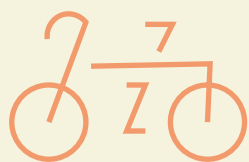
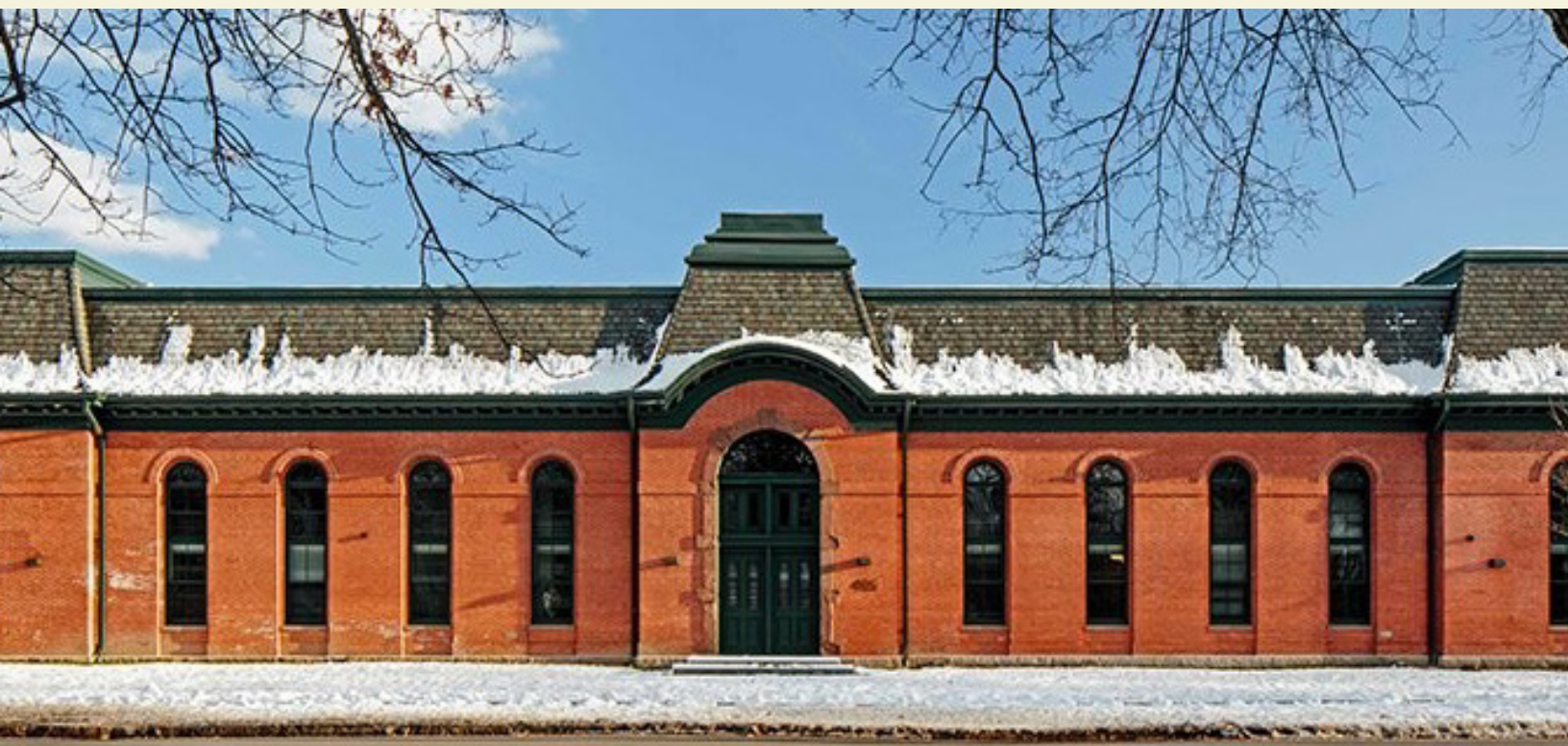


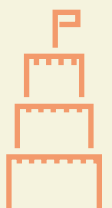
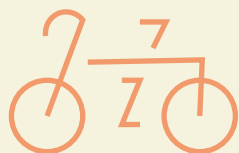
City of Somerville Community Preservation Act

Program Evaluation



Bill Coen | Tony Collins | Amber Davis | Kelsey Tustin | Gabby Queenan

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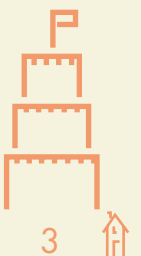
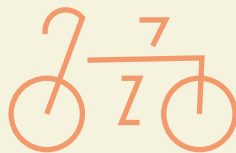


Acknowledgements

This report was created by a group of students pursuing Tufts University's Urban and Environmental Policy and Planning (UEP) Master's Program, for the Field Projects course. The authors include Bill Coen, Tony Collins, Amber Davis, Gabby Queenan, and Kelsey Tustin.

We are extremely grateful to the many individuals who participated in interviews for this evaluation and shared their experiences with us in great detail, fundamentally helping to shape this report. This report would also not have been possible without the guidance of our project partner and Somerville Community Preservation Act Program Manager, Judith Tumusiime, as well as our UEP Field Projects advisor, Christine Cousineau and our Teaching Assistant, Becky Eidelman. We thank them for their time, instruction, and encouragement.

Cover Photo: Mystic Water Works Building, Somerville, MA. (Colantonio Construction, 2021)



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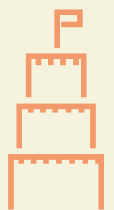
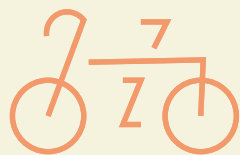
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Executive Summary

The executive summary provides a brief overview of our program evaluation. In this section, we introduce you to the field project team members, our project partner, and the purpose of the program evaluation. We also provide context to the Somerville Community, review our research methods, and provide an overview of our findings and recommendations.





Executive Summary

Purpose of the Project

The Tufts University Department of Urban and Environmental Policy and Planning (UEP) Field Projects course matched our student team – Bill Coen, Tony Collins, Amber Davis, Kelsey Tustin, and Gabby Queenan – with the Somerville Community Preservation Act program (CPA). Our main point of contact for this project was the Somerville CPA Manager, Judith Tumusiime. The objective of our project was to build upon a 2017 Somerville CPA evaluation framework completed by a previous Tufts UEP student. We investigated the progress of the CPA since 2017, conducted our own program evaluation, and built a replicable evaluation tool to guide future CPA program managers.

