



JOSEPH A. CURTATONE  
MAYOR

## CITY OF SOMERVILLE, MASSACHUSETTS COMMUNITY PRESERVATION COMMITTEE



### MINUTES JUNE 28, 2016

The Community Preservation Committee (CPC) held a public hearing on the FY18 Community Preservation Plan at 7:00pm 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, Elizabeth Duclos-Orsello, Arn Franzen, Ezra Glenn, James McCallum and Uma Murugan

**Members Absent** Vice Chair Michael Fager, Michael Capuano, and Jessica Palacios Yamakawa

**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 approximately 7:05p.m.

#### Agenda item 1: Welcome and Introductions

Mr. Bauer opened the meeting and CPC members introduced themselves.

#### Agenda item 2: CPA Overview and Community Preservation Plan purpose

Ms. Stelljes gave a presentation that included an overview of the Community Preservation Act, Somerville CPA funding to date, and the FY18 proposed priorities (see attached slides). The CPC is proposing a new priority under the overall priority of supporting projects that are consistent with the community's values: *Supports Somerville's diversity, including support to immigrants regardless of status*. The CPC is also seeking community input on how it should consider projects that are anticipating requesting funding over multiple years.

#### Agenda item 3: Invited testimony

##### ***Somervision Update: Melissa Woods, City of Somerville Senior Planner***

Ms. Woods presented the progress Somerville has made towards the SomerVision goals, adopted in 2012 (see attached slides). For the goal of creating 1,200 new permanently affordable units, Somerville has created 225 new units (19% of goal). For the goal of creating 125 new acres of open space, Somerville has created 16.78 acres of new usable open space (13% of goal). Ms. Woods requested the CPC focus funding to help acquire and improve open space because the least progress has been made to date in this area and the private market contributes more towards to the jobs and housing goals than it does for open space.

Mr. Glenn asked if the housing goal of 1,200 permanently affordable units is sufficient to meet the demand for affordable housing given that many of the 33,000 units that were de facto affordable housing are being lost due to rising rents. Ms. Woods responded that her presentation was oriented around the SomerVision goals so her comment to support open space is a reflection of the fact that open space is lagging behind in meeting these goals. The City of Somerville and its staff are very supportive of increasing affordable housing beyond the SomerVision goals given the great demand.

***Somerville Capital Planning Update: Emily Monea, City of Somerville SomerStat Director***

Ms. Monea presented how the City of Somerville prioritizes its capital investment plan and provided an overview of the projects that are planned for FY17 to FY26 (see attached slides). During this time period, the City anticipates needing \$374 million for projects that are critical, recurring, and underway. Given the great need to invest in the city's infrastructure and buildings over the next ten years, Ms. Monea stated that CPA funds are an invaluable resource for moving forward the unscheduled open space/recreation and historic preservation projects which are important to move forward but do not currently have the necessary funding to move forward.

***Community affordable housing update: Mark Alston-Follansbee and Lisa Davidson, Somerville Homeless Coalition***

Mr. Alston-Follansbee and Ms. Davidson spoke to the desperate need for affordable housing in Somerville that is affordable to all income levels. Many affordable units are unaffordable to the individuals and households the Somerville Homeless Coalition works with unless they receive an additional subsidy. Somerville residents are finding it difficult to use their Section 8 vouchers within the City.

Mr. Bauer asked for the reaction of Mr. Alston-Follansbee and Ms. Davidson to the CPC's intention to add a priority to support the diversity of Somerville, including to immigrants regardless of status. Ms. Davidson said she thinks it is a fantastic idea to make a priority for families who are undocumented because they cannot be supported with federal funds. There is not enough state housing for those with immigration challenges and that is the only housing open to them. Mr. Alston-Follansbee said that as rents rise in East Somerville pressures will be placed on everyone in Somerville regardless of status.

Mr. Bauer read a resolution from the Board of Aldermen into the record requesting the CPC consider funding housing for municipal employees.

Mr. Bauer then asked Mr. Alston-Follansbee and Ms. Davidson for their reactions to the request from the Aldermen. Mr. Alston Follansbee responded that many people want to live in Somerville who cannot and the city needs more housing. It is tricky to prioritize the needs of different groups. He stated he thought that if municipal employees were given preferential treatment over other groups there would be community backlash.

Ms. Duclos-Orsello asked if Mr. Alston-Follansbee and Ms. Davidson would prioritize housing for those at the 30% of area median income (AMI) and below level or if they would prioritize a different AMI category. Ms. Davidson said she would prioritize housing for those at 30% AMI and below.

[Ms. Duclos-Orsello departs the meeting]

***Community historic resources update: Richard Graf, Somerville Historical Society***

Mr. Graf, as the Museum's architect and project manager, spoke to the Museum's future funding needs to preserve its historic collections.

***Community open space and recreation land update: Amber Christoffersen, Mystic River Watershed Association***

Ms. Christoffersen presented four trends around open space and recreation land she sees in Somerville and the surrounding areas: working to increase connectivity; thinking about how to make spaces useful and useable for communities; going back to the basics of making sure parks stay functional and free of invasive species once improved; and thinking about parks as opportunities to include infrastructure that addresses stormwater issues (see attached slides). She noted that because of the costs of public realm projects and the need to maintain them, public-private partnerships are essential and planning should consider the next 35 years of the life of a space.

Mr. Franzen asked about the connections in other communities on the Mystic River. Ms. Christoffersen said that the Clipper Ship Connector project is moving forward but it was only possible through a public-private partnership requiring funding from multiple sources.

