



JOSEPH A. CURTATONE  
MAYOR

## CITY OF SOMERVILLE, MASSACHUSETTS COMMUNITY PRESERVATION COMMITTEE



### MINUTES JULY 22, 2020

The Community Preservation Committee (CPC) virtually held a regular meeting at 6:00 pm on the GoToMeeting platform in compliance with Governor Baker's emergency orders regarding the Open Meeting Law during the COVID-19 crisis. An audio recording of the meeting is available upon request.

**Members Present** Chair Jane Carbone, Vice Chair Laura Beretsky, Eleanor Rances, Amelia Aboff, Heather Heimarck, Cristina Kennedy, Caitlin Hart, Tatiana Shannon

**Members Absent** Luisa Oliveira

**Staff Present** Judith Tumusiime, Andrew Louw, Alan Inacio, Arn Franzen, Brandon Wilson, Ted Louis-Jacques

**Others Present** Barbara Mangum, Jimmy Placide, Victoria Eduardo, Leensyn Rivera

#### MEMBERS

Jane Carbone, Chair  
Laura Beretsky, Vice Chair  
Luisa Oliveira  
Tatiana Shannon  
Amelia Aboff  
Eleanor Rances  
Heather Heimarck  
Cristina Kennedy  
Caitlin Hart

#### STAFF

Judith Tumusiime

The chair opened the meeting at approximately 6:05 p.m. and made a roll call of the members.

#### **Agenda item 1: Public comment period (5 minutes)**

There was no public comment.

#### **Agenda item 2: Introduction of the Summer Youths (5 minutes)**

Ms. Tumusiime informed the committee that three Summer Youth on the Mayor's program were selected to work on some aspects of the CPA multimedia package. Mr. Inacio led the introduction of the youth. The youth made a presentation of the activities they planned to do during the six weeks.

#### **Agenda item 3: Approve minutes from May 27 and June 10 meetings (5 Minutes)**

There were no edits to the minutes.

Upon a motion by Ms. Heimarck, seconded by Ms. Rances, the Committee approved the minutes from the May 27 and June 10 meetings by a vote of 8-0.

#### **Agenda item 4: Somerville Museum request for a change in scope for CPA FY16 and CPA FY19 Projects (5 Minutes)**

Ms. Mangum presented the Somerville Museum request for a change in scope for CPA FY16 and FY19 projects. She told the committee that the change in scope would allow the museum to get closer to the

construction of the access for all additions to the museum including an elevator. She informed the committee that the FY16 award of \$423,480 was for a variety of building projects and only \$20,217 had been spent to date. She said that over \$300,000 was for the construction of the elevator addition at that time and that they were not able to go forward with it for a number of reasons including the lawsuit against the museum. She listed the things that the FY16 funds had been spent on and requested the committee to allow the remaining \$403,263 to be added to the elevator construction project.

She also informed the committee that the museum had been awarded \$100,000 in FY19 for the collection care and fire detection improvements and that \$13,200 was used to upgrade the smoke detectors. She request that the remaining funds (\$86,800) be put towards the Access for All construction project. She also informed the committee that the museum was going to reappportion some of the donor funds that were for the Development Director into the elevator construction project. Ms. Magnum assured the committee that with those adjustments they were confident to go on with the project in the fall.

Ms. Carbone asked about the total funds that the museum wanted to allocate to the elevator construction project and Ms. Mangum responded that \$403,263 was needed from the FY16 and \$86,800 from the FY19 projects. She informed the committee that there was a 2% cost inflation factor bringing the total elevator construction cost to \$1,586,949. Ms. Carbone asked how much of the total funds were available to get the work done and Ms. Mangum responded that if the committee approved the FY16 and FY19 funding adjustments, there would be a balance of only \$30,000.

Ms. Carbone asked if the total included the construction contingency and Ms. Mangum responded that the construction company had included a 6% contingency but that there was a wish beyond that which they hoped to find funding for. Ms. Kennedy asked about the information in the email Ms. Mangum had sent regarding the emergency funding where the Museum lawyer was not comfortable with moving forward with the construction without the full amount and if that would now move forward with the change of scope. Ms. Mangum responded that initially the project had a deficit of \$235,000 but that if the change of scope is approved, the project would be down to needing only \$30,000 which the contractor was willing to accept. Ms. Carbone asked if the museum would be coming back to the committee to request for more funds to cover the balance and Ms. Mangum responded in affirmative.

Upon a motion by Ms. Shannon, seconded by Ms. Heimarck, the Committee agreed to change the scope for CPA FY16 and FY19 Somerville Museum projects by a vote of 8-0.

#### **Agenda item 5: Extension Requests for CPA Projects (15 Minutes)**

Ms. Tumusiime informed the committee that there were a number of projects which had not been completed and were requesting for time extension.

##### *Butterfly Pollinator Garden at the Morse Kelley Playground*

Mr. Franzen informed the committee that there were a number of CPA open space projects which the City's department of Public Space and Urban Forestry was partnering with the community. He told the committee that one of the projects was the Butterfly Pollinator Garden at the Morse Kelley Playground which was a great space. He said that the project was put forward by a group of the Green and Open Somerville who put in volunteer hours and that the City had been working with them on procurement and coordination issues. He informed the committee that most of the funds were spent and a total of

\$2,000 was remaining to take care of the signage and a fence to go around the edge of the garden. He requested the committee for time extension to complete those items.

Ms. Carbone asked about the schedule for the sign and Mr. Franzen responded that he didn't have the schedule but that he had an account setup with the signage company but that there was coordination to do on the lay out of the signage and what needed to be included. He informed the committee that they were plans for the purchase of the fence materials which had been affected by the COVID 19 crisis. He said that he estimated that the work would be completed within one year but to be safe he put a request for three years in case of unforeseen issues and some opportunities that could require amendment of the design. He informed the committee that they had added some marvelous tiled mosaic benches to the space.

Upon a motion by Ms. Beretsky, seconded by Ms. Kennedy, the Committee agreed to extend the FY17 grant for the Butterfly Pollinator Garden at the Morse Kelley Playground for three years, by a vote of 8-0.

#### *Healey Schoolyard Design*

Mr. Franzen informed the committee that the Plans for the Healey Schoolyard design were done and that they would go out to bid when the City is ready. He told the committee that because of the COVID 19 crisis the project had been postponed to a more appropriate time and requested for a three year grant extension because the portion of the design funds included construction administration costs such as the cost for the landscape architect to go out to weekly site meetings to monitor the construction. Ms. Carbone asked when they were going out to bid and Mr. Franzen responded that it was a \$6.5 million project and he couldn't tell when it would go out to bid because of the COVID 19 crisis.

Upon a motion by Ms. Heimarck, seconded by Ms. Shannon, the Committee agreed to extend the FY17 grant for the Healey Schoolyard design for three years, by a vote of 8-0.

#### *Renovation Plans for Henry Hansen Park*

Mr. Franzen informed the committee that he was putting forward the request for the renovation plans for the Henry Hansen Park on behalf of the Department of Veterans Services. He told the committee that it was a great project which had gone forward with the then Director of Veterans Services, Mr. Bryan Bishop. He told the committee that Mr. Bishop engaged the CBA Landscape Architects who developed the schematic design for the park but that unfortunately Mr. Bishop left the City to join the City of Boston and had not been replaced until Mr. Ted Louis Jacques was hired as the new Director of Veterans Services in the spring. He told the committee that they had held meetings with Mr. Jacques about the next steps in the design process but that unfortunately COVID 19 crisis affected the plans. He informed the committee that Mr. Jacques would like to continue the project and would be support by the department of Public Space and Urban Forestry. He requested the committee to extend the grant for another three years.

Ms. Heimarck asked if the funds were for the design or renovation and Mr. Franzen responded that the funds were for the design services. Ms. Heimarck asked where the money for construction after the design would come from and Mr. Franzen responded that they were not sure yet but that the schematic design would include the construction estimates. He told the committee that there were still several details to work out in the design and that the construction designs needed to be complete before they could go out to bid. He added that there were also a number of questions that needed to be resolved with the Landscape Architects. Ms. Beretsky asked if it was an opened ended project since so much was

on hold and Mr. Franzen agreed that they didn't have a schedule yet and that there were a lot of projects which were within the City open space list of priorities which made it hard to know if that was one of them. He added that there was interest on the part of the City to complete the project. Ms. Carbone asked whether they would continue working with the CBA Landscape Architects and Mr. Franzen responded that they would continue working with them.

Upon a motion by Ms. Beretsky, seconded by Ms. Heimarck, the Committee agreed to extend the FY17 grant for the renovation plans for the Henry Hansen Park for three years, by a vote of 8-0.

#### *Milk Row Cemetery Grave Marker Restoration Project*

Ms. Wilson presented the request for a date extension for the FY17 CPA grant project at the Milk Row Cemetery. She informed the committee that, the request was part of the master plan that started in 2002 and that they had received funds from the CPA for the conservation of the monument and head stones. She requested the committee for an extension of three months to enable them to restore and preserve the fragment that was in storage using the remaining contingency funds of \$1741. Ms. Tumusiime informed the committee that a three month extension may not be feasible because of the processes involved in approving the extension and the permits for the restoration. Ms. Shannon suggested that because of the uncertainties caused by COVID 19 a year extension could be the safe option. Ms. Wilson agreed and amended her request to extend the grant to October 2021.

Upon a motion by Ms. Beretsky, seconded by Ms. Shannon, the Committee agreed to extend the FY17 grant for the Milk Row Cemetery Grave Marker Restoration Project to October 2021, by a vote of 8-0.

#### **Agenda item 6: Approval FY20 Annual Report (15 minutes)**

Ms. Tumusiime presented the FY20 annual report and informed the committee that the FY20 budget in the report was discussed at November 2019 meeting. She also presented the CPA allocations from FY15 through April FY20 and the FY20 CPA applications. She also presented a listed of completed projects and ongoing projects. She also presented the FY20 CPA results and informed the committee that the projects were distributed in all the 7 wards. She also presented the applicant and implementer survey results and the program improvements which included the multimedia package which was put on hold because of the COVID 19 outbreak. She also presented the results of the community engagement activities.

Upon a motion by Ms. Heimarck, seconded by Ms. Beretsky, the Committee approved the FY20 annual report, by a vote of 8-0.

#### **Agenda item 7: Status of the Powderhouse School park renovations (5 Minutes)**

Mr. Inacio presented an update on the progress of the Powderhouse school park renovation project and told the committee the City is hopeful that the schedule would be completed by the end of August. He also informed the committee that Eversource Energy was a big challenge. Mr. Dan Sibor the Project Manager informed the committee that the schedule remains up to date and that he had presented the same update to city's Economic Development and Park teams.

#### **Agenda item 8: Approval of FY21 Eligibility Determination Forms (40 Minutes)**



Ms. Carbone informed the committee that she was on the board of Cascap Inc. and excused herself from discussing the 181 Broadway House project.

#### *181 Broadway House Project*

Ms. Tumusiime informed the committee that the applicant had been in touch before the submission of the eligibility form and that she had informed them about the historic preservation restrictions which were required if they were to access CPA funds. Ms. Heimarck asked if the project would be wholly supported by historic funds or if it would be a hybrid with affordable housing funds and Ms. Tumusiime responded that it would be supported wholly by historic preservation funds because the affordable housing funds could not support renovations of a building which was not constructed using CPA funds. Ms. Heimarck said that if they put a preservation restriction on the property it could be eligible for funding and Ms. Inacio agreed.

Upon a motion by Ms. Beretsky, seconded by Ms. Shannon, the Committee voted 7-0 to determine the 181 Broadway House project eligible for CPA funding.

#### *EPH 277 Broadway Exterior Siding and Trim Repairs*

Ms. Carbone asked if there was a preservation restriction and Ms. Tumusiime responded that it was under review. Ms. Tumusiime informed the committee that CPC had awarded FY19 funds for a comprehensive building assessment plan which included plans to repair the building's vinyl siding, restore the exterior wood trim, and make additional repairs to the wood and paint. Ms. Carbone and Ms. Heimarck asked if the CPA funds could repair the vinyl siding and whether it was not a maintenance aspect.

Ms. Tumusiime shared with the committee the table of allowable uses of CPA funds. Ms. Shannon said that there were limited details of what EPH wanted to use the CPA funds for and suggested that the application should be approved with request to amend the language in the form. Ms. Hart agreed that it was very difficult to draw a line between restoration and maintenance. Ms. Aboff told the committee that the report which was earlier submitted on the existing condition of the building, had a lot of work which needed to be done on the building and that even if the vinyl siding was beyond the scope of the CPA funding, there were other items that needed to be funded. Mr. Inacio suggested that there could be other opportunities for providing the details in the full application and that the application would also have to be reviewed by the City planner before it is discussed with the committee.

Upon a motion by Ms. Aboff, seconded by Ms. Beretsky, the Committee voted 8-0 to determine the 277 Broadway Exterior Siding and Trim Repairs project eligible for CPA funding with amendment to the Vinyl siding.

#### *Collection Care at the Somerville Museum*

Ms. Kennedy reminded the committee that the Somerville Museum request had already be discussed.

Upon a motion by Ms. Kennedy, seconded by Ms. Beretsky, the Committee voted 8-0 to determine the Collection Care at the Somerville Museum project eligible for CPA funding.

*Somerville Hispanic Church (Formerly Known as Grace Baptist Church)*

Ms. Carbone asked if the building had a preservation restriction and Ms. Tumusiime responded that it was under review.

Upon a motion by Ms. Shannon, seconded by Ms. Aboff, the Committee voted 8-0 to determine the Somerville Hispanic Church project eligible for CPA funding.