Program & Community Context

Somerville prides itself on being a welcoming, culturally rich, and vibrant community. The Somerville Community Preservation Act (CPA) program supports and advances these attributes in an effort to improve the quality of life for all inhabitants. Like many urban centers in eastern Massachusetts, the city of Somerville is confronted by several challenges in supporting its diverse community. With a population of 81,360 people residing in an area of 4.1 square miles, Somerville is the most densely populated city in New England (US Census 2019). The limited supply of land

*Figure 1: Winterhill Community School, Somerville, MA.
Photo by Tony Collins, 2021.*

“The Somerville CPA program came about through a tremendous community-led, grassroots campaign effort... The program has absolutely had an impact on this city. It’s allowed us as a community to dedicate funding in really key areas, in particular affordability. Given the current challenges we face with COVID, having the CPA program for issues like open space and affordable housing has been critical... The program aligns nicely with the community’s values, not just with the narrative but with real, tangible results.”

-Somerville Mayor Joseph Curtatone

makes it difficult for the city to create new open space for residents. The city is becoming younger, more educated, and whiter – which are all indicators of gentrification (Bonfiglioli 2017). Affordable housing is in short supply across the state, and Somerville is not immune to the problem of insufficient and unaffordable housing. Somerville has set a goal to have 20% of its housing stock be affordable in perpetuity, which is well above the state’s 10% affordable housing guideline (City of Somerville 2020). Few municipalities have set such ambitious goals because of the costs associated with providing below market rate housing options. In addition, as the city evolves, there are unique historical characteristics that are in danger of being lost and cultural ties that need to be preserved. For Somerville, the CPA has served as both a funding source and

prioritization tool to combat these intractable challenges.

The City of Somerville voted to adopt the CPA program in November 2012 by an overwhelming 76% majority, agreeing to a 1.5% annual surcharge on local property taxes. This voter approval rate was the second highest in CPA history (after Barnstable). The Somerville CPC, the CPA’s primary governing body, was formed in January of 2014. The Somerville CPC is responsible for overseeing CPA funding and makes decisions about which projects will be supported, and at what funding level. Since then, the CPA has funded 79 projects throughout the city and has raised over \$26 million in funds, which includes state match funds (City of Somerville 2021a).

Since 2014, the Somerville CPA has raised over \$26 million and funded 79 projects in affordable housing, open space and recreation, and historic preservation.

Methodology

We conducted primary and secondary research for the project. The research questions we intended to address with this research are further outlined in the Evaluation Planning Grid (see Appendix B). A Program Logic Model was developed for the CPA program as well, which informed the development of research questions (see Appendix A).

Primary research for the project included a total of 28 interviews that were conducted via phone and video conference. The intent of the interviews was to gather perspectives and collect data which addressed the research questions outlined in the Evaluation Planning Grid (see Appendix B). Interviewees were selected using a purposive sampling strategy to identify interview participants who could represent key stakeholder groups for the CPA program. The below parties were interviewed using a series of open-ended questions (see Appendix C).

- Current and former Somerville CPA managers (2 interviews)
- Current and former Somerville CPC members (7 interviews)
- Somerville Office of Strategic Planning and Community Development Department non-CPA staff, including Affordable Housing Trust Fund delegates (3 interviews)
- CPA managers or equivalent staff in other communities (5 interviews)
- Somerville CPA project applicants (9 interviews)
- Somerville Mayor (1 interview)
- Community Preservation Coalition Director (1 interview)

Secondary research for the project included a literature review, analysis of Somerville goals, an analysis of Somerville CPA projects and project implementers, and a quantitative and qualitative analysis of historical community survey data.

Key Findings & Recommendations

Several key findings and recommendations were developed over the course of the evaluation.

•CPA Manager: The CPA manager was identified as one of most significant defining factors of the success of the CPA program. CPA managers may need additional resources and support to meet all the demands of their position. The CPA program should explore opportunities to support existing CPA managers with an additional staff person or existing staff in other departments. In addition, the transitional materials shared between CPA managers should be revisited annually to ensure there is strong documentation of processes, regulations and contacts that can be passed from manager to manager as transitions take place.

•CPC Members: The Somerville CPC members are critical in their role to ensure that the CPA program is run effectively and efficiently. However, the CPC makeup is not perceived by stakeholders to be reflective of the community's diversity. The CPA manager and CPC should discuss their membership goals as a group and develop concrete goals for the future CPC makeup. Furthermore, the CPA program should consider developing semi-annual progress reports and reflection discussions facilitated by the CPA manager to ensure that the program is on track with its goals and that all CPC members are in agreement about the direction of the CPC. These discussions will also foster better dialogue and a deeper understanding of varying perspectives as the CPC members evaluate applications.

•CPA Program Funding: Current CPA funding levels

cannot keep pace with demand for the program. The CPA program should explore opportunities for developing new funding in the short and long term. The CPA program should vet funding options, such as bonding for historic preservation and open space projects, and increasing the tax surcharge.

•CPA Application

Process: With critical guidance provided by the CPA manager and the CPC, the CPA application is feasible for a variety of project applicants. However, the CPA program should evaluate whether additional technological support should be provided for community project applicants who lack the resources, such as Adobe, to complete the application.

•Community Outreach and Engagement:

Community outreach and engagement were identified as areas for significant improvement for the CPA program. It is recommended that the CPA program develop a formal community outreach and engagement strategy with concrete metrics to measure success of efforts. Community outreach and engagement initiatives should focus on engaging all neighborhoods in Somerville. Ideally, outreach and engagement efforts will be supported by existing staff in other city departments who already have access to resources to run effective outreach campaigns. The CPA Manager has been identified as the person who should be responsible for community outreach and engagement, with support from CPC members.

•Program

Effectiveness: The CPA program is perceived by many stakeholders as highly effective overall. In terms of affordable housing, the CPA program has made substantial progress in supporting the overarching affordable housing goals

of Somerville. However, the program areas of both open space and historic preservation would benefit from long-term visioning by the CPC. The CPA program should consider developing long-term goals that are consistent with SomerVision2040 and other strategic plans for these two program areas. Long-term visioning would ensure that future CPA projects help the city to make tangible progress in these issues.

•Program Equity:

The CPA program has room for growth in terms of operating as a truly equitable and inclusive program. Improving community outreach and engagement will be essential to building the equity of the program and the aforementioned outreach and engagement planning recommendations should be prioritized accordingly. The CPA should continue to explore innovative endeavors, such as the documentary about the CPA program, to educate the public and introduce the program to those who have never heard of it before. In addition, the CPC should evaluate what metrics it asks project applicants to capture in terms of populations served. With an emphasis on collecting data about vulnerable populations served, the CPA program might encourage projects to reach a wider audience and encourage projects that already serve these communities to participate in the program. Furthermore, the CPA program should consider whether they want to support changes to the Massachusetts CPA statute to eliminate some of the current restrictions for the program. Issues such as supporting services versus affordable housing units should be considered.

Team Members



Figure 2: Tufts UEP Field Projects Team on Zoom. Photo by Kelsey Tustin, 2021.



