



JOSEPH A. CURTATONE  
MAYOR

## CITY OF SOMERVILLE, MASSACHUSETTS COMMUNITY PRESERVATION COMMITTEE



MINUTES  
MAY 24, 2017

The Community Preservation Committee (CPC) held a regular meeting at 6:30pm in the third floor community room at the Visiting Nurse Association, 259 Lowell Street, Somerville, MA 02144. An audio recording of the meeting is available upon request.

**Members Present** Chair Dick Bauer, Vice Chair Michael Fager, Elizabeth Duclos-Orsello, Arn Franzen, James McCallum, Uma Murugan, Jessica Palacios Yamakawa

**Members Absent** Michael Capuano and Ezra Glenn

**Staff Present** Kristen Stelljes

**Others Present** Members and staff of the Somerville Affordable Housing Trust Fund: Danny LeBlanc, Andrea Shapiro, Lisa Davidson, Mary Cassesso, Michael Feloney, Heidi Burbidge, and Alderman Mark Neidergang  
Staff of POAH and SCC: John Springfield and Scott Hayman  
CPA Evaluation Intern: Alyssa Kogan

**MEMBERS**  
Dick Bauer, Chair  
Michael Fager, Vice Chair  
Michael A. Capuano  
Elizabeth Duclos-Orsello  
Arn Franzen  
Ezra Glenn  
James McCallum  
Uma Murugan  
Jessica Palacios Yamakawa

**STAFF**  
Kristen Stelljes

The chair opened the meeting at 6:40p.m.

### **Agenda item 1: Public comment period**

No members of the public were present.

### **Agenda item 2: Approve minutes from April 26<sup>th</sup> meeting**

Upon a motion from Mr. McCallum seconded by Ms. Duclos-Orsello, the minutes were approved with corrections by a vote of 7-0.

### **Agenda item 3: Affordable Housing Trust Fund**

#### ***Comments on semi-annual report***

Mr. Bauer shared his appreciation for the SAHTF members and staff for submitting the report and acknowledged all of the work represented in the report. Members of the CPC requested the following additions to the report:

- Addition of addresses for the photos of the 100 Homes properties
- Report date

#### ***CPA signs on housing projects***

The grant agreement between the CPC and the SAHTF states that CPA funded projects will be marked with a sign stating the project was supported with CPA funds. However, Ms. Duclos-Orsello it may not be appropriate for homes to be marked in a way that would distinguish the home as affordable. Ms. Shapiro noted the complexity of noting all funding sources for the project in one sign, because there are often multiple funding sources for each project. Ms. Cassesso noted the ongoing stigma that continues around affordable housing. Mr. Hayman suggested that it may be most appropriate to post a sign in a neighborhood celebrating the CPA contributions in that area. Mr. Fager suggested a sign could be posted at the City of Somerville Housing Division office stating that SAHTF is supported with CPA funds.

### ***Supporting Somerville's Sanctuary City status***

Ms. Murugan asked the CPC and SATF members to consider how they can collaborate to use CPA funds to support Somerville's undocumented immigrant community while protecting the privacy and security of affected families. Mr. LeBlanc noted that the 100 Homes project does not come with the same requirements of other affordable housing opportunities so allows SCC to be flexible to support existing tenants. He also noted that in cases where families have mixed immigration status in housing they manage and rent is pro-rated for those who are not documented, SCC will accept less rent than is actually owed to ensure families can stay in their housing. Mr. Bauer suggested CPA funds could go towards making up the difference between the rent owned and the rent families can pay in these situations.

Ms. Murugan asked if it would be possible to include in the Community Preservation Plan a priority around allocating affordable housing resources to support undocumented families. Mr. Fager stated his opinion that this would not be possible.

Mr. Bauer asked Ms. Stelljes to follow up with the City Solicitor to determine the legality of using CPA funds as a rental subsidy for families with mixed immigration status living in affordable housing units.

### ***FY17 bonding request***

Mr. Feloney presented an overview of the 100 Homes and Clarendon Hill projects to the Community Preservation Committee. He noted that both projects were requesting up to \$2 million in bonding for his year, but the projects anticipate requesting a total of \$16 million in bonding over the next few years, so the Trustees have been considering how to fully fund the requests using both CPA and other funds available in the Trust and minimizing the administrative burden of requesting multiple rounds of bonding. The Trustees are anticipating making a request of \$8 million in bonding for the CPC's consideration- \$4 million for each project. Clarendon Hill would create a total of 530 units of housing, replacing the existing 216 units of affordable housing that are about to become obsolete. The 100 Homes project has received CPA funding in FY15 and FY16 and to date has acquired 20 units in seven properties. The initiative acquires existing multi-family homes in Somerville and converts them to affordable housing.

Ms. Duclos-Orsello asked if the percentage of units dedicated for households at 30% AMI (area median income) and below was going to be maintained. Mr. Feloney said the 216 units being replaced will have the same allocation across AMI as the existing units.

Ms. Duclos-Orsello asked if the Trustees found the projects to be important enough that they are willing to pay the debt service, even if it takes a higher percentage of housing funds available than anticipated. Mr. Feloney responded that the Trustees believe these projects to be crucial and factored changes in CPA revenue into their consideration which is why they are suggesting an \$8 million bond because that would leave some cushion for the steady state. Ms. Stelljes added that the Trust's estimates are based only on CPA revenue through the property tax surcharge and do not include future state match funds or City appropriations.

Ms. Murugan asked if it is planned that the families would return. Mr. Springfield said the current tenants will be temporarily located and any who wish to return will be invited to do so.

Mr. Franzen asked how up to date the construction costs are for the projects. Mr. Hayman said the Clarendon Hill costs are very current and since they anticipate construction to start shortly they don't anticipate much escalation. The prices of the 100 Homes units are determined by the market. Mr. Feloney added that the Trustees hired a consultant to assess the funding sources for the Clarendon Hill project to ensure the funding request to the City was as low as possible. The memo from the consultants found that SCC and POAH had accessed all other likely sources of funding. Mr. Fager then asked what the project would do if CPA funds weren't available. Mr. Hayman responded that it would be very difficult for them to access additional funds from the state and there aren't other local sources. Therefore the project could not go forward as planned.

Ms. Cassesso stated that the presence of so many Trustees demonstrates their support for the two projects.

**Agenda item 4: FRIT Assembly Square waiver discussion**

Mr. Hayman stated that when the project was originally approved the City's inclusionary housing requirement was 12.5% and it has since been raised to 20%. FRIT requested a waiver from the 20%. There was strong support from many in the community to not grant FRIT the waiver and require 20% inclusionary housing in the planned apartment building. The Planning Board approved a compromise plan where FRIT would provide 6.25% on-site affordable housing at the Assembly Row site and contribute \$10 million for off-site units to the 100 Homes project.

[Liz Duclos-Orsello and Jim McCallum leave at 8:15]

**Agenda item 5: Review CPA evaluation questions**

Ms. Kogan is an intern hired by the CPC to evaluate Somerville's CPA program. She presented the draft evaluation questions to the CPC.

Mr. Franzen said it would be most important to get the input of community organizations. Ms. Murugan added that the evaluation should be designed taking into account that there are differences between the community organizations and City departments that apply for and implement projects. Ms. Murugan also wanted to know the level of awareness of community organization of the CPA program. Mr. Fager said that the evaluation should look at awareness of the CPA program in the general public.

Mr. Bauer asked how much of the information in the evaluation would be gathered through interviews. Ms. Kogan responded that she is still determining the methodologies she will be using for data collection and is aware of the CPC's interest in qualitative data.

Mr. Fager said he wanted to know the level of community awareness of what the Community Preservation Act is and where CPA funding comes from.

Ms. Duclos-Orsello, Ms. Murugan, and Ms. Palacios Yamakawa volunteered to serve on the evaluation advisory group.

#### **Agenda item 6: Planning for the Community Preservation Plan process**

##### ***New ideas to discuss***

Mr. Bauer asked Ms. Stelljes to present what is new in the draft plan from the FY17 version. Ms. Stelljes said the primary difference is the draft now includes more data from the monitoring and evaluation plan but additional changes have not been made because they have not yet been discussed by the CPC. Three topics had come up previously for the CPC to consider while developing the FY18 plan: support for long-term projects, considering additional targets for types of projects to support (ie rehabilitation, design, creation, etc.), and incorporating consideration of the monitoring and evaluation plan during the hearing on the plan.

Ms. Murugan asked Ms. Stelljes if she believed setting targets for types of projects would be possible based on her experience in working with the applicants. Ms. Stelljes said she believes the CPC will still receive many design and rehabilitation project requests and there are fewer opportunities for acquisition and creation.

Mr. Bauer said he did not think the CPC should articulate priorities around types of projects within each category. He feels it will be important for the CPC to articulate how it will prioritize projects that will need long term funding. He gave the example of whether or not the CPC should fund a design project if the members do not think they would support funding for the construction and the Trust's approach to bonding for the large housing development projects, which is locking in funding for those projects over the long term.

Ms. Stelljes noted that several members expressed a preference for funding construction projects over design projects during the review of the FY17 projects and suggested that if this is a preference that is shared across the Committee and decisions will be based upon this preference, it should be stated in the



plan. Mr. Bauer said he did not feel the Committee should state this preference in the plan and Mr. Franzen spoke to the value of supporting design projects with CPA funds.

The Committee agreed that it does not want to prioritize according to types of project within each funding category.

Ms. Murugan said she would like to wait to see what the level of awareness is of CPA overall before deciding whether or not to prioritize long term/multi-year projects. She would like to make sure the CPC is doing everything possible to get as many different applicants as possible. Mr. Fager responded that it is difficult for projects like the Somerville Museum to know the total costs at the beginning of the project because of changes that are required by regulatory bodies along the way. He added that the Blessing of the Bay Boathouse project will need to come back because the design will inform how much they will need for construction costs. Mr. Bauer he noted that he is increasingly uncomfortable with the CPC's current approach of telling applicants that they will have to apply each year with no guarantee or prioritization for funding if they have received funding in the past.

Ms. Murugan suggested that a point system be used to help prioritize existing projects. Ms. Stelljes said if the Committee wanted to use this approach it should develop a scoring system to consider the project overall. She suggested that if the Committee is not yet clear how to prioritize multi-year projects, they could explicitly ask for feedback on this topic during the public hearing and in the comment period on the plan.

Mr. Fager asked Ms. Stelljes if she had received complaints about applicants receiving funding over multiple years. She responded that she had not. During the SomerStreets events, most people she spoke with were not familiar with CPA and the projects it is funding.

### ***Timing***

The Committee members agreed that Ms. Stelljes should post the draft plan in advance of the plan hearing and approved the draft agenda for the hearing. The Committee agreed the meeting would be held at 7pm at the Visiting Nurse Association.

### ***Feedback on initial draft plan***

Ms. Murugan suggested that language be added to list support to Somerville's Sanctuary City status, given that there are no legal reasons not to include it. The Committee agreed that language would be added to the overall priority related to CPA funds support projects consistent with Somerville's values. Ms. Stelljes said she would ask for legal input on the matter.

### **Agenda item 7: Review FY18 BOA budget submissions**

#### ***FY18 Budget***

Ms. Stelljes provided an overview of the FY18 budget. The budget submitted to the Aldermen uses the 10% minimum per category because the Committee will not have decided on the FY18 funding

allocations before the Aldermen need to approve the budget. She noted that the SomerStat department is taking on 20% of her salary in recognition of the cross-departmental contributions she is making and to accommodate her recommended increase in salary from the Municipal Compensation Advisory Board.

Ms. Stelljes noted that the City had not yet been able to determine the FY17 City appropriation. She will update the Committee members when the appropriation has been determined.

Upon a motion by Ms. Murugan, seconded by Ms. Palacios Yamakawa, the Committee voted 5-0 to adopt the proposed FY2018 budget.

### ***FY17 Annual Report***

Ms. Stelljes shared that the annual report is submitted to the Board of Aldermen along with the budget.

Mr. Bauer noted a typo and a section of unclear phrasing in the document.

Upon a motion by Mr. Fager, seconded by Ms. Murugan, the Committee voted 5-0 to adopt the report with corrections.

### **Agenda item 8: Other business**

- Mr. Bauer noted the Community Path Ribbon Cutting was scheduled for 8:15am on May 25<sup>th</sup>.
- Mr. Bauer asked for volunteers to join the CPA events sub-committee to help plan the CPA and Cities conference and events to celebrate the 5<sup>th</sup> anniversary of the adoption of CPA in Somerville. Ms. Murugan and Ms. Palacios Yamakawa volunteered. Mr. Fager said he would consider volunteering.
- CPC members are requested to sign up to join Ms. Stelljes for a 2 hour shift during the four SomerStreets events
- Ms. Stelljes informed the Committee that she is working to hire one or two on-call historic preservation consultant to work with her on developing the preservation restrictions that have been required by the CPC.
- Mr. Fager announced the Charles River Canoe and Kayak service is now open at the Blessing of the Bay Boathouse. He also announced that individuals can help count herring on the Mystic during their seasonal run by going to [www.mysticherring.org](http://www.mysticherring.org).
- Upon Mr. Franzen's suggestion, the Committee agreed that they would like to have another meeting to discuss the housing bonds before they make their vote and there is not sufficient time to have the discussion before or after the plan hearing in June. Ms. Stelljes said she would work with the Trust's staff to determine an appropriate time for this meeting and will send a Doodle poll to the Committee members to select a date.

**Next meeting: The next CPC meeting will be Wednesday, June 28<sup>th</sup> at 7:00pm at the VNA. The meeting will be the annual Community Preservation Plan hearing.**

## **Meeting Adjournment**

Upon motion from Mr. Fager, seconded by Ms. Murugan, the Committee voted 5-0 to adjourn at 9:54.

## **Documents and Exhibits**

1. Agenda
2. Minutes from April 26, 2017 meeting
3. Somerville Affordable Housing Trust Fund (SAHTF) Bi-annual Community Preservation Act Progress Report
4. CPA Update memo from SAHTF regarding bonding for 100 Homes and Clarendon Hill projects
5. SAHTF presentation on 100 Homes and Clarendon Hill projects
6. Estimated debt service tables for potential \$8 million and \$16 million bonds
7. Draft funding recommendations and application cover pages for 100 Homes and Clarendon Hill projects
8. CPA Evaluation Question presentation
9. Draft agenda for FY18 Community Preservation Plan hearing
10. Draft FY2018 budget
11. Draft FY18 Community Preservation Plan
12. Draft FY17 Community Preservation Act Annual Report



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## CITY OF SOMERVILLE, MASSACHUSETTS COMMUNITY PRESERVATION COMMITTEE



### AGENDA

**DATE:** Wednesday, May 24, 2017  
**TIME:** 6:30pm  
**PLACE:** Visiting Nurse Association, Third Floor Community Room  
259 Lowell St.

1. Public comment period (10 minutes)
2. Approve minutes from April 26th meeting (5 minutes)
3. Affordable Housing Trust Fund (60 minutes)
  - a. Comments on semi-annual report
  - b. CPA signs on housing projects
  - c. Supporting Somerville's Sanctuary City status
  - d. FY17 bonding request
4. FRIT Assembly Square waiver discussion (10 minutes)
5. Review CPA evaluation questions, Alyssa Kogan (20 minutes)
  - a. CPA evaluation advisory group
6. Planning for Community Preservation Plan process (40 minutes)
  - a. New ideas to discuss: support for long-term projects, incorporating monitoring and evaluation plan, additional ways to consider support (ie rehab, access, creation, etc.)
  - b. Timing
  - c. Feedback on initial draft plan
7. Review FY18 BOA budget submissions (15 minutes)
  - a. FY18 budget
  - b. FY17 annual report
8. Other business
9. Next meeting: Wednesday, June 28th 6:30pm. (Visiting Nurse Association)

#### MEMBERS

Dick Bauer, Chair  
Michael Fager, Vice Chair  
Michael A. Capuano  
Elizabeth Duclos-Orsello  
Arn Franzen  
Ezra Glenn  
James McCallum  
Uma Murugan  
Jessica Palacios Yamakawa

#### STAFF

Kristen Stelljes



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## CITY OF SOMERVILLE, MASSACHUSETTS COMMUNITY PRESERVATION COMMITTEE



MINUTES  
APRIL 26, 2017

The Community Preservation Committee (CPC) held a regular meeting at 6:30pm in the third floor community room at the Visiting Nurse Association, 259 Lowell Street, Somerville, MA 02144. An audio recording of the meeting is available upon request.

**Members Present** Chair Dick Bauer, Vice Chair Michael Fager, Michael Capuano, Elizabeth Duclos-Orsello, Arn Franzen, James McCallum and Uma Murugan

**Members Absent** Ezra Glenn

**Staff Present** Kristen Stelljes

**MEMBERS**  
Dick Bauer, Chair  
Michael Fager, Vice Chair  
Michael A. Capuano  
Elizabeth Duclos-Orsello  
Arn Franzen  
Ezra Glenn  
James McCallum  
Uma Murugan  
Jessica Palacios Yamakawa

**STAFF**  
Kristen Stelljes

The chair opened the meeting at 6:30p.m.

### **Agenda item 1: Public comment period**

No members of the public were present.

### **Agenda item 2: Approve minutes from March 22 meeting**

Upon a motion by Ms. Murugan, seconded by Ms. Duclos-Orsello, the Committee voted 5-0 with three abstentions (Mr. Capuano, Ms. Duclos-Orsello, and Mr. Franzen) to approve the minutes with corrections.

### **Agenda item 3: FY17 Application Review**

Mr. Capuano asked if the ArtFarm project request had been withdrawn and if \$673,805 was remaining after the remaining projects were fully funded. Ms. Stelljes responded that the City requested the application be put on hold until the Fall. She added that at the previous meeting the members decided to create an emergency reserve of \$240,000. The \$673,805 remaining includes this reserve and other remaining FY17 funds.

Mr. Bauer asked the Committee if there was a preference for increasing the reserve beyond the current \$673,805 and not funding all of the projects fully or to keep the reserve at \$673,805.

Mr. Franzen asked what projects were likely to request funding from the reserve. Mr. Bauer responded that it was likely the Somerville Museum would request funding when they are able to move the project forward. Ms. Duclos-Orsello said she would like to see the reserve be open for any eligible projects that



would need to request emergency funding. Mr. Bauer explained that the intention of the members at the last meeting was to make funds available for any worthy projects that need emergency funds and funds are not being held for any projects. The Somerville Museum and ArtFarm have both said they would come back to the CPC in the fall, so it is not anticipated they will request a recommendation from the CPC in the current FY17 fiscal year.

*Butterfly Pocket Park, Green and Open Somerville and City of Somerville Parks and Open Space*

Mr. Capuano asked about the need for a funding condition related to the involvement of the Conservation Commission on this project. Mr. Fager responded that he raised the issue of the project with the Conservation Commission and they asked him to be the point person on the project. The Conservation Commissions raised questions about the proposed plant palette for the park and whether the park is primarily intended for human use or for wildlife.

Ms. Duclos-Orsello said she was supportive of funding this project as a pilot to see if a project of this kind could be successful. Mr. Franzen said he is also supportive of considering this project as a pilot. It will be the City's first pollinator garden, along with the pollinator garden that will be planted at Lincoln Park.

The Committee agreed on the following funding conditions for the project:

1. Upon commencement of the Project and as appropriate, the City of Somerville agrees to post a sign stating that the Project was funded through the City of Somerville's Community Preservation Act program.
2. Interpretive signage be included in the park.
3. A maintenance plan will be developed for the pocket park.
4. The Conservation Commission will be kept informed and provide an advisory role on the project.

The Committee agreed to add a measure of success on use by members of the community and expanded the measure of new plantings being sustained from one growing season to two growing season.

Upon a motion by Mr. Fager, seconded by Ms. Duclos-Orsello, the Committee voted 8-0 to recommend \$13,000 in funding to the City of Somerville Park and Open Space Division in collaboration with Green and Open Somerville for the creation of a butterfly garden pocket park at Morse-Kelly Park from the open space reserve with the above funding conditions.

*ArtFarm, City of Somerville Arts Council*

The City has put this request on hold. There are several civic uses being considered for this site in addition to ArtFarm and the City is now aware that a pump station will need to be added to help address flooding issues in Union Square. The City respects the desire of the Committee to have a long-term commitment to ArtFarm and feels it will be in a better position to make a more specific commitment to ArtFarm in the fall once it has more information about the location and massing of other civic uses that may be added to the site including a public safety building and a fire station.

Given the City has temporarily withdraw its funding request for ArtFarm, the Committee took no further action on the project.

*Winter Hill Schoolyard Construction, City of Somerville Parks and Open Space*

The City increased the funding request from \$450,000 to \$500,000. As they approach the finalization of the design, the team realized an additional \$50,000 is needed to be able to fully achieve the project's design goals.

Mr. Capuano asked Mr. Franzen his assessment of the increased request. Mr. Franzen responded that the budget was very tight from the beginning. The design team was considering a very expensive piece of play equipment but given the price, moved to a lower price item but that would still provide a lot of play value. Mr. Franzen said that he strongly supported the request.

Mr. Franzen added that the schoolyards are used extensively by the community, including outside of school hours. Schoolyard projects are not eligible for PARC grants because they are not open to the general public during school hours, making CPA funds especially important for schoolyard improvements to be possible. Ms. Duclos-Orsello added that families use the schoolyards on the weekends because they are the open spaces with which their children are most familiar.

The Committee agreed on the following funding condition:

- Upon commencement of the Project and as appropriate, the City of Somerville agrees to post a sign stating that the Project was funded through the City of Somerville's Community Preservation Act program.

Upon a motion by Mr. Capuano, seconded by Mr. Franzen, the Committee voted 8-0 to recommend \$500,000 in funding to the City of Somerville Parks and Open Space Division for the construction of a new Winter Hill Schoolyard- \$56,233 from the open space reserve and \$443,767 from the undersigned reserve budget.

*Healey Schoolyard Design, City of Somerville Parks and Open Space*

Mr. Frazen stated that none of the \$80,000 requested will be used for the planned turf field. Mr. Fager asked from where the funds for the field design would come. Mr. Franzen said that is yet to be determined.

The Committee agreed on the following funding condition:

- Hold at least one public meeting.

Upon a motion by Mr. Capuano, seconded by Mr. Fager, the Committee voted 8-0 to recommend \$80,000 in funding to the City of Somerville Parks and Open Space Division for the design of the Healey Schoolyard from the open space and recreation land reserve with the above funding condition.



*Henry Hansen Park Design, City of Somerville Veteran's Services*

Mr. Bauer asked Mr. Franzen for his opinion on the proposed project. Mr. Franzen said he believed the \$49,200 request was appropriate because there is a minimum amount needed to do a design project, even for a small project.

Mr. Fager raised a concern about the proposed design. Mr. Franzen responded that Veteran's Services will be hiring a firm to complete the design that will create their final design based on input from a community process.

Ms. Stelljes said that she raised the possibility of the Committee recommending a lower amount of funding than requested. Mr. Bishop responded that he would decline partial funding because he does not currently have another source of funding so the project would not be able to go forward.

The Committee agreed on the following funding condition:

- Hold at least three public meetings and integrate feedback from the meetings into the final design.

The Committee requested the following measure of success be added to the funding recommendation: project completed on time and within budget. The Committee also struck the language about using the park to recognize all World War II Veterans and all Somerville Veterans through the park.

Upon a motion by Mr. Capuano, seconded by Mr. Fager, the Committee voted 8-0 to recommend \$49,200 in funding to the City of Somerville Veteran's Services Division for a design for the Henry Hansen Park from the open space and recreation land reserve with the above funding condition.

*Community Path Survey, City of Somerville Parks and Open Space*

Mr. Fager asked about the timing of the survey. Mr. Franzen responded that the survey will be done once all of the paving is completed both to the east and west of Davis Square. Mr. Franzen added that when the design firm does the survey, it typically costs more than if it is contracted out separately. It is also best practice to start the design process with a completed survey.

Ms. Duclos-Orsello provided the following language for a goal for the project: Conduct a survey of the Community Path from the Cambridge line to Cedar Street in preparation for the re-design of the Path.

The Committee agreed on the following funding condition:

- The City develops a repository for surveys and plans to ensure they are available and accessible to City staff in the future.

Upon a motion by Mr. Fager, seconded by Mr. Franzen, the Committee voted 8-0 to recommend \$20,000 in funding from the open space and recreation land reserve to the City of Somerville Parks and Open Space Division with the above funding condition.

**Agenda item 4: Review Affordable Housing Trust Fund Report**

Mr. Bauer asked the members to review the document for any comments before the May meeting, when the Trustees will be present.