Mr. Glenn asked how Ms. Christoffersen would prioritize between three possible strategies: acquire parcels, provide access regardless of ownership, and maintain and more intensively use existing space. Ms. Christoffersen said the Mystic River Watershed Association seeks to create seamless access to the waterfront in its projects and she would think more about the question and get back to the CPC.

**Agenda item 4: Public testimony**

***Barbara Mangum (statement read into record):*** Ms. Mangum encouraged the CPC to more evenly distribute funds across the three categories of affordable housing, historic resources, and open space/recreation.

***Nancy Kalojian:*** Ms. Kalojian spoke to the need to support individuals and mental illness and disabilities, such as creating a new park such as the Menino Playground at Spalding in Boston that is designed to be fully accessible. She suggested that more could be done to feature and link our historic squares, mansions, hill and brooks. This could be done by combining open space and historic aspects.

***Stephen Mackey:*** Mr. Mackey spoke about the importance of the Somerville Museum in his own life and the value of preserving historic buildings for Somerville. Through his involvement in the creation of the *Beyond the Neck* book, he saw how a historic collection can lead to much bigger things.

**John Reinhardt:** Mr. Reinhardt spoke about how the lack of open space negatively affects quality of life and merits investment. He is supportive of the CPC's efforts to set aside funding for land acquisition.

**Agenda item 5: CPC reflections on input from hearing**

Mr. Bauer thanked the participants for coming and closed the meeting at approximately 8:15pm.

**Next meeting: The next CPC meeting will be held at 6:30pm on July 26, 2017 at the Visiting Nurse Association.**

**Documents and Exhibits**

1. Agenda
2. Slides from presentations
3. Draft FY18 Community Preservation Plan



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## CITY OF SOMERVILLE, MASSACHUSETTS COMMUNITY PRESERVATION COMMITTEE



### MEMBERS

Dick Bauer, Chair  
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Ezra Glenn  
James McCallum  
Uma Murugan  
Jessica Palacios Yamakawa

### STAFF

Kristen Stelljes

## AGENDA

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

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, Mark Alston-Follansbee and Lisa Davidson
  - d. Community historic resources update: Somerville Historical Society, TBD
  - e. Community open space and recreation land update: Mystic River Watershed Association, Amber Christoffersen
4. Public testimony
5. CPC reflections on input from hearing
6. Next CPC meeting: Wednesday, July 26<sup>th</sup> at 6:30 p.m. (Visiting Nurse Association)



# FY17 Community Preservation Plan

Community Hearing

June 28, 2017

# What is the Community Preservation Act?

Massachusetts law that 172 municipalities have adopted to create a fund for grantmaking:



## Primary sources of funding:

Surcharge on real estate  
property tax (1.5%)

State match

City appropriation

# Allowable Projects

	Community Housing	Historic Preservation	Open Space	Outdoor Recreation
Acquire	✓	✓	✓	✓
Create	✓	X	✓	✓
Preserve	✓	✓	✓	✓
Support	✓ includes funding for affordable housing trust	X	X	X
Rehabilitate and/or Restore	✓ if acquired or created with CPA funds	✓	✓ if acquired or created with CPA funds	✓

**\*\*Cannot pay for maintenance or replace current spending\*\***



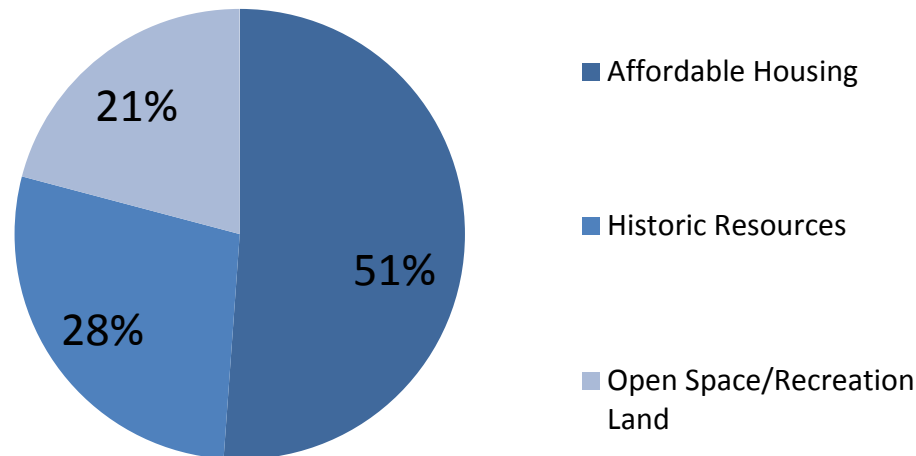
# Allocation of Funding

<b>CPA Category</b>	<b>State Minimum</b>	<b>Somerville Allocation- FY15 - FY17</b>
Open Space & Recreation	10%	15%
Historic Preservation	10%	15%
Affordable Housing	10%	45%
Administrative (max)	5%	5%

# How much is spent?

FY18 new project funding available= \$1,984,489  
10% minimums= \$198,449

Allocation of CPA Funds by Category  
without bonding: FY15-FY17



# What does this mean in terms of projects?

CPA Category	Project Total	Funding Total
Affordable Housing	10	\$4,921,119
Historic Preservation	15	\$2,924,251 (\$5,424,251)
Open Space & Recreation	17	\$1,699,862
<b>Total</b>	<b>42</b>	<b>\$9,545,232</b> <b>(\$12,045,232)</b>

# How are funding decisions made?

- Governed by 9 member citizen committee:  
5 positions designated from relevant  
commissions, 4 at-large  
(now recruiting for a new general public  
member!)
- Annual application process
- Affordable Housing Trust Fund makes grants for  
housing projects
- Guided by annual Community Preservation Plan