*Broadway Winter Hill Congregational Church Bell Tower*

Ms. Carbone asked if there was a preservation restriction on the church and Ms. Tumusiime responded that there was no preservation restriction.

Upon a motion by Ms. Heimarck, seconded by Ms. Beretsky, the Committee voted 8-0 to determine the Broadway Winter Hill Congregational Church Bell Tower project eligible for CPA funding only if they are agreeable to a permanent preservation restriction.

*Healey School Tot Lot Renovation*

Mr. Franzen told the committee that the project was part of the larger Healey school yard renovation and that it was the main focus of the Healey school committee and an important part of the design. He told the committee that the project was proposed by the Friends of the Healey on City land and that the form was submitted in partnership with the Friends of the Healey and the Public Space and Urban Forestry department.

Upon a motion by Ms. Heimarck, seconded by Ms. Beretsky, the Committee voted 8-0 to determine the Healey School Tot Lot renovation project eligible for CPA funding.

*City of Somerville's Land Acquisition Fund*

Mr. Franzen presented the form for the land acquisition fund and said that the CPA had previously supported the fund.

Upon a motion by Ms. Shannon, seconded by Ms. Aboff, the Committee voted 8-0 to determine the City of Somerville's Land Acquisition Fund project eligible for CPA funding.

*Works Progress Administration Carved Wood Bas- Relief Restoration Project*

Ms. Tumusiime informed the committee that the project was on going and was previously funded in FY19 but that it was over budget by about \$3,500. She told the committee that the request was for additional funds to cover the budget.

Upon a motion by Ms. Beretsky, seconded by Ms. Kennedy, the Committee voted 8-0 to determine the Works Progress Administration Carved Wood Bas- Relief Restoration Project Somerville public library project eligible for CPA funding.

**Agenda item 9: Results from FY20 Applicants' and Implementers' surveys (5 Minutes)**

Ms. Tumusiime presented the results from the FY20 Applicants' and Implementers' surveys and informed committee that she had received 3 responses (50%) for the FY20 applicants survey and 7 (54%) for the implementers' survey.

Upon a motion by Ms. Beretsky, seconded by Ms. Shannon, the Committee voted 8-0 to accept the results of the FY20 Applicants' and Implementers' surveys.

**Agenda item 10: Schedule for the Affordable Housing Trust's FY21 CPA Request for Proposals process (2 Minutes)**

Ms. Tumusiime presented the schedule for the Affordable Housing Trust's FY21 CPA Request for Proposals process. Ms. Carbone informed the committee that in the past the CPC had requested the trust to reconcile their request for proposals with those of the CPC.

**Agenda item 11: Other business (2 minutes)**

Mr. Inacio presented the invoice of the Community Preservation Coalition membership dues and requested the committee to approve the payment.

Upon a motion by Ms. Heimarck, seconded by Ms. Beretsky, the Committee voted 8-0 to approve the payment of the coalition member dues.

Ms. Tumusiime informed the committee that her predecessor had hired a consultant, who was a Tufts student in the UEP program who recommended that the next evaluation be done by a team of students through the UEP Field Projects program. She informed the committee that the next evaluation was due in 2021 but that the CPA did not have funds to support the evaluation and that the Tufts UEP Field Project was a great opportunity. She presented the call for Tufts UEP Field Project Hosts - spring 2021 and requested the committee to approval the submission of a concept for the Tufts UEP Field Project.

Upon a motion by Ms. Beretsky, seconded by Ms. Heimarck, the Committee voted 8-0 to approve the submission of the concept for the Tufts UEP Field Project.

Ms. Carbone informed the committee that there was no CPC meeting in August.

**Next meeting: The next CPC will be held at 6:30 p.m. on September 23, 2020.**

**Meeting Adjournment**

Upon motion from Ms. Beretsky, seconded by Ms. Shannon, the Committee voted 8-0 to adjourn at 8:00 p.m.

**Documents and Exhibits**

1. Agenda
2. Minutes from May 27 and June 10 meetings
3. Somerville Museum request for a change in scope for CPA FY16 and CPA FY19
4. Extension Requests for CPA Projects
5. FY21 Eligibility Determination Forms
6. Results from FY20 Applicants' and Implementers' surveys



JOSEPH A. CURTATONE  
MAYOR

## CITY OF SOMERVILLE, MASSACHUSETTS COMMUNITY PRESERVATION COMMITTEE



### AGENDA

**DATE:** Wednesday, July 22, 2020  
**TIME:** 6:30 – 8:30 p.m.  
**PLACE:** GoToMeeting (Please join from your computer, tablet or smartphone.  
<https://global.gotomeeting.com/join/792438397>. You can also dial in  
using your phone. United States: [+1 \(646\) 749-3122](tel:+16467493122). Access Code: 792-  
438-397)

#### MEMBERS

Jane Carbone , Chair  
Laura Beretsky, Vice Chair  
Luisa Oliveira  
Tatiana Shannon  
Amelia Aboff  
Eleanor Rances  
Heather Heimarck  
Cristina Kennedy  
Caitlin Hart

#### STAFF

Judith Tumusiime

1. Public comment period (5 minutes)
2. Introduction of the Summer Youths (5 minutes)
3. Approve minutes from May 27 and June 10 meetings (5 Minutes)
4. Somerville Museum request for a change in scope for CPA FY16 and CPA FY19 (5 Minutes)
5. Extension Requests for CPA Projects (15 Minutes)
6. Approval FY20 Annual Report (15 minutes)
7. Status of the Powderhouse School park renovations (5 Minutes)
8. Approval of FY21 Eligibility Determination Forms (40 Minutes)
9. Results from FY20 Applicants' and Implementers' surveys (5 Minutes)
10. Schedule for the Affordable Housing Trust's FY21 CPA Request for Proposals process (2 Minutes)
11. Other business (2 minutes)
12. Next meeting: Wednesday, September 23 at 6:30 p.m. (GoToMeeting)



JOSEPH A. CURTATONE  
MAYOR

## CITY OF SOMERVILLE, MASSACHUSETTS COMMUNITY PRESERVATION COMMITTEE



### MINUTES MAY 27, 2020

The Community Preservation Committee (CPC) virtually held a regular meeting at 6:30 pm on the GoToMeeting platform in compliance with Governor Baker's emergency orders regarding the Open Meeting Law during the COVID-19 crisis. An audio recording of the meeting is available upon request.

**Members Present** Chair Jane Carbone, Vice Chair Laura Beretsky, Eleanor Rances, Amelia Aboff, Heather Heimarck, Cristina Kennedy, Luisa Oliveira, Caitlin Hart

**Members Absent** Tatiana Shannon

**Staff Present** Judith Tumusiime, Alan Inacio, Kristen Stelljes, Heidi Burbidge  
Andrew Louw,

**Others Present**

#### MEMBERS

Jane Carbone, Chair  
Laura Beretsky, Vice Chair  
Luisa Oliveira  
Tatiana Shannon  
Amelia Aboff  
Eleanor Rances  
Heather Heimarck  
Cristina Kennedy  
Caitlin Hart

#### STAFF

Judith Tumusiime

The chair opened the meeting at approximately 6:33 p.m and made a roll call of the members.

#### **Agenda item 1: Public comment period (10 minutes)**

No members of the public were present. Ms. Tumusiime informed that committee that staff had joined the meeting and requested them to introduce themselves. Mr. Andrew Louw introduced himself as the Public Space Planner in the PSUF – Public Space Division and said he was attending at the request of Ms. Oliveira and that eventually he would take over from her. Ms. Heidi Burbidge introduced herself as the Housing Program Coordinator in the Housing Division and Staff on the Affordable Housing Trust and Mr. Alan Inacio told the committee that he was the Director of Finance and Administration in the Mayor's Office of Strategic Planning and Community Development where the CPA program was moving on July 1.

#### **Agenda item 2: Approve minutes from April 29 Meeting**

No comments were made on the minutes from April 29 Meeting. Upon a motion by Ms. Beretsky, seconded by Ms. Oliveira, the Committee approved the minutes from the April 29 meeting by a vote of 8-0.

#### **Agenda item 3: Review results from FY21 CPA Survey**

Ms. Tumusiime presented a summary of the FY21 survey results (Table 1. below) and said that the results differed from the previous results from the FY21 Public Hearing and the 2019 voting. She told the committee that the percentage for affordable housing had decreased and the one for historic resources had increased. She also presented the comments which included; having enough affordable housing for all the people who need it in order to remain in Somerville.

Table 1: FY21 CPA Survey Results

	<b>Affordable Housing</b>	<b>Open Space and Recreation</b>	<b>Historic Resources</b>	<b>Flexible Funding</b>
<b>TOTAL:</b>	\$1,270	\$980	\$1,120	\$230
<b>PERCENT:</b>	35.28	27.22	31.11	6.39

Ms. Carbone observed that affordable housing was still the highest percentage followed by historic resources. Ms. Tumusiime also presented the voting results at the hearing (Table 2) and for the year to help in the discussion and decisions on FY21 allocations (Table 3).

Table 2: Results from April 22 Public Hearing

	<b>Affordable Housing</b>	<b>Historic Resources</b>	<b>Open Space/ Recreation</b>	<b>Flexible</b>
<b>Number</b>	52	18	20	8
<b>Percentage</b>	53%	18%	21%	8%

Table 3: 2019 Results from SomerStreets Voting

	<b>Affordable Housing</b>	<b>Historic Resources</b>	<b>Open Space/ Recreation</b>	<b>Flexible</b>
<b>Number</b>	1238	556	985	308
<b>2019</b>	40%	18%	32%	10%

Ms. Beretsky commented on the difference in the results of the public hearing and the survey and noted that the percentage for affordable housing had reduced for the FY21 CPA survey. Ms. Kennedy asked Ms. Tumusiime how the FY21 results compared with those of the previous years and Ms. Tumusiime responded that the percentages from the 2019 voting exercise were similar with the highest percentage going for affordable housing. Ms. Heimarck asked about the FY21 participation of the survey compared to FY20 and Ms. Tumusiime said that the participation FY20 was about 100 compare to 36 for FY21. She said that overall the total number of people who participated in the FY21 survey, SomerStreet voting, and FY21 public hearing was comparable to the previous years. Ms. Kennedy requested that in future the number of people who participated in the survey should be included in the table.

#### **Agenda item 4: Finalize Community Preservation Plan**

Ms. Carbone reminded the committee that the approval of the Community Preservation Plan was deferred pending the 15 May deadline for the FY21 CPA survey and the public comment period. Ms. Tumusiime said the guidance pending from the committee was on the FY21 allocations. Ms. Carbone informed the committee that the percentage allocation for affordable housing was increased two years

ago from 45% to 50% and the undesignated fund allocations were also adjusted. Ms. Heimarck asked about the historic usefulness of the undesignated funds and whether the 10% can be pushed downwards. Ms. Tumusiime responded that the undesignated funds had played a very important role because the committee typically received more applications in the different categories than can be supported by the allocated funds. She gave an example of FY20 applications where money from the reserve supported funding of the Somerville Museum and Open space acquisition fund.

Ms. Carbone asked whether the committee felt that the numbers should change or should stay the same as last year, because in the survey people indicated that they wanted both support for housing and historic resources. Ms. Heimarck said that the FY21 survey indicated that people wanted support for housing and historic resources but that the numbers for open space were also close. Ms. Heimarck asked the city isn't the only one which has tapped into the open space funds and that it sounded like there was going to be a slowdown in the building of parks and open space from the last CPC meeting. Ms. Oliveira responded that there was going to be a slow down of everything because of the pandemic but that wouldn't certainly say that there is going to be a slowdown of parks and open spaces and not historic or other projects. She added that there was going to be an economic fall down from the pandemic, both on municipal and federal levels and that was not only on parks and open spaces. She said that in her opinion it made a lot of sense to be able to have some flexibility, and that she didn't think that the surveys were enough to change the percentages.

Ms. Heimarck asked if there was a response to COVID that supported putting more money in the community housing because it's an unusual year. Ms. Burbidge responded that that they had been keeping the trustees for the Affordable Housing Trust Fund up to speed on the funds that have been expended by the agencies which were administering trust funded housing programs. She added that they had seen a sharp increase in the last couple of months for the demand for housing assistance programs, in particular the tenancy stabilization program and some of the longer term rental assistance programs. She informed the committee that they heard back from trustees in the last meeting that they were interested in the possibility of increasing the award for programs depending on how that need would continue. Ms. Kennedy asked if there was an argument for increasing undesignated funding to see where the need is greatest over the next several months. Ms. Carbone responded the committee would have to designate where they would want to put the funding and that it could be distributed based on the percentages of the different categories.

Ms. Tumusiime informed the committee that from the inquiries and the pre-applications she had received there was likely to be increase of FY21 applications in all the three categories. Ms. Aboff asked about how obligated the committee was to fund individual projects in keeping with the allocations which were set the plan. Ms. Tumusiime responded that once the committee sets the allocation they can't be changed during the application review process. Ms. Carbone added that for cases where there are more applications the undesignated funds can be used to fund the additional projects in the different categories. Ms. Aboff told the committee that understanding that current situation which may affect the organizations' she was wondering whether they could increase the allocation of the

undesignated funds. She added that FY21 might be a different future. Ms. Carbone told the committee that increasing the undesignated funds would require reduction of the allocation in the three other categories and that she was not comfortable reducing the affordable housing allocations considering the risk to families that had been caused by the COVID-19 outbreak. Ms. Beretsky agreed with Ms. Carbone that there was a high possibility of having a high increase in the affordable housing applications in FY21. She also agreed with Ms. Tumusiime to maintain the FY20 allocations.