Ms. Duclos-Orsello asked if the North St./Clarendon Hill project had acquired state workforce housing funding. Ms. Stelljes responded that she did not know, but would ask the Trust to provide this information at the May meeting. She also asked if both projects have fully tapped into all possible funding sources.

Ms. Murugan asked for the definition of severely rent and cost burdened. If a household is paying 50% or more of their income on rent or their mortgage, they are considered to be severely rent or cost burdened. She also raised the concern that only 20% of trust funds are required to serve household with incomes between 0-50% of median income.

Ms. Palacios-Yamakawa raised a concern she had heard at a community meeting that development in Somerville is not complying with affordable housing regulations. Ms. Murugan responded that the regulatory process ensures that affordable housing complies with regulations. Ms. Stelljes suggested that Ms. Palacios Yamakawa ask this question of the Trustees at the May meeting.

**Agenda item 5: Reflections on FY17 Application Process**

Mr. Bauer asked the members if there are any suggestions for improving the FY18 application process based on the FY17 experience. Mr. Capuano asked Ms. Stelljes for her feedback on the process. Ms. Stelljes responded that she would like to provide more instructions about using fillable PDFs and have the applications be due on a Thursday night so the deadline can be later in the evening.

Ms. Stelljes said she is often asked if there is a narrative page limit and asked the Committee if they would like to set a page limit. She also asked if the members if they would like her to work more closely with applicants on the measures of success. Ms. Murugan and Ms. Duclos-Orsello said they would be willing to help applicants with their measures of success. Mr. Fager said he would like to see a narrative page limit. Ms. Duclos-Orsello agreed that there would be a page limit and applicants can use appendices if needed. Ms. Duclos-Orsello and Mr. Fager suggested a page limit of three pages. Ms. Stelljes said she was concerned that three may be too little because the narrative prompt page is one page itself. Ms. Duclos-Orsello then suggested the limit be 3-5 pages and Mr. Bauer agreed. Mr. Fager said the font should be 12 point. Ms. Stelljes suggested that applicants wouldn't be able to respond to the questions in three pages. Ms. Duclos-Orsello suggested the Committee could review the narrative prompts requested to make sure the Committee is asking for the information it needs in the most helpful and concise way for applicants and the Committee members. The Committee will review the draft FY18 application materials at the July meeting.

Mr. Bauer noted that in past years there were complications around projects on public land that were proposed by community members, leading the Committee to require the owning agency be a co-



applicant on the process. Mr. Fager said that he thought the process had been improved this year. Ms. Stelljes added that she had gotten feedback from City staff that a more formal and transparent process was needed for City staff to review community projects proposed for public land to ensure the projects are in alignment with SomerVision and neighborhood plans as well as to ensure that staff have the capacity to be good partners on the projects with their co-applicants. This process will be rolled out starting with the FY18 application process.

**Agenda item 6: Timing for FY18 Application Process**

Ms. Stelljes reviewed the proposed schedule for the FY18 application process, including dates for new process for community projects proposed for public land. Ms. Duclos-Orsello suggested the community presentation be recorded so people who cannot attend can watch the video. Ms. Stelljes agreed that would be a good idea. She said she would also try to set up one on one meetings with people who cannot attend and schedule a second workshop date if needed.

The Committee agreed on the proposed schedule.

**Agenda item 7: Ideas to Improve Outreach for FY18 Application Round**

Ms. Stelljes asked the Committee for input on outreach to specific groups within Somerville. She is continuing to do general outreach, but feels that in order to get to know potential applicants better she would need to do outreach to specific communities, which would lead to specific types of applications. Some potential groups include outreach to businesses that want to restore a historic storefront or create privately owned public space on their property, organizations that own historic churches, and/or arts organizations that might want to purchase a historic building for studio space and would restore it in the process. Mr. Capuano agreed this was a good list for outreach. Mr. Frazen agreed that small group outreach is important.

Ms. Stelljes also presented the idea of offering planning grants for neighborhood groups that would have the benefit of providing a small amount of money that would allow people with ideas for projects to develop them more fully and more inclusively before they submit their ideas for CPA funding. Some types of activities that could be paid for with the fund would be flyers, translation and interpreters to help get more community input on a project idea from a wide range of people and hiring technical experts to help lead a community meeting or provide advice on how to implement the project. Mr. Bauer said he believed the grants should be made out of the administrative fund because these would not be for projects. Ms. Duclos-Orsello agreed these were administrative costs because it will help with the administration and moving the CPA program forward in Somerville. She also thought it would help raise awareness about the CPA program and lead to higher quality applications being submitted to the Committee.

Ms. Duclos-Orsello said her preference would be that organizations who receive planning grants not be required to submit a proposal for CPA funding because the group could realize they were not ready to apply or were not able to develop an idea for a feasible project. Ms. Stelljes agreed that planning grant recipients would not be required to submit an application for further funding. Mr. Bauer said that



planning grant recipients should submit a final report to document their work. Ms. Stelljes agreed that would be necessary administratively.

Mr. Franzen asked if there were sufficient funds in the admin budget to pay for these grants. Ms. Stelljes said it would need to be a competitive process. She is still determining the FY18 admin budget. Mr. Bauer suggested there should be a dedicated amount of funding available each year for this program and Ms. Stelljes should administer the program.

Mr. Bauer suggested applications should be accepted on a rolling basis. Ms. Duclos-Orsello suggested all grants receive the same amount of money and it be paid on a reimbursement basis so groups would not need to develop a detailed budget. She also suggested there be two application deadlines each year. She thinks the process should be developed so that people who are less familiar with grant application process. Ms. Stelljes said she will talk with the Finance Department to determine if there is a way to make some funds available if there are groups that cannot front the funding.

The Committee agreed that Ms. Stelljes should continue to develop this idea and come back to the Committee with a more developed proposal.

**Agenda item 8: Recruiting New CPC General Public Member**

Mr. Bauer shared with the group that Arn Franzen and Ezra Glenn's terms will end at the end of the calendar year. Ms. Stelljes will need to organize the process to recruit a new general public member to replace Mr. Glenn as a general public member. She asked Mr. Glenn if he would be willing to be the Committee's representative on the review committee which review the applications and interviews the finalists in advance of the Committee's meeting, knowing that he was unable to attend. Mr. Glenn agreed to serve on the review committee if the Committee members agreed.

The Committee agreed that Mr. Glenn should represent the Committee on the general public member review committee.

Ms. Stelljes informed the group that she is organizing a workshop for potential Community Preservation Committee applicants to provide more information about the Community Preservation Act and what it means to be on the Committee. She asked for volunteers to be part of the workshop to speak to their experience of being on the Committee. Ms. Duclos-Orsello offered to make her application available as an example and said she would be willing to participate in the workshop. Ms. Murugan and Ms. Palacios Yamakawa both said they would be interested. Mr. Bauer asked those who were interested in participating to let Ms. Stelljes know their schedule so she could plan around them. Mr. Franzen suggested Ms. Stelljes sent out a Doodle poll.

**Agenda item 9: Discuss Events to Celebrate CPA's 5<sup>th</sup> Anniversary in Somerville**

Mr. Bauer invited the Committee to talk about ideas for events to celebrate the fifth anniversary of Somerville adopting CPA. One idea he has discussed with Ms. Stelljes is hosting a conference for CPA cities to talk about the unique needs of urban communities implementing the CPA program. This is

timely given the number of cities that have adopted CPA recently. Ms. Murugan said that cities who are interested in adopting CPA should also be invited. The Committee supported this idea.

Mr. Fager proposed an event oriented towards Somerville residents. Ms. Duclos-Orsello proposed that the Committee organize a Friday conference in September and then hold events that weekend. Mr. Capuano suggested a walking or biking tour of CPA projects. Mr. Bauer said we could hold different events at different sites to highlight different types of investments. Ms. Duclos-Orsello suggested that balloons be tied to each of the CPA project sites so people can see the breadth of projects that were funded.

**Agenda item 10: CPA Manager Update**

Ms. Stelljes noted that Emily Monea will be providing coverage for Ms. Stelljes while she is on maternity leave, October 2017-February 2018.

Ms. Stelljes shared that the Historic Preservation Plan has been delayed due to the high workload on the City's preservation staff. The preservation staff anticipate they will have more availability this summer. Ms. Stelljes will continue to be in touch with the preservation staff to finalize the plan once they become available.

**Agenda item 11: Timing for First Draft of FY18 Community Preservation Plan**

The Committee agreed that Ms. Stelljes should prepare a first draft of the Community Preservation Plan for the Committee's May meeting.

**Agenda item 12: Other Business**

The Committee moved to adjourn but then the chair called the meeting back to order to approve the minutes of the final meeting of the CPA logo sub-committee which was held on October 21, 2016. In the meantime, Mr. Capuano left the meeting.

Upon a motion by Mr. Franzen, seconded by Ms. Duclos-Orsello, the Committee voted 2-0 with five abstentions (Ms. Murugan, Mr. McCallum, Mr. Fager, Ms. Palacios Yamakawa, and Ms. Murugan) to approve the minutes.

**Next meeting: The next CPC meeting will be held at 6:30pm on May 24, 2017.**

**Meeting Adjournment**

Upon motion from Ms. Murugan, seconded by Mr. McCallum, the Committee voted 7-0 to adjourn at approximately 8:56.

**Documents and Exhibits**

1. Agenda
2. Minutes from March 22, 2017 meeting
3. FY17 CPA project funding allocations

4. Funding recommendations for:
  - a. Butterfly Garden Pocket Park
  - b. Winter Hill Community Schoolyard
  - c. Healey Schoolyard Design
  - d. Henry Hansen Park Design
  - e. Community Path Survey
5. Draft bi-annual Affordable Housing Trust Community Preservation Act Report
6. CPA FY18 Funding Application and Review Process Timeline
7. Proposal for CPA Neighborhood Planning Grant Programs
8. Guide to Proposing a CPA Project on Public Land
9. Plan for FY18 CPC General Public Member Recruitment



# Somerville Affordable Housing Trust Fund

## Bi-annual Community Preservation Act Progress Report

### FY17 Affordable Housing Funding

In FY17, \$880,416 in CPA funds was appropriated to the Somerville Affordable Housing Trust Fund (AHTF or Trust). The Community Preservation Act allows communities to allocate funding to the community's Affordable Housing Trust Fund. Somerville's Affordable Housing Trust has 25 years of experience preserving and creating affordable housing units and supporting programs to assist homeowners and renters; the CPC has designated the Trust to administer CPA Community Housing funds.

Projects and programs must constitute a CPA allowable spending purpose as defined by the state Department of Revenue. CPA Community Housing eligible uses include the following five categories:

- *Acquisition* – to obtain property interest by gift, purchase, devise, grant, rental, rental purchase, lease or otherwise. Eminent domain takings only as provided by G.L. c.44B.
- *Creation* - to bring into being, cause to exist.
- *Preservation* - protect personal or real property from injury, harm or destruction.
- *Support* - provide grants, loans, rental assistance, security deposits, interest-rate write downs or other forms of assistance directly to individuals and families eligible for community housing or to an entity that owns, operates or manages such housing for the purpose of making housing affordable.
- *Rehabilitation and Restoration* – eligible if property was acquired or created with CPA funds. Capital improvements to comply with federal, state or local building or access codes or federal standards for rehabilitation of historic purposes.

### Priorities and Criteria

Housing developed with CPA funds may be offered to those persons and families whose annual income is less than 100% of the area-wide median income, as determined by HUD. The following priorities apply when CPA funds are allocated by the Trust:

- Preserve or increase the supply of affordable housing in Somerville.
- Mitigate displacement of low-to-moderate income households.

The following criteria are used when the Trust considers project- and program-funding requests:

- Demonstrated capacity to carry out the project/program and ability to continue the project/program beyond the funding period.
- Preference for non-profit applicants. If two non-profits propose similar projects/programs, Trustees assess the need within the community (i.e., is the need great enough to support the work of two agencies?). There also is a preference for agencies based in Somerville.



- Viable development/program budget and secure funding status, with ability to leverage other funding.
- Ability to document a measurable impact.
- Development projects and housing programs that foster SomerVision goals and other City plans, including those of the Community Preservation Committee.

In addition, the Declaration of Trust for the AHTF requires that:

- at least 20% of the trust funds must serve households with incomes between 0-50% of median
- at least 20% must serve households with incomes between 51-80% of median
- at least 10% must serve households with incomes between 81-110% of median.

Fifty percent (50%) of Trust funds are discretionary and can be allocated over these three target income categories. The Trust regularly reviews its allocation of funds by income category to ensure that the income requirements of the Trust are met. The Trust encourages deeper affordability where possible, to the extent it is consistent with project feasibility. Many housing development loans and grant-funded programs serve households with incomes below 30% of AMI. The Trust also seeks to encourage projects and programs that serve homeless households. Trustees also require a commitment to the preservation of affordability in perpetuity.

### **Fiscal Year 2017 revenue for the AHTF**

Non-CPA revenue sources for FY17 include are summarized below. The linkage payment represents the second of five annual payments being made by Partners Healthcare in association with construction of its administrative offices located at Assembly Square.

<b>AHTF Non-CPA Revenue Sources</b>			
	Linkage	Inclusionary-Fractional Payments	Loan repayments
FY17 (projected)	\$869,625	-	\$43,175

AHTF funds leverage additional federal, state and local funding as a part of most project and program budgets to create deeper and broader affordability when eligible uses and priorities of sources are aligned. These additional sources of funds include HOME, HUD Continuum of Care and others.

### **Current year funding requests**

Two housing development project requests were received by the February deadline, in response to a Request for Proposals issued for project and program requests. Four housing program requests were received. (One of the four housing program requests was determined to be for an ineligible CPA use.) The Trust typically considers requests over the course of two meetings. Given the size and complexity of the two project requests received for FY17 funds, SAHT requested additional analysis be prepared.

Table 1 below summarizes project requests.

**Table 1 – Project Requests**

Funding Requests				
Project	Applicant	Request	Funded	Purpose
100 Homes	Somerville Community Corporation (SCC)	\$2 million, with a request to consider bond issuance for part or all of the request.	To be determined (TBD)	For acquisition and rehabilitation of 17 units (6 1BR, 8 2BR, 3 3BR); rental and possible homeownership after 3-5 years. Five (5) units for below 80% AMI, and 12 units between 80% and 100% AMI. To date, SCC has completed acquisition 20 units, or 1/5 of the program goal, using the first two installments of CPA funds. The objective noted above contemplates up-front funding of the request, versus bond issuance.
Clarendon Hill Apartments, 28 North St.	Preservation of Affordable Housing (POAH) and SCC	\$2 million, with a request to consider bond issuance for part or all of this request.	TBD	Request is to help fund new construction of 73 units of low- and extremely low-income rental housing, plus 20 units of "workforce" (<100%AMI) housing. Current program is for 45 2BR units and 4 3BR units w/ rents below 60% AMI, and 22 2BR and 2 3BR w/rents below 30% AMI. Current request is for the first phase of the. Developer would plan to return with an additional funding request for subsequent phase(s).

Table 2 below summarizes program-related requests.

Table 2 – Program Requests

Funding Requests (continued)				
Program	Applicant	Request	Funded	Purpose
Leasing Differential Program	Somerville Homeless Coalition (SHC)	\$41,976	TBD	<p>Request is for rental assistance for formerly homeless people living in 17 rental units at scattered sites throughout Somerville, leased by SHC and sublet to homeless and disabled Somerville residents. The 17 formerly homeless Somerville households encompasses 21 individuals.</p> <p>Most clients have incomes below 30% AMI. Nine of the clients qualify as chronically homeless people as defined by HUD. Clients include families and individuals with disabilities. All beneficiaries are Somerville residents.</p> <p>Average annual subsidy per person is \$1,999.</p>
PASS 3: Prevention-and-Stabilization-Services Housing Program (expansion)	Somerville Homeless Coalition (SHC)	\$93,728	TBD	<p>Rental subsidy for 6 Somerville households at risk of homelessness, or in transition out of emergency shelter system into permanent housing. Case management is also provided as part of the program using other sources of financial support. (CPA funds would pay for \$85,000 in client rental subsidies and \$8,728 in administrative costs). Proposed term is 7/1/17-6/30/18. Average annual subsidy per person is \$14,166.</p>



Program Requests (continued)				
Program	Applicant	Request	Funded	Purpose
(continued) PASS 3: Prevention- and- Stabilization- Services Housing Program (expansion)	Somerville Homeless Coalition (SHC)		TBD	(continued from previous page) Generally, households to be served will have incomes at or below 60% AMI. SHC requests flexibility to serve households up to 100% AMI should such households apply and meet all other eligibility criteria. The program is designed to work with Somerville residents experiencing a housing crisis (for instance burdensome rental increases and/or losses in income) to allow them to remain in the City.
ShortStop	Wayside Youth and Family Support Network	\$25,000	TBD	Request is to address gap in support for building lease costs at 116-118 North St. and 10 High St.; the buildings house the ShortStop program which provides transitional housing and case management services to 9 homeless young adults to support development of client self-sufficiency. Average annual subsidy per person is \$2,778. Participants are extremely low- and low-income. The program prioritizes serving youth and young adults from Somerville.
FOCUS	Maloney Properties w/ The Home for Little Wanderers	\$46,000	Ineligible use – not considered, beyond eligibility determination.	Payment for staff to conduct workshops and coaching for formerly homeless youth who have aged-out of foster care. Proposal has been determined an ineligible use for CPA funds.

### CPA Allocations to the Affordable Housing Trust Fund

Prior and current fiscal year CPA revenue designated for housing is summarized below in Table 3, CPA Allocations by Fiscal Year.

Table 3, CPA Allocations by Fiscal Year.

	Appropriation Amount
FY14 + FY15	\$2,800,784
FY16	\$1,239,919
FY17	\$880,415
Total	\$4,921,118

### Ongoing Project and Program Updates

Project updates follow below.

Table 4, Project Updates

Project	Applicant	Funded	Committed	Disbursed	Update	Ward	# new units/ # HH	Mixed use	TOD
Mystic Water Works (acquisition loan)	Somerville Housing Authority	\$507,000	\$507,000	\$456,300	Under construction; approximately 35% completion. All historic windows are in place, exterior masonry restoration is underway, roofs are 100% complete, interior walls are 25% complete.	7	25	N	Y
100 Homes FY15 (small site acquisition loans)	Somerville Community Corporation	\$1,200,000	\$1,200,000	\$625,000	Funds generally are expended property-by-property, upon permanent loan closings. Permanent closing on two properties, assisted with \$600,000 in state funding to enhance affordability, are scheduled to close in May, 2017.	NA	8	N	
100 Homes FY16 (small site acquisition loans)	Somerville Community Corporation	\$1,200,000	\$1,200,000	See update column.	Funds generally are expended property-by-property, upon permanent loan closings. Next tranche is expected to close by July 31, 2017.	NA	12	N	
163 Glen St.	Somerville Community Corporation	\$915,000	\$915,000	See update column.	Construction loan closing scheduled for May, 2017. SCC has submitted a draft requisition for \$819,995, to be processed upon closing. Full occupancy targeted for June, 2018.	1	8	N	Y

Program updates follow below.

Table 5, Program Updates

Ongoing Program Update									
Program	Applicant	Funded	Committed	Disbursed	Update	Ward	# new units/ # HH	Mixed use	TO D
Better Homes FY15 (rent assistance program grant)	Somerville Homeless Coalition	\$35,820	\$35,820	\$35,820	Funding filled the gap between HUD Fair Market Rent reimbursements and actual market rents at 17 scattered-site apartments leased by SHC. Provided housing for 17 formerly homeless and disabled Somerville households. 22 people (3 families and 14 individuals) were served. Nine (9) qualify as chronically homeless people as defined by HUD. \$35,820 invoice is in processing.		17	NA	NA
Better Homes FY16 (rent assistance program grant)	Somerville Homeless Coalition	\$56,868	\$56,868		SHC was able to renew leases for the 17 apartments and continue to provide housing for these households throughout the year. The contract for this work is in production, with disbursement to follow execution.		17	NA	NA
Short Stop Self-Sufficiency FY16 (housing program grant)	Wayside	\$26,107	\$26,107		Over the course of year from 1/1/15 to 12/31/16, Shortstop served 18 young adults. Of 9 youth who exited the program, 7 are living independently, 1 left the program for other opportunities and 1 began 4-year college, living on campus. Educational stability after exit as well as during program participation has increased.	7	9	NA	NA



Other information requested on projects previously funded follows below.

Table 6, Other Project Information

PROJECTS AWARDED CPA FUNDING	BR MIX	UNITS BY AMI LEVELS					TOTAL UNITS	TYPE
		<30%	<50%	<80%	<100%	<110%		
SHA Waterworks	25 1BR	5	20				25	rental
163 Glen St.	7 2BR, 1 3BR			4	2	2	8	ownership
100 Homes								
Homeownership - 29 Jackson Rd.	1 2BR, 1 5BR			1	1		2	ownership
Rental – all other units	6 2BR, 6 3BR		4	4	6		12	rental
TOTAL BY % AMI		5	24	9	9	2	49	

Other information requested on projects being considered for funding follows below.

Table 7, Other Project Information

PROJECTS PROPOSED FOR CPA FUNDING		<30%	<50%	<80%	<100%	<110%	Total	
Clarendon	2BR	22	0	45				rental
Clarendon (cont'd)	3BR	2	0	4				rental
	total	24	0	49			73	
100 Homes	Future 100 Homes bedroom mix and affordability will be determined by site selection and acquisition constraints. Units to date are representative of program goals.							

#### Affordable Housing Trends

The Housing Division works with the City of Somerville Planning and Zoning Division to commission a housing needs assessment (HNA) at least every 5 years, as required under the City's inclusionary zoning ordinance. The most recent assessment was completed by LDS Consulting Group in December, 2015. Information on housing trends in Somerville as of that time is excerpted below.



- % of housing stock that is affordable
  - 9.69%
- Total number of affordable units (disaggregated by % of AMI)
  - 3,178 rental (voucher: 1,217; 30%: 2,583; 50%: 140; 60%: 289; 80%: 54) 112 ownership (80%: 77; 110%: 35)
- % of households who are rent burdened
  - 38.7% (8,114/20,947)
- % of households who are severely rent burdened
  - 17.8% (3,722/20,947)
- % of households who are cost burdened
  - 38.7% (4,318/11,239)
- % of households who are severely cost burdened
  - 19.0% (2,134/11,239)
- # of affordable units expiring in the next five years
  - Between 279 and 285
- SCC average wait time
  - 3-5 years
- # of homeless individuals in Somerville
  - 6 unsheltered; 152 sheltered

## CPA Stories

Stories from several CPA-funded efforts illustrate the critical role housing-designated funds have served in the last several years – both in enabling projects to advance into construction, and in preserving the tenancies of households that would have been displaced in the absence of CPA project funding.

After more than three years of intensive work Somerville Housing Authority (SHA) had invested in assembling approvals and highly competitive funding on its 25-unit Water Waterworks project, in May 2016 faced the prospect of seeing the project stall – or not happen at all – as continued price escalations presented a limited but intractable budget shortfall. Housing staff had worked with SHA to close the majority of the deficit with City and other Trust funding sources, leaving a \$250,000 gap. The CPC voted last spring to allocate an additional \$250,000 in funding to the Trust, for the purpose of supporting the Waterworks project. With the help of the additional housing-designated CPA funds, the project closed last year and was approaching 50% completion as of its last construction requisition.

While CPA funding enabled a major SHA development project to begin construction after years in development, it has also enabled existing tenancies to be preserved at 94-96 Grant Street and, most recently, at 72 Marshall Street. At the former property, two of three units were occupied. SCC worked swiftly to determine the incomes of the occupied households and engaged translators to assist that effort. Occupants of both units were occupied by families who had emigrated to the U.S. and Somerville. SCC's acquisition of 72 Marshall Street also preserved three existing tenancies.

Of particular significance in the 72 Marshall Street acquisition was the fact that the units were – and fortunately still are – occupied by households receiving rental assistance through Section 8 vouchers. The seller had already provided notice to the tenants of his intention to convert the property to condominium ownership – meaning their tenancies would in all likelihood end after expiration of the notice period. Acquisition by SCC was virtually the only way the units could be preserved as affordable.

Finally, SCC and the City of Somerville have collaborated on the first two 100 Homes purchases – at 52 Sydney Street and 297 Alewife Brook Parkway – to leverage more than \$600,000 in state resources and five project-based Massachusetts Rental Vouchers. This effort will enable these two homes to serve 5 very low income, homeless and at risk families in their own apartments, rather than in shelters. Supportive services will be provided to these families by the Somerville Homeless Coalition.