# How many applications get funded?

**FY15 = 63% of proposed projects received funding**

**65%** Community EDFs (13/20); **80%** City EDFs (8/10)

**100%** of Community and City applications funded

**FY16 = 50% of proposed projects received funding**

**50%** Community EDFs (8/16); **75%** City EDFs (6/8); **75%** Joint EDFs (3/4)

**100%** of Community; **100%** of City; **75%** of Joint applications funded

**FY17 = 59% of proposed projects received funding (3 still under consideration)**

**46%** Community EDFs (6/13- 3 pending); **71%** City EDFs (5/7); **100%** Joint EDFs (2/2)

**54%** of Community (3 pending); **83%** of City; **100%** of Joint applications funded

**Most projects not funded were either withdrawn or determined ineligible**

FY15 = 9 no full proposal, all other projects offered funding

FY16 = 10 no full proposal, 1 not funded, 2 offered lower funding

FY17 = 1 ineligible, 2 no full proposal, 3 put on hold by applicant, 1 offered lower funding

# FY18 Community Preservation Plan

## Proposed Priorities

### **Projects that are consistent with the community's values:**

- Improve accessibility for all members of the community
- Incorporate sustainable practices and design
- Receive endorsement from other Somerville boards, commissions, departments or community groups or from city, state, or federal officials
- Are consistent with the goals and priorities established in other current planning documents
- Address two or more of the CPA focus areas
- **Supports Somerville's diversity, including support to immigrants regardless of their status**

# FY16 Community Preservation Plan

## Proposed Priorities

### **Projects that use CPA funding strategically:**

- Leverage other funds or in-kind contributions and/or implement cost-saving measures
- Address long-standing or urgent needs in the community
- Take advantage of exceptional, time-sensitive opportunities
- Could serve as catalysts for transformative change
- How should support for multi-year projects be prioritized?

# FY16 Community Preservation Plan

## Proposed Priorities

### **Open Space & Recreation Land:**

- Support the acquisition of land for and creation of new publically accessible open space and recreation land
- Expand access to and use of the Mystic River and Alewife Brook corridors
- Improve the health of the wetlands and shores of the City's water resources
- Rehabilitate and restore existing recreational land according to need
- Expand urban agriculture opportunities



# FY16 Community Preservation Plan

## Proposed Priorities

### **Community Housing:**

- Provide affordability in perpetuity as required by the Community Preservation Act
- Preserve expiring-use units
- Support mixed-use and transit-oriented development
- Prevent homelessness and/or provide housing units or other support for homeless and formerly homeless households

# FY18 Community Preservation Plan Proposed Priorities

## **Historic Resources:**

- Priorities being developed through the creation of Somerville's first Historic Preservation Plan

# Still have more to say?

Written comments accepted through noon,  
Thursday, July 20:

- [kstelljes@somervillema.gov](mailto:kstelljes@somervillema.gov)
- 93 Highland Ave. Somerville, MA 02143



# **SomerVision Update**

**June 28, 2017**

**Melissa Woods, Senior Planner**

# SomerVision goals: 2010-2030

## Citywide

- ❑ 30,000 new jobs
- ❑ 125 acres of open space
- ❑ 6,000 new housing units
  - ❑ 1,200 permanently affordable
- ❑ 50% of new trips via transit, bike, or walk
- ❑ 85% of new development in transformative areas

# SomerVision Tracker

## The SomerVision Tracker (SVT) tracks...

- Square footage (SF) of development and commercial/residential use
- Jobs created from SF averages based on research
- Net new housing units including affordable units
- Open space created by City and developers

# SomerVision Tracker

- All projects included in the SVT have received a Certificate of Occupancy (CO)
- CO is the only definitive way to inventory progress
  - Projects receiving zoning relief are not always built.
- Data presented is as of December 31, 2016  
(Updated every 6 months)



# Target Area: Jobs

❖ Goal (2010-2030): 30,000 new jobs

**What we've achieved: 6,086**

Jobs created by type	Total (2011-2017)	% towards goal
Commercial	5,127	-
Retail	958	-
Hotel	1	-
<b>Total</b>	<b>6,086</b>	<b>20%</b>

# Target Area: Housing

❖ Goal (2010-2030): 6,000 new housing units

**What we've achieved: 1,135**

Area Type	2010-2030 goal for Area	Net new housing units 2011-2017	Progress towards goal
Conserve	150	162	108%
Enhance	750	421	56%
Transform	5,100	552	10.8%
<b>Total</b>	<b>6,000</b>	<b>1,135</b>	<b>19%</b>

# Target Area: Housing

❖ Goal (2010-2030): 1,200 permanently affordable units

**What we've achieved: 225**

New affordable + inclusionary units (2011-2017)	Progress towards goal
225	19%

# Target Area: New Usable Open Space

❖ Goal (2010-2030): 125 new acres of open space

**What we've achieved: 16.78**

	2010-2017	% towards goal
New Usable Open Space	16.78	13%

# Target Area: New development

❖ Goal (2010-2030): 85% of new development to occur in transformative areas

**What we've achieved: 75%**

	Total new development (sq ft)	Total new development in transformative areas (sq ft)	% in transformative area (target = 85%)
New development	3,550,509	2,668,723	75%

# SomerVision: Score Card

Target Area	% towards 2010-2030 SomerVision Goal
Jobs Created, total	20%
New housing units, total	19%
New affordable & inclusionary units	19%
<b>New acres of open space</b>	<b>13%</b>
New development, transform	75%

# How is OSPCD Shifting?

- Continue path to zoning overhaul
  - Move development out of conserve areas
  - Facilitate (and require) commercial development
  - Increase open space percentages
  - Maintain affordable housing percentage (20%)
- Focus planning in transformational areas
- Continue reporting SomerVision progress to CPA

# How Can CPC Help?

- Support the Zoning Overhaul
- Focus funding to help acquire and improve open space...jobs and housing need less help
- Adjust funding in reflection to progress reports



# Thank you

Questions?