Ms. Tumusiime informed the committee that the debt service for the West Branch Library of \$128,278 would be paid for the first time in FY21 reducing the historic funding significantly. She also told the committee that the city had received guidance from the Department of Revenue to conservatively plan for the FY21 CPA budget because of the uncertainties in releasing the earlier projected revenue increases because of the COVID-19 outbreak and that the state match had been reduced the state match to 11.2%.

Upon a motion by Ms. Beretsky, seconded by Ms. Oliveira, the Committee approved to maintain the FY20 funding allocations for FY21 by a vote of 8-0.

#### **Agenda item 5: Review Somerville Affordable Housing Trust report**

Ms. Burbidge presented an overview of the Somerville Affordable Housing Trust report. She told the committee that the report captured the progress for the last six months of FY20. She presented the different funding sources for the Trust which included the CPA fund (\$1.16 million) and the non-CPA Trust fund which came from Linkages, Inclusionary Fractional Payments, and Loan repayments which totaled \$2.6 million and made about two thirds of the total funding of the Trust. She also presented the CPA affordable housing funds from FY14 to FY20. She took the committee through the Request for Proposal process which gave an idea of the kind of projects to expect in FY21. She told the committee that the applications included one development project and housing programs which included lease differential programs, housing stability, PASS Expansion, HOME PASS Program, 100 Homes Administrative expenses, and Emergency Shelter and Homeless programs.

Ms. Burbidge presented the allocations of the 100 Homes program over a time (FY14-FY20) and said that the program had created over 53 units and that 48 had been occupied. She also presented other ongoing projects and their allocations over the years which showed that some funds had been drawn down and other projects had funds available especially for the housing programs. Ms. Carbone asked about the CPA funds and non-CPA funds and Ms. Burbidge said that the non-CPA funds were included in the chart because they fund similar programs as the CPA funds and that she wanted to show the funds available for the different programs. Ms. Carbone asked about the CAAS program and Ms. Burbidge responded that CAAS stabilization program was funded using CPA funds and that it was different from the tenancy stabilization program. Ms. Beretsky asked if the 100 Homes program was only for rental and Ms. Burbidge responded in affirmative. Ms. Carbone asked whether the Clarendon project was going to receive bonding money and Ms. Burbidge responded that a bond would be issued for that project. She gave a brief history of the project and said that progress had been made on the side of the developer and that it was awaiting approval from the city.



Ms. Carbone asked whether the city had received any housing COVID funding and Ms. Burbidge responded that the city had received funds from HUD through the CARES Act program for ESG program totaling to \$750,000 (for emergency rental assistance program) and that the CDBG had awarded \$1.5 million and that the city had allocated \$80,000 to the COVID fund. She said the total COVID -19 funds as of April 29 totaled to \$2.3 million. Ms. Oliveira thanked Ms. Burbidge for a good report.

Upon a motion by Ms. Kennedy, seconded by Ms. Beretsky, the Committee accepted the Somerville Affordable Housing Trust report by a vote of 8-0.

**Agenda item 6: Approve FY21 CPA Budget**

Ms. Tumusiime presented the FY21 CPA budget and told the committee that for the first time the city was not likely to allocate funds to the FY21 CPA budget. She said that the total debt service was \$442,779 and the available total for FY21 project was about \$1.6 million. Ms. Heimarck asked about the period of the payment of debt service and Ms. Tumusiime responded that it was between 10-30 years. Ms. Heimarck requested Ms. Tumusiime to keep track of the debt service payment.

Upon a motion by Ms. Heimarck, seconded by Ms. Berestky, the Committee approved the proposed FY21 budget by a vote of 8-0.

**Agenda item 7: Approve FY20 Annual Report**

Ms. Tumusiime requested to defer the approval of the FY20 Annual Report to the next CPC meeting.

**Agenda item 8: CFP CPA Multimedia Package**

Ms. Tumusiime informed the committee that only one proposal had been submitted despite the extension of the deadline to April 10. She told the committee that she received two emails after the deadline inquiring about the call for proposal. She told the committee that the funds for multimedia package could only be utilized in FY20 and that if they were not used then the funds would be transferred to the CPA reserve and used for the FY21 budget. She asked the committee for guidance on how to proceed on the CFP. Ms. Carbone told the committee that the CFP went out pre-COVID-19 and that now there were restrictions and was wondering if it would be done during the outbreak. Ms. Kennedy asked about the timelines and Ms. Tumusiime responded that the plan was for the contract to be signed by June 15. Ms. Kennedy asked what would happen to funds if the project was not done and Ms. Tumusiime responded that the funds would be transferred to the CPA budget reserve and which would be used for FY21 budget but would not be specifically for the multimedia package. She told the committee that the project could be supported by the FY21 administration budget.

Ms. Hart told the committee that she would be in favor of delaying the project because she wanted to see more applications and she wondered about the logistics of the of doing the project during the COVID-19 outbreak which required social distancing. She also said that one of the purposes of the package was to generate more projects and was wondering if it would be helpful during the COVID-19 outbreak. She also thought that there could be meaningful stories that could result from the COVID-19 outbreak which could be captured as part of the package. Ms. Beretsky agreed with Ms. Hart. Ms.

Heimarck asked about the period of the project implementation after approval and Ms. Tumusiime responded it would be for six months.

Ms. Aboff said that she did think that the package was a priority under the COVID-19 outbreak. Ms. Beretsky asked whether Ms. Tumusiime could request proposals from the people that had reached out to her and compared them but inform them that the process had been postponed because of the COVID-19 outbreak but pick it up when the situation improves. Ms. Oliveira responded that there could be a complication and asked Ms. Tumusiime if she had put out the CFP through the purchasing department. Ms. Tumusiime responded that she had contacted purchasing and that she was advised because the amounts were less than \$10,000, she could handle the CFP process. Ms. Oliveira asked Ms. Tumusiime to check with purchasing on how long the CFP could be valid. Ms. Carbone also added that the public events where the firm could get information about the CPA program had been suspended and was wondering what the project would look like. After extensive discussion the committee agreed to postpone the CFP.

Upon a motion by Ms. Aboff, seconded by Ms. Oliveira, the Committee postponed the CFP CPA Multi Media Package by a vote of 8-0.

#### **Agenda item 9: Update FY21 Pre-applications**

Ms. Tumusiime presented the pre-applications and said that she had received five pre-applications and that one was a late submission. She informed the committee that the City department of Public Space and Urban Forestry had accepted to sign on one of the pre-applications. Ms. Oliveira told the committee that her understanding was that the pre-application process was setup so that the city could decide whether it would sign or not sign on a proposal and she wondered whether the pre-applications could be discussed with the committee. Ms. Tumusiime agreed that the city determined whether to be a co-applicant or not but that she shared the pre-applications with the committee because it was part of the application process.

Ms. Oliveira said that she didn't think that the committee needed to discuss the pre-applications because they were still in the application process and Ms. Tumusiime responded that she shared the pre-applications with the committee for information and that the committee could decide whether they would like to discuss the pre-applications or not. Ms. Carbone told the committee that in the past only applications that had been reviewed by the city were brought before the committee. Ms. Carbone said that because there were many new members on the committee it was important to know what they could be involved in and what they couldn't. Ms. Kennedy asked whether there were some applications that did not need to be reviewed by the committee and Ms. Tumusiime said that for the applications that needed to do projects on city land the city had to accept to be a co-applicant. Ms. Oliveira gave the history regarding the pre-applications and Ms. Tumusiime agreed and also added that the committee could decide how they want to handle the pre-applications moving forward. Ms. Carbone guided that the committee was reviewing the pre-application for general information.

Ms. Heimarck reminded the committee that Ms. Tumusiime had raised the issue of how to handle late submissions and also wondered why sidewalks could not be supported by CPA funds. Ms. Oliveira responded that the Blessing of the Bay project had a lot of complications to it and that in order for the project to move forward the city has to sign off but that the city was still researching and that

conversations were ongoing. Ms. Oliveira asked whether the pre-applications that had missed the deadline and didn't require the city be a co-applicant could submit a full application and Ms. Tumusiime responded that they could proceed to the eligibility determination phase and if approved could submit a full proposal. Ms. Carbone asked if the pre-applications that had not be signed on by the city could submit a full proposal and Ms. Tumusiime responded that for projects on city land where the city is not a co-applicant cannot submit a full proposal and Ms. Oliveira agreed.

#### **Agenda item 10: Project Updates**

Ms. Tumusiime informed the committee that the City Council had approved the re-purposing of \$200,000 CPA funds awarded to the City's Capital Project Division for the rehabilitation of City Hall.

#### **Agenda item 11: Other business**

There was no other business.

**Next meeting: The next CPC will be held at 6:30 p.m. on June 24, 2020.**

#### **Meeting Adjournment**

Upon motion from Ms. Hart, seconded by Ms. Heimarck, the Committee voted 8-0 to adjourn at 8:17 p.m.

#### **Documents and Exhibits**

1. Agenda
2. Minutes from April 29 meeting
3. Results from FY21 CPA Survey
4. Community Preservation Plan
5. Somerville Affordable Housing Trust report
6. FY21 Budget
7. CFP CPA Multi Media Package application



JOSEPH A. CURTATONE  
MAYOR

## CITY OF SOMERVILLE, MASSACHUSETTS COMMUNITY PRESERVATION COMMITTEE



### MINUTES JUNE 10, 2020

The Community Preservation Committee (CPC) virtually held a regular meeting at 6:00 pm on the GoToMeeting platform in compliance with Governor Baker's emergency orders regarding the Open Meeting Law during the COVID-19 crisis. An audio recording of the meeting is available upon request.

**Members Present** Chair Jane Carbone, Vice Chair Laura Beretsky, Eleanor Rances, Amelia Aboff, Heather Heimarck, Cristina Kennedy, Luisa Oliveira, Tatiana Shannon

**Members Absent** Caitlin Hart

**Staff Present** Judith Tumusiime

**Others Present** Andrew Louw, Cortney Kirk, Barbara Mangum

#### MEMBERS

Jane Carbone, Chair  
Laura Beretsky, Vice Chair  
Luisa Oliveira  
Tatiana Shannon  
Amelia Aboff  
Eleanor Rances  
Heather Heimarck  
Cristina Kennedy  
Caitlin Hart

#### STAFF

Judith Tumusiime

The chair opened the meeting at approximately 6:09 p.m. and made a roll call of the members.

#### **Agenda item 1: Public comment period (10 minutes)**

There was no public comment. Ms. Carbone informed the committee that Ms. Beretsky would join the meeting later. She informed the committee that the meeting was called to discuss the FY21 emergency funding requests.

#### **Agenda item 2: FY16 Somerville Museum Capital Improvements Phase 5 Award Extension Request**

Ms. Mangum presented the FY16 Somerville Museum Capital Improvements Phase 5 Award Extension Request and said that they were not able to use all the funds within the grant period because part of the funds was for the construction of the elevator for the 'All Access project'. She said that the All Access project was a \$1.6 million dollar project and that they needed to get all the funds before starting the project and that was why they were requesting for an extension for another three years.

Ms. Aboff asked whether there was a reason why the request was brought up at an emergency meeting or whether they did not anticipate the expiration date of the funds. Ms. Mangum responded that they found out recently that these funds needed to be used and that they realized that they had not requested for an extension. Ms. Carbone asked whether the extension needed to be granted before the next council meeting and Ms. Tumusiime responded in affirmative. Ms. Oliveira requested that the grantees be mindful of the contract deadlines to avoid emergency requests for contract extensions. Ms. Mangum agreed and said they would give plenty of time before requesting for future project extensions. Ms. Kennedy observed that in the request there was mention of extension to 2021 and wondered

whether it was still an option. Ms. Tumusiime responded that a three extension would be better since the FY16 Somerville Museum Capital Improvements Phase 5 Award was part of the larger All Access project which was likely to be completed beyond the three years.

Upon a motion by Ms. Beretsky, seconded by Ms. Rances, the Committee approved the extension of the FY16 Somerville Museum Capital Improvements Phase 5 Award by three years vote of 8-0.

### **Agenda item 3: Somerville Museum emergency Funding Request**

Ms. Tumusiime informed the committee that the City had received an emergency funding request from the Somerville Museum of \$234,801 and requested Ms. Mangum to present their request. Ms. Mangum thanked the committee for allowing her to present their emergency funding request and gave a brief background on the Somerville Museum. She informed the committee that the Museum had recently received a \$200,000 award from the Massachusetts Cultural Facility Fund which made 15% of the total funds needed to start construction on the building provided the costs of contractor did not go up. She told the committee that she spoke with the contractor who said that they would have to rebid some of the sub-contractors but that he hoped the costs wouldn't go up. She informed the committee that the Museum which was a voluntary organization with two part time staff one day staff members would be able to finally get ADA compliance and a new addition that would have an elevator which would grant the public access to collections and office area.

Ms. Mangum told the committee that she hoped their request would be considered because they wanted to start construction this summer since the Museum was closed to the public as a result of the COVID 19 situation. She informed the committee that they still had their original team which included an Architectural consultant and that they had everything in order including the zoning Somerville Historic Preservation Commission approval, the Massachusetts Architectural Access Board approval, and are waiting to go to the Massachusetts Historic Commission approval. She told the committee that they had received two awards from the Massachusetts Cultural Facility Fund which was a great express of support and trust in their process. She informed the committee that in 1986 the Museum underwent renovation and that at the time they thought they would get an elevator and that was why there were built handicap restrooms in the basement but that they ran out of money. She also told the committee the COVID-19 outbreak had affected their plans of raising money from private sources.