### **Lessons Learned, Looking Ahead**

After its first eighteen months of implementation, the 100 Homes Initiative has been proven to work. Increasingly, prospective sellers are contacting SCC before putting properties on the open market – creating an ancillary benefit of properties not being ‘bid up’ further as would-be buyers bid on them. The program has credibility among the real estate agents, and is recognized by an increasing number of owners as an alternative for sellers who share the program’s goal of preserving affordable housing. As the program scales up, there are economies of scale that can be realized and create options to help families and individuals who would otherwise face displacement.

Along with pursuing options to expanding the program’s rate of activity through bonding CPA resources, other areas for further exploration include:

- Scaling up to the point that a property management system can be designed and affordably customized to the program.
- Exploring more affordable property insurance (vacant property insurance is very costly).
- Standardizing and bidding out a menu of basic renovation services needed to local trades and vendors (locks and keys, painting, flooring, electrical upgrades such as adding common house meters)
- Exploring tax exempt bond financing for permanent first mortgages at lower rates.
- Considering further homeownership options.
- Formation of a local lending consortium around the 100 Homes Consortium.

On other CPA-related efforts, City staff and AHT Trustees look forward to presenting to the CPC May 24, as it looks ahead to making final decisions on FY17 funding requests based on information to be shared. Staff and trustees will continue outreach to developers of affordable housing to identify new opportunities. Administratively, staff and trustees will continue to attend seminars and trainings on issues relevant to and regarding the effective use of CPA funds to leverage affordable housing creation, preservation and support.



# 100 Homes Properties



CPA UPDATE

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5-19-17

Hi Kristen –

Following up on our conversation this morning, I'm glad to provide an update on the status of SAHTF review of pending CPA project requests we will be discussing with CPC members next week.

As I mentioned, at last week's Trust meeting trustees reviewed several scenarios relative to bonding, and a combination of upfront funding and bonding scenarios. After reviewing four scenarios initially requested, trustees have asked staff to refine two scenarios for consideration and discussion with CPC members and staff. The scenarios under consideration for the Clarendon Hill and 100 Homes requests are intended to take two points of feedback into account.

The first factor is that the requests as submitted – each for \$2 million in some combination of upfront and/or bond issuance – both identified the need for future requests in order to complete the proposed reconstruction of Clarendon Hills and the 100 Homes initiative respectively. Given the inefficiencies involved with multiple bond issuances in successive years that funding in such increments would involve, trustees asked staff to analyze scenarios involving funding in larger increments.

The total funding requests for the project at this time are roughly \$6 million for Clarendon Hill, and \$10 million to complete the 100 Homes initiative. As debt service on a \$16 million bond issuance would actually exceed the annual 45% of CPA resources allocated for affordable housing, trustees also requested that a scenario that contemplates funding in \$8 million 'tranches' be explored as well.

A second factor trustees requested staff to consider in its further analysis was the level of non-CPA, multi-year Trust resources that could be committed to each project, in an effort to develop funding approaches that contemplate them in full, rather than only phase-by-phase. We are working on this analysis and look forward to sharing it and the other information you requested. Thanks very much.

Please let me know of any questions you may have on this information.

Mike



**FY 2017 CPA PROJECT APPLICATIONS BONDING REQUEST PRESENTATION**

SOMERVILLE AFFORDABLE HOUSING TRUST FUND  
CITY OF SOMERVILLE HOUSING DIVISION  
MAY 24, 2017

**CPA PROJECT REQUESTS – FY2017**

**Clarendon Hill Public Housing**

- Applicant – Preservation of Affordable Housing, Somerville Community Corporation
- Request – \$2 million

**100 Homes Initiative**

- Applicant – Somerville Community Corporation
- Request – \$2 million

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**FY2017 CPA Funding**

- \$880,415

**Expected Request Amounts & Time Frames**

Clarendon Hill	Request is the first of two or more, expected to total \$6 million.
100 Homes	Request would fund acquisition and rehab of approximately 17 units; projected total remaining need is approximately \$9-10 million.

**Clarendon Hill**

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**Proposed Program**

- 216 deeply affordable units
- 44 moderate income units
- 270 market rate units

530 total

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### 1st phase proposed program

Phase 1: Building A, 93 units

- 24 2BR + 3BR <30% AMI
- 49 2BR + 3BR <80% AMI
- 20 1BR + 2BR <120% AMI

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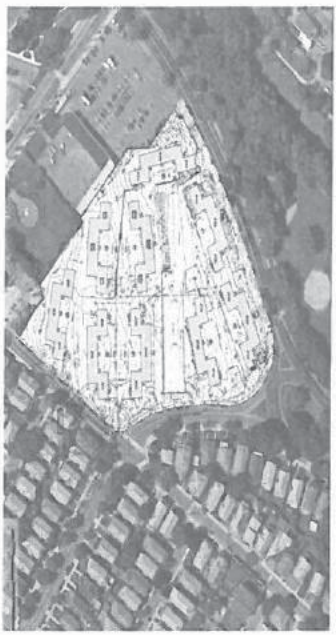
### Budget information

Total projected costs: \$102.1 million

#### Funding Sources

- o State (\$45.5 million)
- o Private Development Subsidy (\$16 million)
- o Tax exempt bonds (\$25.6 million)
- o 4% tax credit equity
- o DHCD Partnership to Expand Housing Opportunities (PEHO)
- o MassHousing workforce housing subsidy
- o MassWorks infrastructure funds

### Existing Site Plan and Context



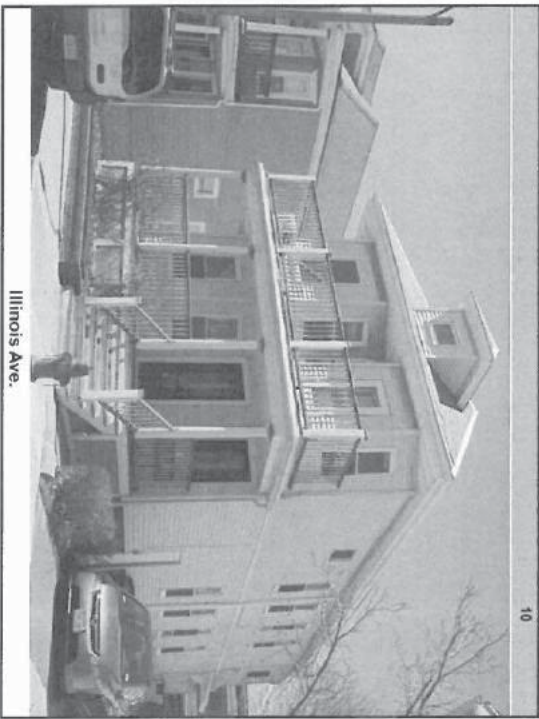
### Potential site plan alternative (illustrative)



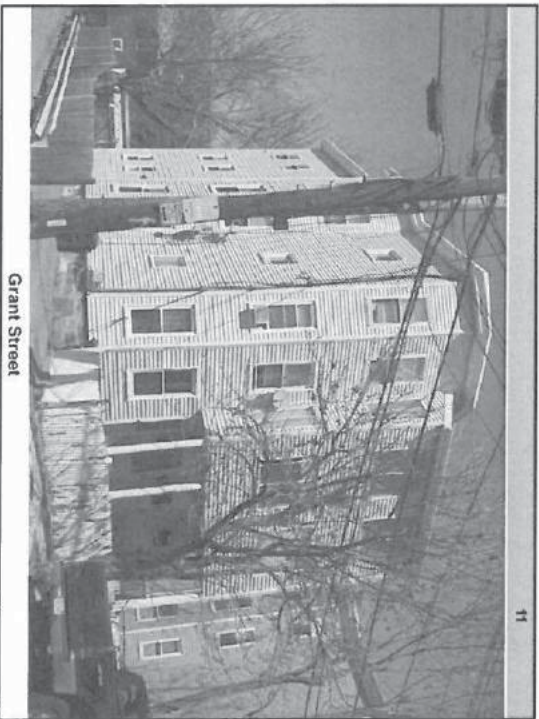
### 100 Homes – Progress to date

- 7 properties acquired, totaling 20 units (1/5 of program goal);
- 7 tenancies preserved

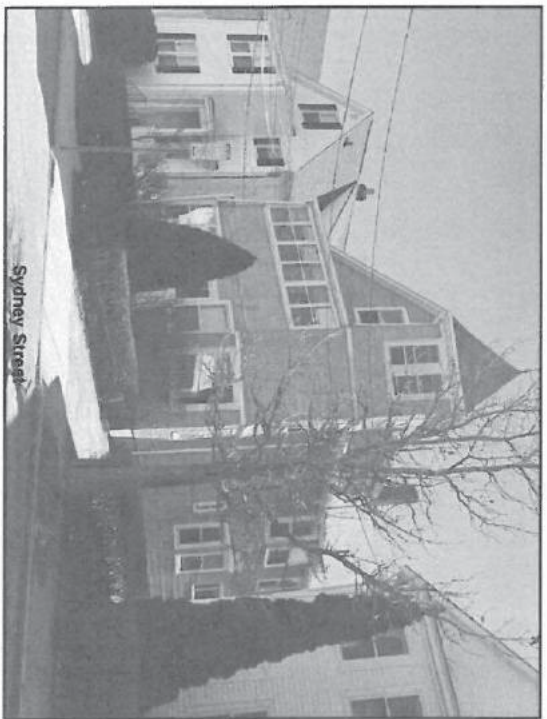
10 1BR-3BR <50% AMI
3 2BR -3BR <80% AMI
7 2BR - 3BR - 4BR <100% AMI



Illinois Ave.



Grant Street



Sydney Street





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### Basis for AHT bonding scenario(s)

**Goals**

- Minimize inefficiencies associated with multiple bond issuances.
- Maximize non-CPA resources that can be used to help keep annual debt service well below annual CPA allocation.
- Retain capacity to fund other projects going forward.

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### Current preferred scenario

Project	Bond amount	Year of bond issue	Total term	Short-term rate	Blurred, only period	Long-term rate	Payment source
Clarendon Hill	4,000,000	2019	25	1.75%	2	4.75%	CPA
100 Homes	4,000,000	2018	25	1.75%	2	4.75%	CPA

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### Bond payments as % of CPA allocation

Bond Payments as % of Annual CPA Housing Allocation									
	2017	2018	2019	2020	2021	2022	2023	2024	
CPA Debt Service by Year		70,000	70,000	289,599	289,599	289,599	289,599	289,599	
CPA Allocation by Year	880,416	887,933	940,360	1,031,648	991,802	1,049,527	1,108,374	1,170,167	
Debt service as % allocation	0%	0%	7%	7%	29%	28%	26%	25%	

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## **Conclusion & discussion**

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- Affordable units to be created or acquired:
- Clarendon – 260
- One hundred homes – 100
- Local subsidy/affordable unit:
  - \$44,444

**FY17 Housing Bond Estimated Debt Service  
5/19/17**

Short-term rate	1.75%	
Long-term rate	4.75%	
Bond amount	\$8,000,000	

	Year #	Debt Service	Principal	Interest	Principal Balance
FY2018	1	\$140,000		\$140,000	\$8,000,000
FY2019	2	\$140,000		\$140,000	\$8,000,000
FY2020	3	\$579,198	\$199,198	\$380,000	\$7,800,802
FY2021	4	\$579,198	\$208,659	\$370,538	\$7,592,143
FY2022	5	\$579,198	\$218,571	\$360,627	\$7,373,572
FY2023	6	\$579,198	\$228,953	\$350,245	\$7,144,619
FY2024	7	\$579,198	\$239,828	\$339,369	\$6,904,791
FY2025	8	\$579,198	\$251,220	\$327,978	\$6,653,571
FY2026	9	\$579,198	\$263,153	\$316,045	\$6,390,418
FY2027	10	\$579,198	\$275,653	\$303,545	\$6,114,766
FY2028	11	\$579,198	\$288,746	\$290,451	\$5,826,020
FY2029	12	\$579,198	\$302,462	\$276,736	\$5,523,558
FY2030	13	\$579,198	\$316,829	\$262,369	\$5,206,729
FY2031	14	\$579,198	\$331,878	\$247,320	\$4,874,851
FY2032	15	\$579,198	\$347,642	\$231,555	\$4,527,209
FY2033	16	\$579,198	\$364,155	\$215,042	\$4,163,054
FY2034	17	\$579,198	\$381,452	\$197,745	\$3,781,602
FY2035	18	\$579,198	\$399,571	\$179,626	\$3,382,030
FY2036	19	\$579,198	\$418,551	\$160,646	\$2,963,479
FY2037	20	\$579,198	\$438,432	\$140,765	\$2,525,047
FY2038	21	\$579,198	\$459,258	\$119,940	\$2,065,789
FY2039	22	\$579,198	\$481,073	\$98,125	\$1,584,717
FY2040	23	\$579,198	\$503,924	\$75,274	\$1,080,793
FY2041	24	\$579,198	\$527,860	\$51,338	\$552,933
FY2042	25	\$579,198	\$552,933	\$26,264	\$0
	<b>TOTAL</b>	<b>\$13,601,544</b>	<b>\$8,000,000</b>	<b>\$5,601,544</b>	

Year 1 payment due 12 months after debt issued --> debt issued in June 2017 will have Year 1 payment due June 2018.



	Housing Estimated Debt Service	Projected CPA Revenue				Housing Estimated Debt Service as % of Projected CPA Revenue				Housing Estimated Debt Service as % of Projected CPA Revenue Less 45% for Community Housing			
		Surcharge Only	Surcharge + State Match	Surcharge + State Match + Max. City Approp.	Surcharge Only	Surcharge + State Match	Surcharge + State Match + Max. City Approp.	Surcharge Only	Surcharge + State Match	Surcharge + State Match + Max. City Approp.	Surcharge Only	Surcharge + State Match	Surcharge + State Match + Max. City Approp.
FY2017	0	1,779,058	2,199,739	4,015,104	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	-45.0%	-45.0%	-45.0%
FY2018	140,000	1,928,774	2,249,004	4,588,124	7.3%	6.2%	3.1%	7.3%	6.2%	3.1%	-37.7%	-38.8%	-41.9%
FY2019	140,000	2,089,688	2,436,867	4,971,405	6.7%	5.7%	2.8%	6.7%	5.7%	2.8%	-38.3%	-39.3%	-42.2%
FY2020	579,198	2,292,550	2,668,693	5,443,789	25.3%	21.7%	10.6%	25.3%	21.7%	10.6%	-19.7%	-23.3%	-34.4%
FY2021	579,198	2,446,762	2,859,421	5,834,179	23.7%	20.3%	9.9%	23.7%	20.3%	9.9%	-21.3%	-24.7%	-35.1%
FY2022	579,198	2,589,170	3,029,587	6,181,815	22.4%	19.1%	9.4%	22.4%	19.1%	9.4%	-22.6%	-25.9%	-35.6%
FY2023	579,198	2,734,343	3,200,393	6,530,453	21.2%	18.1%	8.9%	21.2%	18.1%	8.9%	-23.8%	-26.9%	-36.1%
FY2024	579,198	2,886,786	3,378,968	6,894,856	20.1%	17.1%	8.4%	20.1%	17.1%	8.4%	-24.9%	-27.9%	-36.6%
FY2025	579,198	3,073,485	3,593,106	7,331,292	18.8%	16.1%	7.9%	18.8%	16.1%	7.9%	-26.2%	-28.9%	-37.1%
FY2026	579,198	3,104,220	3,657,447	7,465,927	18.7%	15.8%	7.8%	18.7%	15.8%	7.8%	-26.3%	-29.2%	-37.2%
FY2027	579,198	3,135,262	3,694,022	7,540,586	18.5%	15.7%	7.7%	18.5%	15.7%	7.7%	-26.5%	-29.3%	-37.3%
FY2028	579,198	3,166,615	3,730,962	7,615,992	18.3%	15.5%	7.6%	18.3%	15.5%	7.6%	-26.7%	-29.5%	-37.4%
FY2029	579,198	3,198,281	3,768,271	7,692,152	18.1%	15.4%	7.5%	18.1%	15.4%	7.5%	-26.9%	-29.6%	-37.5%
FY2030	579,198	3,230,264	3,805,954	7,769,073	17.9%	15.2%	7.5%	17.9%	15.2%	7.5%	-27.1%	-29.8%	-37.5%
FY2031	579,198	3,262,566	3,844,014	7,846,764	17.8%	15.1%	7.4%	17.8%	15.1%	7.4%	-27.2%	-29.9%	-37.6%
FY2032	579,198	3,295,192	3,882,454	7,925,232	17.6%	14.9%	7.3%	17.6%	14.9%	7.3%	-27.4%	-30.1%	-37.7%
FY2033	579,198	3,328,144	3,921,278	8,004,484	17.4%	14.8%	7.2%	17.4%	14.8%	7.2%	-27.6%	-30.2%	-37.8%
FY2034	579,198	3,361,425	3,960,491	8,084,529	17.2%	14.6%	7.2%	17.2%	14.6%	7.2%	-27.8%	-30.4%	-37.8%
FY2037	579,198	3,395,039	4,000,096	8,165,374	17.1%	14.5%	7.1%	17.1%	14.5%	7.1%	-27.9%	-30.5%	-37.9%
FY2038	579,198	3,428,990	4,040,097	8,247,028	16.9%	14.3%	7.0%	16.9%	14.3%	7.0%	-28.1%	-30.7%	-38.0%
FY2039	579,198	3,463,280	4,080,498	8,329,498	16.7%	14.2%	7.0%	16.7%	14.2%	7.0%	-28.3%	-30.8%	-38.0%
FY2040	579,198	3,497,913	4,121,303	8,412,793	16.6%	14.1%	6.9%	16.6%	14.1%	6.9%	-28.4%	-30.9%	-38.1%
FY2041	579,198	3,532,892	4,162,516	8,496,921	16.4%	13.9%	6.8%	16.4%	13.9%	6.8%	-28.6%	-31.1%	-38.2%
FY2040	579,198	3,568,221	4,204,141	8,581,890	16.2%	13.8%	6.7%	16.2%	13.8%	6.7%	-28.8%	-31.2%	-38.3%
FY2041	579,198	3,603,903	4,246,182	8,667,709	16.1%	13.6%	6.7%	16.1%	13.6%	6.7%	-28.9%	-31.4%	-38.3%
FY2042	579,198	3,639,942	4,288,644	8,754,386	15.9%	13.5%	6.6%	15.9%	13.5%	6.6%	-29.1%	-31.5%	-38.4%
Total	13,022,346	75,392,818	88,735,504	180,636,968	17.3%	14.7%	7.2%	17.3%	14.7%	7.2%	-27.7%	-30.3%	-37.8%

Assumptions: 1) state match rate without City match = 18%; 2) state match rate with maximum City match = 19.2%



**FY17 Housing Bond Estimated Debt Service  
5/19/17**

Short-term rate	1.75%
Long-term rate	4.75%
Bond amount	\$16,000,000

	Year #	Debt Service	Principal	Interest	Principal Balance
FY2018	1	\$280,000		\$280,000	\$16,000,000
FY2019	2	\$280,000		\$280,000	\$16,000,000
FY2020	3	\$1,158,395	\$398,395	\$760,000	\$15,601,605
FY2021	4	\$1,158,395	\$417,319	\$741,076	\$15,184,286
FY2022	5	\$1,158,395	\$437,142	\$721,254	\$14,747,145
FY2023	6	\$1,158,395	\$457,906	\$700,489	\$14,289,239
FY2024	7	\$1,158,395	\$479,656	\$678,739	\$13,809,583
FY2025	8	\$1,158,395	\$502,440	\$655,955	\$13,307,143
FY2026	9	\$1,158,395	\$526,306	\$632,089	\$12,780,837
FY2027	10	\$1,158,395	\$551,305	\$607,090	\$12,229,531
FY2028	11	\$1,158,395	\$577,492	\$580,903	\$11,652,039
FY2029	12	\$1,158,395	\$604,923	\$553,472	\$11,047,116
FY2030	13	\$1,158,395	\$633,657	\$524,738	\$10,413,459
FY2031	14	\$1,158,395	\$663,756	\$494,639	\$9,749,703
FY2032	15	\$1,158,395	\$695,284	\$463,111	\$9,054,419
FY2033	16	\$1,158,395	\$728,310	\$430,085	\$8,326,109
FY2034	17	\$1,158,395	\$762,905	\$395,490	\$7,563,204
FY2035	18	\$1,158,395	\$799,143	\$359,252	\$6,764,061
FY2036	19	\$1,158,395	\$837,102	\$321,293	\$5,926,959
FY2037	20	\$1,158,395	\$876,865	\$281,531	\$5,050,094
FY2038	21	\$1,158,395	\$918,516	\$239,879	\$4,131,578
FY2039	22	\$1,158,395	\$962,145	\$196,250	\$3,169,433
FY2040	23	\$1,158,395	\$1,007,847	\$150,548	\$2,161,586
FY2041	24	\$1,158,395	\$1,055,720	\$102,675	\$1,105,866
FY2042	25	\$1,158,395	\$1,105,866	\$52,529	\$0
	<b>TOTAL</b>	<b>\$27,203,087</b>	<b>\$16,000,000</b>	<b>\$11,203,087</b>	

Year 1 payment due 12 months after debt issued --> debt issued in June 2017 will have Year 1 payment due June 2018.



	Housing Estimated Debt Service	Projected CPA Revenue				Housing Estimated Debt Service as % of Projected CPA Revenue				Housing Estimated Debt Service as % of Projected CPA Revenue Less 45% for Community Housing			
		Surcharge Only	Surcharge + State Match	Surcharge + State Match + City Approp.	Surcharge + State Match + Max.	Surcharge Only	Surcharge + State Match	Surcharge + State Match + City Approp.	Surcharge + State Match + Max.	Surcharge Only	Surcharge + State Match	Surcharge + State Match + City Approp.	Surcharge + State Match + Max.
FY2017	0	1,779,058	2,199,739	4,015,104	0.0%	0.0%	0.0%	0.0%	0.0%	-45.0%	-45.0%	-45.0%	
FY2018	280,000	1,928,774	2,249,004	4,588,124	14.5%	12.4%	6.1%	14.5%	12.4%	-30.5%	-32.6%	-38.9%	
FY2019	280,000	2,089,688	2,436,867	4,971,405	13.4%	11.5%	5.6%	13.4%	11.5%	-31.6%	-33.5%	-39.4%	
FY2020	1,158,395	2,292,550	2,668,693	5,443,789	50.5%	43.4%	21.3%	50.5%	43.4%	5.5%	-1.6%	-23.7%	
FY2021	1,158,395	2,446,762	2,859,421	5,834,179	47.3%	40.5%	19.9%	47.3%	40.5%	2.3%	-4.5%	-25.1%	
FY2022	1,158,395	2,589,170	3,029,587	6,181,815	44.7%	38.2%	18.7%	44.7%	38.2%	-0.3%	-6.8%	-26.3%	
FY2023	1,158,395	2,734,343	3,200,393	6,530,453	42.4%	36.2%	17.7%	42.4%	36.2%	-2.6%	-8.8%	-27.3%	
FY2024	1,158,395	2,886,786	3,378,968	6,894,856	40.1%	34.3%	16.8%	40.1%	34.3%	-4.9%	-10.7%	-28.2%	
FY2025	1,158,395	3,073,485	3,593,106	7,331,292	37.7%	32.2%	15.8%	37.7%	32.2%	-7.3%	-12.8%	-29.2%	
FY2026	1,158,395	3,104,220	3,657,447	7,465,927	37.3%	31.7%	15.5%	37.3%	31.7%	-7.7%	-13.3%	-29.5%	
FY2027	1,158,395	3,135,262	3,694,022	7,540,586	36.9%	31.4%	15.4%	36.9%	31.4%	-8.1%	-13.6%	-29.6%	
FY2028	1,158,395	3,166,615	3,730,962	7,615,992	36.6%	31.0%	15.2%	36.6%	31.0%	-8.4%	-14.0%	-29.8%	
FY2029	1,158,395	3,198,281	3,768,271	7,692,152	36.2%	30.7%	15.1%	36.2%	30.7%	-8.8%	-14.3%	-29.9%	
FY2030	1,158,395	3,230,264	3,805,954	7,769,073	35.9%	30.4%	14.9%	35.9%	30.4%	-9.1%	-14.6%	-30.1%	
FY2031	1,158,395	3,262,566	3,844,014	7,846,764	35.5%	30.1%	14.8%	35.5%	30.1%	-9.5%	-14.9%	-30.2%	
FY2032	1,158,395	3,295,192	3,882,454	7,925,232	35.2%	29.8%	14.6%	35.2%	29.8%	-9.8%	-15.2%	-30.4%	
FY2033	1,158,395	3,328,144	3,921,278	8,004,484	34.8%	29.5%	14.5%	34.8%	29.5%	-10.2%	-15.5%	-30.5%	
FY2034	1,158,395	3,361,425	3,960,491	8,084,529	34.5%	29.2%	14.3%	34.5%	29.2%	-10.5%	-15.8%	-30.7%	
FY2037	1,158,395	3,395,039	4,000,096	8,165,374	34.1%	29.0%	14.2%	34.1%	29.0%	-10.9%	-16.0%	-30.8%	
FY2038	1,158,395	3,428,990	4,040,097	8,247,028	33.8%	28.7%	14.0%	33.8%	28.7%	-11.2%	-16.3%	-31.0%	
FY2039	1,158,395	3,463,280	4,080,498	8,329,498	33.4%	28.4%	13.9%	33.4%	28.4%	-11.6%	-16.6%	-31.1%	
FY2040	1,158,395	3,497,913	4,121,303	8,412,793	33.1%	28.1%	13.8%	33.1%	28.1%	-11.9%	-16.9%	-31.2%	
FY2041	1,158,395	3,532,892	4,162,516	8,496,921	32.8%	27.8%	13.6%	32.8%	27.8%	-12.2%	-17.2%	-31.4%	
FY2040	1,158,395	3,568,221	4,204,141	8,581,890	32.5%	27.6%	13.5%	32.5%	27.6%	-12.5%	-17.4%	-31.5%	
FY2041	1,158,395	3,603,903	4,246,182	8,667,709	32.1%	27.3%	13.4%	32.1%	27.3%	-12.9%	-17.7%	-31.6%	
FY2042	1,158,395	3,639,942	4,288,644	8,754,386	31.8%	27.0%	13.2%	31.8%	27.0%	-13.2%	-18.0%	-31.8%	
Total	26,044,692	75,392,818	88,735,504	180,636,968	34.5%	29.4%	14.4%	34.5%	29.4%	-10.5%	-15.6%	-30.6%	

Assumptions: 1) state match rate without City match = 18%; 2) state match rate with maximum City match = 19.2%





# CITY OF SOMERVILLE, MASSACHUSETTS COMMUNITY PRESERVATION COMMITTEE



JOSEPH A. CURTATONE  
MAYOR

## COMMUNITY PRESERVATION COMMITTEE FY17 FUNDING RECOMMENDATION FOR *100 HOMES INITIATIVE, SOMERVILLE COMMUNITY CORPORATION*

### PROJECT DESCRIPTION

The Somerville Community Corporation (SCC) is requesting funding for the 100 Homes Initiative, which seeks to secure 100 new units of affordable housing in Somerville through purchasing existing multi-family properties and converting them to affordable housing. The award to the joint venture would be a loan managed by the Somerville Affordable Housing Trust Fund, the housing arm of the Community Preservation Committee.