Bill Coen currently works at Tufts University helping to oversee building operations and energy management. He was previously employed at University of San Francisco working in the Facilities Management Department. Bill holds a B.A. in Communication from Saint Mary's College of California. He is pursuing an M.A. in Urban and Environmental Policy and Planning.



Tony Collins is the associate planner for the Town of Andover, MA where he focuses on developing community engagement strategies that reach underrepresented residents and stakeholders. He is also spearheading a grassroots active transportation planning effort that aims to reduce short trips taken by car, increase access to community resources, and develop spaces that prioritize community development. Tony holds a B.A. in political science and a M.A. in public affairs from Merrimack College. He is pursuing an M.A. in Urban and Environmental Policy and Planning.



Amber Davis is currently employed with the United States Department of Treasury in Accounts Management. She was previously employed at the Environmental Protection Agency (EPA), Office of Regional Counsel as a Legal Technician in Chicago IL, where she earned her B.A. in Public Policy at DePaul University. Originally from Corpus Christi, TX, Amber has been a nurse for over 20 years, and a lifelong civil servant in the urban environmental landscape, pursuing a Master's degree in Urban and Environmental Policy and Planning from Tufts.



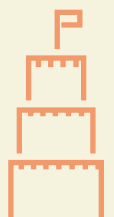
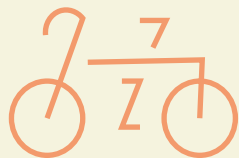
Gabby Queenan is an advocate for community-based climate change resiliency initiatives and green infrastructure. She was previously employed as the Policy Director of the Massachusetts Rivers Alliance, an environmental non-profit organization, leading coalition-based legislative and regulatory efforts to protect and restore rivers and streams in the Commonwealth. Gabby completed her B.A. in Environmental Studies and Political Science at Macalester College. She is pursuing an M.A. degree in Urban and Environmental Policy and Planning from Tufts.



Kelsey Tustin currently works for Bigbelly Solar, a waste and recycling company that encourages zero-waste initiatives for municipalities. She was previously employed with the Emerald Necklace Conservancy, a Boston-based nonprofit stewarding the city's parks, conducting volunteer events and overseeing education programming. Kelsey holds a B.A. in Environmental Studies from the University of Vermont and is pursuing a Master's degree in Urban and Environmental Policy and Planning from Tufts.

Introduction

In this section we will introduce you to the Somerville community and the goals that the community strives to achieve. We will also provide context for the Community Preservation Act at the state level, community level, and program level. Finally, this section states the goals of our project.





Introduction

Somerville prides itself on being a welcoming, culturally rich, and vibrant community. The Somerville Community Preservation Act (CPA) program supports and advances these attributes in an effort to improve the quality of life for all inhabitants. Like many urban centers in eastern Massachusetts, the city of Somerville is confronted by several challenges in supporting its diverse community. With a population of 81,360 people residing in an area of 4.1 square miles, Somerville is the most densely populated city in New England (US Census 2019). The limited supply of land makes it difficult for the city to create new open space for residents. The city is becoming younger, more educated, and whiter – which are all indicators of gentrification (Bonfiglioli 2017). Affordable housing is in short supply across the state, and Somerville is not immune to the problem of insufficient and unaffordable housing. Somerville has set a goal to have 20% of its housing stock be affordable in perpetuity, which is well above the state's 10% affordable housing guideline (City of Somerville 2020). Few municipalities have set such ambitious goals because of the costs associated with providing below market rate housing options. In addition, as the city evolves, there are unique historical characteristics that are in danger of being lost and cultural ties that need to be preserved. For Somerville, the CPA has served as both a funding source and prioritization tool to combat these intractable challenges. See Figure 3 below for Somerville's geographic location and population growth relative to surrounding communities.

The CPA is a Massachusetts state law (M.G.L. c. 44B) that enables adopting communities to create a fund for projects that conserve open space and develop outdoor recreation opportunities, preserve historic resources, and expand community housing.

Figure 3: Somerville Growing Center. Photo by Tony Collins, 2021.

Middlesex County – Massachusetts 2020 Census: 2010 Official Count and Latest Estimates

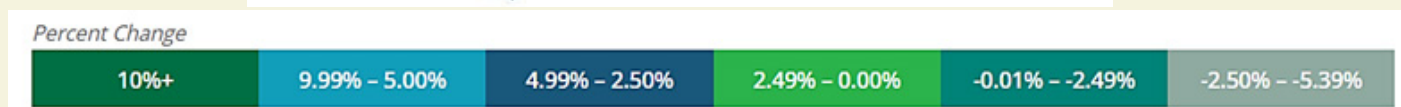


Figure 4: Middlesex County, MA. Somerville's population increased by 7.5% between 2010 and 2019. From Massachusetts 2020 Census, 2020.

Somerville voters approved the adoption of the CPA in November of 2012 by an overwhelming 76% majority, the second-highest passage rate in CPA history (after Barnstable) (City of Somerville 2021 a). The passage of the CPA has provided the City of Somerville and 186 other communities in the Commonwealth of Massachusetts with a steady funding source dedicated to preserving and improving community character and quality of life. In Somerville, CPA funding comes from three sources:

- (1) A 1.5% surcharge on local property taxes
- (2) A contribution from the city's general fund
- (3) A state match (M.G.L. c. 44B)

By adopting the CPA, the City of Somerville now has a funding program that can capitalize on opportunities

to become an even more exceptional place to live, work, play, and raise a family. In order to ensure that CPA funds have been allocated correctly, the Somerville Community Preservation Committee (CPC) is mandated by law to evaluate Somerville's needs, aspirations and demand for conserving open space and supporting outdoor recreation, preserving historic resources, and expanding community housing (M.G.L. c. 44B).

The CPC is a committee of nine volunteer members appointed by the Mayor. It is composed of four members of the public at large and five members representing the Planning Board, the Conservation Commission, the Historical Preservation Commission, the Public Space and Urban Forestry department, and the Housing Authority. The presiding CPC members



Figure 5: West Somerville Branch Library. 40 College Avenue, Somerville. Restoration and addition completed in 2021. From Google Street View, 2020.

and the CPA manager recognize the importance of improving the program's operations and continue to seek out ways to improve their process. In 2017, the CPC called for an evaluation of the CPA program, to maintain ensure that the program maintains the values of the community (City of Somerville 2017a)

Alyssa Kogan, a student from Tufts University's Urban and Environmental Policy and Planning program, conducted a program evaluation of the Somerville CPA in 2017. The program evaluation provided key insights about how effectively the program was being implemented since its inception, and how successful the program was in achieving Somerville community goals. As a self-accountability mechanism, the evaluation provided feedback from CPC members, Somerville residents, and other key stakeholders. The evaluation also sought to analyze if the program addressed the intended goals outlined by the CPA policy and the charge of the CPC. However, results indicated an overall lack of sustained attention to the fulfillment of stated community goals and a need to improve diversity of CPC members and project

applicants (Kogan 2017). Overall, the 2017 CPA evaluation questions not only how the CPA program meets the needs of Somerville as a community, but also how the CPA program upholds and accurately reflects the diversity of residents as well.