Ms. Oliveira asked about the total funds that the Museum had received from the committee and Ms. Aboff responded that it was about one million dollars. Ms. Shannon said that, the total was not only for the elevator project and Ms. Aboff clarified that the one million dollars did not include the other non-construction projects. Ms. Mangum said the elevator project was close to \$900,000 dollars. Ms. Carbone asked how many of the Museum projects had submitted as emergency request and Ms. Mangum responded that they had submitted only one emergency request in FY20. Ms. Carbone asked how long the scope work would take and Ms. Mangum said about 11 months. Ms. Carbone asked about the regular application schedule and Ms. Tumusiime responded that the FY21 applications would be released in June and with deadlines for Eligibility Determination Forms and full applications expected in July and September respectively.

Ms. Carbone informed the committee that in the past the CPC has tried to limit emergency funds to real emergency situations and that even then it had been a challenge and wondered why Museum request was an emergency since the scope was for 11 months. She also asked why the Museum couldn't use the funds that had already been awarded. Ms. Mangum responded that the Museum trustees wouldn't start a project without knowing that the funds are in hand. She said that if she had confirmation that the funds would be provided during the regular application cycle then she would inform the trust and maybe then the project could start. She added that the reason it was an emergency was because they had wanted to start the project in July since the Museum was closed. After long deliberation the committee requested the Museum to consider doing the construction in phases.

Upon a motion by Ms. Aboff, seconded by Ms. Oliveira, the Committee agreed to deny the emergency funding request 8-0.

#### **Agenda item 4: Central Hill Playground Emergency Funding Request**

Ms. Tumusiime introduced Ms. Kirk who presented the emergency request for the Central Hill Playground of \$231,000 to be applied to only the playground. She told the committee that the pandemic had affected the bidding for the construction of the Central Hill Campus which was brought to a halt. She told the committee that the City had re-evaluated construction projects and the outstanding funds and assessed which projects were critical to forward and that as a result the larger Central Hill Campus Phase 1 project was put on hold for an unknown period of time. She told the committee that from the larger project the City was planning on borrowing over \$400 million dollars to pay for the construction which was going to be in combination with the \$400,000 dollars that was awarded just to the playground by the State PARC grant program and the \$300,000 dollars that the CPC awarded for that project.

Ms. Kirk informed the committee that the playground was demolished in November 2019 to make way for the high school project and that there was no active Central Hill playground at the moment. She told the committee that everyone in the City was beginning to recognize how important the playgrounds were during the pandemic. She also told the committee that the playground was critical to the daycares which were about to open. She added that the State recognized the importance of the playground and that was why they provided the PARC grant because it serves residents that are in an environmental justice neighborhood which are surrounding Central Hill who are mostly low income minorities, English isolation residents of Somerville. She also said that the playground serves not only residents in the local neighborhoods but everyone that comes to the Central Library, High School, and City Hall. She told the committee that some of the ideas they worked through the community meetings supported additional learning with learning programs in conjunction with the library which include story walk so that the library can change children's books so that people can read as they walk around the playground.

Ms. Kirk informed the committee that if the project didn't go forward, the City would have to give back the \$400,000 PARC grant to the State. She told the committee that the State was not providing extensions because of the COVID-19 emergency and that the City would have to reapply at another time and that it would not necessarily be guaranteed that the City would receive those funds again. She told the committee that she was coming to them to try and keep the playground project moving that because everything happened in the middle of reviewing the bids and that they hoped to start the project in July and that the State PARC funds would also be available in July.

Ms. Kennedy asked if there were any FY20 CPA funded projects that would not be able to be completed, where funds could be drawn rather than take funds out of the FY21 budget. Ms. Tumusiime responded that the FY20 budget was exhausted and that there were no funds available. She said that the open space funds were allocated to three projects which included \$300,000 for the Central Hill Campus Phase one project. Ms. Kennedy asked whether the Central Hill Campus funds could be used to fund the emergency request. Ms. Kirk responded that they were planning on using that money in addition to the emergency request funds. Ms. Oliveira clarified that, that the emergency funds would have come from the larger portion of the Central Hill Campus product which was put on hold due to the pandemic. Ms. Kirk said that the original FY20 Central Hill Campus Phase one project which was put on hold included the playground which was very critical. Ms. Kennedy asked what the \$300,000 FY20 CPA funds were being used for and Ms. Kirk responded that it was going to be applied to the larger project but that since the \$400,000 PARC grant was going to be applied only to the playground project and plus the \$300,000, and the emergency funds that she was requesting would guarantee that the playground would get constructed in July. She told the committee that the City had received the bids and that the bid that they were considering was for \$809,000 dollars with \$120,350 dollars in contingency.

Ms. Aboff asked whether the City was confident that the construction would happen in the timeline they were looking into. She also asked whether there was anything the committee needed to do to change or approve to be rerouted from the broader Central Hill Campus to the specific playground project. Ms. Kirk responded to the first question and said that the City Construction projects were permitted to proceed with the approval of the Infrastructure and Asset Management (IAM) Director who reviewed a COVID specific construction safety plan that the contractor would submit to IAM and that upon sufficient City safety measures for COVID the IAM department would grant permission for the construction to begin. Ms. Carbone asked whether the bids were received before or after COVID and if there would be additional construction costs for adding the protocols. Ms. Kirk said that the bid was received on April 17 which was a few weeks after the emergency shutdown and that, they had a virtual construction site walk to talk about the project. Ms. Oliveira added that most open space projects happen outside and that the protocols maybe different from those protocols of enclosed spaces. After long deliberations the Committee agreed to vote for the repurposing of the \$300,000 FY20 CPA funds to be used exclusively for the rehabilitation of the Central Hill playground and the reduction of the contingency funds in the emergency request from 15% to 12%. Ms. Tumusiime also presented the funding recommendation for the Central Hill playground emergency result.

Upon a motion by Ms. Beretsky, seconded by Ms. Aboff, the Committee agreed to reduce the contingency funds in the emergency request from 15% to 12% and approved \$206,080 dollars Central Hill playground emergency funding by a vote of 8-0.

Upon a motion by Ms. Oliveira, seconded by Ms. Beretsky, the Committee agreed to repurpose the \$300,000 FY20 CPA funds to be used exclusively for the rehabilitation of the Central Hill playground by a vote of 8-0.

Upon a motion by Ms. Oliveira, seconded by Ms. Beretsky, the Committee approved the funding recommendation for the Central Hill playground emergency request by a vote of 8-0.

#### **Agenda item 5: Other business**

There was no other business.

**Next meeting: The next CPC will be held at 6:30 p.m. on June 24 2020.**

**Meeting Adjournment**

Upon motion from Ms. Kennedy, seconded by Ms. Beretsky, the Committee voted 7-0 to adjourn at 8:00 p.m.

**Documents and Exhibits**

1. Agenda
2. FY16 Somerville Museum Capital Improvements Phase 5 Award Extension Request
3. Somerville Museum emergency Funding Request
4. Central Hill Playground Emergency Funding Request



From: Barbara Mangum <bmangum411@aol.com>

Sent: Thursday, June 18, 2020 5:25 PM

To: Judith Tumusiime

Subject: update on the Access for All project.

Hi Judith,

At last Saturday's trustee meeting, the Trustees were inclined to move ahead with the construction project without the full funding in place. However, one of the Trustees, Bill White (also a councillor) is a lawyer, who has dealt with this type of situation before. He said it would be immoral to go ahead and sign a contract with a contractor without letting the contractor know that full funding is not in place. I contacted Richard Graf, our architectural consultant about this and he agreed. In fact he said it could be considered fraudulent to sign a contract with a contractor knowing that we did not have the full funding in place. Therefore, we will not move forward with this project until full funding is in place.

Would you please let the CPC know? I just want everyone to understand that we are doing what we can and are not being capricious in not moving forward.

My best,

Barbara



**Somerville Museum**  
One Westwood Road  
Somerville, Massachusetts 02143  
(617) 666-9810

July 18, 2020

Somerville Community Preservation Act Committee  
c/o Judith Tumusiime  
Somerville Community Preservation Act Manager

Dear Community Preservation Act Committee Members,

I am writing to request the CPA Committee's approval for a change in the scope of the CPA FY16 award and the CPA FY19 award to the Somerville Museum to allow most of the remaining funds from these grants to go toward supporting the construction of a new addition onto the Museum's building that will enclose an elevator. This addition will allow the Museum to meet its ADA obligations, allow it to function as a community center for the 21<sup>st</sup> century, open up access to collections in a new way, allow the Trustees to receive grants from civic organizations that only utilize ADA compliant buildings, and more.

Costs of the construction have risen from approximately \$400,000 in an early 2015 cost estimate to \$1,573,000 in 2019 due to a number of factors: changes in the design required by the SHPC to make the addition more compatible with the historic building, a need to address further structural deficiencies in the area of the proposed elevator, a 2.5 year delay caused by an abutter's lawsuit and then an appeal of the judge's ruling, and escalating construction costs in Somerville as a "hot market". In order to avoid more delays that may continue to cause inflation of prices and to take advantage of having our team assembled and ready to go with all approvals in place, the Museum is requesting that the majority of the remaining funds from the CPC FY16 and CPC FY19 awards be allowed to be used instead for the construction of the Access for All addition. These funds combined with other donations the Museum has received and is receiving will allow construction to go forward this Fall, provided there have been no further cost increases since last year. We are now waiting for the updated prices from the contractor.

**The CPA FY16 Award:**

**\$423,480 for a variety of building improvements and inventory of the collection  
minus \$20,217 spent to date**

**Remaining to put toward the Access for All Construction Project: \$403,263.**

Expenditures to date include :

\$1,750 for a new handrail on the Central St. stairs - completed

\$5,366 repairs to the Central St. door and installation of a pushbar release and security improvements. - completed

\$6,072 capital improvements to security- more work remains to be done. Waiting on completion of new construction.

\$1,352 for a new fire alarm panel. - completed

\$69.85 in collection care and inventory supplies – preliminary work has started. More will be done with the commencement of the construction project, and is needed for when the collections return.

\$4,311 in consultant fees for design of the new storage space. Preliminary work has started.

\$1,286 examination of the Palladian Window (Gentle Giant moving fees and R. Graf, B. Mangum, P. Quinn review.) Part of the ADA project and is included in the scope of the construction work to be done.

**The CPA FY19 Award:**

**\$100,000 for collection care and fire detection improvements.**

**minus \$13,200 spent to date on the upgrade of smoke detectors.**

**Remaining to put toward the Access for All construction project: \$86,800.**

The Museum intends to ask the CPC for funds for security, collection care and any increases that have occurred since the 2019 cost projections were made in the 2021 cycle of CPA awards. In this way, the work that was intended through these grant awards will be completed and the building project assured a successful conclusion.

Thank you to the Committee for the CPA for your consideration of this matter.

Sincerely yours,

A handwritten signature in black ink, appearing to read 'Barbara Mangum', with a stylized flourish at the end.

Barbara Mangum  
President of the Trustees  
Somerville Museum



**CITY OF SOMERVILLE, MASSACHUSETTS**  
***OFFICE OF STRATEGIC PLANNING AND COMMUNITY DEVELOPMENT***  
**JOSEPH A. CURTATONE**  
**MAYOR**

**GEORGE J. PROAKIS, AICP**  
**EXECUTIVE DIRECTOR**

July 21, 2020

Somerville Community Preservation Act Committee  
c/o Judith Tumusiime  
Somerville Community Preservation Act Manager

Dear Ms. Tumusiime and Community Preservation Act Committee Members,

I am writing to request the CPA Committee's approval of an extension of the FY17 \$13,000 CPA award to Green and Open Somerville, and City's Department of Public Space and Urban Forestry (PSUF), for the development of the Butterfly Pollinator Garden at the Morse Kelley Playground.

At present the majority of the funds have been expended and the garden has been planted and looks wonderful, and we encourage you to stop by for a visit. However, there are still some outstanding items to be completed, including a fence and the park signage. Therefore, we would like to request an extension of the balance of the CPA grant funds year until the summer of 2023.

Thank you for your consideration of this matter. Please do not hesitate to call with any questions.

Sincerely yours,

Arn Franzen  
Senior Project Manager  
Public Space and Urban Forestry  
Mayor's Office of Strategic Planning  
& Community Development

cc:

Tori Antonino, Green and Open Somerville  
David Falk, Native Plant Trust, Green and Open Somerville  
Luisa Oliveira, Director, Public Space & Urban Forestry



**CITY OF SOMERVILLE, MASSACHUSETTS**  
***OFFICE OF STRATEGIC PLANNING AND COMMUNITY DEVELOPMENT***  
**JOSEPH A. CURTATONE**  
**MAYOR**

**GEORGE J. PROAKIS, AICP**  
**EXECUTIVE DIRECTOR**

July 21, 2020

Somerville Community Preservation Act Committee  
c/o Judith Tumusiime  
Somerville Community Preservation Act Manager

Dear Ms. Tumusiime and Community Preservation Act Committee Members,

I am writing to request the CPA Committee's approval for an extension of the FY17 CPA award to the City of Somerville Department of Public Space and Urban Forestry (PSUF) for the Healey Schoolyard Design. This extension is needed as the project has been delayed by the Covid-19 Pandemic.

At present the design for the new schoolyard is complete and the project is ready to go out to bid. However, because a portion of the design funds include Construction Administration services, and the construction was delayed by the Covid Pandemic, I would like to request an extension of the balance of the unspent funds for another three years to 2023.