Contact: Melissa Woods, Senior Planner

617-625-6600 x2535



# **City of Somerville Capital Planning Update**

**Emily Monea,  
SomerStat Director**

# Somerville Capital Planning

- Somerville tracks its capital investment needs in a Capital Investment Plan (CIP) Project List
  - The most recent version is online:  
<http://www.somervillema.gov/sites/default/files/capital-projects-list.pdf>
- Covers 10-year period from FY17 to FY26
  - FY18 to FY27 update coming soon

# CIP Project List Categories

- Projects fall into one of five categories:
  - 1. Critical:** projects required to fulfill SomerVision and the USQ Neighborhood Plan
    - Includes subsurface utility and streetscape work, the relocation of the existing public safety building and fire station in USQ, and more
  - 2. Recurring:** Investments the City has made and will continue to make on a regular basis to maintain and improve existing assets
    - Includes investments in vehicles, city and school buildings, street trees, and more

# CIP Project List Categories, cont'd

3. **Underway:** projects that are ongoing but not yet completed
4. **Pending:** priority projects that should happen in the coming years because they respond to a community need, address a public health or safety issue, or advance projects that are underway or critical
  - Includes fields projects to advance Athletic Fields Master Plan and potential demolition of the Homans building
5. **Unscheduled:** community priorities and identified needs that currently have no assigned timetable
  - Includes water and sewer, parks, fields, streetscape, and building projects

# Current CIP Project List totals \$682M

**FY17-FY26 CIP Projects by Category & Funding Source  
as of 6/14/17**

	<b>CPA</b>	<b>Debt Exclusion</b>	<b>General Fund</b>	<b>Grant</b>	<b>Pay-go</b>	<b>Sewer Enterprise</b>	<b>Water Enterprise</b>	<b>Total</b>
Critical			\$73,150,000	(\$13,000,000)	\$550,000	\$86,225,000	\$17,675,000	<b>\$164,600,000</b>
Recurring			\$63,928,522		\$6,336,829	\$13,500,000	\$21,176,363	<b>\$104,941,714</b>
Underway	\$2,500,000	\$137,233,000	\$66,597,946			\$22,309,196	\$6,450,000	<b>\$235,090,142</b>
Pending			\$7,370,000					<b>\$7,370,000</b>
Unscheduled			\$131,300,000		\$1,650,000	\$27,405,000	\$9,800,000	<b>\$170,155,000</b>
<b>Total</b>	<b>\$2,500,000</b>	<b>\$137,233,000</b>	<b>\$342,346,468</b>	<b>(\$13,000,000)</b>	<b>\$8,536,829</b>	<b>\$149,439,196</b>	<b>\$55,101,363</b>	<b>\$682,156,856</b>

# \$374M without Unscheduled and Debt Exclusion Projects

FY17-FY26 CIP Projects by Category & Funding Source, Excluding Unscheduled & Debt Exclusion Projects as of 6/14/17							
	CPA	General Fund	Grant	Pay-go	Sewer Enterprise	Water Enterprise	Total
Critical		\$73,150,000	(\$13,000,000)	\$550,000	\$86,225,000	\$17,675,000	<b>\$164,600,000</b>
Recurring		\$63,928,522		\$6,336,829	\$13,500,000	\$21,176,363	<b>\$104,941,714</b>
Underway	\$2,500,000	\$66,597,946			\$22,309,196	\$6,450,000	<b>\$97,857,142</b>
Pending		\$7,370,000					<b>\$7,370,000</b>
<b>Total</b>	<b>\$2,500,000</b>	<b>\$211,046,468</b>	<b>(\$13,000,000)</b>	<b>\$6,886,829</b>	<b>\$122,034,196</b>	<b>\$45,301,363</b>	<b>\$374,768,856</b>



# FY18 to FY23 are the most challenging years

FY17-FY26 CIP Projects by Category & Year,  
Excluding Unscheduled & Debt Exclusion Projects  
as of 6/14/17

	Critical	Recurring	Underway	Pending	Total
FY17	\$0	\$7,221,351	\$18,710,000	\$0	\$25,931,351
FY18	\$2,900,000	\$11,497,962	\$18,967,689	\$4,870,000	\$38,235,651
FY19	\$33,350,000	\$10,598,661	\$13,888,443	\$2,500,000	\$60,337,104
FY20	\$59,050,000	\$10,692,876	\$14,853,064	\$0	\$84,595,940
FY21	\$42,900,000	\$10,223,909	\$11,437,946	\$0	\$64,561,855
FY22	\$26,400,000	\$10,624,372	\$10,000,000	\$0	\$47,024,372
FY23	\$0	\$10,027,584	\$10,000,000	\$0	\$20,027,584
FY24	\$0	\$11,535,000	\$0	\$0	\$11,535,000
FY25	\$0	\$10,985,000	\$0	\$0	\$10,985,000
FY26	\$0	\$11,535,000	\$0	\$0	\$11,535,000
Total	\$164,600,000	\$104,941,714	\$97,857,142	\$7,370,000	\$374,768,856

# We're still assessing our capital needs

- We have several studies and assessments underway that could reveal even greater liabilities than we are currently aware of in our city and school buildings and water and sewer infrastructure, which would require additional investment.