Background

Partner Organization History

The Massachusetts CPA was passed on September 14, 2000 by Governor Cellucci to raise funding for affordable housing, historic preservation, and open space throughout the state (Levitt 2010). The idea of a real estate surcharge to fund these types of projects was based on a Land Bank real estate transfer tax program in Nantucket, which was adopted in 1983 (Levitt 2010). Nantucket's original real estate transfer tax (RETT) was a one-time 2% tax on the sale price of a property, at the time a property was sold (transferred) (Community Preservation Coalition

n.d.). In contrast, the CPA allows an annual 1.5% tax on all property, after subtracting the first \$100,000 of assessed value. Since the CPA's introduction, 186 cities and towns have adopted the CPA. More than \$2.5 billion of property taxes as well as other city and state funding have been allocated to the program (Community Preservation Coalition n.d.).

The City of Somerville voted to adopt the CPA program in November 2012 by an overwhelming 76% majority, agreeing to a 1.5% surcharge on local property taxes. This voter approval rate was the second highest in CPA history (after Barnstable). The Somerville CPC, the CPA's primary governing body, was formed in January of 2014. The Somerville CPC is responsible for overseeing CPA funding and makes decisions about which projects will be supported, and at what funding level. Since then, the CPA has funded 79 projects throughout the city and has raised over \$26 million in funds, which includes state match funds (City of Somerville 2021a). These projects have helped to preserve the city's character and livability for its residents. Some noteworthy projects over the years have included the following:

- Restoration of the West Branch Library in 2021 (Figure 5)
- Construction of 163 Glen Street affordable housing complex in 2017 (Figure 6)
- Stabilization of Prospect Hill Tower in 2016 (Figure 7)
- Renovation of the Somerville Community Growing Center in 2019 (Figure 9)
- Conversion of the Mystic Water Works pump station into 25 units of affordable senior housing in 2017 (Figure 10), and
- Rehabilitation of the historic Elizabeth Peabody House in 2019 (Figure 11).

Figure 7: Prospect Hill Tower, 68 Munroe Street, Somerville. Stabilization completed in 2016. (Bottom)



Figure 6: 163 Glen Street Affordable Housing Complex. Construction completed in 2017. (Top)



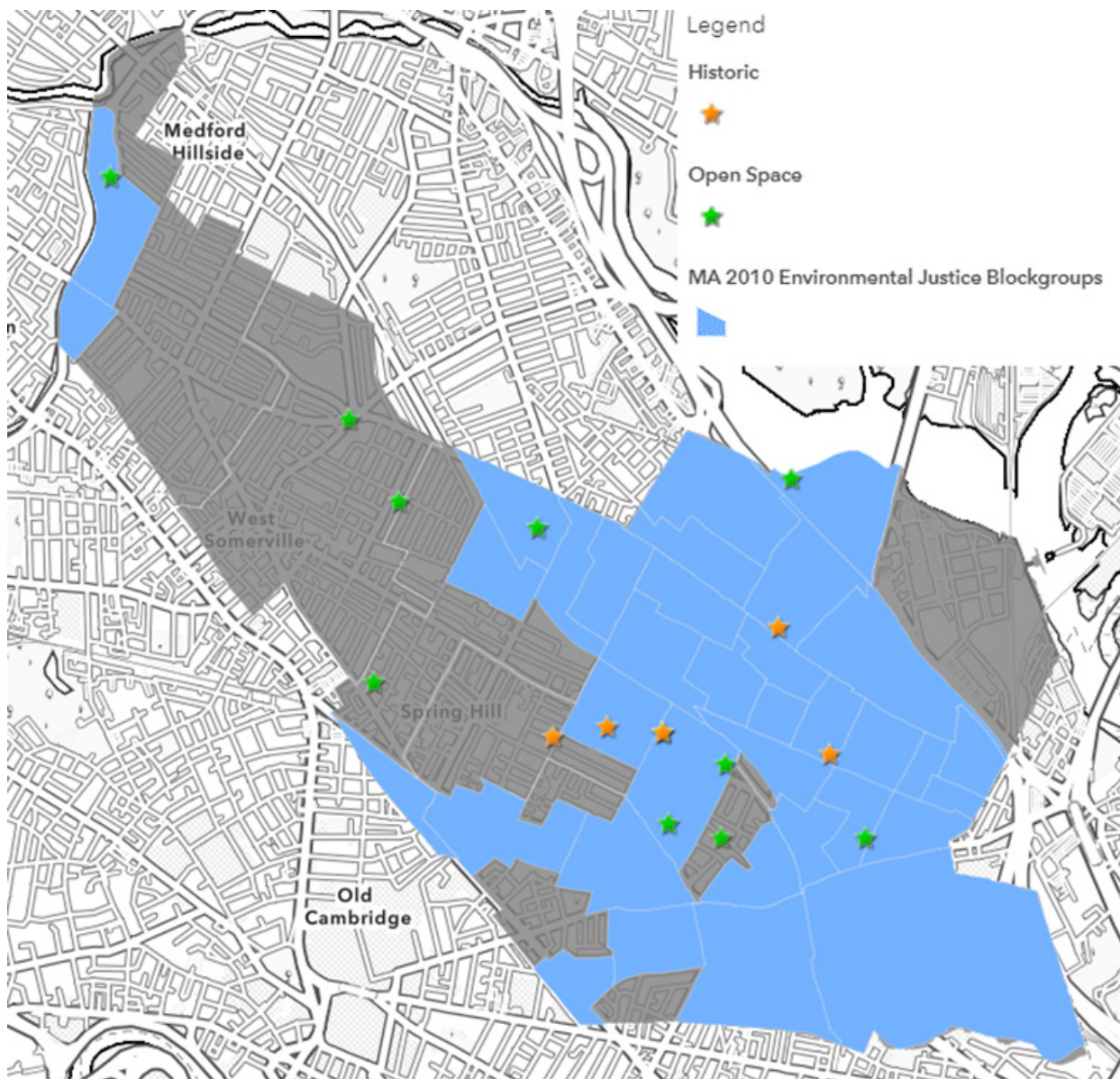


Figure 8: Somerville CPA Funded Projects, 2018-2020. Created by Bill Coen using ArcGIS, 2021.