Thank you for your consideration of this matter. Please do not hesitate to call with any questions.

Sincerely yours,

Arn Franzen  
Senior Project Manager  
Public Space and Urban Forestry  
Mayor's Office of Strategic Planning  
& Community Development

cc: Luisa Oliveira, Director, Public Space & Urban Forestry



**CITY OF SOMERVILLE, MASSACHUSETTS**  
***OFFICE OF STRATEGIC PLANNING AND COMMUNITY DEVELOPMENT***  
**JOSEPH A. CURTATONE**  
**MAYOR**

**GEORGE J. PROAKIS, AICP**  
**EXECUTIVE DIRECTOR**

July 21, 2020

Somerville Community Preservation Act Committee  
c/o Judith Tumusiime  
Somerville Community Preservation Act Manager

Dear Ms. Tumusiime and Community Preservation Act Committee Members,

This is Arn Franzen of the Department of Public Space and Urban Forestry writing on behalf of the City of Somerville Department of Veterans Services, to request the CPA Committee's approval for an extension of the balance of the funds from the FY17 \$49,200 award to the Department of Veterans Services for the renovation plans for Henry Hansen Park.

At present the park's design work is largely complete and the majority of the funds have been expended. CBA Landscape Architects and the previous Director of Veterans Services, Bryan Bishop, held a series of Community Meetings and developed the schematic design for the park. However, that design process was suspended when Mr. Bishop accepted a new job with the 'City of Boston in the summer of 2018.

Then in the spring of 2020, the City hired Ted Louis Jacques as the new Director of Veterans Services. Shortly afterward Mr. Jacques and PSUF staff restarted conversations about the the next steps in the design process. Unfortunately, the Covid-19 Pandemic then caused the closure of all City offices and discussions regarding the park have been postponed.

Therefore, as the initial CPA award has reached its three-year maximum, the Department of Veterans Services, with the support of PSUF, would like to request an extension of the balance of the CPA grant funds year until the summer of 2023.

Thank you for your consideration of this matter. Please do not hesitate to call with any questions.

Sincerely yours,

Arn Franzen  
Senior Project Manager  
Public Space and Urban Forestry  
Mayor's Office of Strategic Planning  
& Community Development

cc:

Ted Louis Jacques, Director of Veterans Services

Luisa Oliveira, Director, Public Space & Urban Forestry



## CITY OF SOMERVILLE, MASSACHUSETTS HISTORIC PRESERVATION COMMISSION

**Joseph A. Curtatone**  
Mayor

July 14, 2020

Somerville Community Preservation Act Committee  
c/o Judith Tumusiime, Somerville Community Preservation Act Manager

Re: Milk Row Cemetery Grave Marker Restoration Project – Brief Time Extension

Dear Community Preservation Act Committee Members,

I would like to respectfully request a date extension on a contract for a CPA grant project at the Milk Row Cemetery. The grant involved conserving and resetting 44 headstones and smaller monuments and footstones at the site, all of which was completed on time and under budget. However, this past fall it was discovered that a small amount of contingency funds (\$1,741 out of a total grant of \$25,052) remained in the account. Unfortunately, both New England winter weather and the COVID-19 pandemic conspired to prevent the additional conservation work from taking place. Both conditions, however, have just been lifted, but now the contract recently expired at the end of May 2020.

A three-month extension of the contract to October 2020 would give adequate time for the remaining contingency funds to be used to repair one headstone fragment found in the shed late in the project. The work would be done by the same project team wearing masks and adhering to all required social distancing and sanitation protocols, with no changes to the original contract beyond the expiration date.

Thank you for considering this time extension for a long neglected but very significant historic site in our City which is gradually being restored and more fully appreciated as a result of our 2002 Preservation Master Plan and CPC funds in recent years.

Sincerely,

J. Brandon Wilson  
Executive Director

W: (617)625-6600, x.2532  
Remotely: (617)776-3938  
C: (617)388-1137

[bwilson@somervillema.gov](mailto:bwilson@somervillema.gov)  
[www.somervillema.gov/historicpreservation](http://www.somervillema.gov/historicpreservation)

Somerville City Hall, 93 Highland Avenue, Somerville, Massachusetts 02143  
(617) 625-6600, Ext.2532. TTY: (617) 666-0001. Fax: (617) 625-0722  
[bwilson@somervillema.gov](mailto:bwilson@somervillema.gov); [www.somervillema.gov/historicpreservation](http://www.somervillema.gov/historicpreservation)



## FY21 CPA Eligibility

Project	Applicant	More info needed	Comments
<b>Historic Resources</b>			
Broadway House	Cascap Inc.		Funds to preserve the detail and craftsmanship of 181 Broadway exterior that includes a beautiful eccentric bay window with decorative shingling, multiple bay windows and decorative details, a grand entrance with double wooden doors, and a slate hip roof. Residents are some of the state's most vulnerable: disabled adults who need 24 hour support services.
Exterior Siding and Trim Repairs	The Elizabeth Peabody House Association		Following the building assessment, EPH plans to repair the building's vinyl siding, restore the exterior wood trim, and make additional repairs to wood and paint.
Collection Care at the Somerville Museum	Somerville Historical Society		Improve the basement environment for collection preservation, improved security and access for the public.
Somerville Hispanic Church (formerly known as Grace Baptist Church)	Somerville Hispanic Association for Community Development		Funding for Phase III of this multi-phase project. The work of this phase would continue the process of window repair and restoration, and the cutting and repointing of deteriorated brick masonry. Accessibility improvements to the lower level would also be part of the work scope.
Broadway Winter Hill Congregational Church Bell Tower	Luis Morales		Project area of interest is of restoring structural soundness to the bell tower by repointing and restoring it's gaps.
<b>Open Space/Recreational Land</b>			
Healey School Tot Lot Renovation	Friends of Healey & Somerville Public Space and Urban Forestry (PSUF)		This project proposes the renovation of the Healey School Tot Lot, which is the primary outdoor play and learning environment for students in grades Pre-K through Grade 2. Because the project is on City land, PSUF agreed to be a co-applicant.

City of Somerville Stabilization Fund	City of Somerville, Public Space & Urban Forestry		Funds to seed the Open Space Acquisition Fund
------------------------------------------	---------------------------------------------------------	--	-----------------------------------------------



JOSEPH A. CURTATONE  
MAYOR



**CITY OF SOMERVILLE, MASSACHUSETTS**  
**COMMUNITY PRESERVATION COMMITTEE**  
**FY21 FUNDING CYCLE**  
**ELIGIBILITY DETERMINATION FORM**

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PROJECT LOCATION: \_\_\_\_\_

APPLICANT(S) NAME / ORGANIZATION: \_\_\_\_\_

CONTACT PERSON: \_\_\_\_\_

MAILING ADDRESS: \_\_\_\_\_

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Interested in collaborating with local artist on your project? Yes ☐ No ☐

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Yes (Attach documentation) ☐

No (Project will be deemed ineligible for this applicant) ☐

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Acquisition				
Creation				
Preservation				
Support				
Rehabilitation/ Restoration				

**FOR HISTORIC RESOURCES PROJECTS:**

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Yes ☐ No ☐

(you can check designation at [mhc-macris.net](http://mhc-macris.net))

If no, has the Somerville Historic Preservation Commission made a determination that the resource is significant?

Yes ☐ No ☐

**PROJECT SUMMARY:**



JOSEPH A. CURTATONE  
MAYOR



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Eligible

Potentially Eligible

Not Eligible

More Information Needed

**COMMENTS:**



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**CITY OF SOMERVILLE, MASSACHUSETTS**  
***OFFICE OF STRATEGIC PLANNING AND COMMUNITY DEVELOPMENT***  
**JOSEPH A. CURTATONE**  
**MAYOR**

**GEORGE J. PROAKIS, AICP**  
**EXECUTIVE DIRECTOR**

July 16, 2020

Somerville Community Preservation Act Committee  
c/o Judith Tumusiime  
Somerville Community Preservation Act Manager

Dear Ms. Tumusiime and Community Preservation Act Committee Members,

I am writing to confirm that the City of Somerville Department of Public Space and Urban Forestry is partnering with the Friends of the Healey in a joint CPA application to fund the renovation of the Healey School Tot Lot. This is an admirable project which meets the recreation and education needs of the City and the Healey School Community. I have also reviewed the Eligibility Determination Form submitted and I am in complete agreement with the contents. As the representative of the City of Somerville, which is the property owner, our department fully supports the project and we would appreciate the support of the Community Preservation Act Committee.

Thank you for your consideration of this matter. Please do not hesitate to call with any questions.

Sincerely yours,

Arn Franzen  
Senior Project Manager  
Public Space and Urban Forestry  
Mayor's Office of Strategic Planning  
& Community Development

cc: Luisa Oliveira, Director, Public Space & Urban Forestry  
Andrew Arbaugh, Friends of Healey





JOSEPH A. CURTATONE  
MAYOR



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MAYOR



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More Information Needed

**COMMENTS:**



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More Information Needed

**COMMENTS:**



CPA Applica

Questions

Responses

3

3 responses



Accepting responses



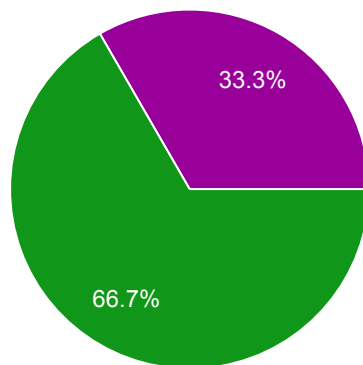
Summary

Question

Individual

In your experience, how clear were the requirements of the application process?

3 responses



- Very difficult to understand
- Somewhat difficult to understand
- In between
- Fairly Clearly
- Very clear

How can we improve the clarity of the application process?

3 responses

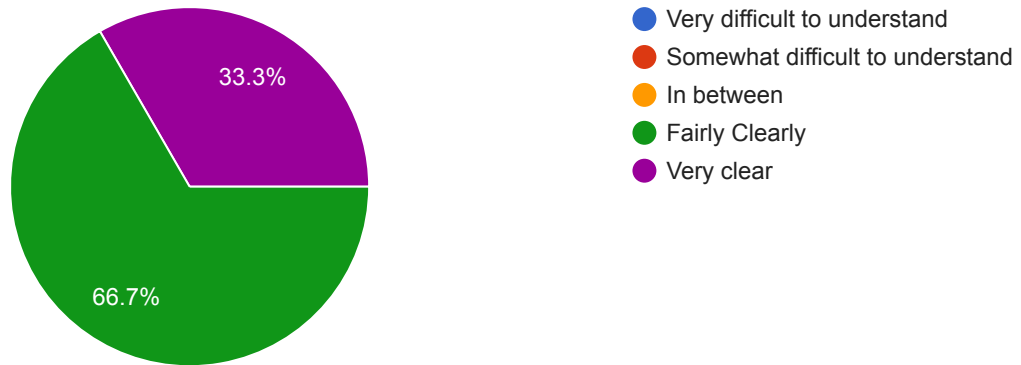
I think if applicants need clarity they can ask during Q&amp;A appointments

N/A

I was a little confused with the campaign contribution forms.

In your experience, how easy/difficult was the application process?

3 responses



How can we increase the ease of the application process?

3 responses

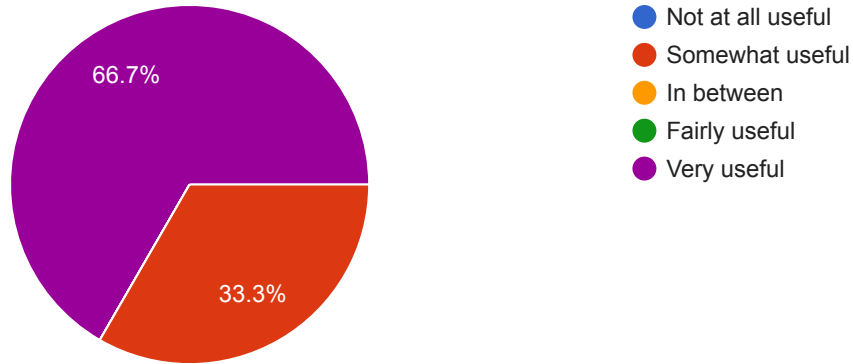
I think it is important to have access to staff who can answer questions during the process.

An online portal could be useful for managing documents/versions.

Perhaps there is a way to tailor specifically to help a regular citizen, a non-profit or group, and the City

In your experience, how useful was the feedback you received during the application process?

3 responses



How can we increase the usefulness of the feedback you receive during the application process?

3 responses

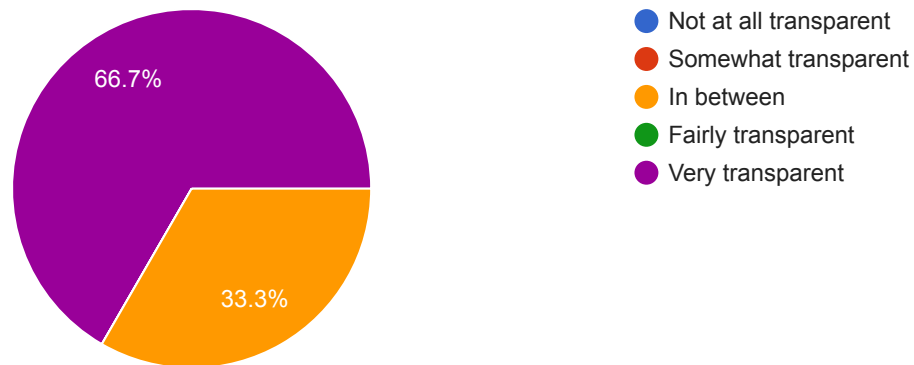
I think to make sure that it is realistic with the demands and constraints of resources from agencies.