# City finances

- We are in the process of updating our long-range plans for the General Fund, Water Enterprise Fund, and Sewer Enterprise Fund.
  - We're only including Critical, Recurring, Underway, and Pending projects in this analysis, since they have to be our priorities.
- This analysis will provide our projected budget surplus for the next 10 years and the extent to which – if any – we are able to take on any Unscheduled projects in each year.

# How can the CPC help?

- Fund our Unscheduled projects!
  - In the words of one staff member, these projects are unscheduled but not unloved.
  - They are important projects, but given resource constraints, the City has to prioritize our Critical, Recurring, Underway, and Pending projects.
  - The CPA is an invaluable resource for moving forward our Unscheduled open space/recreation and historic projects.



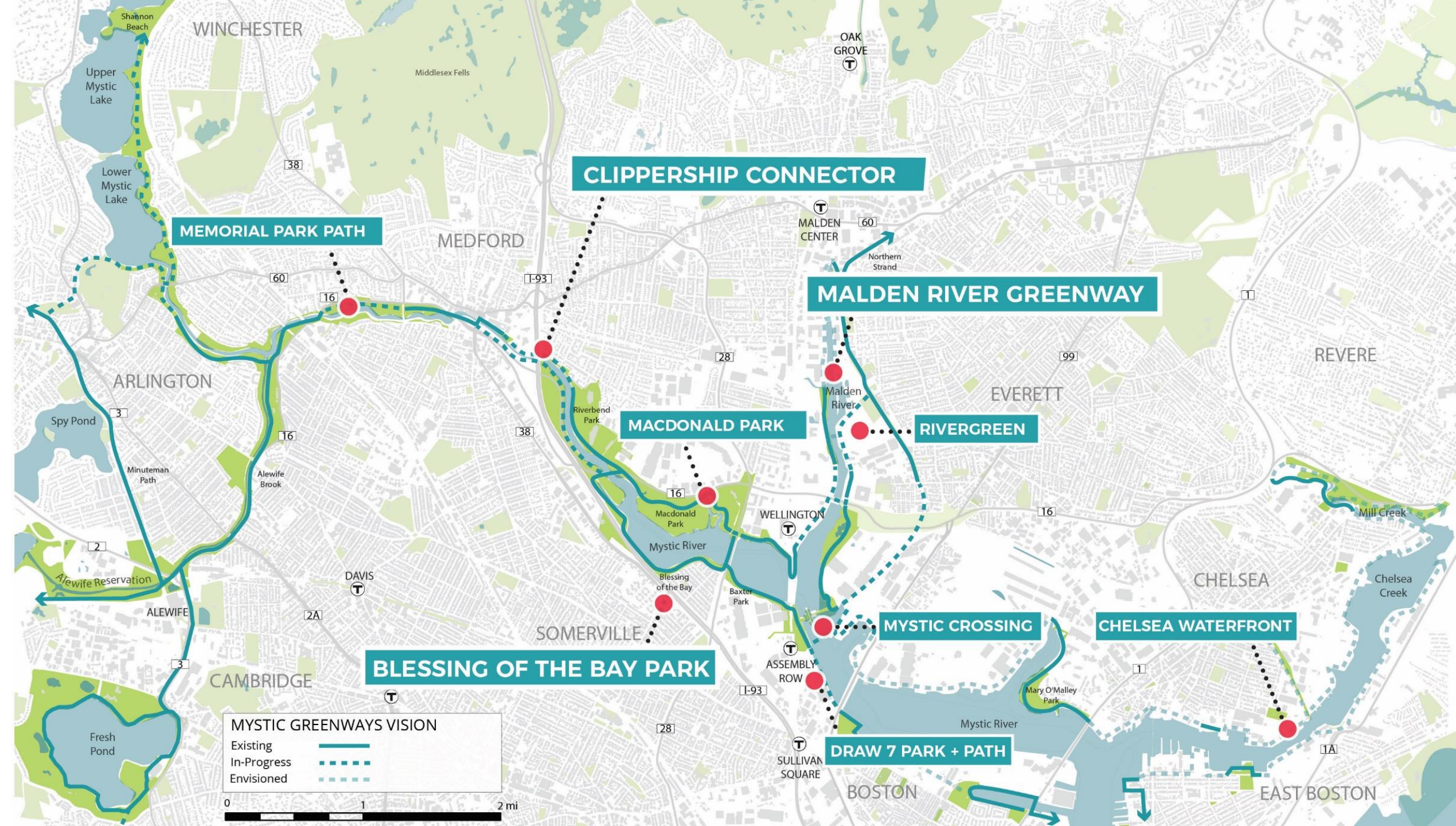


# COMMUNITY OPEN SPACE AND RECREATION TRENDS

Amber Christoffersen  
Mystic River Watershed Association  
June 28, 2017

## #1 CONNECTIVITY

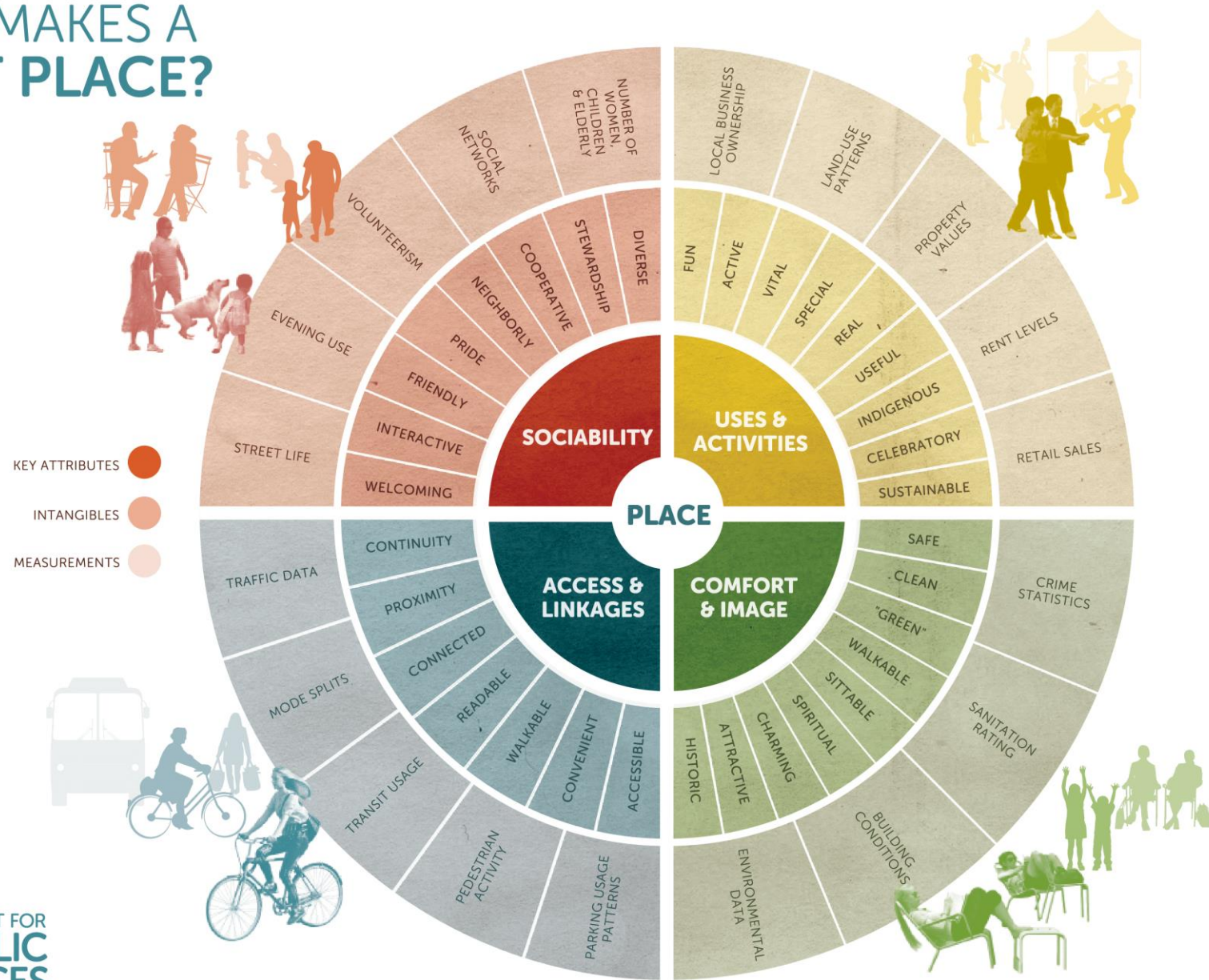






## #2 THINKING BEYOND PROXIMITY

# WHAT MAKES A GREAT PLACE?



## #3 BACK TO BASICS







## #4 PARKS AS INFRASTRUCTURE





TREES TAKE UP AND  
TRANSPIRE WATER FROM  
TRENCH PROVIDING SHADE  
AND ENHANCING THE  
STREETScape





QUESTIONS?







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

### **MEMBERS**

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Michael A. Capuano  
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### **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

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<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)
- f. Support Somerville's diversity, including support to immigrants regardless of their status

**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

Note for input: the CPC is currently considering whether or not to establish a policy around how it should prioritize projects that are seeking long term funding, such as historic restoration projects that will need to take place over multiple phases or design projects that come in with an expectation they will later apply for construction funds. Let us know what you think!