The above map was designed to spatially and visually represent all historic and open space projects funded by the Somerville CPA program between 2018 and 2020. Affordable housing projects were omitted from this map because the allocation of bulk transfer of funds from the CPA program to the Affordable Housing Trust Fund makes locating individual project addresses difficult. The intention of this map is to understand the locational context of CPA projects, and examine if there are any patterns present in the data. In general, CPA funded projects appear to be relatively equitably distributed, with nine of fifteen projects occurring in environmental justice areas. The environmental justice layer for this map was created by using data from

the Massachusetts Executive Office of Energy and Environmental Affairs (EOEEA) using data from the 2010 census and American Community Survey estimates from 2006-2010 (arcgis.com n.d.). This is the most currently available data for environmental justice communities in Massachusetts available in ArcGIS online. Environmental justice designations are made at the census block group level and are based on race and ethnicity (25% of the population is identified as minority), income (the median household income is below 65% of the statewide median as of 2010), and/or English isolation (25% of the households includes no one over the age of 14 that speaks English well or very well).

Community Context

Somerville is a city within Middlesex County, Massachusetts, just two miles north of Boston. Located in the Mystic River watershed, Somerville is bounded to the north by the Mystic River and the communities of Medford, Malden, and Everett, to the west by the Alewife Brook and Arlington, and to the east and south by the cities of Boston and Cambridge (City of Somerville 2020). As previously noted, Somerville's population of 81,360 on 4.1 square miles makes it the most densely populated community in New England (City of Somerville 2020). Public open space represents only approximately 5.3% of Somerville's total land area (about 141 acres), and supports a variety of uses, including passive recreation, athletic activities, playgrounds, and natural habitat. Only 45% (roughly 63.52 acres) of this open space is owned by the City of Somerville. The remainder is owned and managed by the Massachusetts Department of Conservation and Recreation (68.36 acres), the Massachusetts Bay Transportation Authority (6.13 acres which encompasses the Community Path), and Middlesex County (0.50 acres occupied by the Somerville District Court). There are also approximately 45 acres of privately held open space, including Tufts University sports fields and church properties (Somerville Open Space Plan 2017).

Since its founding, Somerville has been home to a vibrant blue-collar community. The city has seen significant changes in demographics over the past three decades, with gentrification changing the make-up of entire neighborhoods (Bonfiglioli 2017). Somerville has transformed into a hotspot for people of all ages, but primarily millennials. Millennials (individuals born between 1981 and 1996) make up the highest percentage of the city's population; the second highest percentage of residents are ages 35-54 (Schumer 2020). As of 2019, Somerville had a median household income of \$97,328, the

median property value was \$664,700, and the rate of homeownership was 33.6% (US Census 2019).

The five largest racial and ethnic groups in Somerville are White (Non-Hispanic) at 68.2%, Hispanic or Latino at 12.4%, Asian (Non-Hispanic) at 10.3%, Black or African American (Non-Hispanic) at 6.2%, and Two or More Races at 4.3% (US Census 2019). Foreign-born residents represent 25% of the population, of whom roughly half have arrived in the past ten years (US Census 2019). Nearly a third (30.2%) of Somerville residents speak a language other than English at home, and more than 50 languages are spoken in the city (US Census 2019). The most spoken foreign languages in Somerville are Portuguese at 6.3% and Spanish at 8.0% (Somerville, MA Demographics n.d.). Smaller yet significant populations of Haitian Creole, Italian, and Chinese speakers are also present in the city (Somerville, MA Demographics, n.d.).

Community Goals

The Somerville CPA funds projects that impact the community in a variety of ways, but the program emphasizes an alignment with CPA program objectives and the goals established in the Somerville long-term comprehensive plan, SomerVision2040. Somerville's comprehensive planning process uses innovative ways to engage the community to understand how residents prioritize different goals, such as sustainability, affordable housing, and open space (City of Somerville 2020). The priorities set by the community drive the development of the comprehensive plan. Analyzing this report provided a critical foundation for our research team to understand the needs and aspirations of the Somerville community. The report was the result of extensive community outreach completed by City of Somerville staff and the SomerVision 2040 Committee. SomerVision2040 covers eight issues, including Climate and Sustainability, Commercial Development, Business and Arts, Community and Governance, Housing, Mobility, Public Space and the Natural Environment,



Figure 9: Somerville Community Growing Center, 22 Vinal Avenue, Somerville. Renovation completed in 2019. From Somerville Community Growing Center Website, 2021.

and Youth and Education (City of Somerville 2020). Many of these topics overlap with the types of projects funded by the CPA program. SomerVision2040 and its predecessor, SomerVision2030, show the progressive nature of the community. The comprehensive plan indicates the community's willingness to continue to learn and build upon the various issues they have collectively identified. The city takes a community-oriented, multifaceted approach to problem solving in their comprehensive plan. They seek out ways in which their transportation system, housing options, open space, cultural identity, and commerce can take strides towards becoming more sustainable, accessible, innovative, and diverse (City of Somerville 2020).

In addition to SomerVision2040, the research team analyzed the Somerville Open Space and Recreation Plan 2016-2023 and the Somerville Affordable Housing Trust Fund Fiscal Year 2017 Report. These two reports provided additional data on the established city goals in relation to their specific subject areas. There is a great deal of intersection among the reports in terms of objectives, most notably in the prioritization of community outreach and education and a commitment to equity and sustainability.

The City of Somerville has set high standards for success as a community, in some instances far exceeding other Massachusetts municipalities' aspirations. Somerville has set a goal to have 20% of their housing stock be affordable in perpetuity and to decrease their 2014 carbon emissions by 80% by 2040 (City of Somerville 2020). The city has also set a goal of creating 105 acres of open space by 2040 (City of Somerville 2020). The stated SomerVision2040 goals also call for all city departments, boards, and commissions to connect with diverse demographics of residents in decision-making processes. Community outreach and education was a major goal that was emphasized in all three of the community reports we analyzed. Somerville believes that community engagement is essential to their commitment to equity. To understand the needs of residents, the city must reach the public and provide critical information as to how the city can best serve them (City of Somerville 2020). The Somerville community goals also encourage the CPA and CPC to conduct program evaluations to ensure that they are doing their part to align with what the community expects from them.



Figure 10: Renovated Mystic Water Works at Capen Court, 485 Mystic Valley Parkway, Somerville. Adaptive reuse into housing completed in 2017. From Colantonio Construction.

Project Goals

The primary goal of the project was to evaluate the Somerville CPA program and its ability to meet the goals of the Somerville community. The following research questions were developed to determine if the Somerville CPA is helping the City of Somerville achieve its overarching goals for the community:

- What progress has the Somerville CPA achieved in regard to its goals since 2017?
- How is the Somerville CPA program serving all community members?
- How can the Somerville CPC be more representative of the community?
- How could the Somerville CPC function in a way that better supports the mission and management of the CPA program as well as meet the goals of the overall community?
- What kind of outreach is occurring to the general public and potential project applicants about the Somerville CPA program?
- What other effective CPC structures exist currently

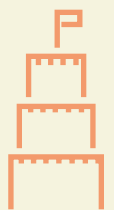
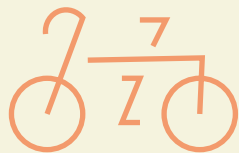
in Massachusetts and how could their models and strategies be incorporated into the Somerville CPA program?