Communication has flowed smoothly.

N/A

In your experience, how transparent was the application process?

3 responses



How can we increase the transparency of the application process?

3 responses

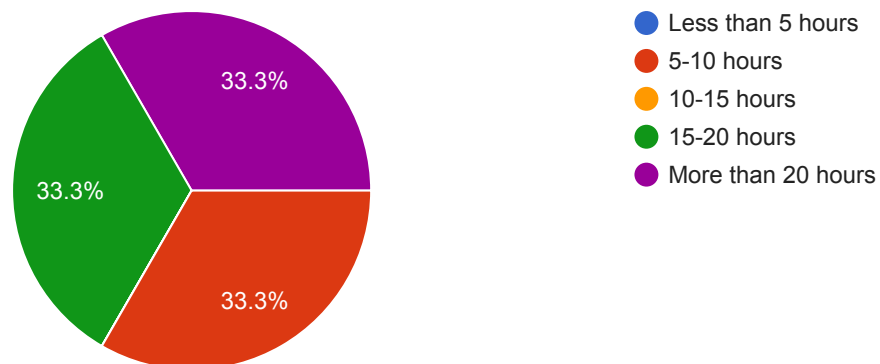
Clear about budget expectations and what projects would likely be funded

It was a very transparent and open process.

N/A

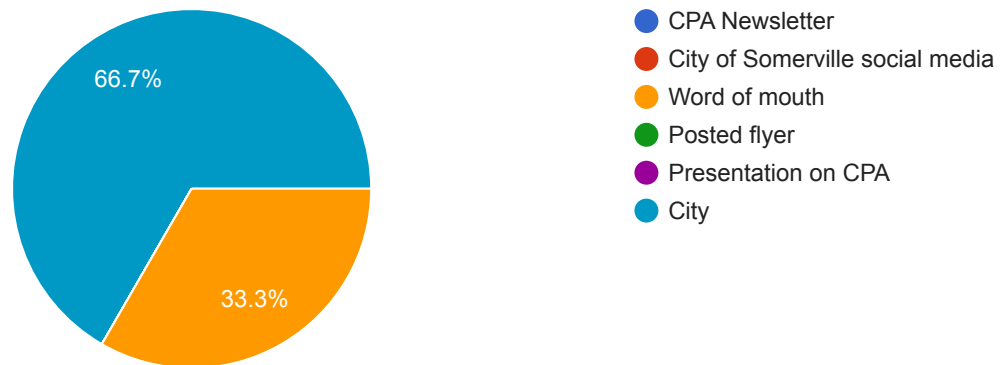
How much time did you spend in total on the application process?

3 responses



### Where did you hear about the CPA application process?

3 responses



### If "other," please describe.

3 responses

N/A

Not applicable.

### How can the CPC do more effective outreach about the program and funding opportunities?

3 responses

CPC should come to different community mtgs.

N/A

Maybe make a plug for the program at Res-Stat or another public meeting that is a quick reminder.

Do you have any other feedback on how to improve the application process?

3 responses

Too many copies printed every time you submit an application.

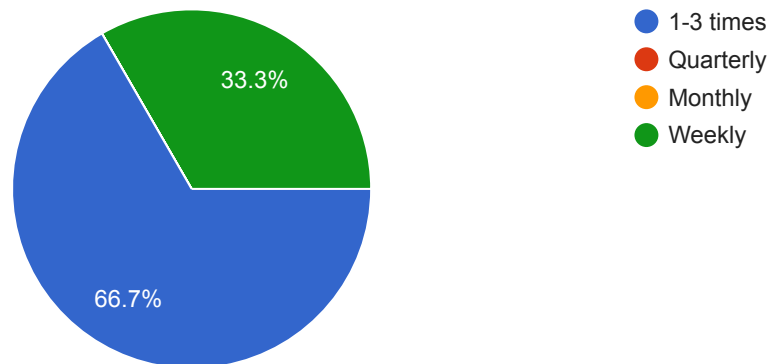
N/A

No

### CPA Manager

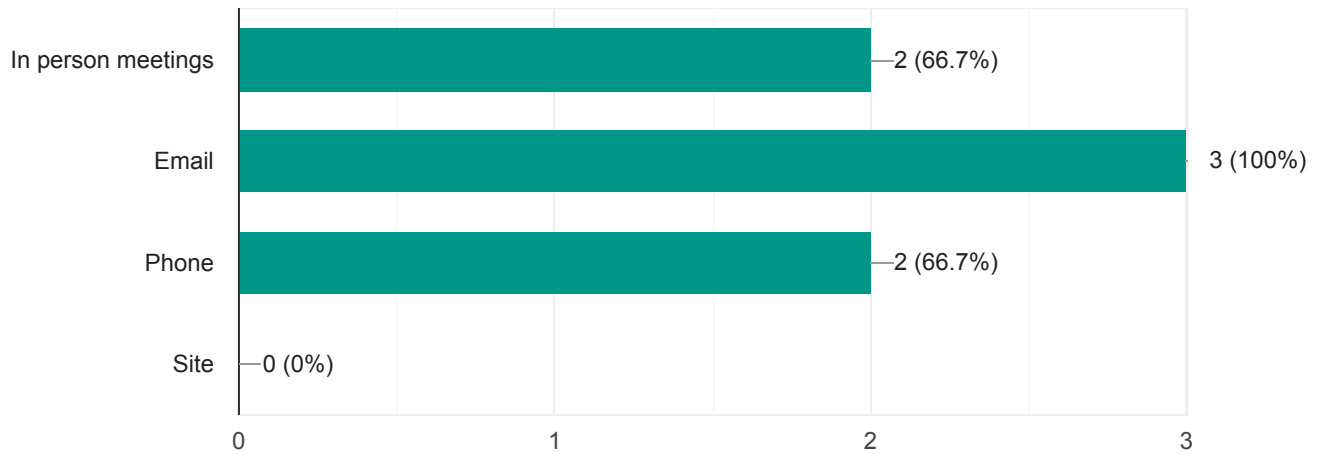
How frequently did you interact with the CPA Manager while you were developing your application?

3 responses



### In what formats did you interact with the CPA Manager? (check all that apply)

3 responses



### If "other," please describe.

3 responses

N/A

Not applicable

### In your experience, how useful was the support of the CPA Manager?

3 responses





How can the CPA Manager increase the usefulness of support provided to applicants?

3 responses

Answer questions, address concerns, troubleshoot and being accessible for applicants.

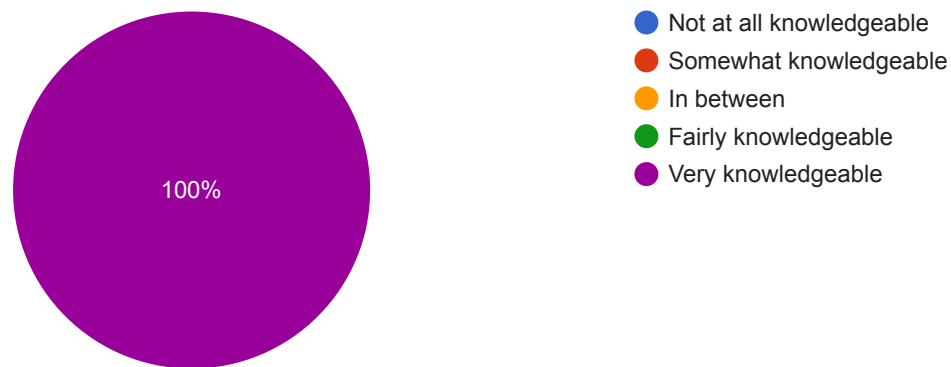
N /A

N/A

### Community Preservation Committee (CPC)

As a whole, how knowledgeable did you find the CPC in your project area?

3 responses



Please share any additional feedback you have for the CPC.

3 responses

Not applicable

N/A

None

## Final feedback

Please share any additional feedback you have for Somerville's CPA Program.

3 responses

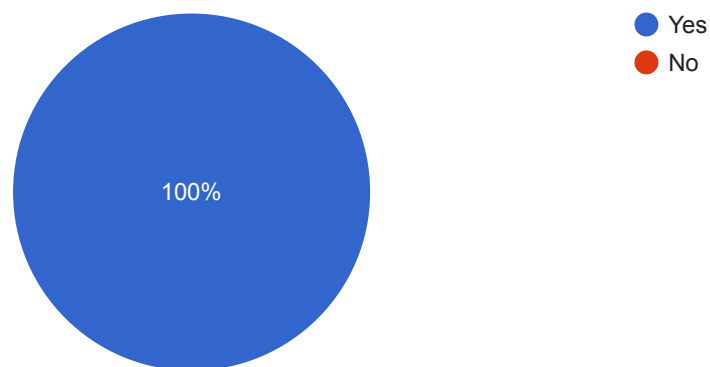
Good program

We are grateful for our partnership with the city.

None

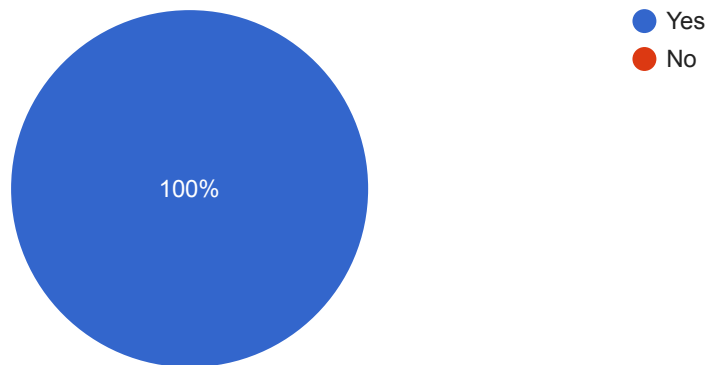
Were you invited to submit a full application?

3 responses



If yes, did the CPC recommend funding for your project?

3 responses



If no, what barriers did you face that prevented you from submitting a full application?

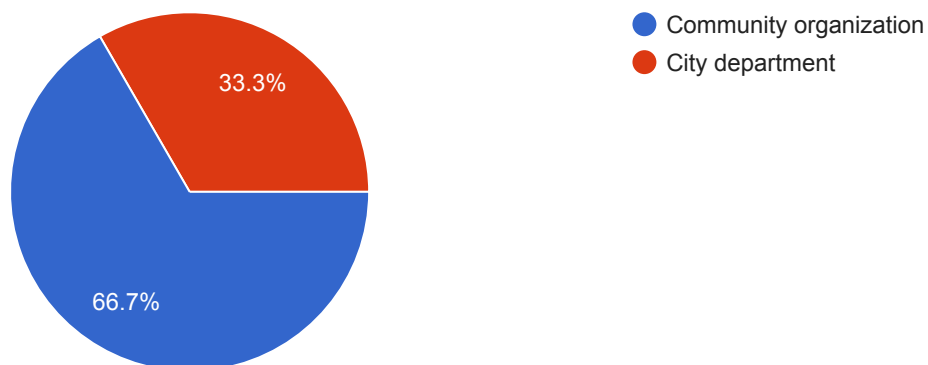
3 responses

N/A

Not applicable

What type of organization do you represent?

3 responses





Questions Responses 7

7 responses



Not accepting responses ☐

### Message for respondents

This form is no longer accepting responses

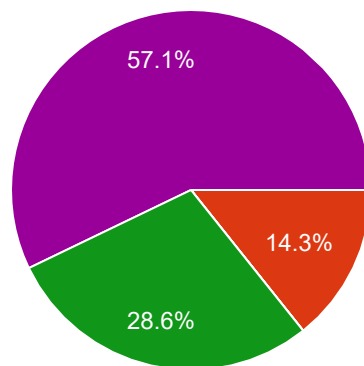
Summary

Question

Individual

In your experience, how appropriate were the funding conditions placed on your project by the CPC?

7 responses



- Not at all appropriate
- Somewhat appropriate
- In between
- Fairly appropriate
- Very appropriate



Please share any feedback you have on the funding conditions.

3 responses

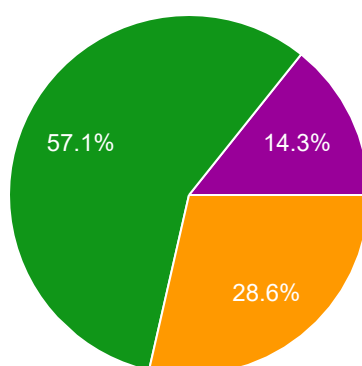
none

My answer is too long to fit easily  
onto this form. I will send it separately.

Requiring  
more financial planning as a part of the application process might help to  
provide groups in their decision process as they move  
forward.

In your experience, how clear were the reporting requirements?

7 responses



- Very difficult to understand
- Somewhat difficult to understand
- In between
- Fairly clear
- Very clear

## How can we improve the clarity of the reporting process?

3 responses

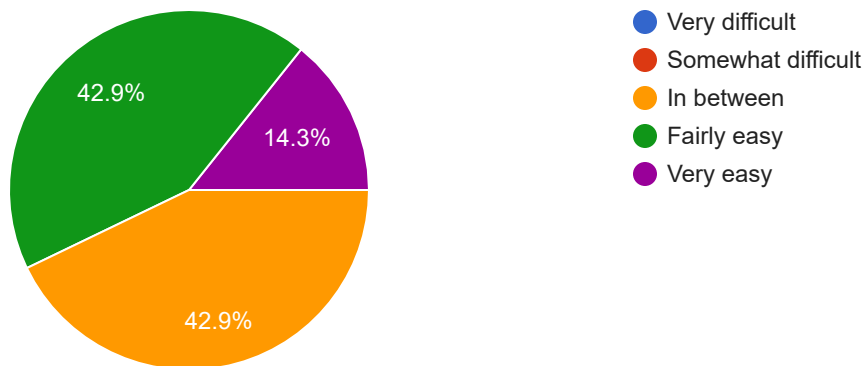
This process has not begun, so I'm not sure if it is clear or not at this time.