## **FY18 Funding Allocation**

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

<b>Use</b>	<b>Percent of FY18 CPA Revenue</b>	<b>Estimated Amount of FY18 New CPA Revenue</b>
Community Housing reserve or projects	45%	\$893,020
Historic Resources reserve or projects	15%	\$297,673
Open Space and Recreation reserve or projects	15%	\$297,673
Undesignated/flexible project funds	20%	\$396,898
CPC administrative and operating expenses	5%	\$99,224
<b>Total</b>	<b>100%</b>	<b>\$1,984,489</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 \$1,007,673 in the open space

category and \$1,070,703 in the flexible category. There is also an additional \$500,000 from the unallocated FY17 City appropriation. The combined total from the FY17 rollover and new FY18 revenue is \$3,769,069. The total amount of funding available will likely be greater as a result of surcharge revenue beyond the original budget, 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 and the allocation for the FY17 City appropriation 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 \$1.98 million in new CPA revenue in FY18, including an estimated state match of 15% on local revenue raised in FY17. Unexpended revenue from FY17 totals \$1,883,805 (FY17 City appropriation plus unspent FY17 project funds), including \$710,000 earmarked for land acquisition. As a result, the CPC estimates that \$3.77 million will be available fund projects in the FY18 funding cycle.

<b>Table 2. Estimated CPA Funds Available in FY18 Funding Cycle</b>	
<b><i>FY18 Revenue</i></b>	<b><i>\$1,984,489</i></b>
Surcharge Revenue	\$1,660,425
City Appropriation <sup>4</sup>	\$0
State Match of FY17 Local Revenue	\$324,064
<b><i>Unexpended Revenue from FY17</i></b>	<b><i>\$1,883,805</i></b>
Unexpended FY17 Project Funds	\$1,383,805
FY17 City Appropriation	\$500,000
FY18 Admin expenses (5%)	(\$99,224)
<b>Total</b>	<b>\$3,769,069</b>

<sup>4</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.