- How do Somerville CPA project implementers perceive the program's effectiveness?
- How could the Somerville CPA application process be improved to ensure that a wider pool of applicants can successfully navigate the process?
- What other types of projects or opportunities could be supported by Somerville CPA funds?

Because the primary purpose of the evaluation is to assess how the program is currently functioning and measure outcomes, the evaluation plan reflects a process and outcome evaluation. Within Francine Jacobs' Five-Tiered Approach, this evaluation plan would be described as a Tier Three and Tier Four evaluation because it seeks to monitor program performance and develop a more detailed picture of the program as it is implemented (Jacobs and Kapuscik 2000). A Tier Three and Tier Four evaluation is well suited for a relatively nascent program (Jacobs and Kapuscik 2000).

Methods

In this section we detail our primary and secondary research which includes interviews, a literature review, analysis of Somerville community goals, analysis of Somerville CPA projects, and analysis of Somerville CPA organizational recipients





Methods

To meet the stated project goals, we conducted primary and secondary research. The research questions we intended to address with primary and secondary research are further outlined in the Evaluation Planning Grid (see Appendix B). A Program Logic Model was developed for the CPA program as well, which informed the development of

research questions (see Appendix B).

Primary Research

Interviews

A total of 28 interviews were conducted via phone and video conference depending on the preference and availability of the interviewees. The intent in interviewing these parties was to gather perspectives and collect data which addressed the research questions outlined in the Evaluation Planning Grid (see Appendix B). Interviewees were selected utilizing a purposive sampling strategy to identify interview participants who could represent key stakeholder groups for the CPA program. The below parties were interviewed using a series of open-ended questions (see Appendix C).

- Current and former Somerville CPA managers (2 interviews)
- Current and former Somerville CPC members (7 interviews)
- Somerville Office of Strategic Planning and Community Development Department, including Affordable Housing Trust Fund delegates (3 interviews)
- CPA managers or equivalent staff in other

Figure 11: Renovation of Elizabeth Peabody House, 277 Broadway, Somerville. Completed in 2019. From Google Street View, 2020.

communities (5 interviews)

- Somerville CPA project applicants (9 interviews)
- Somerville Mayor (1 interview)
- Community Preservation Coalition Director (1 interview)

Secondary Research

Literature Review

We gathered news articles, social media posts, and other publications about Somerville CPA project announcements and summarized key themes to establish common practices for outreach. We assessed prior Somerville CPA program feedback surveys to determine trends in community feedback. In addition, we analyzed past CPA assessments at both the state and community level to develop a foundational understanding of the context in which the CPA program operates.

Analysis of Somerville Goals

We reviewed significant Somerville community reports (i.e., SomerVision2040, Somerville Affordable Housing Trust Fund FY2017 Report, and the Somerville Open Space and Recreation Plan) to develop a set of overarching Somerville goals. We conducted an analysis to determine how well CPA program goals align with these overarching Somerville goals.

Analysis of Somerville CPA Projects

We compiled data from FY2018, FY2019, and FY2020 about the missions of Somerville CPA project applicants and the goals of the projects that were funded. We compared those projects and applicants

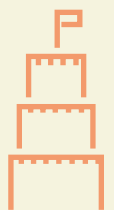
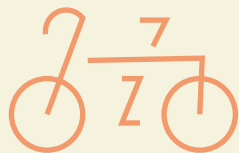
with Somerville CPA program goals to determine alignment.

Analysis of Somerville CPA Organizational Recipients

We collected information about Somerville CPA project applicants that have been funded by the program since FY2018. We noted similarities between applicants and identified services being provided by applicants.

Literature Review

To fully understand the current conditions that helped to shape the Somerville CPA program, we analyzed literature that captured current program outreach strategies, program goal prioritization, prior program evaluations, and the Massachusetts CPA program as a whole.





Literature Review

Program Outreach

A key indicator of public awareness and understanding of the Somerville CPA is the extent to which grey literature has been published that highlights the program and its achievements. This public-facing information brings recognition to both the city's efforts as well as the contribution of Somerville residents. While not always a primary focus of news articles and other grey literature, the Somerville CPA program is frequently cited within articles for its funding contribution to newsworthy projects. This is also helpful for further public recognition of the program and its purpose throughout the community. For example, the program was recognized for funding green spaces and trails along the Mystic River (Figure 12) by supporting the Mystic River Watershed Association (MyRWA) in its efforts to improve and extend the River's greenways and parks. The CPA's funding of MyRWA in 2017 and 2018 is helping to revitalize the 5-acre Blessing of the Bay Park that is part of the Mystic River Reservation (The Somerville Times 2019a).

Another example of how the CPA program has supported community projects is through the repaving of a section of the Somerville Community Path (Figure 13), and the ability of the funded organization to hire a consultant to oversee the project's design. The article also notes that CPA capital comes from both the city and residents (The Somerville Times 2017). The CPA was highlighted for its backing of the Prospect Hill Tower renovation (Figures 7), which is considered one of its most notable projects (Clark 2017). All these examples were reported in Somerville's local newspaper, The Somerville Times.

Figure 12: Somerville Community Path. From Google Streetview, 2020.

While The Somerville Times has been a helpful source for promoting the projects supported by the CPA program, it has also provided opportunities for public comment. Over the years, the paper has published articles requesting public comments regarding the CPC (The Somerville Times 2019b) and encouraging individuals and organizations to apply for CPA funds (The Somerville Times 2018). In addition, the paper published an article when the CPC was looking for a new member, which included ample background information on the CPA and CPC (The Somerville Times 2020). The Somerville Times has been an effective resource for the CPC to generate public recognition and engagement.

Another way in which the Somerville CPC has promoted the CPA program is by collaborating with a group of high school students as part of the Mayor's Summer Jobs Program in 2020 to develop a short documentary on the program (Figure 14). This group of students created a 22-minute video that presented an overview of the Somerville CPA program. The video also dives into specific projects that have been successfully funded by the CPA and interviews stakeholders of each of the projects. While The Somerville Times has been a helpful source for promoting the projects supported by the CPA program, it has also provided opportunities for public comment. Over the years, the paper has published articles requesting public comments regarding the CPC (The Somerville Times 2019b) and encouraging individuals and organizations to apply for CPA funds (The Somerville Times 2018). In addition, the paper published an article when the CPC was looking for a new member, which included ample background information on the CPA and CPC (The Somerville Times 2020). The Somerville Times has been an effective resource for the CPC to generate public recognition and engagement.

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Figure 13: Somerville CPA Documentary. Created by students in Mayor's Jobs Program with City of Somerville, 2020.