### ELIGIBILITY

*Community Housing:* This project will create new housing for low and moderate income individuals and families.

### RECOMMENDED FUNDING- PRELIMINARY DISCUSSION

On [May 24, 2017] by a vote of [x-x] the Community Preservation Committee recommended bonding [\$x,xxx,xxx] for this project from the community housing reserve budget to the control of Clarendon Hill Apartments joint venture for the overall purposes summarized in this document.

OR

On [May 24, 2017] by a vote of [x-x] the Community Preservation Committee recommended not funding this project from the Community Preservation Fund.

### Project Budget

Expenses	Amount
Study	\$0
Soft costs	\$603,585
Acquisition	\$5,270,000
Construction	\$0
<b>Total</b>	<b>\$5,873,585</b>
<b>Sources</b>	
CPA community housing funds- requested	\$2,193,000
Permanent mortgages and other subsidy	\$3,680,585
<b>Total</b>	<b>\$5,873,585</b>



**ALIGNMENT WITH FY17 COMMUNITY PRESERVATION PLAN**

100 Homes will provide for affordability in perpetuity.

**SPECIAL ISSUES CONSIDERED BY THE CPC**

[Heading]

[Description issue that would be useful to document for the CPC or would be of interest to the Board of Alderman or community]

**FUNDING CONDITIONS**

1. Upon commencement of the Project and as appropriate, the [applicant] agrees to post a sign stating that the Project was funded through the City of Somerville’s Community Preservation Act program. [for all construction projects]
2. Other conditions as necessary

DRAFT



SOMERVILLE COMMUNITY CORPORATION

337 Somerville Avenue, 2<sup>nd</sup> Floor  
Somerville, MA 02143  
Phone (617) 776-5931  
Fax (617) 776-0724

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February 21, 2017

Somerville Affordable Housing Trust Fund  
c/o: Heidi Burbidge  
City of Somerville Housing Division  
50 Evergreen Avenue  
Somerville, MA 02145

Dear Trustees:

I am pleased to submit this application in response to your January 19<sup>th</sup>, 2017 announcement of affordable housing development funding opportunities. The Somerville Community Corporation respectfully requests up to \$2 Million of CPA/Housing funds to continue the 100 Homes Program- a successful partnership between the City of Somerville's Affordable Housing Trust and Community Preservation Act Committee, the Massachusetts Housing Investment Corporation (MHIC) and SCC. Since the inception of the program, SCC has been able to purchase 13 units of housing in 5 properties, securing affordability of these units in perpetuity and preventing the displacement of existing Somerville tenants. Five of the units purchased will provide housing to very low income homeless or at risk families, while the remaining 8 units provides affordable housing to households earning at or below 80% and 100% of AMI. Currently, SCC has entered into purchase and sale agreements for two more 100 Homes properties, containing 7 units. Upon purchase of these properties in the next 60 days, the program will have completed acquisition of 1/5 of the 100 unit program goal and exhausted the first two installments of CPA funds totaling \$2.4M. The program is leveraging approximately \$2 dollars of private financing and subsidy from the State and other sources for every \$1 dollar of CPA funds committed.

SCC respectfully requests an additional \$2 Million of CPA/housing funds to advance the program's success even further, inclusive of \$25,000 per calendar year quarter for contracted professional services and administration and operation of the program.

There is undoubtedly more need for CPA affordable housing subsidy than there is availability of funds on an annual basis. For this reason, SCC proposes that the Trustees consider recommending the issuance of a bond to continue funding the 100 Homes program. A bond issuance of \$2,000,000 would carry the program for another 6 months to a year and would annually require an estimated \$141,905 of CPA funds to service the debt over the next 25 years at 5% interest. This annual commitment of \$141,905 represents 21% of the estimated \$675,000 fund for housing that is created, assuming the CPC continues to allocate 45% of the estimated annual surcharge for housing.

Thank you very much for your consideration of our request. Should you have any questions or need further information on this or any other matter please don't hesitate to contact me at your earliest convenience.

Sincerely,

Scott Hayman, Director of Real Estate.





# CITY OF SOMERVILLE, MASSACHUSETTS COMMUNITY PRESERVATION COMMITTEE



JOSEPH A. CURTATONE  
MAYOR

## COMMUNITY PRESERVATION COMMITTEE FY17 FUNDING RECOMMENDATION FOR *CLARENDON HILL APARTMENTS, JOINT VENTURE BETWEEN PRESERVATION OF AFFORDABLE HOUSING AND SOMERVILLE COMMUNITY CORPORATION*

### PROJECT DESCRIPTION

Preservation of Affordable Housing (POAH) and the Somerville Community Corporation (SCC) are requesting funding for the construction of 73 new low- and extremely low-income rental housing, plus 20 units of workforce housing, as part of a new mixed income community. The new development will include a total of 530 units that will house the current Clarendon Hill residents as well as provide additional workforce and market rate housing. The development will include a large common green and a community garden area as well as new streets and pedestrian paths. The award to the joint venture would be a loan managed by the Somerville Affordable Housing Trust Fund, the housing arm of the Community Preservation Committee.

### ELIGIBILITY

*Community Housing:* This project will create new housing for low and moderate income individuals and families.

### RECOMMENDED FUNDING- PRELIMINARY DISCUSSION

On [May 24, 2017] by a vote of [x-x] the Community Preservation Committee recommended bonding [\$x,xxx,xxx] for this project from the community housing reserve budget to the control of Clarendon Hill Apartments joint venture for the overall purposes summarized in this document.

OR

On [May 24, 2017] by a vote of [x-x] the Community Preservation Committee recommended not funding this project from the Community Preservation Fund.

### Project Budget

Expenses	Amount
Study	\$
Soft costs	\$
Construction	\$203,156,396
<b>Total</b>	<b>\$203,156,396</b>
<b>Sources</b>	
CPA community housing funds- <b>requested</b>	\$4,500,000
First Mortgage	\$85,564,360



Private Equity	\$32,364,159
LIHTC Equity- 4%	\$25,602,736
Cross Subsidy	\$16,000,000
MassHousing- Workforce Funds	\$5,900,000
MassWorks	\$5,250,000
Somerville Affordable Housing Trust Fund non-CPA funds	\$1,500,000
State support	\$17,904,057
FHLB funds	\$1,100,000
Deferred Developer Fee	\$7,471,085
<b>Total</b>	<b>\$203,156,396</b>

**ALIGNMENT WITH FY17 COMMUNITY PRESERVATION PLAN**

This project is in alignment with multiple priorities established in the FY17 plan. SCC and POAH have stated their commitment to achieving the highest new construction sustainability performance standards and anticipate the project will achieve Enterprise Green Communities Standards. It leverages almost \$200 million in other funding sources. It would also preserve affordable units, replacing 216 units that are about to become obsolete. Five percent of units will be ADA compliant.

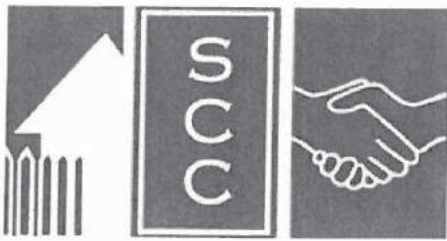
**SPECIAL ISSUES CONSIDERED BY THE CPC**

**[Heading]**

[Description issue that would be useful to document for the CPC or would be of interest to the Board of Alderman or community]

**FUNDING CONDITIONS**

1. Upon commencement of the Project and as appropriate, the [applicant] agrees to post a sign stating that the Project was funded through the City of Somerville’s Community Preservation Act program. [for all construction projects]
2. Other conditions as necessary



REDGATE™

Dear Sirs and Madams,

We are excited to submit this application for Somerville Community Preservation Act affordable housing funding.

Attached you will find an application for the first phase of the redevelopment of Clarendon Hill Apartments, located at 28 North Street near Powder House Blvd and Alewife Brook Parkway. Clarendon Hill is operated as state public housing by the Somerville Housing Authority (SHA) and is home to 216 families. The apartments and buildings are in great need of rehabilitation to ensure that safe, healthy, high-quality affordable housing is available for decades to come. At the request of the SHA, a development team comprised of Somerville Community Cooperation (SCC), Preservation of Affordable Housing (POAH), and Gate Residential have proposed a plan to redevelop the site. The redevelopment would create a 530-unit mixed-income community, providing 216 deeply affordable replacement units for the current residents as well as additional moderate-income and market rate housing.

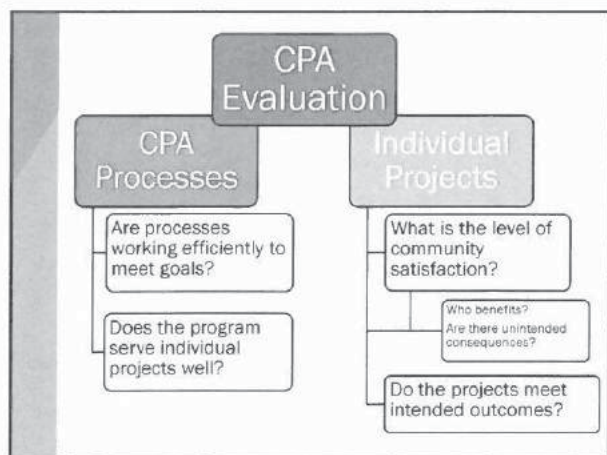
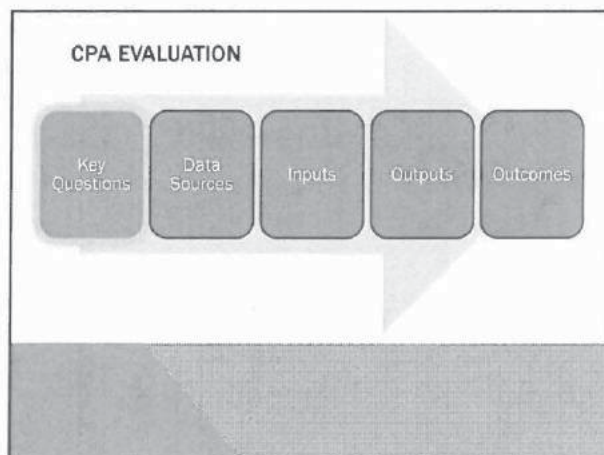
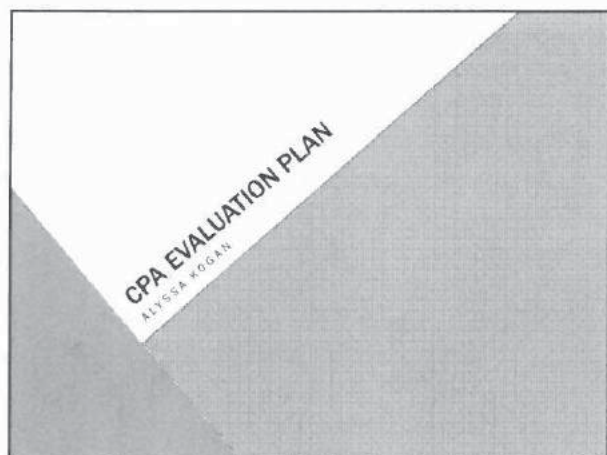
An award of funds from the Affordable Housing Trust and CPA is a valuable and necessary component to our success working to redevelop this site and, in the course of that effort, help to maintain Somerville's diversity and affordability. We recognize that the scale of our request is quite significant with respect to the Trust's annual allocations. In order to fully leverage affordable housing resources and allow other important projects access to CPA funds, we respectfully offer that the CPA, at the recommendation of the Somerville Affordable Housing Trust, could bond against a portion of the CPA allocation. This allows ongoing CPA funding to continue to be available to support deserving projects that preserve or enhance Somerville's affordability, with a portion supporting Clarendon Hill – one of the largest revitalization projects undertaken in Somerville, serving an economically vulnerable population that is an important part of the social and community fabric of the City.

Our request for the first phase of the project is for \$2 million. The application outlines a possible allocation between CPA and Trust funds; but in order to provide a sense of scale, if CPA funds were bonded for the full \$2 million, annual payments at 5% for a 25 year term would be \$141,905.

Such a structure has been used here in Somerville and elsewhere in the Commonwealth to achieve affordable housing production goals, and we are happy to further discuss any questions or issues.

Sincerely,

Aaron Gornstein, CEO  
POAH



- NEXT STEPS**
- Finalization of Key Questions
  - Timeline
  - Logic Model
  - Advisory Group?





JOSEPH A. CURTATONE  
MAYOR

## CITY OF SOMERVILLE, MASSACHUSETTS COMMUNITY PRESERVATION COMMITTEE



### AGENDA

**DATE:** Wednesday, June 28, 2017  
**TIME:** 7:00pm  
**PLACE:** Visiting Nurse Association, Third Floor Community Room  
259 Lowell St.

**MEMBERS**  
Dick Bauer, Chair  
Michael Fager, Vice Chair  
Michael A. Capuano  
Elizabeth Duclos-Orsello  
Arn Franzen  
Ezra Glenn  
James McCallum  
Uma Murugan  
Jessica Palacios Yamakawa

**STAFF**  
Kristen Stelljes

The Community Preservation Committee (CPC) will hold a **public hearing** to receive testimony on how the City should prioritize spending Community Preservation Act (CPA) funding. City departments and commissions and community organizations whose work is related to the CPA have been invited to give testimony. Following the invited testimony, members of the public will be invited to provide testimony. The Chair will establish a time limit for testimony, which will be at most five minutes per person, at the start of the hearing.

1. Welcome and introductions: Dick Bauer, CPC Chair
2. CPA Overview and Community Preservation Plan purpose: Kristen Stelljes, CPA Manager
3. Invited testimony:
  - a. SomerVision Update: Melissa Woods, Senior Planner
  - b. Somerville Capital Planning Update: Emily Monea, SomerStat Director
  - c. Community affordable housing update: Somerville Homeless Coalition or Wayside Youth and Family Support Network
  - d. Community historic resources update: Somerville Historical Society
  - e. Community open space and recreation land update: Friends of the Community Growing Center, Mystic River Watershed Association, or Green and Open Somerville
4. Public testimony
5. CPC reflections on input from hearing
6. Next meeting: Wednesday, July 26<sup>th</sup> at 6:30 p.m. (Visiting Nurse Association)



JOSEPH A. CURTATONE  
MAYOR



## CITY OF SOMERVILLE, MASSACHUSETTS COMMUNITY PRESERVATION COMMITTEE FY18 COMMUNITY PRESERVATION PLAN

**MEMBERS**  
Dick Bauer, Chair  
Michael Fager, Vice Chair  
Michael A. Capuano  
Elizabeth Duclos-Orsello  
Arn Franzen  
Ezra Glenn  
James McCallum  
Uma Murugan  
Jessica Palacios Yamakawa

**STAFF**  
Kristen Stelljes

### Introduction

With the passage of the Community Preservation Act (CPA) in November 2012, the City of Somerville joined 161 other communities in the Commonwealth of Massachusetts that have a steady funding source dedicated to preserving and improving their character and quality of life. The CPA is a Massachusetts state law (M.G.L. c. 44B) that enables adopting communities to create a dedicated fund for preserving open space and historic resources and expanding community housing and outdoor recreation opportunities.<sup>1</sup> Somerville voters passed the Act by 76%, the second highest passage rate in CPA history.<sup>2</sup> This achievement represents an exciting opportunity to make Somerville an even more exceptional place to live, work, play, and raise a family.

### The Community Preservation Committee

The Community Preservation Committee (CPC) oversees the implementation of the CPA in Somerville. The Committee, formed in January 2014, is responsible for establishing priorities for how CPA funding should be spent and, based on those priorities, making recommendations to the Board of Aldermen (BOA) on projects to receive funds. As established in Somerville's [Community Preservation Committee Ordinance](#), the CPC has nine members, including five ex-officio members and four members of the general public, who may serve two consecutive three-year terms. The current members are:

- Dick Bauer (Chair), Historic Preservation Commission representative
- Michael Fager (Vice Chair), Conservation Commission representative
- Michael A. Capuano, Planning Board representative
- Elizabeth Duclos-Orsello, general public representative
- Arn Franzen, Parks and Open Space Department representative
- Ezra Glenn, general public representative
- James McCallum, Housing Authority representative
- Uma Murugan, general public representative
- Jessica Palacios Yamakawa, general public representative

<sup>1</sup> The CPA legislation uses the term community housing to refer to housing for individuals and families with incomes below 100% of area median income (AMI). This plan uses the terms community housing and affordable housing interchangeably.

<sup>2</sup> Excludes Cape Cod communities that passed the predecessor to the CPA.



## The Community Preservation Plan

The Community Preservation Plan provides an overview of the CPA in Somerville and establishes the Committee's priorities for funding projects. The fiscal year 2018 (FY18) Plan builds on the previous Community Preservation Plans and is based on the City's existing planning documents and resident input. The CPC invited input to inform the FY18 Community Preservation Plan update at a public hearing on June 28, 2017 and through a six-week written comment period. Comments received from residents during the FY18 public comment period are available [here](#) and the minutes from the public hearing are available [here](#).

This plan has six sections. The first discusses the priorities of Somerville's CPA program and the FY17 funding allocations across CPA categories. The second describes the sources of CPA funding. The third describes the process the CPC follows to determine which projects to recommend for funding. The fourth section discusses the types of projects that are eligible to receive CPA funding and the fifth details priorities for each of the CPA categories. The sixth and final section provides information on how funding was distributed across projects in previous funding rounds. The monitoring and evaluation (M&E) plan for the FY18 Community Preservation Plan is attached as an appendix. The M&E plan details what information the CPC collects, in addition to community input, to inform their decisions about how to set funding priorities and to determine the effectiveness of the CPA program overall.

## Section 1. Somerville Community Preservation Act Priorities

Communities across Massachusetts face the challenge of how to maintain the character of their towns and cities while also growing and developing. Residents in CPA communities agree to support a fund through a surcharge on their property tax that is designed to help them proactively address this challenge. In Somerville, CPA funds are used to maintain the character that makes it a great city while preserving and creating new open space, recreation opportunities, and affordable housing so that Somerville will continuously be a greater place to live, work, play and raise a family. To determine the best use of CPA funds, the CPC has established two priorities that apply to all projects.

### General Priorities

The CPC will prioritize projects that:

1. **Are consistent with the community's values, which includes projects that:**
  - a. Improve accessibility for all members of the community
  - b. Incorporate sustainable practices and design<sup>3</sup>
  - c. Receive endorsement from other Somerville boards, commissions, departments, or community groups or from city, state, or federal officials
  - d. Are consistent with the goals and priorities established in other current planning documents but not explicitly addressed in this plan

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<sup>3</sup> Includes but is not limited to: protecting natural resources, cleaning up contaminated land, revitalizing and reusing existing buildings and structures, using reusable and sustainable materials, using renewable energy sources, achieving high standards of energy efficiency, expanding permeable surfaces, and increasing trees and vegetation, particularly native perennial and drought-resistant species.



e. Address two or more of the CPA focus areas (i.e., blended projects)

**2. Use CPA funding strategically, which includes projects that:**

- a. Leverage other funds or in-kind contributions and/or implement cost-saving measures
- b. Address long-standing or urgent needs in the community
- c. Take advantage of exceptional, time-sensitive opportunities
- d. Could serve as catalysts for transformative change

**FY18 Funding Allocation**

In FY18, the CPC is maintaining the funding allocations used in FY15, FY16 and FY17.

**Table 1. Preliminary Allocation of CPA Revenue in FY17 Funding Cycle**

Use	Percent of FY17 CPA Revenue	Estimated Amount of FY17 New CPA Revenue	Estimated Amount of FY17 City Appropriation	Total
Community Housing reserve or projects	45%	\$849,995	\$0	\$849,995
Historic Resources reserve or projects	15%	\$283,332	\$0	\$283,332
Open Space and Recreation reserve or projects	15%	\$283,332	\$0	\$283,332
Undesignated/flexible project funds	20%	\$377,776	\$0 <sup>4</sup>	\$377,776
CPC administrative and operating expenses	5%	\$94,444	\$0	\$94,444
<b>Total</b>	<b>100%</b>	<b>\$1,888,878</b>	<b>\$0</b>	<b>\$1,888,878</b>

In deciding how to set these minimums, the Committee considered, among others, the following factors:

- The CPA legislation requires communities to spend or reserve at least 10% of annual CPA revenues for each of open space and recreation, historic resources, and community housing.
- There is a demonstrated need to invest in all of the CPA focus areas in Somerville, but the most critical need is for affordable housing, as established in the City’s planning documents and expressed by residents.
- The CPA legislation allows communities to spend up to 5% of annual CPA revenue on the administrative and operating expenses of the Committee.
- The CPA legislation does not require communities to spend all CPA revenue available each year and therefore allows communities to save revenue and spend it on projects in future years.

At the end of FY17, \$710,000 remained in the land acquisition earmark and \$673,805 remained in an emergency reserve. This brings the total funding available in FY18 to \$993,332 in the open space

<sup>4</sup> Admin funds cannot be taken from the FY16 City appropriation because this revenue would count towards the FY16 admin total. Since the appropriation is made at the end of the fiscal year, all of the City appropriation is spent in the following fiscal year and all admin funds from previous fiscal years are required to rollover into project funding the following year. As a result 25% of the FY16 City appropriation is undesignated funding to be spent in any of the three categories based on the quality of applications received.

category and \$1,051,581 in the flexible category. The total available funding in FY18 is \$3,272,683. The total amount of funding available will likely be greater as a result of funding rolling over from unspent FY17 administrative funds and any project funding remaining after a project closes. Unspent administrative funds will be allocated to the undesignated category and unspent funds from completed projects will return to the fund from which they originally came. Actual rollover amounts from FY17 will be finalized in late July/early August once the City of Somerville has closed the 2017 fiscal year.

As in past funding cycles, the final allocation of total FY18 CPA revenue will likely deviate from this distribution due to the project applications that the CPC receives and ultimately recommends funding with the Board of Aldermen’s approval.