## 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				
	Open Space	Recreational Land	Historic Resources	Community Housing
	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>5</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>5</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.

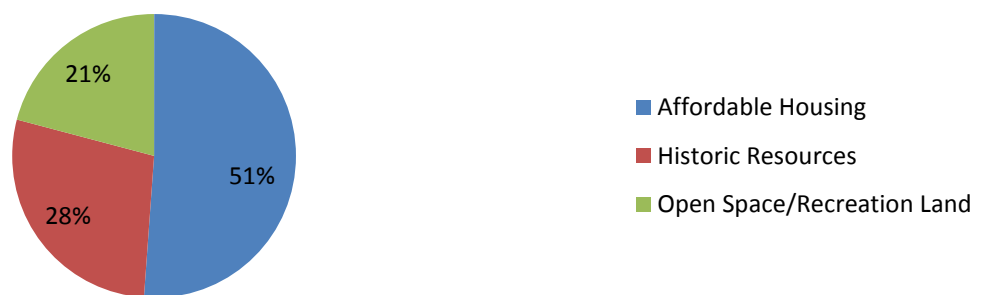
## Section 6. CPA Supported Projects

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 10 housing. Fifteen projects are managed by the City (36%), 22 are managed by community groups (52%), and five are collaborations between the City and a community group (12%). Table 4 on the following page details CPA funding since adoption.

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.

**Chart 2. Allocation of CPA Funds by Category without bonding**



For more details about Somerville's CPA funded projects, see the [FY17 Annual Report](#).

**Table 4. CPA funding since adoption**

<b>Community Preservation Act Fund</b>	<b>FY14 Actual</b>	<b>FY15 Actual</b>	<b>FY16 Actual</b>	<b>FY17 Thru 6/1</b>	<b>FY18 Estimated</b>	<b>Total</b>
<b>Total Funding Available</b>	<b>2,681,180</b>	<b>6,223,963</b>	<b>4,868,257</b>	<b>2,772,128</b>	<b>3,868,294</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>2,583,300</b>	<b>1,984,489</b>	<b>11,696,399</b>
Surcharge Revenue	1,323,320	1,430,721	1,546,198	1,660,425	1,660,425	5,960,664
City Appropriation	1,355,671	1,200,000	510,844	500,000		3,566,515
State Match of Previous Year's Local Revenue	0	904,917	829,456	420,681	324,064	2,155,054
Interest	2,189	7,145	2,638	2,194	0	14,166
<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>1,883,805</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>2,338,783</b>		<b>9,775,574</b>
Committee admin expenses (up to 5% of annual revenue)	56,769	93,585	61,827	95,661	99,224	307,842
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		4,921,119
<b>Funding Available for Projects in Next Fiscal Year</b>	<b>2,681,180</b>	<b>1,979,121</b>	<b>188,828</b>	<b>1,883,805</b>	<b>3,769,069</b>	<b>n/a</b>
Open Space and Recreation Reserve*	402,177	706,131	0	710,000	297,673	n/a
Historic Resources Reserve*	402,177	0	0	0	297,673	n/a
Community Housing Reserve*	1,206,531	594,755	0	0	893,020	n/a
Undesignated Project Funding*	670,295	678,234	188,828	673,805	396,898	n/a
Current Year's Unallocated City Appropriation	—	—	—	500,000		n/a
*FY18 funding available for FY18 projects; ** FY18 City appropriation determined in Spring 2019.						

## Appendix: FY18 Community Preservation Plan Monitoring and 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>6</sup> Somerville voters passed the Act by 76%, the second highest passage rate in CPA history.<sup>7</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 \$12 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