Figure 14: Pathways along the Mystic River. CPA funds in 2017 and 2018 helped to improve and expand of greenways, trails, and parks along the river. From Google Street View, 2020

Prior Fiscal Year Annual Reports

As part of our evaluation, we reviewed prior CPA Annual Reports to understand how funding has been generated and allocated to the different sectors over recent years. The FY18 and FY19 CPA annual reports begin by introducing the CPA, program funding sources, various projects supported by CPA funds, and the public process for allocating CPA funds. The reports reference data from FY14, but more detail is available beginning in FY17, when the city began authoring CPA annual reports. The reports detail the sources (real estate tax surcharge, state match, and city appropriation) and amounts of the funds that are available to support the program in that year (City of Somerville 2018a; City of Somerville 2019). The state mandates that all CPA programs allocate a minimum of 10% of their funds to each of the three project categories and the remaining 70% funds are undesignated, and can be used for any allowable project in any of the CPA categories. This gives each community tremendous flexibility to determine its own priorities. As of 2019, Somerville chose to allocate 15% for open space and recreation, 15% for historic resources, 45% for community housing, 20% for flexible spending, and 5% for CPA program administration (City of Somerville 2018a; City of Somerville 2019). Table 1 depicts the funding sources and the appropriations from FY14 through FY19.

Since the CPA program was first established in Somerville in FY14 up until the FY18 Annual Report, 48% of CPA funding has gone to affordable housing, 23% to historic resources, and 29% to open space and

recreation. Of the funded project applicants, 53% have been community organizations, 36% have been city departments, and 11% have been joint applicants—city and community partnerships (City of Somerville 2018a).

The CPA Applicant and Implementer Survey results show that since FY16, 93% of implementers and 100% of applicants found the CPA Manager to be a beneficial support in the application process; 40% of the applicants found the application process to be easy and very transparent; 62% of funded projects would not have gone forward without CPA funding; and 84% benefited from being a part of the CPA beyond receiving funding (City of Somerville 2018). This feedback led the CPA manager to hold application workshops and create additional content to help applicants better understand the application process. Also, a new pre-application process was added to help project applicants foster ideas (City of Somerville 2018). Feedback also prompted the timeline of the CPA to shift to better accommodate the construction season (City of Somerville 2018). Further public input was gathered through community engagement at two Somerville community events where the CPA manager and CPC members gathered 276 responses from a survey asking people to vote on how they would spend CPA funds (City of Somerville 2018).

In FY19 the CPA Applicant and Implementer Survey results show that since FY18, there was a 5% increase in the number of applicants who found the application process to be easy (City of Somerville 2019). This improvement is in part due to a change in the schedule for the application process to better accommodate the construction season, and a redesign of the report template for grantees (City of Somerville 2019). Further

48% of CPA funding has gone to affordable housing, 23% to historic resources, and 29% to open space and recreation.

Table 1: Somerville CPA Fund (FY14-FY19)

Community Preservation Act Fund	FY14 Actual	FY15 Actual	FY16 Actual	FY17 Actual	FY18 Actual	FY19 Thru 4/30	Total
Total Funding Available	2,681,180	6,223,963	4,868,257	2,776,974	4,053,077	2,655,542	n/a
Current Fiscal Year Revenue	2,681,180	3,542,783	2,889,136	2,588,146	2,669,272	2,655,542	17,026,059
Surcharge Revenue	1,323,320	1,430,721	1,546,198	1,664,815	1,794,507	2,208,864	9,968,425
City Appropriation**	1,355,671	1,200,000	510,844	500,000	500,000	0	4,066,515
State Match of Previous Year's Local Revenue	0	904,917	829,456	420,681	370,465	432,342	2,957,861
Interest	2,189	7,145	2,638	2,650	4,300	14,336	33,258
Rollover from Previous Fiscal Year	0	2,681,180	1,979,121	188,828	1,383,805	0	n/a
Appropriations and Encumbrances	56,769	4,188,072	3,941,950	2,329,797	3,645,578	2,300,501	15,838,473
Committee admin expenses (up to 5% of annual revenue)	56,769	93,585	61,827	86,675	84,068	81,452	590,182
Open Space and Recreation Projects	0	227,463	695,160	777,239	2,203,008	74,888	3,977,758
Historic Resources Projects	0	1,660,996	600,288	585,467	158,100	747,175	3,752,026
Community Housing Projects	0	2,206,028	1,834,675	880,416	1,200,402	1,396,986	7,518,507
Funding Available for Projects in Next Fiscal Year (Rollover)	2,681,180	1,979,121	188,828	1,883,805	0	0	n/a
Open Space and Recreation Reserve*	402,177	706,131	0	710,000	0	0	n/a
Historic Resources Reserve*	402,177	0	0	0	0	0	n/a
Community Housing Reserve*	1,206,531	594,755	0	0	0	0	n/a
Undesignated Project Funding*	670,295	678,234	188,828	673,805	0	0	n/a
Current Year's Unallocated City Appropriation	—	—	—	—	—	0	n/a
*FY18 funding available for FY18 projects; ** FY18 City appropriation not final when report finalized; FY19 City appropriation determined in Spring 2019.							

Source: City of Somerville's Community Preservation Act FY2019 Annual Report, 2019.

public input was gathered in FY19 through community engagement efforts at seven Somerville community events where the CPA manager and CPC members collected 330 responses to the same survey asking people to vote on how they would spend CPA funds (City of Somerville 2019).

Prior Somerville CPA Evaluation

The only formal program evaluation of the Somerville CPA program was completed in 2017 by a Tufts Urban and Environmental Policy and Planning program student (Kogan 2017). As a self-accountability mechanism, the evaluation provided feedback to the CPA manager from CPC members, CPA project

implementers, and other key stakeholders. The report provided key insights to determine how effectively the program was being implemented since its inception and recommendations for improving implementation of the program moving forward. The 2017 report concluded that the CPA is successfully functioning as intended by filling a gap in community-based planning and serving as a critical funding source that is commonly used to leverage other necessary funds (Kogan 2017).

However, the report also determined that the CPC's role had evolved considerably since the program's inception, and not all CPC members were in agreement about the role of the Committee. These inconsistencies were identified as a major concern, as they could lead to a gap in execution of responsibilities. The report

noted several challenges for the program moving forward, including maintaining the public nature of the CPA, ensuring that projects are equitably serving the community, and balancing city and community priorities (Kogan 2017). The evaluation found that an overall lack of sustained attention was given to the fulfillment of stated community goals, particularly in regards to equity and inclusion. Specifically, while the majority of CPA projects at the time were in state designated environmental justice areas, actual project applicants and the CPC members were not demographically representative of the community and did not include residents from environmental justice neighborhoods. Overall, the 2017 CPA evaluation questioned not only how the CPA program fulfills the needs of Somerville as a community, but also how representative the program is of the residents as well. The report included the following recommendations for the program as it matures:

- Conduct a needs assessment
- Engage in more structured outreach by the CPC
- Improve internal communication and role clarity
- Engage in capacity-building
- Consider planning for long-term funding; and
- Alter the evaluation structure.