I have found that working through the report with the CPA manager is the best way to complete the report correctly.

The reporting process is fine

## In your experience, how easy/difficult was it to access funds for your project?

7 responses



## How can we increase the ease of accessing funds?

3 responses

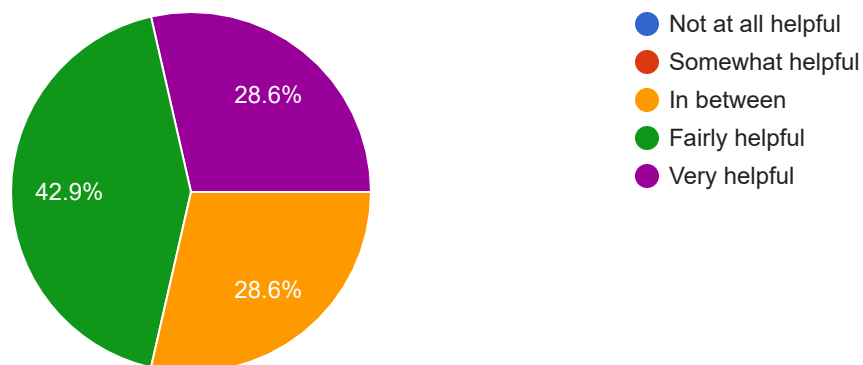
This process has not begun, so I'm not sure if it is clear or not at this time.

I will submit my answer separately, as it is too long to fit in this format.

In the case of projects that require City partnership, the work and time required for PO's and procurement should be made clear, so that applicants understand that the product "shopping" is kept to a minimum. Clarification of budgets, design and material selection should have more definition early on.

## In your experience, how helpful was the reporting process in informing the CPC about your project?

7 responses





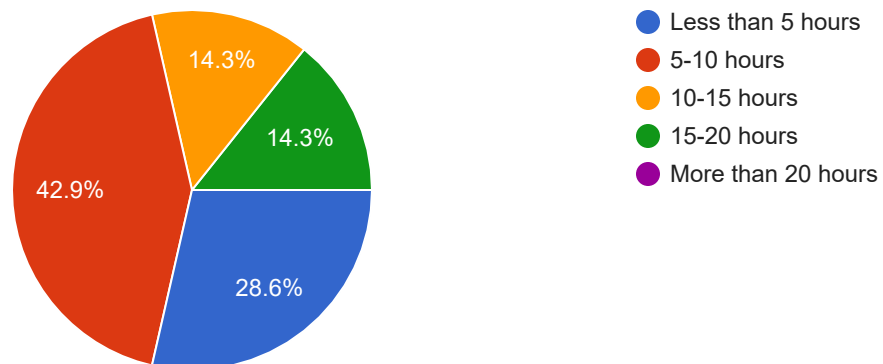
Please explain your selection.

1 response

This process has not begun, so I'm not sure if it is clear or not at this time.

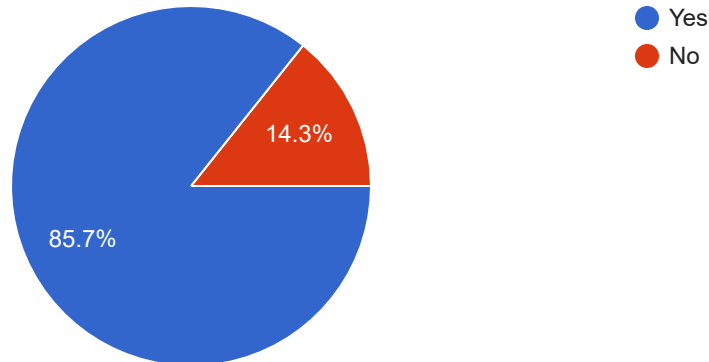
How much time did you spend in total reporting on your project this year?

7 responses



Have you included recognition of CPA funding on your organization's website and/or in other relevant materials?

7 responses



Do you have any other feedback on how to improve CPA processes?

3 responses

Not  
at this moment

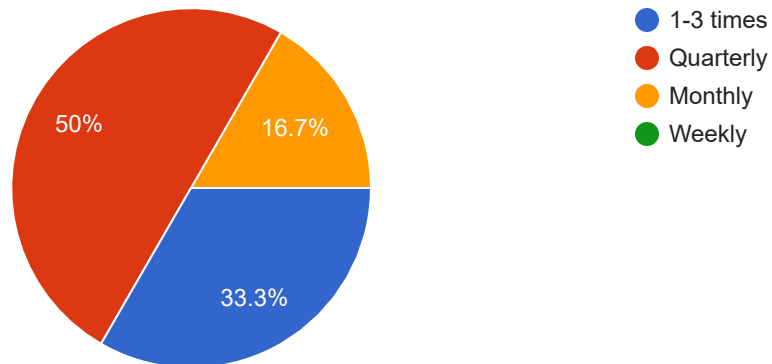
Thank you  
for your help throughout these challenging times, especially chasing down our  
missing check!

The CPC  
should be willing to ask applicants for more budget plans as they make their  
decisions, and not be afraid to postpone or deny projects when that material is  
not available.

CPA Manager

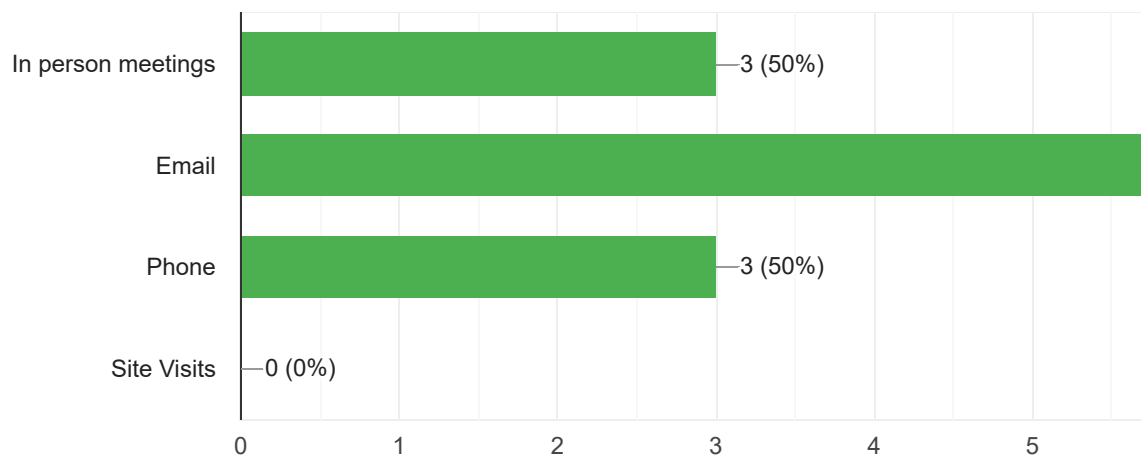
How frequently did you interact with the CPA Manager regarding your project in the last year?

6 responses



In what formats did you interact with the CPA Manager? (check all that apply)

6 responses



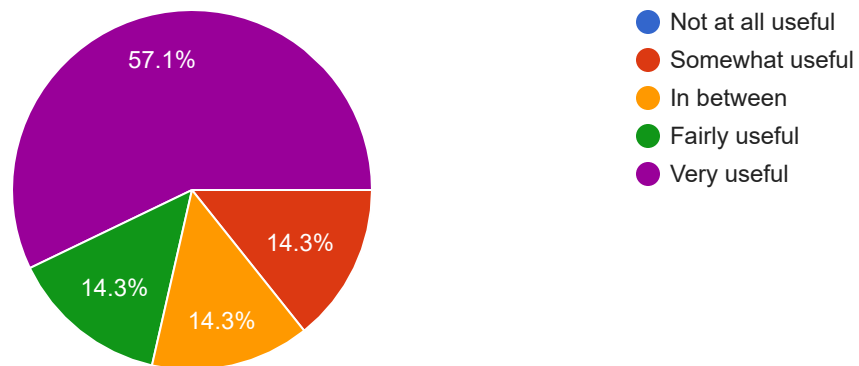
If "other," please describe.

1 response

I  
work in City Hall, so pre-covid communication was not an  
issue.

In your experience, how useful was the support of the CPA Manager?

7 responses



## How can the CPA Manager increase the usefulness of support provided to project implementers?

3 responses

I think the CPA Manager needs to provide more specific feedback catered to individual projects. Each project has different needs and questions, and only receiving generic answers to those questions is not helpful. Some questions are also time-sensitive, so I think it's important that the CPA Manager be more accessible or quicker to check emails and phone messages.

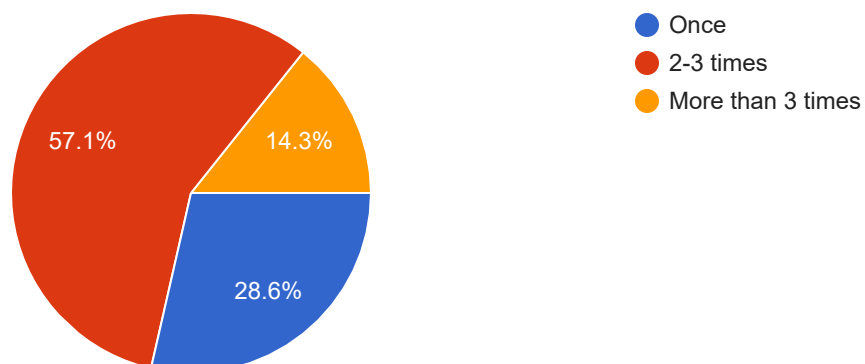
It would be useful for the manager to remind recipients of funding when major milestones, such as reporting or requests for extensions are coming up. Working through the reporting requirements with the manager has been very helpful.

Consider project review meetings with applicants within the first year.

## Community Preservation Committee (CPC)

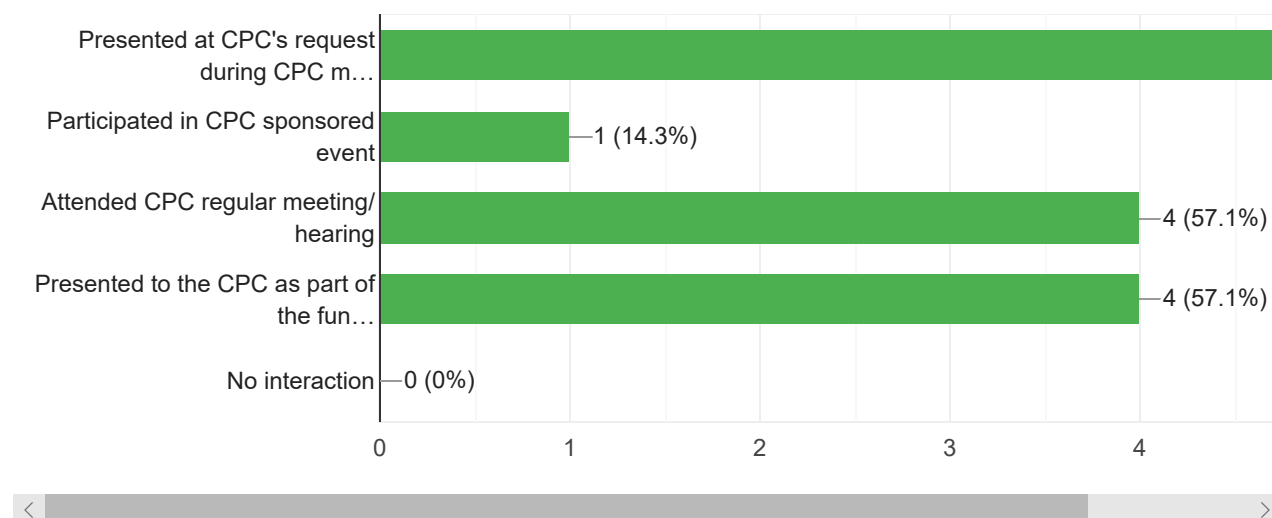
### How frequently did you interact with the CPC in the last year?

7 responses



### In what formats did you interact with the CPC? (check all that apply)

7 responses



### If "other," please describe.

0 responses

No responses yet for this question.

### Please share any additional feedback you have for the CPC.

2 responses

See  
the additional sheet for more comments.

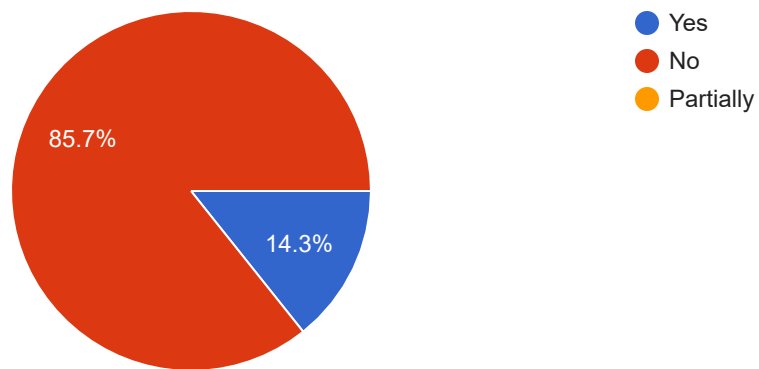
#### Comments

here are unrelated to comments above regarding reporting. I think the CPC and Judith are doing a good job. Keep up the good work! However communication at meetings might be clearer if the CPA manager and CPC Chairperson(?) reviewed the agenda together in advance of CPC meetings.