## Section 2. Somerville Community Preservation Act FY18 Funding

CPA funding comes from residents, through a 1.5% surcharge on local property taxes, and the Commonwealth of Massachusetts, through distributions from its Community Preservation Trust Fund. Because Somerville adopted a “blended CPA,” the City also has the option – though it is not required – to appropriate additional municipal revenue into its Community Preservation Fund. Distributions from the state match are based on the total local CPA revenue (at varying percentage levels, depending upon the amount of revenue received by the statewide Community Preservation Trust Fund in any given year), so the City appropriation represents a crucial opportunity to leverage additional state resources to invest in the four CPA focus areas.

### Estimated Revenue Available in FY18 Funding Cycle

Funds available in the FY18 funding cycle come from two sources: new revenue received in FY18 and unexpended revenue from fiscal year 2017. As Table 1 demonstrates, the CPC estimates that the City will receive \$1.89 million in new CPA revenue in FY17, including an estimated state match of 15% on local revenue raised in FY17. Unexpended revenue from FY17 totals \$1,383,805 (FY17 City appropriation plus unspent FY17 project funds), including \$710,000 earmarked for land acquisition. As a result, the CPC estimates that \$3.2 million will be available fund projects in the FY18 funding cycle.

<b><i>FY18 Revenue</i></b>	<b><i>\$1,888,878</i></b>
Surcharge Revenue	\$1,642,503
City Appropriation <sup>5</sup>	\$0
State Match of FY17 Local Revenue	\$246,275
<b><i>Unexpended Revenue from FY17</i></b>	<b><i>\$1,383,805</i></b>
Unexpended FY17 Project Funds	\$1,383,805
FY17 City Appropriation	\$0
FY18 Admin expenses (5%)	(\$94,444)
<b>Total</b>	<b>\$3,178,240</b>

<sup>5</sup> The FY18 City appropriation will be determined in June 2019 for use in FY19.



## **Borrowing**

The CPA legislation allows communities to leverage their CPA revenue by borrowing for eligible projects and using future CPA revenue to pay the resulting debt service. As such, applicants may apply for funding beyond the amount of revenue currently available. Bonded projects require the approval of two-thirds of the Board of Aldermen.

The first bonded CPA project in Somerville is the historic rehabilitation of the West Branch Library. The Board of Aldermen approved the \$2.5 million appropriation in FY16. Add language about FY17 housing bond request.

## **Section 3. FY18 Funding Cycle Review**

The Community Preservation Committee invites City departments, community organizations and individuals to submit applications for CPA funding on an annual basis, typically starting in September. Applicants first submit an eligibility determination form to confirm the proposed project is eligible for CPA funding. Projects deemed eligible are invited to submit full applications and present their projects during a community meeting. CPC makes funding recommendations on projects to the Board of Aldermen for final approval.

During FY14, the CPC empowered the Somerville Affordable Housing Trust Fund (the Trust or SAHTF) to serve as the housing arm of the CPC, leveraging the Trust's 25 years of experience supporting affordable housing. Under this arrangement, the CPC grants all community housing funds to the Trust (with approval from the Board of Aldermen), and the Trust allocates the funds to CPA-eligible projects and programs. The CPC granted these funds for the first time in January 2015, when the Board of Aldermen approved an appropriation of \$2.2 million to the Trust, equal to 45% of estimated FY14 and FY15 CPA revenue at that time. Since the start of the CPA in Somerville, over \$5.4 million has been appropriated to the Trust. Affordable housing CPA applications are submitted directly to the Trust and follow a separate review process than the CPC's process for open space/recreation land and historic resources applications.

## **Section 4. Allowable Projects**

While this plan establishes the CPC's priorities for the types of projects that should receive CPA funding, the CPA legislation defines the types of projects that are *eligible* to receive funding. Projects seeking CPA funding that do not fit within one (or more) of the allowable uses outlined in Chart 1 cannot be considered by the CPC. In addition, CPA funds cannot be used for maintenance, for artificial turf, or to supplant current spending.



**Chart 1. Community Preservation Act Funding Allowable Uses**

	<b>Open Space</b>	<b>Recreational Land</b>	<b>Historic Resources</b>	<b>Community Housing</b>
	Land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh and salt water marshes and other wetlands, ocean, river, stream, lake and pond frontage, beaches, dunes and other coastal lands, lands to protect scenic vistas, land for wildlife or nature preserve and land for recreational use.	Land for active or passive recreational use including, but not limited to, the use of land for community gardens, trails, and noncommercial youth and adult sports, and the use of land as a park, playground or athletic field.  Does not include horse or dog racing or the use of land for a stadium, gymnasium or similar structure.	Building, structure, vessel, real property, document or artifact listed on the state register of historic places or determined by the Somerville Historic Preservation Commission to be significant in the history, archeology, architecture or culture of the city or town.	Housing for low and moderate income individuals and families, including low or moderate income seniors.  Moderate income is less than 100%, and low income is less than 80%, of US HUD Area Wide Median Income.
<b>Acquisition</b>  Obtain property interest by gift, purchase, devise, grant, rental, rental purchase, lease or otherwise. Only includes eminent domain taking as provided by G.L. c. 44B.	Yes	Yes	Yes	Yes
<b>Creation</b>  To bring into being or cause to exist. Seideman v. City of Newton, 452 Mass. 472 (2008).	Yes	Yes	No	Yes
<b>Preservation</b>  Protect personal or real property from injury, harm or destruction.	Yes	Yes	Yes	Yes
<b>Support</b>  Provide grants, loans, rental assistance, security deposits, interest-rate write downs or other forms of assistance directly to individuals and families who are eligible for community housing, or to entity that owns, operates or manages such housing, for the purpose of making housing affordable.	No	No	No	Yes, includes funding for Affordable Housing Trust Fund
<b>Rehabilitation and Restoration</b>  Make capital improvements, or extraordinary repairs to make assets functional for intended use, including improvements to comply with federal, state or local building or access codes or federal standards for rehabilitation of historic properties.	Yes, if acquired or created with CPA funds	Yes	Yes	Yes, if acquired or created with CPA funds

## Section 5. FY18 Priorities by CPA Category

In addition to the overall priorities to fund projects that are consistent with Somerville's community values and use CPA funds strategically, the CPC has established priorities for each of the CPA areas to guide recommendations made in each category.

### Open Space and Recreational Land

#### Context

The term open space is commonly used in Somerville to describe all of the City's 180 acres of green space and land for active and passive recreation, including all of its parks, playgrounds, and fields. The CPA legislation, however, has two terms to describe this land: recreational land, which includes active and passive recreation, and open space. The distinction between the two in the CPA legislation is somewhat confusing, as open space is defined to include recreational land in addition to natural habitat land. However, open space and recreational land have different allowable uses (see Chart 1 above).

In Somerville, land for active or passive recreational use accounts for the vast majority of the City's 180 acres of open space, including all of its parks, playgrounds, and fields. A very small amount of open space in the City is not recreational land, including the wetlands and shores of the Alewife Brook and Mystic River. While the Committee prioritizes the preservation of this land, it also recognizes that most of the work to be done in Somerville relates to improving existing and creating new space for active and passive recreation. The Committee has therefore decided to address these two focus areas together and create one set of priorities for them.

#### Priorities

The CPC will prioritize projects that:

1. **Support the acquisition of land for and creation of new publicly accessible open space and recreational land.** In SomerVision, the City's 20-year comprehensive plan, residents called for adding 125 new acres of publicly accessible open space and recreational land to the City's current stock. Between 2010 and 2017, 16.78 new acres of usable open space have been created in Somerville. CPA has not yet had the opportunity to support the acquisition of land for open space. However, the CPC has set aside \$710,000 for acquisition to ensure funds will be available when the opportunity arises. The CPC will prioritize projects that move the City towards this goal.
2. **Expand access to and use of the Mystic River and Alewife Brook corridors.** Somerville has over two miles of shoreline that provide opportunities for walking, boating, and fishing, among other recreational activities. The CPC will prioritize projects that expand opportunities for residents to enjoy their shoreline.
3. **Improve the health of the wetlands and shores of the City's water resources.** While expanding access to the Mystic River and Alewife Brook, it is essential to improve the health of the wetlands and shores of these waterways through efforts including invasive species control.



4. **Rehabilitate and restore existing recreational land according to need.** The CPC will prioritize the rehabilitation of existing fields, parks, and playgrounds that are in the worst condition. The City's 2016-2021 Open Space and Recreation Plan provides baseline data on the condition of these parcels, updated from the 2008-2013 plan. In the 2016-2021 plan, 20% of Somerville's open spaces were determined to be in poor condition (17 out of 85).
5. **Creatively and coherently combine multiple uses that meet community need.** In a City as densely populated as Somerville, sharing space is an imperative. Wherever possible, projects seeking CPA funding should include multiple uses and demonstrate how these uses meet community need.
6. **Expand urban agriculture opportunities.** Residents regularly express a desire for expanded urban agriculture opportunities. Demand for Somerville's 225 community garden plots, for example, far outstrips supply, with over 450 individuals on waitlists at the City's 11 gardens. Projects should seek to incorporate expanded urban agriculture opportunities, including new community garden plots, wherever possible and appropriate.

## Historic Resources

The CPC commissioned the creation of Somerville's first-ever historic preservation plan in FY15 using CPA administrative funds. The historic preservation plan will identify and evaluate the City's resources, identify strategies for improving the preservation of these resources, and guide the allocation of CPA funds for historic resources. Work on the plan is underway and once it is finalized will inform the priorities the CPC sets for funding historic resources projects.

In the meantime, the CPC will continue to prioritize historic resources projects that address crucial, longstanding needs in Somerville's historic landmarks and properties, especially those at risk, while embodying the general priorities established in Section 1 above.

## Community Housing

### Context

The revitalization of Somerville, spurred on in part by the extension of the Green Line (GLX) through the heart of the city, has made clear the need for more housing, and affordable housing in particular. Currently, 9.69% of Somerville's housing stock is affordable- 3,178 rental units and 112 ownership units. It is recommended that households spend no more than 30% of their income on housing. In Somerville, 38.7% of renters and homeowners are paying more than 30% of their income on housing. If you are paying more than 50% of your income in housing costs, you are considered severely burdened. In Somerville, 17.8% of renters and 19.0% of homeowners are paying more than 50% of their income on housing. The Metropolitan Area Planning Council (MAPC) estimates that Somerville's population will grow by 17% to 25% (roughly 13,000 to 19,000) by 2030, adding further demand to an incredibly tight housing market that has consistently seen vacancy rates well below those considered healthy for years.



In SomerVision, residents set a goal of adding 6,000 new housing units to the city's stock by 2030, 1,200 of which would be permanently affordable.<sup>6</sup> Seven years into SomerVision, 1,135 units of housing have been created, of which 225 are permanently affordable. CPA funding has contributed to the creation of 53 of these units. MAPC's report on the impact of the GLX suggests this may not be sufficient. It estimates the city will need anywhere from 6,300 to 9,000 units to accommodate increased demand, 35% of which (2,205 to 3,105) should be affordable.

As noted in Section 3 above, the CPC has empowered the Trust to serve as the housing arm of the CPC. All applicants interested in receiving CPA funding for affordable housing projects must therefore apply to the Trust, and, with the approval of the Board of Aldermen, the Committee will grant to the Trust the funds it has allocated to community housing. The Trust may also apply to the CPC for additional funding if needed.

### Priorities

In entrusting the award of CPA community housing funds to the good judgment of the Trust, the CPC prioritizes projects and programs that:

1. **Provide for affordability in perpetuity as required the Community Preservation Act.** Housing created, acquired, or rehabilitated with CPA funds must always serve individuals who meet the income limits outlined above. A permanent deed restriction on these units will guarantee that they remain affordable into perpetuity, thereby ensuring that the City's affordable housing stock will remain robust over time.
2. **Preserve expiring-use units.** According to the MAPC, the affordability restrictions on 272 affordable units in Somerville will expire by 2020, equivalent to 8% of the city's dedicated affordable housing stock. Another 674 units will expire after 2020. Extending the affordability of these units into perpetuity will prevent displacement of existing residents and serve as a cost-effective strategy for maintaining affordable units in Somerville.
3. **Support mixed-use and transit-oriented development.** Research shows that housing located within walking distance of jobs, services, and public transportation is usually more affordable than housing that requires individuals to drive, and residents sent a clear message supporting this type of housing in the SomerVision process.

While the extension of the Green Line into Somerville will make this priority easier to achieve, as 85% of the City will be within a ½ mile of a rapid transit station, it will also make it more important. The MAPC projects that rents around future Green Line stations could increase by 25 to 57% and 740 to 810 households may become newly cost burdened as a result of the GLX. The CPC will therefore prioritize mixed-use projects located within ½ mile of a rapid transit station, with a particular focus on projects near future Green Line stations to mitigate displacement in these neighborhoods.

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<sup>6</sup> Somerville currently has about 3,400 designated affordable units, equivalent to about 10% of the City's housing stock. The vast majority of these units (97%) are rental, and the remaining 3% are homeownership.



4. **Prevent homelessness and/or provide housing units or other support for homeless and formerly homeless households.** According to the City’s 2017 point in time survey, while homelessness in Somerville remains low (120 sheltered and 22 unsheltered individuals), the unsheltered homeless population has increased over the past several years, especially among the chronically homeless and veterans. The CPC will prioritize projects and programs that support these households.

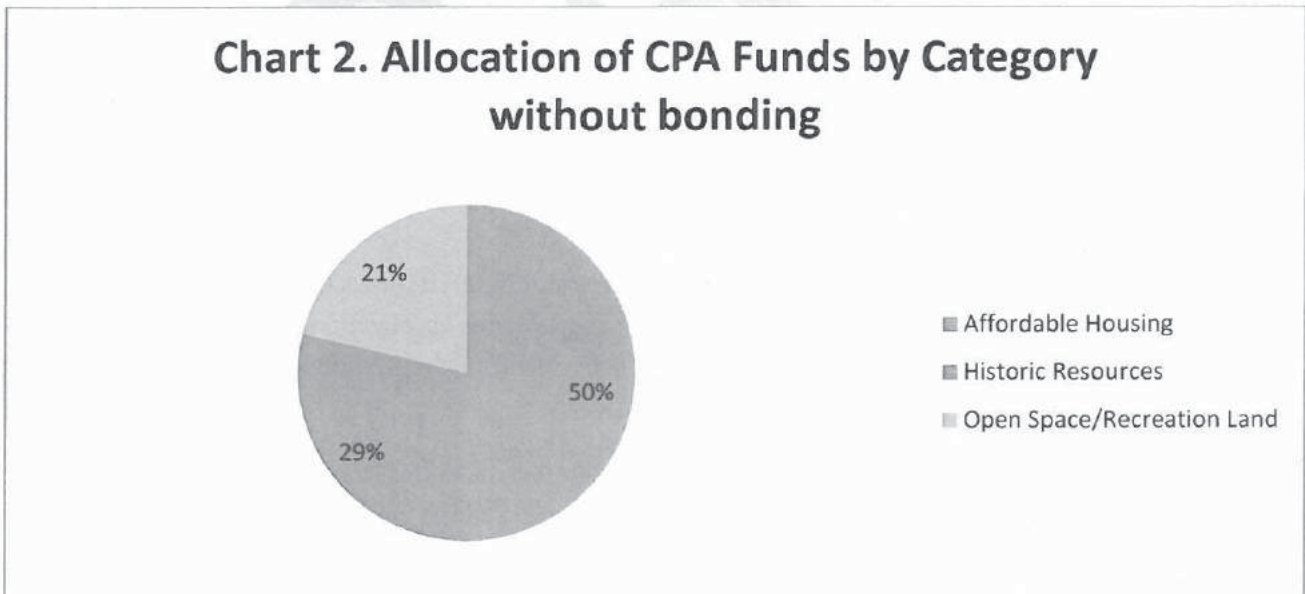
### Section 6. CPA Supported Projects

Since the Community Preservation Committee began accepting project applications in FY15, the Somerville CPA program has provided \$12 million for projects in all three areas, including \$2.1 million in state funds. This money has supported 40 projects: 15 historic resources, 17 open space/recreation land, and 8 housing. Fifteen projects are managed by the City (38%), 20 are managed by community groups (50%), and five are collaborations between the City and a community group (13%).

**Table 3. CPA Funding by Category (without bonding)**

	FY15	FY16	FY17	Total
Community Housing	\$2,206,028	\$1,834,675	\$880,416	\$4,921,119
Historic Resources	\$1,705,978	\$600,288*	\$585,467	\$2,924,251
Open Space/Recreation Land	\$227,465	\$1,445,160	\$777,239	\$1,699,862
<b>Total</b>	<b>\$4,139,471</b>	<b>\$3,880,123</b>	<b>\$2,243,122</b>	<b>\$9,545,232</b>

\*In FY16, the Board of Aldermen approved bonding \$2.5 million for the historic preservation of the West Branch Library. FY17 housing bonds?



For more details about Somerville’s CPA funded projects, see the FY17 Annual Report.

## Appendix: Monitoring and Evaluation Plan

### FY18 Community Preservation Plan: Monitoring & Evaluation Plan

#### Introduction

With the passage of the Community Preservation Act (CPA) in November 2012, the City of Somerville joined 154 other communities in the Commonwealth of Massachusetts, and is now one of 172 communities, that have a steady funding source dedicated to preserving and improving their character and quality of life. The CPA is a Massachusetts state law (M.G.L. c. 44B) that enables adopting communities to create a dedicated fund for preserving open space and historic resources and expanding community housing and outdoor recreation opportunities.<sup>7</sup> Somerville voters passed the Act by 76%, the second highest passage rate in CPA history.<sup>8</sup> This achievement represents an exciting opportunity to make Somerville an even more exceptional place to live, work, play, and raise a family.

FY18 is the fourth CPA funding round for the City. The size of the program in the first three years is impressive- funding of over \$21 million has been allocated for 40 projects across the three funding categories (affordable housing; historic resources; and open space and recreation land). This includes \$2.16 million received from the state in matching funds. Projects have ranged in size from \$4,510 for the restoration of a stained glass window in the residence at 83 Belmont St. to \$2.5 million for the rehabilitation of the historic West Branch Library.

To be successful, it is necessary for every program to be clear about what it is trying to achieve and to collect data along the way to know if the program is moving in the right direction to achieve its goals. The purpose of this monitoring and evaluation (M&E) plan is to supplement the FY18 Community Preservation Plan by detailing what the Community Preservation Committee (CPC) envisions the Community Preservation Act program in Somerville will achieve over short and long terms and how it will measure the progress of both the program as a whole and the individual projects it funds.

#### Goals of Somerville's CPA Program

SomerVision's goal is to *foster vital, healthy, inclusive and distinctive urban neighborhoods that are the best possible places to live, work, play, do business, learn and serve*. The goal of the CPA Program is to contribute to SomerVision by ensuring that ***Somerville maintains and enhances the character that makes it a diverse and unique city***. The diagram on the next page demonstrates how the Community Preservation Committee believes the contributions made by projects in each of the CPA categories add up to this goal and contributes to making Somerville a great place to live, work, play and raise a family.

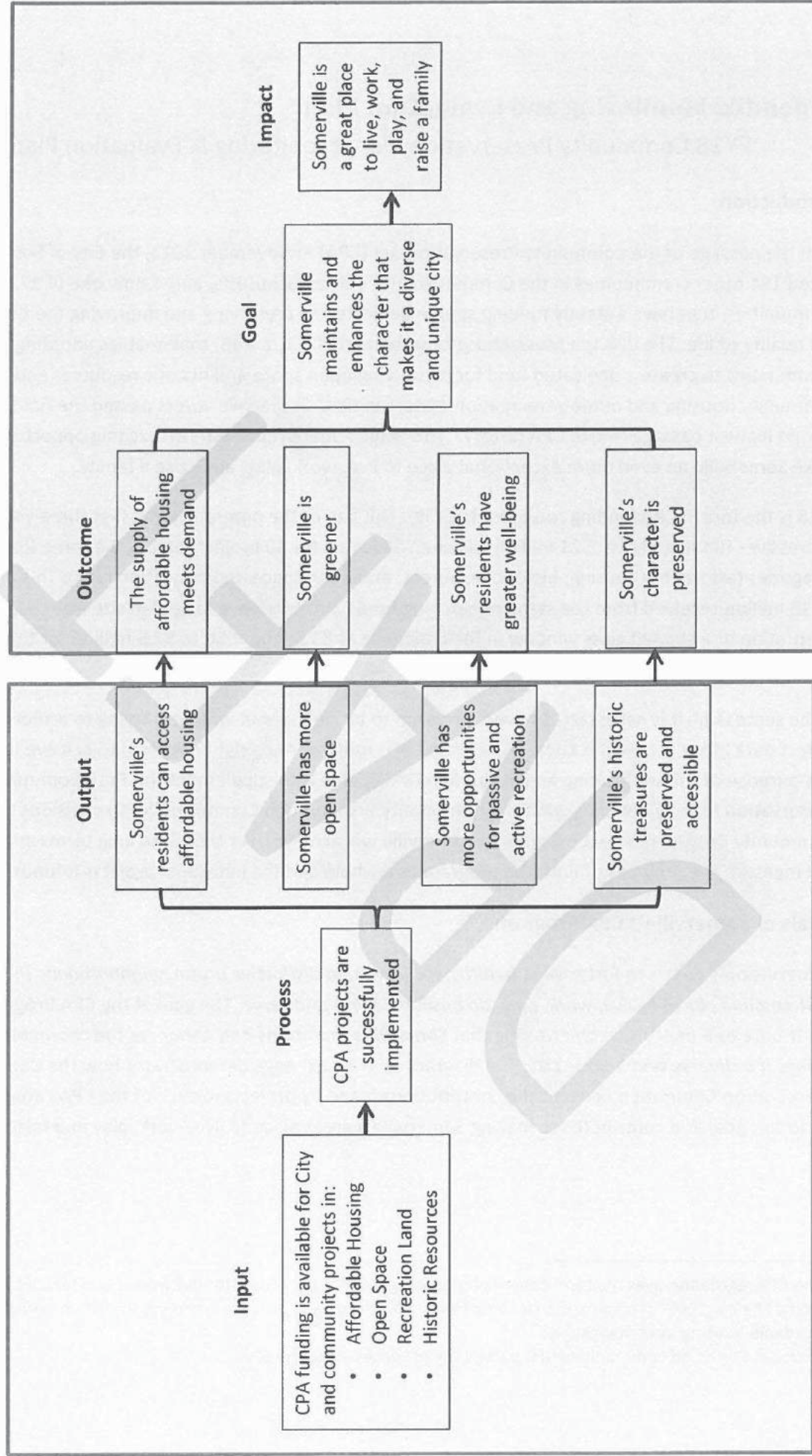
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<sup>7</sup> The CPA legislation uses the term community housing to refer to housing for individuals and families with incomes below 100% of area median income (AMI). This document uses the terms community housing and affordable housing interchangeably.

<sup>8</sup> Excludes Cape Cod communities that passed the predecessor to the CPA.



