respect to CPC related questions and can guide the applicant in preparing for presentations and the Public Hearing. Liaisons may ask for additional information during the due diligence process and/or conduct a site visit.

CPC Recommendation to Town Meeting

After the Public Hearing, the Committee will vote on its final recommendations for funding in the form of one or more warrant articles to be voted on at the upcoming Town Meeting. The Committee may recommend a project:

- As proposed by the applicant, or
- May modify the project, or
- May recommend partial funding or funding for only a portion or phase of the proposed project.

Funded Projects

- If Town Meeting votes to approve funding for a recommended project, the CPC may require the Applicant enter into a Grant Agreement which may impose certain conditions for funding, such as affordability restrictions, conservation restrictions, a deadline by which the project must be completed/funds expended.
- The Committee may require a grant recipient to post a plaque or signage acknowledging the contribution of Community Preservation funds.
- The Committee will require project status updates from grant recipients periodically, but no less than bi-annually and upon project completion.
- CPA funds are issued to grant recipients on a reimbursement basis. The recipient must complete a request for project disbursement and submit the form with all appropriate backup documentation to the Staff Liaison.

Recreation

Needham's CPA Plan seeks to preserve, increase, and enhance recreational uses of and access to Needham's natural and recreational resources. The goals include, but are not limited to:

- Developing active recreational resources, improving handicapped access, addressing adult, senior, and toddler recreational needs.
- Encouraging regional bike trails, enhancing resources for walking, hiking, cross-country skiing, bicycling, boating, and fishing.
- Acquiring land to fulfill identified current and future recreational needs.

Examples of Funded Recreation Projects

Rosemary Recreation Complex	2015-2017	\$ 5,000,000 \$ 8,000,000 (debt service)
Reservoir Trail	2017	\$ 860,000
Claxton Field Lights & Diamond	2020	\$ 101,500
Fisher St. Trailhead	2021	\$ 15,000

Open Space

Needham's CPA Plan seeks to acquire, create and preserve Needham's natural and open space resources. CPA funds may also be used for rehabilitation or restoration of open space that was acquired or created using CPA funds. Goals include, but are not limited to:

- Preserving large tracts of undeveloped land, open fields, woodlands, and ponds.
- Linking and connecting open space resources by providing or improving trails and wildlife corridors.
- Acquiring or controlling additional open space and developing additional public open spaces and parklands.
- Protecting and maintaining the remaining farmland in Town.

Examples of Funded Open Space Projects

Carol/Brewster – Purchase (2 Lots)	2009	\$ 920,000
Greene's Field Park Improvements	2012	\$ 445,000
Rosemary Lake Sediment Removal	2018	\$ 2,400,000
Needham Community Farm	2022	\$ 200,000

Historic Preservation

CPA funds may be spent on the acquisition, preservation, rehabilitation and restoration of historic resources. Needham's goals for historic preservation are to protect, preserve, enhance, restore, or rehabilitate the following:

- Resources of historical, cultural, architectural, or archaeological significance, especially those which are threatened with demolition.
- Historic properties for adaptive reuse.
- Sites on the Needham Historical Commission Inventory.
- This incorporates the remodeling, reconstruction, renovation, and making of extraordinary repairs to historic resources to make historic facilities functional for their intended use, including handicapped accessibility and building code requirements.

Examples of Funded Historic Preservation Projects

First Baptist Church Preservation	2020	\$ 90,200
First Parish Church Steeple	2020	\$ 50,000
Preservation of Town Marriage Records	2021	\$ 25,000
Town Common Historic Design	2021	\$ 1,000,000
Emory Grover Renovation	2022	\$ 2,000,000

Community Housing

CPA funds may be spent on the acquisition, creation, preservation and support of community housing, and for the rehabilitation or restoration of community housing that has been acquired or created using CPA funds.

Needham's CPA Plan was informed by the Needham Housing Plan, which identified the following priorities and strategies for community housing:

- Households with limited incomes
- Need affordable rental housing
- Gaps in affordability and access to affordable housing
- Need affordable homeownership opportunities
- Special needs housing
- Need handicapped accessible units and supportive services

Examples of Funded Community Housing Projects

High Rock Estates	2006-2009	\$ 869,500
Charles River Center Group Home	2012	\$ 220,000
Emergency Rental Assistance Program	2020	\$ 100,000
Linden St Pre-Development	2022	\$ 1,386,000
Linden St. Redevelopment (Construction)	2024	\$ 5,500,000

For More Information

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Useful Websites:

Needham Community Preservation Committee:

www.needhamma.gov/425/community-preservation-committee

Community Preservation Coalition:

www.communitypreservation.org