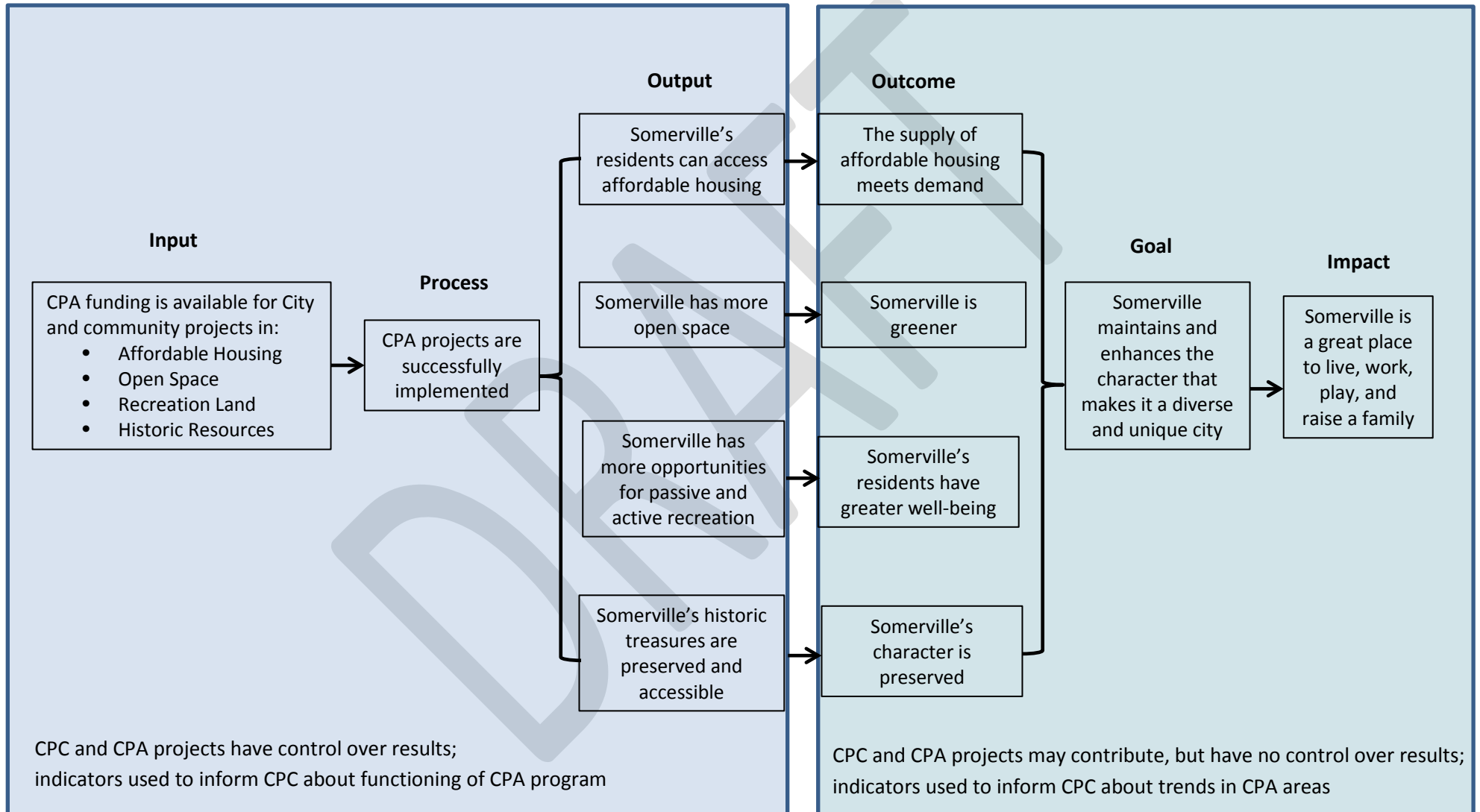
SomerVision's goal is to *foster vital, healthy, inclusive and distinctive urban neighborhoods that are the best possible places to live, work, play, do business, learn and serve*. The goal of the CPA Program is to contribute to SomerVision by ensuring that ***Somerville maintains and enhances the character 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>6</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>7</sup> Excludes Cape Cod communities that passed the predecessor to the CPA.

## CPA Results Chain



## Monitoring Matrix

	Indicators	FY15	FY16	FY17	Frequency	Source	Assumptions
<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	

N/A= not available

	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>8</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>8</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		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	
	% 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	
<b>Outcome 2:</b> Somerville is greener.	Open space as % of total land area	N/A	6.8%	N/A	Every 5 years	Somerville Open Space and Recreation Plan	
	# of new trees in Somerville (disaggregated by CPA, non-CPA)	441 (non-CPA)	59 (non-CPA)	94 (non-CPA)	Annually	City records	
	Annual EPA grade for Mystic River	A-			Annually	US Environmental Protection Agency	

	Annual EPA grade for Alewife Brook	D			Annually	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	City records	
	# of conservation restrictions recorded	0	0	0	Annually	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	Somerville Open Space and Recreation Plan	
<b>Output 2:</b> Somerville has more open space.	# of improved open spaces (CPA, non-CPA)	1- Marshall St. Playground	1- Kennedy School Playground	2- Argenziano Playground Cremin Playground	Annually	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	Somerville Open Space and Recreation Plan	

<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	OSPCD 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	

<b>Process:</b> CPA projects are successfully implemented.	% 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>9</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>10</sup>	\$2,878,304	\$1,924,661	Annually	CPA records	

<sup>9</sup> CPA applicants were first required to set measures of success for their projects in FY17.

<sup>10</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	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	Annually	CPA records	
	Annual optional City appropriation (\$ and %)	\$2,555,671 <sup>11</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)	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)	14 (8- open/rec; 4- historic; 2- 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)	Annually	CPA records	

<sup>11</sup> FY15 city appropriation includes FY14 appropriation

	% of EDF applicants that submit full proposals	73% (22/30) <sup>12</sup>	61% (18/28)	86% (12/14) <sup>13</sup>			
	% of EDFs/housing applications funded each year (disaggregated by recipient)	63% (19/30) Community: 68% (13/19) <sup>14</sup> City: 80% (8/10)	50% (14/28) <sup>15</sup> Community: 50% (8/16) City: 75% (6/8) Joint Community/City: 75% (3/4)	74% (14/19) Community: 60% (6/10) City: 86% (6/7) Joint: 100% (2/2)	Annually	CPA records	

<sup>12</sup> Counts each of the three EDFs submitted by the Somerville Museum as funded, as the projects were combined in the full applications

<sup>13</sup> Does not housing applications because the SATHF utilizes a one-step application process

<sup>14</sup> Counts each of the three EDFs submitted by the Somerville Museum as funded, as the projects were combined in the full applications

<sup>15</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.

<i>Results Matrix (or logical framework):</i>	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.
<i>Monitoring:</i>	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.
<i>Outcome:</i>	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.
<i>Open space:</i>	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.
<i>Preservation:</i>	Protect personal or real property from injury, harm or destruction.
<i>Recreation land:</i>	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.
<i>Rehabilitation / restoration:</i>	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.
<i>Support:</i>	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.
<i>Results Chain (or theory of change):</i>	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).

# of new CPA projects funded (disaggregated by area)	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).
% of EDF applicants that submit full proposals	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.
% of EDFs/housing applications funded each year (disaggregated by recipient)	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.