# CPA Results Chain



## Monitoring Matrix

	<b>Indicators</b>	<b>FY15</b>	<b>FY16</b>	<b>FY17</b>	<b>Frequency</b>	<b>Source</b>	<b>Assumptions</b>
<b>Impact:</b> Somerville is a great place to live, work, play, and raise a family.	Average satisfaction with Somerville as a place to live (out of 10)	8.2	N/A		Every other year	Somerville Happiness Survey	<ul style="list-style-type: none"> <li>CPA is one of many contributors to making Somerville a great place to live, work, play, and raise a family.</li> </ul>
	Average level of pride in being a Somerville resident (out of 10)	8.2	N/A		Every other year	Somerville Happiness Survey	
<b>Goal:</b> Somerville maintains and enhances the character that makes it a diverse and unique city.	Racial diversity	White non-Latino: 66.7% Asian: 9.5% Hispanic or Latino: 9.5% Black or African American: 7.5% American Indian or Alaska Native: 0.3% Multi-racial: 3.3% Other: 3.2%	N/A	N/A	Every 5 years	ACS	<ul style="list-style-type: none"> <li>Project implementers have sufficient resources beyond CPA to provide programming in CPA supported spaces after CPA funding ends.</li> <li>CPA projects are sufficiently maintained after CPA funding ends to provide lasting community benefit.</li> <li>The CPC receives a sufficient diversity of proposals to make progress</li> </ul>
	Age diversity	Under 5: 5.3% 5-19: 11.1% 20-34: 42.6% 35-54: 24.0% 55-64: 7.7% 65+: 9.2%	N/A	N/A	Every 5 years	ACS	



	Economic diversity	Income under \$25,000: 18.9% \$25,000- \$49,999: 18.1% \$50,000-74,999: 17.2% \$75,000- \$99,999: 13.8% \$100,000- 149,999: 18.7% \$150,000+: 13.4%	N/A	N/A	Every 5 years	ACS	across the CPA categories.
	# of artists registered for Somerville Open Studios	392	354	358	Annually	SOS records	
	# of City organized events celebrating Somerville's history and culture <sup>9</sup>	28	28		Annually	Arts Council, Historic Preservation records	
	Average satisfaction with neighborhood beauty/physical setting	7.1	N/A		Every other year	Somerville Happiness Survey	
<b>Outcome 1:</b> The supply of affordable housing meets	% of housing stock that is affordable (disaggregated by perpetual, time limited)	9.69%	N/A	N/A	Every 5 years	2015 Somerville Housing Needs Assessment	

<sup>9</sup>Data from Arts Council only; data from Somerville Historic Preservation Commission pending

demand.	Total number of affordable units (disaggregated by % of AMI)	3,178 rental Voucher: 1,217 30%: 2,583 50%: 140 60%: 289 80%: 54 112 Ownership 80%: 77 110%: 35	N/A	N/A	Every 5 years	2015 Somerville Housing Needs Assessment
	% of households who are rent burdened (>30% of income spent on housing)	38.7% (8,114/20,947)	N/A	N/A	Every 5 years	2015 Somerville Housing Needs Assessment
	% of households who are severely rent burdened (>50%)	17.8% (3,722/20,947)	N/A	N/A	Every 5 years	2015 Somerville Housing Needs Assessment
	% of households cost burdened (>30%)	38.7% (4,318/11,239)	N/A	N/A	Every 5 years	2015 Somerville Housing Needs Assessment
	% of households severely housing cost burdened (>50%)	19.0% (2,134/11,239)	N/A	N/A	Every 5 years	2015 Somerville Housing Needs Assessment
	# of affordable units expiring in next five years	279-285	N/A	N/A	Every 5 years	2015 Somerville Housing Needs Assessment
	Somerville Community Corporation average wait time	3-5 years	N/A	N/A	Every 5 years	2015 Somerville Housing Needs Assessment
	Average satisfaction with cost of housing (out of 5)	2.6	N/A	N/A	Every other year	Somerville Happiness Survey
	# homeless individuals in Somerville	Unsheltered: 6 Sheltered: 152	Unsheltered: 6 Sheltered: 159	Unsheltered: 22 Sheltered: 120	Annually	Point in Time survey



<b>Output 1:</b> Somerville's residents can access affordable housing	# of new units created with CPA funds (% reuse)	15 (7- 100 Homes; 8- Glen St.) 47% reuse (100 Homes)	30 (25-Mystic Water Works, 5- 100 Homes) 100% reuse	8 (8- 100 Homes)	Annually	AHTF records
	Annual # of households receiving rental assistance through CPA funds	24 (7- PASS, 17- Better Homes)	33 (7- PASS 2, 17- Better Homes, 9- ShortStop)		Annually	AHTF records
<b>Outcome 2:</b> Somerville is greener.	% of CPA funded housing projects that are mixed use	0	0	0	Annually	AHTF records
	% of CPA funded housing projects that are transit-oriented	50% (1/2- 163 Glen St.)	50% (1/2-Mystic Water Works)		Annually	AHTF records
	Open space as % of total land area	N/A	6.8%	N/A	Every 5 years	Somerville Open Space and Recreation Plan City records
	# of new trees in Somerville (disaggregated by CPA, non-CPA)	441 (non-CPA)	59 (non-CPA)	94 (non-CPA)	Annually	
	Annual EPA grade for Mystic River	A-			Annually	US Environmental Protection Agency

	Annual EPA grade for Alewife Brook	D						US Environmental Protection Agency	
	# of new acres of open space (disaggregated by CPA, non-CPA)	2.47 (non-CPA)	0.49 (non-CPA)	5.76 (non-CPA)	Annually	Annually	Annually	City records	
	# of conservation restrictions recorded	0	0	0	Annually	Annually	CPA records	CPA records	
	% of households within ¼ mile (5 minutes) of open space (disaggregated by type)	N/A	Total: 99.5% Playgrounds: 95.9% Passive parks: 41.4% Fields: 58.8% Plazas: 13.8% Community gardens: 49.5%	N/A	Every five years	Every five years	Somerville Open Space and Recreation Plan	Somerville Open Space and Recreation Plan	
	# of improved open spaces (CPA, non-CPA)	1- Marshall St. Playground	1- Kennedy School Playground	2- Argenziano Playground Cremin Playground	Annually	Annually	City records	City records	
	Quality of open space (disaggregated by #/% poor, good, excellent)	N/A	Poor: 20% (17/85) Good: 59% (50/85) Excellent: 21% (18/85)	N/A	Every five years	Every five years	Somerville Open Space and Recreation Plan	Somerville Open Space and Recreation Plan	
<b>Output 2:</b> Somerville has more open space.									



<b>Outcome 3:</b> Somerville's residents have greater well-being.	% of Somerville youth with a healthy BMI by grade, disaggregated by gender	Grade 1: Male- 50.2%; Female- 58.0% Grade 4: Male- 47.5%; Female- 53.3% Grade 7: Male- 41.0%; Female- 44.5% Grade 10: Male- 58.7% Female- 71.8%	Grade 1: Male- 54.2% Female- 53.7% Grade 4: Male- 46.4% Female- 54.8% Grade 7: Male- 52.3% Female- 44.4% Grade 10: Male- 50.0% Female- 43.9%		Annually	Somerville Public Schools
	Average satisfaction with appearance of neighborhood parks and squares (out of 10)	7.7	N/A		Every other year	Somerville Happiness Survey
	Average level of self-reported happiness (out of 10)	7.8	N/A		Every other year	Somerville Happiness Survey
	Average level of self-reported life satisfaction (out of 10)	8.0	N/A		Every other year	Somerville Happiness Survey
<b>Output 3:</b> Somerville has more opportunities for passive and active recreation.	# new parks (disaggregated by CPA, non-CPA)	1. Community Path extension (non-CPA) 2. Symphony Park (non-CPA)	1. Partners Healthcare open space (non-CPA) 2. Millbrook Lofts open space (non-CPA)	0	Annually	City records
	# of new community garden plots (disaggregated by CPA, non-CPA)	0	0	0	Annually	City records

<b>Outcome 4:</b> Somerville's character is preserved.	% of local historic district buildings applying for HPC grants	N/A	N/A	N/A	Annually	OSP/CD records
	# of cases HPC reviews for Local Historic District repair, alteration and renovation	56	69		Annually	Certified Local Government report
	# of demolition requests (disaggregated by preferably preserved)	33 (10 preferably preserved)	30 (9 preferably preserved)		Annually	Certified Local Government report
	# of new preservation restrictions recorded	0	0	0	Annually	CPA records
<b>Output 4:</b> Somerville's historic treasures are preserved and accessible.	# of historic buildings preserved with CPA funds	6 (City Hall, Milk Row Cemetery, Prospect Hill Tower, Somerville Museum, Mystic Water Works, Temple B'nai Brith)	1 (West Branch Library)	2 (83 Belmont St., Grace Baptist Church)	Annually	CPA records
	# of historic buildings made ADA accessible with CPA funds	2 (Temple B'nai Brith)	1 (Somerville Museum, West Branch Library)	1 (Grace Baptist Church)	Annually	CPA records
	# of historic collections preserved	2 (City Archives, Somerville Museum)	0	1 (Central Library)	Annually	CPA records



<p><b>Process:</b> CPA projects are successfully implemented.</p>	% of CPA funded projects that are completed within 3 years	36% (4/11)	0% (0/9)	8% (1/12)	Annually	CPA records	<ul style="list-style-type: none"> <li>Project implementers have sufficient capacity and funding to implement the projects they propose.</li> <li>The CPC is high functioning, in tune with community priorities, and possesses a breadth of experience across the CPA areas amongst its members.</li> <li>The CPC and the CPA Manager work effectively with applicants to ensure funded projects are realistic and eligible for CPA funding.</li> <li>Meaningful projects are proposed by City departments and community organizations.</li> </ul>
	% of projects that achieve their measures of success <sup>10</sup>	N/A	N/A	8% (1/12)	Annually	CPA records	
	% of CPA funded projects that combine multiple uses (blended)	13% (Mystic Water Works, Prospect Hill Park- 2/16)	0%	0%	Annually	CPA records	
	Geographic coverage of CPA projects	7/7 wards	7/7 wards		Annually	CPA records	
	% of CPA implementers that report the CPA program has benefited their organization	NA	NA	80%	Annually	CPA records	
	Estimated annual CPA revenue	\$6,223,963 <sup>11</sup>	\$2,878,304	\$1,924,661	Annually	CPA records	

<sup>10</sup> CPA applicants were first required to set measures of success for their projects in FY17.

<sup>11</sup> FY15 revenue total is the combined revenue from FY14 and FY15.

<b>Input:</b> CPA funding is available for City and community projects in: Affordable Housing, Open Space, Recreation Land, and Historic Resources.	Annual % allocation in each CPA area	45%- housing 15%- open/rec 15%- historic 20%- flexible 5% admin	45%- housing 15%- open/rec 15%- historic 20%- flexible 5% admin	45%- housing 15%- open/rec 15%- historic 20%- flexible 5% admin	45%- housing 15%- open/rec 15%- historic 20%- flexible 5% admin	Annually	CPA records	<ul style="list-style-type: none"> <li>Funding for the Community Preservation Act continues through the support of residents, the City's administration and Board of Aldermen, and the state.</li> </ul>
	Annual state match received	\$904,917	\$829,456	\$420,681	\$420,681	Annually	CPA records	
	Annual optional City appropriation (\$ and %)	\$2,555,671 <sup>12</sup> (41%)	\$510,844 (18%)			Annually	CPA records	
	Annual dollar amount awarded to projects (disaggregated by area)	\$4,179,487 (\$227,463- open/recreation; \$1,745,996- historic; \$2,206,028- housing)	\$5,630,123 (\$695,160- open/recreation; \$3,100,288- historic; \$1,834,675- housing)	\$2,243,122 (\$777,239 open/rec; \$585,467- historic; \$880,416- housing)	\$2,243,122 (\$777,239 open/rec; \$585,467- historic; \$880,416- housing)	Annually	CPA records	
	# of new CPA projects funded (disaggregated by area and recipient)	17 (4- open/rec; 8- historic; 5- housing and 6 City; 11 Community)	14 (5- open/rec; 4- historic; 5- housing and 7 City; 7 Community)	12 (8- open/rec; 4- historic; 0- housing)	12 (8- open/rec; 4- historic; 0- housing)	Annually	CPA records	
	# of CPA EDF applicants/housing applications each year (disaggregated by type, new/already funded)	17 (6 City departments; 11 Community) (19 new/0 previous)	17 (4 City departments; 14 Community) (8 new/9 previous)	18 (4 City; 12 community) (8 new/10 funded)	18 (4 City; 12 community) (8 new/10 funded)	Annually	CPA records	

<sup>12</sup> FY15 city appropriation includes FY14 appropriation



	% of EDF applicants that submit full proposals	73% (22/30) <sup>13</sup>	61% (18/28)	86% (12/14) <sup>14</sup>		
	% of EDFs/housing applications funded each year (disaggregated by recipient)	63% (19/30) Community: 68% (13/19) <sup>15</sup> City: 80% (8/10)	50% (14/28) <sup>16</sup> Community: 50% (8/16) City: 75% (6/8) Joint Community/City: 75% (3/4)	69% (9/13) Community: 50% (3/6) City: 80% (4/5) Joint: 100% (2/2)	Annually	CPA records

<sup>13</sup> Counts each of the three EDFs submitted by the Somerville Museum as funded, as the projects were combined in the full applications

<sup>14</sup> Does not housing applications because the SATHF utilizes a one-step application process

<sup>15</sup> Counts each of the three EDFs submitted by the Somerville Museum as funded, as the projects were combined in the full applications

<sup>16</sup> Counts Central Library Mold Remediation as funded- EDF submitted in FY16, but the project was funded in FY17

## **Data sources**

One of the criteria for selecting the indicators in the above table was that the data would be regularly available either through CPA or other City department records or through data already collected through other sources. The data needed to keep this table updated comes from reports the City is required to produce periodically, such as the Open Space and Recreation Plan, the Certified Local Government report on the city's historic preservation activities and the Housing Needs Assessment. Demographic data comes from the American Community Survey which produces one, three and five year estimates. The ACS five year estimates are used because they are more accurate than the one and three year estimates.

The CPA Manager will update the monitoring matrix twice each year- once in October/November and once in April/May in preparation for the submission of the semi-annual CPA program reports to the CPC. The CPA Manager will contact relevant departments to gather updated data related to each indicator based on the frequency the data is collected as noted in the monitoring matrix.

## **Evaluation design**

The Somerville CPA Program will hire an intern every two to three years to conduct a process evaluation of the program that will explore the degree to which the application and grant process is achieving the desired effect. The evaluation will also explore the success of a sampling of CPA funded projects over a period of time in achieving their stated measures of success as well as providing a lasting benefit to the community. It is expected that the intern will collect data through document review and interviews with CPC members and staff, CPA project implementers, and community members. The specific questions for each evaluation will be determined in collaboration with the Community Preservation Committee.

## **Data use and dissemination**

The CPC will review the monitoring matrix every six months. Monitoring data and evaluation results will be used to inform the funding allocations the CPC makes each year across the three CPA categories as part of the annual Community Preservation Plan. Data will also help inform the methods for outreach to potential grantees and the application and grant process.

The CPA Manager will publish an annual report each year that will be submitted to the Board of Aldermen following approval by the CPC. This report will be posted on the City's CPA website. Evaluation reports will be shared with the CPC and then posted on the City's CPA website.



## Acronym List

<i>ACS:</i>	American Community Survey
<i>ADA:</i>	Americans with Disability Act
<i>AMI:</i>	Area median income
<i>BMI:</i>	Body Mass Index
<i>CPA:</i>	Community Preservation Act
<i>CPC:</i>	Community Preservation Committee
<i>EDF:</i>	Eligibility Determination Form
<i>EPA:</i>	U.S. Environmental Protection Agency
<i>FY:</i>	Fiscal year
<i>HPC:</i>	Somerville Historic Preservation Commission
<i>M&amp;E:</i>	Monitoring and evaluation
<i>MGL:</i>	Massachusetts General Law
<i>OSPCD:</i>	City of Somerville Office of Strategic Planning and Community Development
<i>US HUD:</i>	United States Department of Housing and Urban Development

## Glossary

<i>Acquisition:</i>	Obtain property interest by gift, purchase, devise, grant, rental, rental purchase, lease or otherwise. Only includes eminent domain taking as provided by M.G.L. c. 44b.
<i>Community housing:</i>	Housing for low and moderate income individuals and families, including low or moderate income seniors. Moderate income is less than 100%, and low income is less than 80%, of US HUD Area Wide Median Income. The terms community housing and affordable housing are used interchangeably in this document.
<i>Creation:</i>	To bring into being or cause to exist.
<i>Data:</i>	Quantitative or qualitative findings. They are generated from project activities, research, or from the monitoring and evaluation of program performance. Data are in a form that have not yet been analyzed or interpreted.
<i>Evaluation:</i>	A process that attempts to determine as systematically and objectively as possible the relevance, effectiveness and impact of activities in light of their objectives.
<i>Goal:</i>	A broad statement of a desired, long-term outcome of a program. Goals express general program intentions and help guide a program's development. Each goal has a set of related, more specific outcomes that, if met, will collectively permit program staff to reach the stated goal.
<i>Historic resources:</i>	Building, structure, vessel, real property, document or artifact listed on the state register of historic places or determined by the Somerville Historic Preservation Commission to be significant in the history, archeology, architecture or culture of the city or town.
<i>Indicator:</i>	Quantitative or qualitative measures of program performance that are used to demonstrate change and that detail the extent to which programs results are being or have been achieved. Indicators can be measured at each level: input, process, output,

outcome, and impact.

- Results Matrix (or logical framework):* A dynamic planning and management tool that logically relates the main elements in program and project design and helps ensure that an intervention is likely to achieve measurable results. It helps to identify strategic elements of a program, their causal relationships, and the external factors that may influence success or failure. It can provide the basis for monitoring progress achieved and evaluating program results.
- Monitoring:* Monitoring is the routine process of data collection and measurement of progress toward program objectives. It involves tracking what is being done and routinely looking at the types and levels of resources used; the activities conducted; the products and services generated by these activities.
- Outcome:* Significant result that contributes to the achievement of goals and provides a general framework for more detailed planning for specific programs. Several outcomes can contribute to each goal.
- Open space:* Land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh and salt water marshes and other wetlands, ocean, river, stream, lake and pond frontage, beaches, dunes and other coastal lands, lands to protect scenic vistas, land for wildlife or nature preserve and land for recreational use.
- Preservation:* Protect personal or real property from injury, harm or destruction.
- Recreation land:* Land for active or passive recreational use including, but not limited to, the use of land for community gardens, trails, and noncommercial youth and adult sports, and the use of land as a park, playground or athletic field.  
Does not include horse or dog racing or the use of land for a stadium, gymnasium or similar structure.
- Rehabilitation / restoration:* Make capital improvements, or extraordinary repairs to make assets functional for intended use, including improvements to comply with federal, state or local building or access codes or federal standards for rehabilitation of historic properties.
- Support:* Provide grants, loans, rental assistance, security deposits, interest-rate write downs or other forms of assistance directly to individuals and families who are eligible for community housing, or to entity that owns, operates or manages such housing, for the purpose of making housing affordable.
- Results Chain (or theory of change):* A depiction of how and why desired change is expected to happen as a result of a program. A theory of change is read from left to right using if, then statements. For example, if affordable housing meets demand, then more Somerville residents can stay in the community they love.

Definitions of CPA terms are taken from the Community Preservation Act legislation. Definitions for M&E terms were taken from MEASURE Evaluation.



## Indicator definitions

Average satisfaction with Somerville as a place to live (out of 10)	Average response to the question <i>How satisfied are you with Somerville as a place to live?</i> with a range of 0 being very unsatisfied and 10 being very satisfied on the Somerville Happiness Survey.
Average level of pride in being a Somerville resident (out of 10)	Average response to the question <i>How proud are you to be a Somerville resident?</i> with a range of 0 being not proud at all and 10 being very proud on the Somerville Happiness Survey.
Racial diversity	Percentage of Somerville residents who identify as White non-Latino, Asian, Hispanic or Latino, Black or African American, American Indian or Alaska Native, Multi-racial, and Other in the American Community Survey.
Age diversity	Percentage of Somerville residents who are reported as being Under 5, 5-19, 20-34, 35-54, 55-64, and 65+ in the American Community Survey.
Economic diversity	Percentage of Somerville residents who are reported to have an income under \$25,000, \$25,000-49,999, \$50,000-74,999, \$75,000-99,999, \$100,000-149,999, and \$150,000 and above in the American Community Survey.
# of artists registered for Somerville Open Studios	Number of individual artists who register to sell their artwork during Somerville Open Studios.
# of City organized events celebrating Somerville's history and culture	Number of events and festivals organized by the Somerville Arts Council and the Somerville Historic Preservation Commission.
Average satisfaction with neighborhood beauty/physical setting?	Average response to the question <i>How satisfied are you with the beauty or physical setting of your neighborhood?</i> with a range of 0 being very unsatisfied and 10 being very satisfied on the Somerville Happiness Survey.
% of housing stock that is affordable	Percentage of Somerville's housing stock that is designated for individuals making 100% or less of the Area Median Income. Area Median Income for Somerville is set by HUD. Somerville is located in the Boston-Cambridge-Quincy service area.
% of households who are rent burdened (>30% of income spent on housing)	Percentage of rental households who are spending more than 30% of their income on housing.
% of households who are severely rent burdened (>50%)	Percentage of rental households who are spending more than 50% of their income on housing.
% of households cost burdened (>30%)	Percentage of homeowners who are spending more than 30% of their income on housing.
% of households severely housing cost burdened (>50%)	Percentage of homeowners who are spending more than 50% of their income on housing.
# homeless individuals in Somerville	Total number of individuals who lack housing in Somerville.
# of new units created with CPA funds (% reuse)	Number of new affordable units created in Somerville using CPA funding in part or in whole. A new affordable development counts as 'reuse' if it is either an existing housing unit that was previously not affordable that has been converted into an affordable unit or new units created in an existing building that previously not used as housing or was not affordable housing.
Total number of affordable units (disaggregated by % of AMI)	Total number of housing units in Somerville that are designated for individuals making 100% or less of the Area Median Income. Area Median Income for Somerville is set by HUD. Somerville is located in the Boston-Cambridge-Quincy service area.
Annual # of households receiving rental assistance through CPA funds	Total number of households receiving funding to support their rent using CPA funding in part or in whole.
# of affordable units expiring in next	Total number of units of affordable housing that are at risk of losing



five years	their affordability in the next five years
Somerville Community Corporation average wait time	Average time a household is on the Somerville Community Corporation waiting list before they are placed in an affordable housing unit.
Average satisfaction with cost of housing	Average response to the question <i>How would rate the following? The cost of housing</i> with a scale of 0 being very bad and 5 being very good on the Somerville Happiness Survey
% of CPA funded housing projects that are mixed use	Percentage of CPA funded housing projects that include residential and commercial uses in the same building.
% of CPA funded housing projects that are transit-oriented	Percentage of CPA funded housing projects that are located within a half mile of existing and anticipated rapid transit stations.
# of new trees in Somerville (disaggregated by CPA, non-CPA)	Number of new trees added to Somerville's urban tree canopy each year (does not include replacement trees)
Open space as % of total land area	Percentage of Somerville's total land area that is dedicated to open space. The City of Somerville's definition of open space includes: playgrounds, community gardens, athletic fields, passive parks, dog parks, landmarks, schoolyards, urban farms, café spaces, and performance spaces.
Annual EPA grade for Mystic River	Measure of how frequently bacteria levels in the Mystic River meet state water quality standards for boating and swimming. Grades are assigned as follows: A+=95-100%; A=90-95%; A-=85-90%; B+=80-85%; B=75-80%; B-=70-75%; C+=65-70%; C=60-65%; C-=55-60%; D+=50-55%; D=45-50%; D-=40-45%; F=less than 45%
Annual EPA grade for Alewife Brook	Measure of how frequently bacteria levels in the Alewife Brook meet state water quality standards for boating and swimming. See above for grade scale.
# of new acres of open space (disaggregated by CPA, non-CPA)	Total number of new acres of open space created within a given year.
# of conservation restrictions recorded	Number of conservation restrictions recorded on land acquired with CPA funds in part or in whole.
% of households within ¼ mile (5 minutes) of open space (disaggregated by type)	Percentage of households in Somerville that live within a ¼ mile radius of open space.
Average level of self-reported happiness (out of 10)	Average response to the question <i>How happy do you feel right now?</i> with a range of 0 being I feel very unhappy right now and 10 being I feel very happy right now on the Somerville Happiness Survey.
Average level of self-reported life satisfaction (out of 10)	Average response to the question <i>How satisfied are you with your life in general?</i> with a range of 0 being I am very unsatisfied with my life and 10 being I am very satisfied with my life on the Somerville Happiness Survey.
% of Somerville youth with a healthy BMI by grade	Percentage of Somerville youth in each grade with a 'healthy' Body Mass Index. A healthy BMI is between the 5 <sup>th</sup> and 85 <sup>th</sup> percentile.
# of improved open spaces (CPA, non-CPA)	Number of open spaces that are rehabilitated in a given year.
Quality of open space (disaggregated by #/% poor, good, excellent)	Number and percentage of Somerville's open spaces that are categorized as poor, good, and excellent in the open space survey.
# new parks (disaggregated by CPA, non-CPA)	Number of new parks constructed on land that was not previously used as open space.
# of new community garden plots	Number of new community garden plots added to the existing stock of City-wide community garden plots managed by the City of Somerville Conservation Commission
Average satisfaction with appearance of neighborhood parks and squares	Average response to the question <i>How satisfied are you with the appearance of parks and squares in your neighborhood?</i> with a range of 0 being very unsatisfied and 10 being very satisfied on the Somerville



	Happiness Survey.
# of cases HPC reviews for Local Historic District repair, alteration and renovation	Total number of cases put before the Somerville Historic Preservation Commission for their consideration relating to the changes to the exterior of historically significant buildings that are listed as local historic districts.
# of demolition requests (disaggregated by preferably preserved)	Total number of requests presented to the Somerville Historic Preservation Commission to remove or take down an entire structure. A building is preferably preserved if it is determined by the HPC to be historically significant and that it is in the public interest for the building to be preserved or rehabilitated rather than demolished.
% of local historic district buildings applying for HPC grants	Percentage of existing local historic district buildings that apply for a Local Historic District Property Owner's small grant in a given fiscal year.
# of historic buildings preserved with CPA funds	Number of historic buildings that receive CPA historic preservation or rehabilitation funding
# of historic buildings made ADA accessible with CPA funds	Number of historic buildings that become accessible, in compliance with Americans with Disabilities Act standards, through CPA funding, in whole or in part.
# of new preservation restrictions recorded	Number of historic preservation restrictions recorded on buildings that receive CPA historic resources funding.
# of historic collections preserved	Number of historic collections, such as documents or artifacts that are preserved in whole or in part through CPA funding.
% of CPA funded projects that are completed within 3 years	Percentage of CPA funded projects that are fully complete and closed out within three years of the signing of a grant agreement or memorandum of agreement.
% of projects that achieve their measures of success	Percentage of CPA funded projects that report they have achieved their measures of success in their final report. Measures of success were not required to be part of CPA applications until the FY17 application round.
# of CPA EDF/housing applicants each year (disaggregated by type, new/already funded)	Number of organizations/departments that submit an eligibility determination form each year disaggregated by City/community and never applied for CPA funding before/has already received CPA funding.
% of CPA funded projects that combine multiple uses (blended)	Percentage of CPA funded projects that include work in more than one CPA category (affordable housing, historic resources, open space/recreation land).
Geographic coverage of CPA projects	Number of Somerville wards (out of 7) where a CPA project received funding each year.
% of CPA implementers that report the CPA program has benefited their organization	Percentage of respondents to the annual CPA implementer survey that respond "Yes" to the question <i>Has your organization benefited from being part of the Somerville CPA program beyond receiving funds?</i>
Estimated annual CPA revenue	Total amount of new CPA revenue estimated for the fiscal year as approved by the Board of Aldermen through the annual budgeting process.
Annual % allocation in each CPA area	Percentages allocated for each of the CPA areas each year, as detailed in the annual Community Preservation Plan (affordable housing, historic resources, open space/recreation land).
Annual state match	Total amount of CPA match funding received from the Commonwealth of Massachusetts.
Annual optional City appropriation (\$ and %)	Amount of funding appropriated by the City of Somerville to the CPA Fund from Free Cash, both in dollar amount and as percentage of the annual CPA budget.
Annual dollar amount awarded to projects (disaggregated by area)	Total dollar amount, including bonding, of projects approved by the Board of Aldermen in a given year, disaggregated by CPA area (affordable housing, historic resources, open space/recreation land).