Support to CPA project implementers

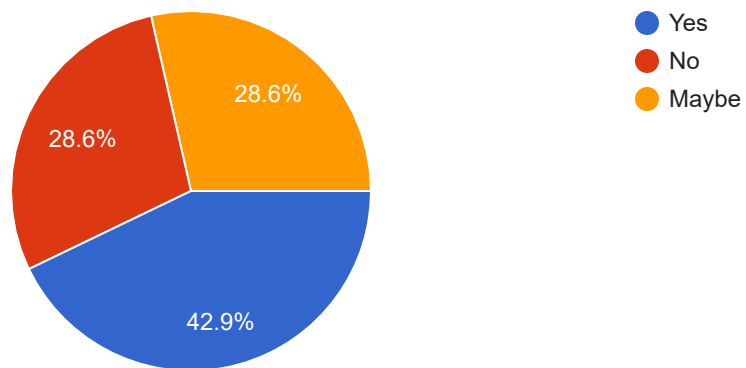
Would your CPA funded project have gone forward if it had not received CPA funds?

7 responses



Has your organization benefited from being part of the Somerville CPA program beyond receiving funds?

7 responses



If "yes," please describe.

2 responses

City

benefits greatly from CPA

CPA program support has been very important in leveraging other sources of funding and in giving credibility to the Museum's projects to the public and potential funders.

Are there additional ways your organization could be supported by the CPA program in the future?

3 responses

More

funds for open space acquisition

It

would be good if the CPA program could do more outreach about the program and what it entails, at times of the year not just focused on the funding process.

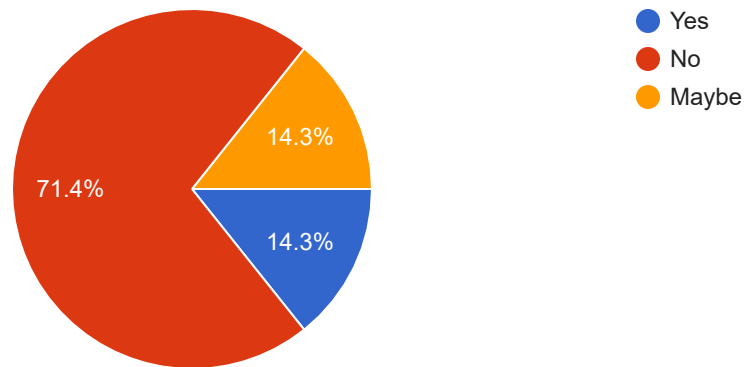
yes, more funds

for historic preservation.



Would you be interested in participating in a CPA peer learning group?

7 responses



If you checked yes or maybe, what topics would you be interested in covering in this group?

1 response

- 1)  
More big picture reviews of the CPA potential within the community. 2)  
Community outreach to known community organizations. 3) Better understanding of CPC priorities. 4) Understanding the types of projects that other communities are funding - and considering as priorities.

How can the CPC do more effective outreach about the program and funding opportunities?

2 responses

More  
outreach to 'Friends Groups'

Send  
hard copy letters to boards etc of other community organizations and follow up with email.

### Untitled Section

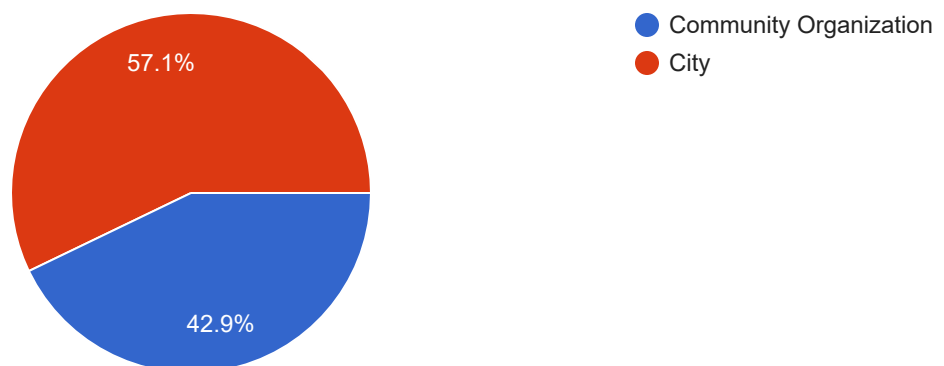
Please share any additional feedback you have for Somerville's CPA Program.

1 response

Keep  
up the good work. Maintain a strong relationship with City  
Council

What type of organization do you represent?

7 responses



If "other," please describe.

2 responses

RE  
Development

Thank  
you



6 Beacon Street, Suite 615  
Boston, MA 02108  
617-367-8998

July 15, 2020

Community Preservation Committee  
City of Somerville  
Somerville City Hall  
93 Highland Ave.  
Somerville, MA 02143

**Community Preservation Coalition Dues Notice**

Annual membership dues..... \$4350.00

**Please make checks payable to: Community Preservation Coalition**

**Please remit to our address:**

**Community Preservation Coalition  
Attn: Stuart Saginor  
6 Beacon Street, Suite 615  
Boston, MA 02108**

*Contact the Community Preservation Coalition with any questions at 617-367-8998.*

**[www.communitypreservation.org](http://www.communitypreservation.org)**

## Request for Taxpayer Identification Number and Certification

► Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Give Form to the  
requester. Do not  
send to the IRS.

Print or type.  
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

**The Trust for Public Land Action Fund**

2 Business name/disregarded entity name, if different from above

**Community Preservation Coalition, a program of The Conservation Campaign**

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor or single-member LLC

☐ C Corporation

☐ S Corporation

☐ Partnership

☐ Trust/estate

☐ Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ►

**Note:** Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☒ Other (see instructions) ►

**501(C)(4) nonprofit organization**

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) \_\_\_\_\_

Exemption from FATCA reporting code (if any) \_\_\_\_\_

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

Requester's name and address (optional)

**6 Beacon Street, Suite 615**

6 City, state, and ZIP code

**Boston, MA 02108**

7 List account number(s) here (optional)

### Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

\_\_\_\_ - \_\_\_\_ - \_\_\_\_

or

Employer identification number

0 4 - 3 5 1 5 3 4 1

### Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign  
Here

Signature of  
U.S. person ►

*Stuart Jayson*

Date ►

12-4-18

### General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

### Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
  - Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
  - Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
  - Form 1099-S (proceeds from real estate transactions)
  - Form 1099-K (merchant card and third party network transactions)
  - Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
  - Form 1099-C (canceled debt)
  - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.



# Community Preservation Coalition

*Preserving our past. Building our future.*

# 2019 *Year in Review*

## CPA ADVOCACY: 12 YEARS IN THE MAKING - "SAVE CPA" CAMPAIGN SUCCEEDS!

2019 was a landmark year for the Coalition's legislative work as we achieved a long-anticipated milestone for the statewide CPA program. After over a decade of advocacy, we were finally successful in passing a permanent funding increase for the CPA Trust Fund.

Propelled under the banner of "Save CPA", the campaign was able to build momentum throughout the legislative session by utilizing online news-blasts, distributing educational infographics, and mobilizing a network of both key municipal officials and local grassroots advocates from across the state. Our legislative team committed hundreds of hours on strategy and collaboration with state legislators, and throughout all of this, the message was clearly heard: 2019 was the year to "Save CPA." The increase to the CPA Trust Fund will bring in an estimated \$36 million in additional revenue every year, and we'll see the first infusion in the November 2020 distribution.

There was more good news for CPA on Beacon Hill in 2019. Through our advocacy work, the legislature and Governor Baker agreed to allocate an additional \$20 million in state budget surplus funding for the November 2019 state match. Although the actual distribution of the additional funding was delayed until January 2020, it did provide a substantial boost to the state match. All communities received a 23.9% first round base match last year - the highest since 2015 - and the total amount distributed (\$43.76 million) was the largest dollar total since 2013.

## CPA TECHNICAL ASSISTANCE AND COMMUNICATIONS

### ***The New and Improved Coalition Website***

Our staff continued to add elements to the new Coalition website, which has now been up and running for just over a year. Still located at [www.communitypreservation.org](http://www.communitypreservation.org), the new website was redesigned with user accessibility in mind, hosting streamlined menu navigation, a mobile friendly design that functions across all devices, and an aesthetic upgrade that we hope all visitors will appreciate. The Coalition website is still the only source for comprehensive CPA resources on the internet, and in 2020 we will be adding an extensive section containing historical CPA revenue and spending data.

### ***Sustained support and technical assistance to CPCs statewide, both new and old***

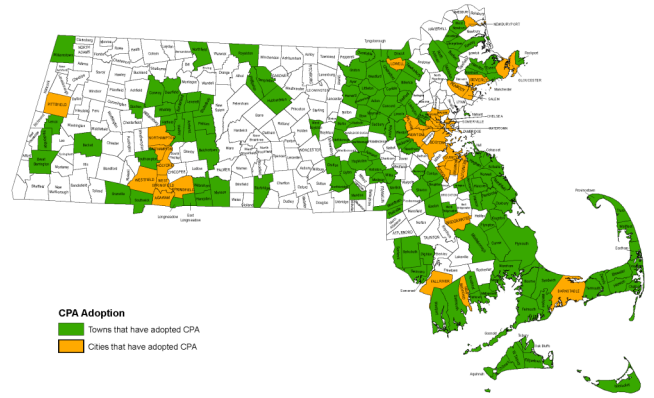
The Coalition responded to a huge volume of emails and phone inquiries from member communities across the state. We offer support across a range of CPA concerns, including project eligibility questions, legislative clarification, budgeting issues, and warrant article development and review. One of the important tasks in 2019 involved working with the 15 communities on Cape Cod who transferred their Land Bank program to CPA in 2005, and are finally eligible to make changes to their surcharge amount and exemptions. The Coalition also conducted many field trainings for Community Preservation Committees (CPCs) in both new and existing CPA communities.

### ***Email Newsletters and Social Media Outreach***

The Coalition's CPA Update email newsletter provided valuable information for CPA communities throughout 2019, with an emphasis on promoting the ultimately successful "Save CPA" campaign. The newsletter also provided breaking CPA news and updates on legislative issues. On social media, the Coalition's Facebook and Twitter accounts grew dramatically in 2019, posting inspiring CPA project highlights from across the state and delivering all the latest CPA news.

## CPA ADOPTION: THE CALM BEFORE THE STORM

The low number of CPA elections in 2019 was clearly the calm before the storm. The city of Lowell was the only new community that adopted the program, becoming the 176th CPA municipality after a quick and quiet campaign leading up to their November election. But throughout 2019, dozens of calls have been coming into the Coalition from across the state, all looking at starting up adoption campaigns for the November 2020 presidential election. Based on this initial buzz, 2020 could have a record-breaking number of communities with CPA on the ballot.



## CPA PROJECTS: OVER 12,000 AND COUNTING

The Coalition spends hundreds of hours each year ensuring that legislators, communities, state agencies, and the press have access to a robust database on CPA revenue, adoption, and projects. This year marked another incredible year for CPA, as there are now over 12,000 projects that have been approved by local communities. More than 17,500 affordable housing units have been created or supported, 30,894 acres of open space have been preserved, over 5,500 historic preservation projects have been approved, and over 2,500 outdoor recreation projects have been initiated.

## COALITION OPERATIONS: PERSONNEL & FINANCIAL REPORT

2019 was a year that included some exciting new additions for the Coalition, as well as some staff changes. To start off the year, Alison Leary moved on from her position as Associate Director and is now running an election campaign to serve as a state representative for her district in Newton. And then at the end of the year, we also said farewell to our Research & Outreach Director, Kaitlin Butler—she will be starting up her own business, following a longtime entrepreneurial passion for making custom jewelry.

We were thrilled to introduce several fresh faces to the Coalition's Steering Committee at our December meeting. After an extensive search for candidates, five new representatives from CPA communities have joined the Steering Committee: Patty Carey from Needham, George Comeau from Canton, Bruce Easom from Groton, Anne Louro from New Bedford, and Jennifer Matthews from Cambridge. The selection process was a difficult one, as we received applications from dozens of enthusiastic and well-qualified CPA advocates from across the state, but each of these new members provide a wealth of experience and new perspectives ranging across each of the CPA categories. The entire Steering Committee is looking forward to working with these new members on the continued success of the statewide CPA program.

The Coalition completed another year on firm financial footing (see our budget report above). We are deeply grateful for the support of our member communities and thank them for their advocacy on behalf of CPA, as well as their work on hundreds of impressive housing, recreation, historic, and open space projects that were completed during 2019.

### FISCAL YEAR 2019

#### COALITION FINANCIAL REPORT:

##### REVENUE

Community Members	\$438,000
Foundation Grants	\$130,776
Coalition Partners & Misc.	\$24,542
<b>Total Revenue</b>	<b>\$593,318</b>

##### EXPENSES

Personnel Costs	\$232,000
Benefits & Personnel Overhead	\$111,000
Advocacy Costs	\$96,056
Professional Services	\$10,912
Travel and Meeting Costs	\$2,352
Rent and Office Costs	\$35,047
Legal, Financial, Admin. & Misc.	\$105,951
<b>Total Expenses</b>	<b>\$593,318</b>