<p># of new CPA projects funded (disaggregated by area)</p>	<p>Number of new CPA projects funded each year, not including projects already receiving funding that request additional funding to continue work with the same scope as previously requested, disaggregated by CPA area (affordable housing, historic resources, open space/recreation land).</p>
<p>% of EDF applicants that submit full proposals</p>	<p>Percentage of projects that submit eligibility determination forms that go on to submit a full proposal, including affordable housing projects. Projects may not submit a full proposal because either the applicant decides to withdraw the project for funding consideration or the CPC determines the project to be ineligible for CPA funding. This indicator is only relevant to open space/recreation and historic resources applications, because the Somerville Affordable Housing Trust Fund uses a one-step application process.</p>
<p>% of EDFs/housing applications funded each year (disaggregated by recipient)</p>	<p>Percentage of projects that submit eligibility determination forms that receive funding and the funding is accepted by the recipient. This figure including affordable housing projects. Projects that receive partial funding are counted if the applicant accepts the lower funding amount. This indicator is disaggregated by recipient type including: Community, City and Joint Community/City.</p>

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**CPA FY2018 Budget**

Community Preservation Act Fund	FY18 Budget	FY17 Rollover	Total Available for FY18 Projects
Estimated new revenue			
Surcharge revenue	1,642,503		
State match of previous year's local revenue	246,375		
<b>Total</b>	<b>1,888,878</b>		
<b>New appropriations and reserves</b>			
Admin and Operating Expenses of Committee (5% of estimated revenue)	94,444		
Open Space and Recreation Reserve (10% of estimated revenue)	188,888	710,000	898,888
Historic Resources Reserve (10% of estimated revenue)	188,888	0	188,888
Community Housing Reserve (10% of estimated revenue)	188,888	0	188,888
Budgeted Reserve (65% of estimated revenue)	1,227,771	673,805	1,901,576
<b>Total</b>	<b>1,888,878</b>	<b>1,383,805</b>	<b>3,272,683</b>

\*\$710,000 FY17 rollover earmarked for land acquisition; \$673,000 earmarked for an emergency reserve

Community Preservation Act Fund	FY16 Actual	FY17 Thru 5/18	FY18 Estimated	Total
<b>Total Funding Available</b>	<b>4,868,257</b>	<b>2,254,004</b>	<b>3,272,683</b>	<b>n/a</b>
<b>Current Fiscal Year Revenue</b>	<b>2,889,136</b>	<b>2,065,176</b>	<b>1,888,878</b>	<b>6,843,190</b>
Surcharge Revenue	1,546,198	1,642,503	1,642,503	4,831,204
City Appropriation	510,844	0	0	510,844
State Match of Previous Year's Local Revenue	829,456	420,681	246,375	1,496,512
Interest	2,638	1,992	0	4,630
<b>Rollover from Previous Fiscal Year</b>	<b>1,979,121</b>	<b>188,828</b>	<b>1,383,805</b>	<b>n/a</b>
<b>Appropriations and Encumbrances</b>	<b>3,941,950</b>	<b>2,331,262</b>	<b>94,444</b>	<b>6,367,656</b>
Committee admin expenses (up to 5% of annual revenue)	61,827	88,141	94,444	244,412

Open Space and Recreation Projects	1,445,160	777,239	TBD	2,222,399
Historic Resources Projects	600,288	585,467	TBD	1,185,755
Community Housing Projects	1,834,675	880,415	TBD	2,715,090

**Personnel List**

Position	Name	Current Base	Fiscal Year Base	Total
Community Preservation Act Manager	Kristen Stelljes	1,601	83,232	66,905





# City of Somerville Community Preservation Act FY17 Annual Report



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Mystic Water Works Building: Magicpiano - Own work, GFDL, <https://commons.wikimedia.org/w/index.php?curid=8947932>



## Introduction

Since the first Community Preservation Act (CPA) funding round in FY15, more than \$12 million has been awarded to 40 affordable housing, historic preservation, and open space and recreation land projects. This year saw work underway at each of the iconic Somerville places that were used as model projects during the campaign for the adoption of CPA:

- Prospect Hill Tower is now open to the public for docent tours and a virtual tour is available online,
- Mystic Water Works is under construction to become 25 units of affordable housing, and
- the Community Path has been repaved from Grove to Cedar Streets, with more improvements on the way.

Of the 40 projects being implemented, 50% are community led and 16% are joint projects between a community organization and the City of Somerville.

The Community Preservation Committee (CPC) created the first monitoring and evaluation plan in the state in FY17 to increase the use of data in their decision making. CPA also made its SomerStreets debut this year. Over 180 people stopped by the CPA table to cast their vote on how they would allocate the CPA funds. Finally, the CPC adopted a new logo developed by the seniors in the Somerville High School Graphic Design program.

## CPA Background

With the adoption of the Community Preservation Act in November 2012, the City of Somerville joined 154 other communities in the Commonwealth of Massachusetts that have a steady funding source dedicated to preserving and improving their character and quality of life. The CPA is a Massachusetts state law (M.G.L. c. 44B) that enables adopting communities to create a dedicated fund for preserving open space and historic resources and expanding community housing and outdoor recreation opportunities.<sup>1</sup> Somerville voters passed the Act by 76%, the second highest passage rate in CPA history.<sup>2</sup> This achievement represents an exciting opportunity to make Somerville an even more exceptional place to live, work, play, and raise a family.

## The Community Preservation Committee

The Community Preservation Committee (CPC) oversees the implementation of the CPA in Somerville. The Committee, formed in January 2014, is responsible for establishing priorities for how CPA funding should be spent and, based on those priorities, making recommendations to the Board of Aldermen (BOA) on projects to receive funds. As established in Somerville's Community Preservation Committee Ordinance, the CPC has nine members, including five ex-officio members and four members of the general public, who may serve two consecutive three-year terms. This year general public member Courtney Koslow stepped down from the CPC and was replaced by Jessica Palacios Yamakawa through a competitive application process as laid out in the CPC ordinance. The current members are:

- Dick Bauer (Chair), Historic Preservation Commission representative
- Michael Fager (Vice Chair), Conservation Commission representative
- Michael A. Capuano, Planning Board representative
- Elizabeth Duclos-Orsello, general public representative
- Arn Franzen, Parks and Open Space Department representative
- Ezra Glenn, general public representative
- James McCallum, Somerville Housing Authority representative
- Uma Murugan, general public representative
- Jessica Palacios Yamakawa, general public representative

## The Community Preservation Plan

The Community Preservation Plan provides an overview of the CPA in Somerville and establishes the Committee's priorities for funding projects. The FY17 Plan is based on the City's existing planning documents and resident input. The CPC invited feedback on the FY17 Plan update at a public hearing on June 29, 2016 and through a five-week written comment period. Comments received from residents during the FY17 public comment period are available on the CPA website. The CPC also piloted including monitoring and evaluation plan with the Community Preservation Plan.

<sup>1</sup> The CPA legislation uses the term community housing to refer to housing for individuals and families with incomes below 100% of area median income (AMI). This report uses the terms community housing and affordable housing interchangeably.

<sup>2</sup> Excludes Cape Cod communities that passed the predecessor to the CPA.



## FY17 Funding

Key sources of CPA funding include a 1.5% surcharge on net property taxes, an optional city appropriation, and a match from the Commonwealth of Massachusetts. Figure 1 shows how this money flows into the CPA Fund over the course of the fiscal year. Since CPA adoption in 2012, over \$12 million has been appropriated for 40 projects across the three CPA eligible categories: open space/recreational land, historic preservation, and affordable housing, including over \$2.1 million dollars in matching funds from the state (Table 3).

In FY17, the City had \$2.5 million available to spend on projects (Table 1). Up to 5% of new annual CPA revenue can be used each year to administer the CPA program. In FY17, \$96,233 was available in administrative funds.

As part of the Community Preservation Plan, the CPC dedicated a minimum of 45% of FY17 revenue for affordable housing, to be administered by Somerville's Affordable Housing Trust Fund (Table 2).<sup>3</sup> In FY17, \$880,416 was appropriated to the Trust. \$293,472 was available for open space and recreation land projects. The Prospect Hill Tower restoration project ended under budget and the Planning and Zoning Division decided to fund the American Tube Works project with its own funds. As a result, \$72,075 was returned to the Historic Resources Reserve, increasing the amount available for historic projects to \$365,547. In addition, \$298,201 in unspent admin funds were returned to the undesignated fund balance, along with unspent FY16 funds between the unspent project funds and higher than anticipated revenue, \$1,337,492 was available in the undesignated category. These funds are available for worthy projects in any CPA category that cannot be funded from the designated funds in the category specific reserves.

**Table 1. FY17 CPA Budget**

<b>Total FY17 new revenue available in FY17</b>	<b>\$1,924,661</b>
Surcharge (estimate)	\$1,642,503
State match	\$388,862
<b>Total FY17 unexpended revenue (rollover)</b>	<b>\$699,672</b>
FY16 City appropriation (available for FY17)	\$510,844
Unallocated project funds	\$188,828
<b>Total Funding Available in FY17</b>	<b>\$2,624,333</b>
(CPC admin funds)	(\$96,233)
<b>Total Project Funding Available in FY17</b>	<b>\$2,528,100</b>
FY17 City appropriation (available to spend in FY18)	\$0

**Table 2. Preliminary Allocation of CPA Funding Available in FY17**

	Unexpended FY16 Revenue	Estimated FY17 Revenue	Returned Funds: Project & Admin	Total FY17 CPA Funds Available
Open Space & Recreation (15%)	\$0	\$293,472	\$0	\$293,472
Historic Resources (15%)	\$0	\$293,472	\$72,075	\$365,547
Community Housing (45%) (appropriated to AHTF)	\$0	\$880,416	\$0	\$880,416
Undesignated (25%)	\$646,404	\$392,887	\$298,201	\$1,337,492
<b>Total</b>	<b>\$646,404</b>	<b>\$1,860,247</b>	<b>\$370,276</b>	<b>\$2,876,927</b>

<sup>5</sup>The Community Preservation Act allows communities to allocate funding to the community's Affordable Housing Trust Fund.

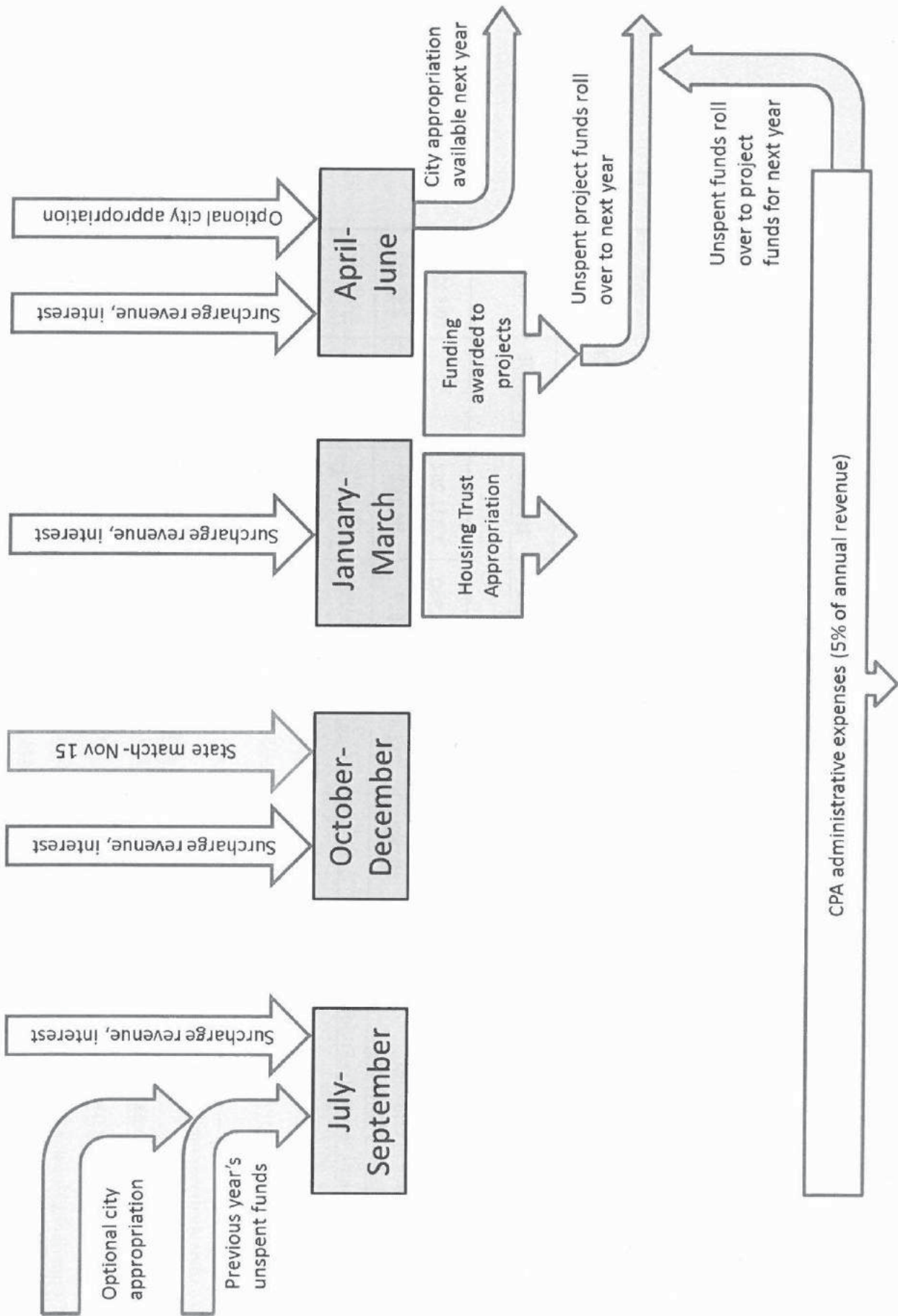


Table 3. CPA Funding Since Adoption

Community Preservation Act Fund	FY14 Actual	FY15 Actual	FY16 Actual	FY17 Thru 5/18	FY18 Estimated	Total
<b>Total Funding Available</b>	<b>2,681,180</b>	<b>6,223,963</b>	<b>4,868,257</b>	<b>2,254,004</b>	<b>2,719,478</b>	<b>n/a</b>
<b>Current Fiscal Year Revenue</b>	<b>2,681,180</b>	<b>3,542,783</b>	<b>2,889,136</b>	<b>2,065,176</b>	<b>1,335,673</b>	<b>10,697,227</b>
Surcharge Revenue	1,323,320	1,430,721	1,546,198	1,642,503	1,161,455	5,461,694
City Appropriation	1,355,671	1,200,000	510,844	0	0	3,066,515
State Match of Previous Year's Local Revenue	0	904,917	829,456	420,681	174,218	2,155,054
Interest	2,189	7,145	2,638	1,992	0	13,964
<b>Rollover from Previous Fiscal Year</b>	<b>0</b>	<b>2,681,180</b>	<b>1,979,121</b>	<b>188,828</b>	<b>1,383,805</b>	<b>n/a</b>
<b>Appropriations and Encumbrances</b>	<b>56,769</b>	<b>4,188,072</b>	<b>3,941,950</b>	<b>2,331,262</b>		<b>10,512,169</b>
Committee admin expenses (up to 5% of annual revenue)	56,769	93,585	61,827	88,141	66,784	294,438
Open Space and Recreation Projects	0	227,463	695,160	777,239		1,699,862
Historic Resources Projects	0	1,660,996	600,288	585,467		2,846,751
Community Housing Projects	0	2,206,028	1,834,675	880,416		4,921,118
<b>Funding Available for Projects in Next Fiscal Year (Rollover)</b>	<b>2,681,180</b>	<b>1,979,121</b>	<b>188,828</b>	<b>1,383,805</b>	<b>2,139,356</b>	<b>n/a</b>
Open Space and Recreation Reserve*	402,177	706,131	0	710,000	\$898,888	n/a
Historic Resources Reserve*	402,177	0	0	0	\$188,888	n/a
Community Housing Reserve*	1,206,531	594,755	0	0	\$188,888	n/a
Undesignated Project Funding*	670,295	678,234	188,828	673,805	\$862,693	n/a
Current Year's Unallocated City Appropriation	—	—	—	0		n/a

\* FY18 funding available for FY18 projects; \*\* FY18 City appropriation determined in Spring 2019.

Figure 1. CPA Fiscal Year Funding Flows





## FY17 Funding Requests

The CPC received 11 full applications for historic resources and open space/recreation land funding totaling \$2,270,263 in FY17.  
 Table 4. FY17 Open Space/Recreation Applications

Project	Applicant	Request	Funded	Project Summary
ArtFarm	City of Somerville Arts Council	\$725,050	\$0	ArtFarm will be a space for arts, culture, and urban agriculture. CPA funds were requested to support site preparation work and the construction of recreation space. Project not funded due to uncertainty around future of the proposed ArtFarm site. Application is on hold until the fall.
Blessing of the Bay Park Design	Mystic River Watershed Association	\$41,863	\$41,863	MYRWA will lead a robust community engagement process and procure design services to complete a 25% design landscape plan for the Blessing of the Bay Boathouse Park and phasing and cost estimates for implementation.
Butterfly Garden Pocket Park at Morse-Kelly	City of Somerville Parks and Open Space & Green and Open Somerville	\$13,000	\$13,000	The City of Somerville and Green and Open Somerville will convert the planting beds on the Summer Street side of the Morse Kelly Park into a pocket park that will support our local pollinators with native plants.
Community Growing Center	Friends of the Community Growing Center	\$33,176	\$33,176	The Friends of the Community Growing Center will procure landscape architect and project management services to complete construction documents for the re-design of the Center funded by the CPA in FY15.
Community Path Survey	City of Somerville Parks and Open Space	\$20,000	\$20,000	The City of Somerville will hire a firm to conduct a survey of the Somerville Community Path from the Cambridge line to Cedar Street. The survey will be done in preparation for the re-design of the Path, funded by CPA in FY16.
Healey Schoolyard Design	City of Somerville Parks and Open Space	\$80,000	\$80,000	The City of Somerville will procure design services for a renovated Healey Schoolyard. The full design will likely include plans for a field; costs for the design of the field will be funded through other sources.
Henry Hansen Park Design	City of Somerville Veteran's Services	\$49,200	\$49,200	The City of Somerville will procure design services for the revitalization of Henry Hansen Park. Henry Hansen was a Somerville resident who raised the first American flag at Iwo Jima during World War II.
Winter Hill Schoolyard	City of Somerville Parks and Open Space	\$500,000	\$500,000	The City of Somerville will construct a new schoolyard for the Winter Hill Community Innovation School.
<b>Total Open Space &amp; Recreational Land</b>		<b>\$1,462,289</b>	<b>\$737,239</b>	

Table 5. FY17 Historic Resources Applications

	Project	Applicant	Request	Funded	Project Summary
Blended Historic Resources & Open Space/ Recreation (1)	Milk Row Cemetery- Grave Markers Restoration and Open Space Master Plan	City of Somerville Planning & Zoning	\$19,300	\$6,300	The City of Somerville requested funding for both updating the open space master plan for the cemetery and restoring additional grave markers that were not possible to preserve using FY16 CPA funds. Only the grave marker restoration was funded this year.
	<b>Total Blended</b>		<b>\$19,300</b>	<b>\$6,300</b>	
Historic Resources (2)	Historic Grace Baptist Church Restoration	Somerville Hispanic Association for Community Development	\$553,378	\$553,378	The Somerville Hispanic Association for Community Development will rehabilitate the historic Grace Baptist Church and begin work to make it ADA accessible. The building is home to the association and the food pantry it runs, a family homeless shelter, a day care and two religious congregations that rent the use of the sanctuary space from the association.
	Somerville Museum ADA Accessibility	Somerville Historical Society	\$235,296	\$0	The Somerville Museum will construct an elevator addition, making the Museum fully accessible. The project was not funded due to the pending lawsuit regarding the ZBA approval for the elevator construction. The application is on hold until the fall.
<b>Total Historic Resources</b>			<b>\$788,674</b>	<b>\$553,378</b>	
<b>Total FY16</b>			<b>\$2,270,263</b>	<b>\$1,296,917</b>	



## **FY17 Application Process— Historic Resources & Open Space/Recreation**

The Community Preservation Act funded three projects out of cycle this year:

- Central Library Mold Remediation (Somerville Public Libraries), which had applied in FY16 and requested consideration in the fall when the project was more defined;
- the restoration of a stained glass window at 83 Belmont St. (Laura de la Torre Bueno), a home on the national register of historical buildings; and
- the creation of a Land Acquisition Study Fund for the City of Somerville (Parks and Open Space Division).

Thirteen institutions submitted eligibility determination forms in September 2016. All 13 projects were determined eligible, of which 11 applicants submitted full proposals. The Somerville community commented on the 11 applications through two public meetings and a written comment period. Each applicant presented their projects during one of the meetings and took questions from CPC members and the community. Eighteen community members attended the first public meeting on January 11 and 23 community members attended the second public meeting on January 31. The written comment period was open from January 4 to March 16. The CPC received comments from 72 individuals. The comments from both the public meetings and the written comments are available here.

During meetings on March 22 and April 26, 2017, the Committee voted on funding recommendations for the 11 applications. The CPC voted to fully fund eight projects: Blessing of the Bay, Butterfly Garden Pocket Park, Community Growing Center, Community Path Survey, Grace Baptist Church Restoration, Healey Schoolyard Design, Henry Hansen Park Design, and Winter Hill Schoolyard Construction. The CPC recommended funding the grave marker portion of the Milk Row Cemetery application, but not the open space master plan update. The Somerville Museum and ArtFarm applications were not funded this year because of uncertainty around key aspects of each of these projects and have been placed on hold until the fall. The Board of Alderman approved the CPC's nine funding recommendations at meetings on April 27 and May 25.

In FY17, in total, the CPC recommended and the Board of Aldermen approved \$777,239 for Open Space and Recreation projects, \$585,467 in Historic Resources projects, and \$880,416 in Community Housing projects

through the Affordable Housing Trust Fund. This includes six City proposed projects, eight community organization proposed projects and two joint City-community projects. Since the start of the CPA in Somerville, over to \$12 million has been awarded to projects across the three CPA categories: \$1.7 million for Open Space and Recreation projects, \$5.4 million on Historic Resources projects (including the bond for the West Branch Library restoration) and \$4.9 million on Community Housing projects (Table 3).

## **FY17 Affordable Housing Funding**

In FY17, upon the recommendation of the CPC, the Board of Aldermen approved appropriating an initial \$880,416 in CPA funds to the Somerville Affordable Housing Trust Fund (AHTF or Trust; see Table 2 above).<sup>5</sup> The Committee empowered the Trust to serve as the housing arm of the CPC in FY15 given the Trust's 25 years of experience preserving and creating affordable housing units and supporting programs to assist homeowners and renters.

The Trust has prioritized preserving or increasing the supply of affordable housing in Somerville and helping low-to-moderate income households gain access to or retain housing. Projects and programs serving individuals and families at or below 100% of the area median income (AMI) are eligible for CPA-funded Trust projects.

In FY17, as in previous years, the Trust released a Request for Information and then a subsequent application for proposals for CPA funds. The Trust has received five eligible funding requests to date: continuing support for the 100 Homes Initiative (Somerville Community Corporation); Clarendon Hill Apartments/28 North St. development (Preservation of Affordable Housing with SCC); Leasing Differential Program and Preservation and Stabilization Services Housing Program (both Somerville Homeless Coalition; ShortStop (Wayside Youth and Family Support Network). Add details on funding decisions and bond request.

The Trust is continuing efforts to reach out to other agencies and developers about the availability of CPA funding for affordable housing in Somerville.



## Ongoing Project Update

FY15 was the first year for CPA grantmaking in Somerville, since then five projects have been completed. Two projects funded in FY15 returned— First Church Somerville Window Restoration and American Tube Works national register nomination (City of Somerville, Planning and Zoning). Both projects are continuing with other sources of funding.

In FY15-FY17, the CPC has determined that a minimum of 45% of funding will go to community housing and 15% each to historic resources and open space/recreation; 20% of funds are flexible and can be spent on projects in the three CPA categories based on demand. The remaining 5% goes to support the administration of the program. Of the program funds, to date, not considering bonding, 50% has gone to affordable housing, 29% to historic resources, and 21% to open space/recreation. When the West Branch Library

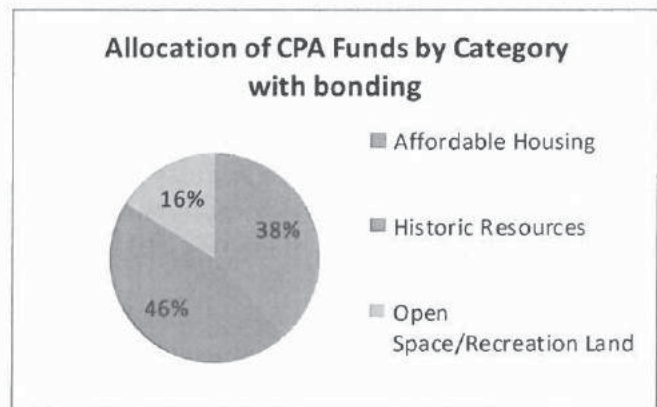
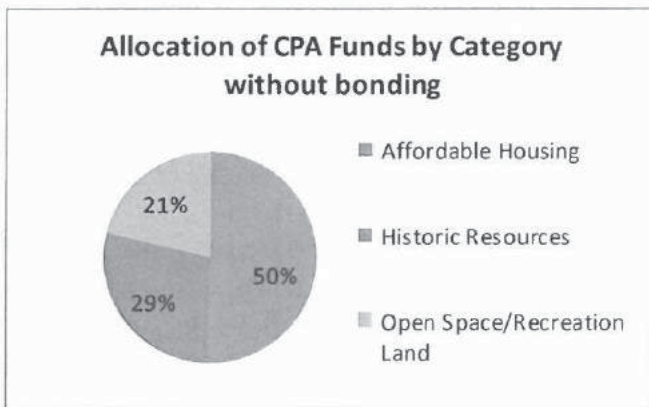
bond is included, the percentage awarded to historic resources increases to 46% and affordable housing decreases to 38% and open space/recreation decreases to 16% (see Figure 2). Add details on housing bonding request

Of the 40 projects that have received funding FY15-FY17:

- 50% are implemented by community organizations (20)
- 35% are implemented by City departments (15)
- 13% are jointly implemented by community organizations and City departments (5)

Non-City grantees receive their project funding in tranches established at the beginning of the project. The final 10% of the budget is released upon the completion of the project and submission of a final report.

Figure 2. CPA Fiscal Year Funding Flows



## Completed Projects

### Prospect Hill Tower Renovation

City of Somerville, Planning & Zoning Division



Photo source: Graham Baker

Year Awarded	Amount Funded	Percent Disbursed
FY15	\$500,000	85% (\$427,425) \$72,575 returned

The Prospect Hill Tower Renovation is the Somerville CPA's first completed project. The Tower was officially reopened during the First Flag ceremony on January 1, 2016 and the CPA celebration was held on September 20, 2016. To ensure that all Somerville residents can experience the Tower, CPA supported the creation of a virtual tour video, *George Washington ... on Prospect Hill?* which is available on the City's website with subtitles in English, Spanish and Portuguese (Haitian Kreyol is coming soon). The Tower is now open in warm weather for docent tours.



***Milk Row Cemetery Rehabilitation and Restoration– FY15***  
 City of Somerville, Planning & Zoning Division



Year Awarded	Amount Funded	Percent Disbursed
FY15	\$48,360	100%

The City of Somerville contracted a firm to complete the rehabilitation and restoration work of the tombs in Milk Row Cemetery. They completed their work summer 2016. Following receiving CPA funding, the project received matching funds from the Massachusetts Historical Commission and the City of Somerville Planning and Zoning Department.

***83 Belmont St. Window Restoration***  
 Laura de la Torre Bueno



Photo source: Boston Globe

Year Awarded	Amount Funded	Percent Disbursed
FY17	\$4,510	100%

This project provided resources for the property owners at 83 Belmont St. to replace the original stained glass window in their home which was damaged in a fire. The home is on the national register of historic places. The restoration of the home was featured in the Boston Globe and received a Director’s Preservation Award from the Somerville Historic Preservation Commission.

***Healey School to Mystic***  
 Friends of the Healey



Year Awarded	Amount Funded	Percent Disbursed
FY15	\$45,000	100%

The Friends of the Healey hired a firm to develop a master plan for the open and recreation space around the Healey School, Mystic Housing Authority and Blessing of the Bay Boat House. The goal was to better connect the three places, which are geographically very close but difficult to access from each location. The City of Somerville supported the Friends in implementing a competitive selection process for the design firm. The design team developed two options for the Healey+Mystic Master Plan, which can be seen at: <http://healeymystic.org>. In FY17, design funds were awarded for the design of the Healey Schoolyard (City of Somerville) and the Blessing of the Bay Boathouse Park (Mystic River Watershed Association). Both will build on the Healey+Mystic Master Plan.

**School Garden Classrooms**  
Groundwork Somerville



Year Awarded	Amount Funded	Percent Disbursed
FY15	\$45,373	100%

This Groundwork Somerville improved eight school yard garden classrooms in Somerville. The project has received in-kind materials from the Somerville School District, which allowed the full vision of the project to be completed. Over 1,000 Somerville students have benefited from the project. Students at the East Somerville Community School held the ribbon cutting for the project in October 2016 with Mayor Curtatone and Superintendent Skipper.

**Withdrawn Projects**

**American Tube Works Complex National Register Nomination**  
City of Somerville, Planning & Zoning Division



Year Awarded	Amount Funded	Percent Disbursed
FY15	\$7,500	0%

This project was approved to contract a historic preservation consultant to prepare a National Register Nomination for the American Tube Works Complex. The Planning and Zoning Division opted to use its own departmental funding for the project and returned all of the funds to the CPA historic reserve. These funds were used to fund other historic projects in FY17.

**First Congregational Church of Somerville Stained Glass Window**  
First Congregational Church of Somerville, UCC



Year Awarded	Amount Funded	Percent Disbursed
FY15	\$44,892	0%

This project was approved to restore a stained glass window at the First Congregational Church. The church opted not to accept CPA funding because it was not able to accept the perpetual preservation restriction funding restriction. The church is moving forward with the renovation of the church with its own funding.



## Ongoing Historic Projects

### *City of Somerville Archives Processing Contractor* City of Somerville Archives



Year Awarded	Amount Funded	Percent Disbursed
FY15	\$43,000	58% (\$24,741)

The Somerville Archives has contracted a consultant to process permanent collections and create record guides. The project is expected to be completed July 2016.

### *Mystic Water Works* Somerville Housing Authority



Year Awarded	Amount Funded	Percent Disbursed
FY15	\$243,000	90% (\$218,700)

The Mystic Water Works project will provide affordable housing for 25 seniors and persons living with disabilities. The Community Preservation Committee provided funding to preserve the historic windows; the Affordable Housing Trust Fund provided funding for the housing component in FY16. The project is currently under construction.

### *Temple B'nai Brith Fire Safety and Accessibility Project* Temple B'nai Brith



Year Awarded	Amount Funded	Percent Disbursed
FY15	\$450,945	90% (\$405,850)

Temple B'Nai Brith is installing a fire safety sprinkler system and an elevator in their historic building. The work has begun and is anticipated to be completed August 2017.

### *Somerville City Hall Renovation, Design, and Construction Management* City of Somerville, Capital Projects Department



Year Awarded	Amount Funded	Percent Disbursed
FY15	\$200,000	0%

Photo source: Eric Kilby

This project will contract a design firm to develop a design to restore the exterior of Somerville City Hall, upgrade mechanical and life safety systems, and ensure accessibility. This project will begin once the owner's project manager is hired.

***West Branch Library Restoration***

City of Somerville, Capital Projects Department



<b>Year Awarded</b>	<b>Amount Funded</b>	<b>Percent Disbursed</b>
FY16	\$2,500,000 (bonded)	0%

The City of Somerville will restore and preserve the existing library interior and exterior and ensure ADA compliance. The project will begin once the design for the project has been finalized.

***Milk Row Cemetery Rehabilitation and Restoration– FY16***

City of Somerville, Planning & Zoning Division



<b>Year Awarded</b>	<b>Amount Funded</b>	<b>Percent Disbursed</b>
FY16	\$48,360	24% (\$6,300)

The City of Somerville is finalizing the contract with a firm to complete the restoration work of 48 grave markers and the Civil War Monument in Milk Row Cemetery. \$6,300 from the FY16 project was spent to complete the FY15 tomb restoration project when the contractors uncovered more extensive damage than expected. The FY17 CPA award for the project will replace these funds, allowing the full project to be completed summer 2016.

***Local Historic District Property Owner Preservation Fund***

City of Somerville, Planning & Zoning Division



<b>Year Awarded</b>	<b>Amount Funded</b>	<b>Percent Disbursed</b>
FY16	\$150,000	0%

This project will provide resources for the City of Somerville to create a dedicated fund that will provide small grants to owners of local historic district designated properties for the restoration and preservation of their structures. The City plans for the fund to be multi-year and renewable. The fund will be managed by the Office of Strategic Planning and Community Development's Preservation Staff along with the Historic Preservation Committee.



**Somerville Museum Capital Improvements– FY15**

Somerville Historical Society



Year Awarded	Amount Funded	Percent Disbursed
FY15	\$168,191	81%
		(\$135,163)

The Somerville Historical Society is making improvements to the Somerville Museum to better preserve its collections and make the building ADA accessible. The project originally planned to construct an elevator lift. The Massachusetts Architectural Access Board determined this was not sufficient as it would not reach all Museum floors. The CPC and Board of Aldermen approved using the \$24,970 allocated for the lift towards the design, purchase and installation of the elevator. An additional \$423,480 for the project was approved for FY16 CPA funding by the Board of Aldermen upon the CPC’s recommendation.

**Somerville Museum Capital Improvements– FY16**

Somerville Historical Society



Year Awarded	Amount Funded	Percent Disbursed
FY16	\$423,480	20%
		(\$86,316)

This project will provide further resources for the Somerville Museum to become ADA compliant and care for its historic collections. This will include building an elevator to meet ADA requirements, reinstalling the Museum’s original Palladian window that was removed in 1986 per a deed restriction with the Massachusetts Historical Society, upgrading security systems, inventorying the Museum’s holdings, and planning for Phase 6 of the Museum’s strategic plan. Abutters are challenging the Museum’s permit from the Zoning Board of Approvals in Land Court. Until this matter is resolved, no funds related to the construction of the elevator will be released to the Museum. The other aspects of the project are moving forward.

**Central Library Mold Remediation**

Somerville Public Libraries



Year Awarded	Amount Funded	Percent Disbursed
FY17	\$21,279	0%

This project will provide resources for the City of Somerville to remediate historic materials damaged by mold in the Closed Stacks, move them to the Library’s Local History Room, and install a 10,000 BTU air conditioning unit in the Local History Room to ensure the historic materials are appropriately stored and preserved.

## Open Space & Recreation Land

### *Prospect Hill Park Design Services*

City of Somerville, Parks and Open Space Division



Year Awarded	Amount Funded	Percent Disbursed
FY15	\$85,000	8% (\$6,799)

Photo source: Eric Kilby

The City of Somerville will contract a firm to develop a design for the Prospect Hill Park. The first step was to conduct an archeological reconnaissance survey of the park to determine if there are any archeologically sensitive areas. The survey was completed in April 2017. Due to the slope of the hill and historic soil disturbance, there is low archeological sensitivity for Native American, Revolutionary War, or Civil War artifacts. There is moderate sensitivity for locating the foundation of two homes that were present on the hill before the land was turned into a park. The design process will be initiated in 2017.

### *Community Growing Center*

Friends of the Community Growing Center



Year Awarded	Amount Funded	Percent Disbursed
FY15	\$52,090	90% (\$46,881)

The Friends of the Community Growing Center hired a firm to create a new design for the Community Growing Center. More information about the project is available at: <http://www.thegrowingcenter.org/#!redesign/tof3d>

### *South Street Farm*

Groundwork Somerville



Year Awarded	Amount Funded	Percent Disbursed
FY16	\$60,160	70% (\$42,112)

Groundwork Somerville is expanding the capacity of the South Street Farm to be used as public space and an outdoor classroom, in addition to its current function as an urban farm. This will include constructing a shade structure, wash station, bicycle parking, and tables and benches. Groundwork Somerville will also make improvements such as conducting a phytoremediation project, creating new rain collection surfaces and storage, installation of composting structures, and improving on-site water and drainage management. Groundwork has been able to leverage the CPA grant with support from WGBH's Design Squad engineering show for youth. The Design Squad will install passive solar heating in the greenhouse for one of their episodes.



***Allen Street Mixed Use Renovation***

City of Somerville Parks and Open Space Division and Stephanie Hirsch



<b>Year Awarded</b>	<b>Amount Funded</b>	<b>Percent Disbursed</b>
FY16	\$20,000	0%

Photo source: Google Earth

The City of Somerville will contract a landscape architect to develop a design to rebuild the Allen Street Open Space. The design will seek to maintain or expand the 16 existing community garden plots and benches for neighbors. The project will add a play area for children, serving the surrounding community and the Allen Street Head Start School, which is directly across from the open space.

***Hoyt Sullivan Playground Renovation***

City of Somerville Parks and Open Space Division



<b>Year Awarded</b>	<b>Amount Funded</b>	<b>Percent Disbursed</b>
FY16	\$400,000	0%

The City of Somerville is renovating the 22,000 square foot Hoyt Sullivan Playground. The renovation will include improving ADA and universal access, new lighting, circulation paths, improving the tree canopy and sustainable practices, providing active and passive recreation with a focus on younger children and improved visual connections to the community path and rail corridor via a new deck overlook. Construction on the park began in May 2017.

***Land Acquisition Study Fund***

City of Somerville Parks and Open Space Division



<b>Year Awarded</b>	<b>Amount Funded</b>	<b>Percent Disbursed</b>
FY17	\$40,000	0%

This project will provide resources for the City of Somerville to create a dedicated fund that will provide resources for the City to explore the feasibility of acquiring parcels for acquisition for open space and recreation land. The fund will support appraisals, environmental studies, surveys, and other preliminary studies necessary to determine if a parcel is a good candidate for acquisition and gather the necessary information to prepare a full proposal for submission to the Community Preservation Committee for CPA funding or directly to the Board of Aldermen for funding through non-CPA sources.

**Community Path Repaving**

City of Somerville Engineering Division and Friends of the Community Path



Year Awarded	Amount Funded	Percent Disbursed
FY16	\$140,000	64% (\$90,000)

The Community Path from Grove St. to Cedar Street was repaved in May 2017. The section from Buena Vista Rd. to the Cambridge line will be repaved following a planned drainage improvement project.

**Community Path Design**

City of Somerville Parks and Open Space Division and Friends of the Community Path



Year Awarded	Amount Funded	Percent Disbursed
FY16	\$75,000	0%

The City of Somerville and the Friends of the Community Path will lead a design process that will make improvements to the existing Community Path and add additional features. The design will emphasize adding green infrastructure to the Grove to Cedar section to improve drainage.

**Ongoing Affordable Housing Projects**

**Redevelopment of 163 Glen Street**

Somerville Community Corporation



Year Awarded	Amount Funded	Percent Disbursed
FY15	\$915,000 (loan)	0%

Somerville Community Corporation is redeveloping the former American Legion Post into eight affordable units and three market rate units. The construction loan closing is scheduled for May 2017. The target for full occupancy is June 2018.

<b>Prevention and Stabilization Services (PASS)</b>	<b>Year Awarded</b>	<b>Amount Funded</b>	<b>Percent Disbursed</b>
Somerville Homeless Coalition	FY15	\$89,250	0%

This project would expand the PASS Program which provides rental assistance for approximately seven households for up to two years, including rental and move-in assistance, case management and stabilization services. The contract is being finalized.



**100 Homes Initiative Pilot**  
Somerville Community Corporation



Year Awarded	Amount Funded	Percent Disbursed
FY15	\$1,200,000 (loan)	0%

This Somerville Community Corporation program was established with the goal of creating 100 new units of affordable housing. To date, SCC has acquired 20 units. The CPA funds are a subsidy that will be released when the SCC secures permanent financing to make the units affordable.

**100 Homes Initiative**  
Somerville Community Corporation



Year Awarded	Amount Funded	Percent Disbursed
FY16	\$1,200,000 (loan)	0%

Based on the initial success of the FY15 pilot, during which SCC acquired seven units in three properties, the Affordable Housing Trust Fund awarded an additional \$1.2 million for the 100 Homes Initiative in FY16.

**Mystic Water Works**  
Somerville Housing Authority



Year Awarded	Amount Funded	Percent Disbursed
FY16	\$507,000 (loan)	90% (\$456,300)

The Somerville Housing Authority will create 25 affordable housing units for Somerville’s elderly population, non-elderly disabled population and formerly homeless households at the historic MWRA Pump Station. CPA funds recommended by the Affordable Housing Trust Fund will be used for soft costs for converting the property into affordable housing. The project is currently under construction. CPA also provided funding for preservation of the historic windows as described in the previous section on historic resource projects.

**Short Stop Self-Sufficiency Program**  
Wayside Youth and Family  
Support Network

Year Awarded	Amount Funded	Percent Disbursed
FY16	\$26,107	0%

The Short Stop program provides transitional housing for homeless young adults. CPA funds cover the gap between what HUD can fund (up to fair market rent) and what the actual cost of monthly rent is for nine individuals at a time. To date the program has served 18 young adults. Nine have left the program, of which seven are living independently, one left the program for other opportunities, and one began a four year college program. Educational stability has increased— during participation in the program and once youth have left the program.

<i>Better Homes Program– FY15</i>	Year Awarded	Amount Funded	Percent Disbursed
Somerville Homeless Coalition	FY15	\$35,820	0%

CPA funding for the Better Homes Program fills the gap between HUD Fair Market Rent reimbursements and the actual market rents at 17 scattered-site apartments leased by the Somerville Homeless Coalition. This program has supported 22 people (three families and 14 individuals), nine of whom qualify as chronically homeless.

<i>Better Homes Program– FY16</i>	Year Awarded	Amount Funded	Percent Disbursed
Somerville Homeless Coalition	FY16	\$56,868	0%

Somerville Homeless Coalition was able to renew the leases for the 17 apartments supported with the FY15 grant. The Housing Trust awarded greater support in FY16 because of decreasing HUD reimbursement rates, leaving a larger gap between HUD funding and actual market rents.

## CPA Results

As a result of Somerville’s CPA projects, which are located in all seven of Somerville’s wards:

- 8 historic buildings are being preserved
- 4 historic buildings are being made more accessible to all Somerville residents
- 2 historic collections are being preserved
- 6 parks and playgrounds are being improved
- 53 new affordable housing units are being created
- 2 transit oriented affordable housing developments are being built
- 32 households are receiving rental assistance

## Program Improvements

The CPC introduced a number of improvements to the program in FY17.

### Increased Community Outreach

The CPA Program continues to look for new ways to let Somerville residents know about the work of the program and to attract new applicants. This year, the CPA Manager began tabling at SomerStreets events. Visitors to the table were asked to distribute 10 pom poms



across the affordable housing, historic resources, open space/recreation land, and flexible CPA categories. Over 180 people participated.

CPA materials were translated into Haitian Kreyol, Portuguese and Spanish. The CPA Manager was interviewed on the Spanish SomerViva SCAT program.

### New applicant resources

The CPA Program took advantage of the new City of Somerville website to develop a more detailed, user friendly CPA program website. The new website provides more information and resources for applicants.

Pre-application workshops were also introduced in FY17 to help applicants become familiar with the process.

### City Project Memoranda of Agreement

Starting with the FY17 funding round, City projects will now sign memoranda of agreement to ensure implementing departments are aware of CPA requirements.

### Applicant and Implementer Surveys

To help the CPA Program learn more about how to improve the program to better support applicants and implementers, applicants and implementers are now being surveyed annually to get their feedback on how the program is working.

### Monitoring and Evaluation Plan

The City of Somerville is committed to using data for decision making across programs. The CPA Program has embraced this spirit by developing the first CPA monitoring and evaluation plan in the state. The plan establishes indicators the program will track– both to inform how funding should be allocated and priorities set as well as to understand how effective the program is in implementing projects and making a real difference in the lives of Somerville residents.



## Looking Ahead to FY18

The CPC projects a minimum of \$1,888,878 in new CPA funds will be available in FY18, including a minimum 15% match on FY17 revenue from the State (Table 6). \$1,383,805 in unspent project funds will roll over from FY17. Of these funds, \$710,000 have been earmarked for open space and recreation land acquisition to ensure funding is available when these unique opportunities arise. The remaining \$673,805 is a reserve for emergency projects. These figures combined with the FY17 City appropriation of \$0, which is available to spend in FY18 result, in a total of \$3,178,240 available for new projects in FY18.

With the experience of three funding rounds to draw on, in FY18 the Community Preservation Act Program will build on its strong foundation to make improvements that will improve the quality of projects and facilitate the work of the CPC. Program improvement goals for FY18 include:

- Increase the diversity of CPC general public member and funding applicants through expanding community outreach
- Establish a neighborhood planning grant program that will enable neighborhood groups to access small grants to engage their neighbors in developing CPA project ideas as inclusively as possible and, as necessary, access technical expertise to guide the scope of a future application.
- Collaborate with other departments implementing projects that CPA can learn from and inform, such as the Community Benefits Committee discussion and the placemaking efforts of the Arts Council and the Office of Strategic Planning and Community Development.



City of Somerville, 1925

Finally, 2017 is an important year for Somerville’s CPA program– it is the fifth anniversary of the adoption of the act in Somerville. The CPC will be organizing activities to celebrate this milestone in September in conjunction with Somerville’s 175th anniversary.

Table 6. Projected FY18 CPA Funding

<b>Total FY18 New CPA Revenue</b>	<b>\$1,888,878</b>
Surcharge	\$1,642,503
State match	\$246,375
City appropriation**	\$0
(CPA admin funds)	(\$94,444)
<b>Total FY17 New Project Funding</b>	<b>\$1,794,435</b>
<b>Total FY17 Unexpended Revenue</b>	<b>\$1,383,805</b>
FY17 City appropriation	\$0
Unallocated project funds	\$1,383,805
<b>Total Available in FY17</b>	<b>\$3,178,240</b>

\*\*FY18 City appropriation determined in Spring 2019.