State Context

The most prominent investigation into the CPA program at a state-wide level was conducted in 2007 by Robin Sherman and David Luberoﬀ of the Rappaport Institute for Greater Boston at Harvard University. Luberoﬀ and Sherman (2007) uncovered equity issues pertaining to the CPA program; most notably they found that state match funding disadvantaged less aﬄuent municipalities and benefited wealthier communities. According to the study, aﬄuent communities are advantaged by the CPA because they are more willing to adopt an optional tax; this advantage is compounded by the fact that higher property values

bring in higher CPA tax revenue, which is matched by the Commonwealth (Luberoﬀ and Sherman 2007). For example, based on data gathered between 2001 and 2006, Luberoﬀ and Sherman (2007) determined that Worcester, Springfield, Brockton, Lowell, Lynn, Haverhill, Framingham, and New Bedford contributed around \$18.88 million to the CPA through deed registry fees, but received zero funding because each of the cities had yet to hold a vote on adopting the CPA. On the other hand, wealthier communities like Newton, Weston, Nantucket, Westford, Duxbury, North Andover, Bedford, Sudbury, and Barnstable accounted for only 4.5% of deed registry fees totaling \$9,063,154, but received greater than 26% of matching funds, equaling about \$50 million because they had established a CPA program (Luberoﬀ and Sherman 2007). In addition to equity concerns about which cities were benefiting from state matching funds, Luberoﬀ and Sherman (2007) raised questions about how CPA money was being spent. According to data from the non-profit Community Preservation Coalition, excluding Cambridge, conservation of open space accounted for more than 50% of CPA project funding across Massachusetts (Luberoﬀ and Sherman 2007). This implies that less funding was being allocated to the creation of aﬀordable housing and preservation of historical amenities. Finally, the article noted a lack of data and overall transparency in the program, which created diﬃculties in determining the eﬃciency of CPA projects (Luberoﬀ and Sherman 2007).

Despite being dated, the Luberoﬀ and Sherman (2007) research provides useful insights into how the CPA program is operating at a macro level. Since the publication of the article over a decade ago, more municipalities have passed CPA measures (e.g., Springfield, Lowell, Framingham, and New Bedford), which should serve to improve the overall equity of the program's state funding (Community Preservation Coalition, n.d.) (Figure 16). However, an inherent shortcoming of the CPA program is

Community Preservation Act Adoption

November 2020

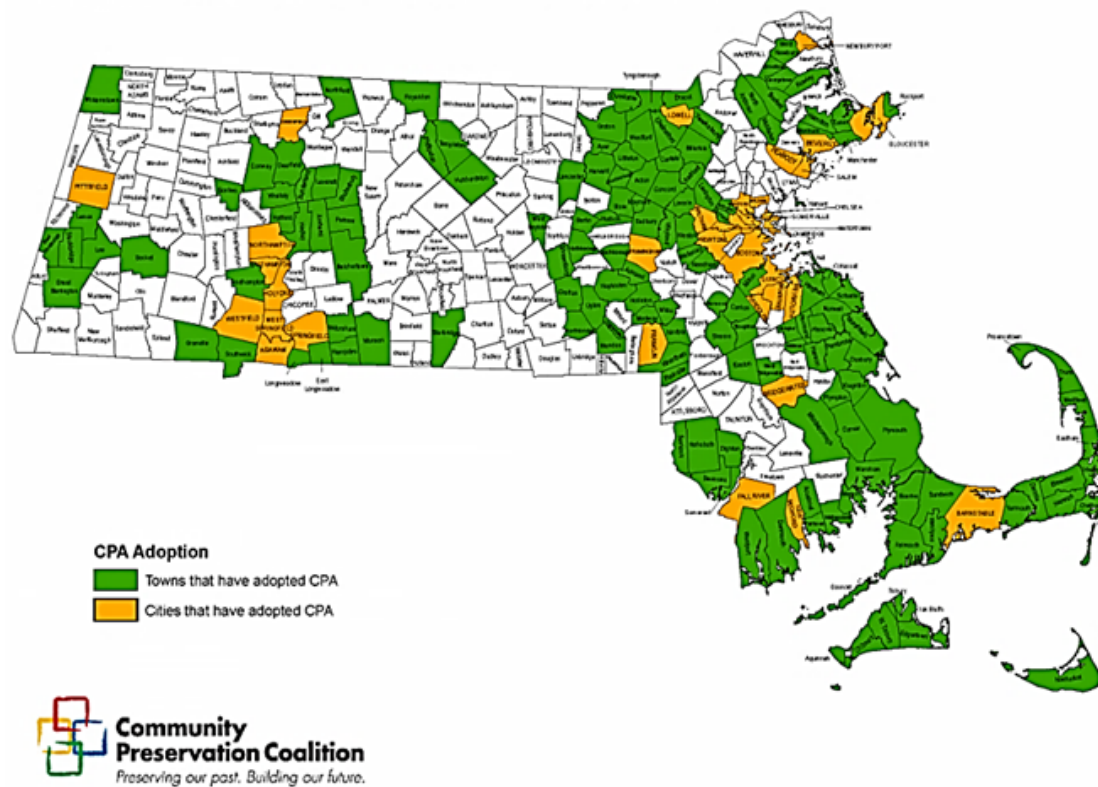


Figure 15: Cities and Towns Across Massachusetts That Adopted CPA. From Community Preservation Coalition, 2020.

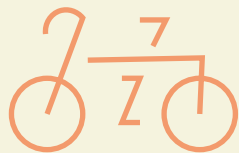
that funding is linked to property values due to the main funding mechanism being a property tax. Understanding the state-wide operation of the CPA provides context for our project and reinforces our goal of creating transparency for the Somerville CPA program.

Relatively few publications have been released assessing the efficacy and impact of CPA programs in Massachusetts communities beyond Somerville. However, some articles address topics such as current projects and challenges of the CPA program within various communities, offering glimpses of how the program is operating. The Wicked Local news platform has served as a main source for this information. For example, a Wicked Local Cambridge edition featured a guest article by two state senators who urged cities and towns to use CPA funds for rental relief during the pandemic. They point out that the state published guidelines to explain how communities can dedicate CPA funds for emergency relief, and mention that both Waltham and Newton have already done so (Eldridge

and Hogan 2020). Another article from 2018 focused on the unusual divergence between the increased number of communities adopting CPA and the annual decrease in funds allocated to the program overall. As more communities join the program, the state fund becomes diluted. It also criticized the fact that funding is more favorable for wealthier communities, considering that most funds are derived from the real estate surcharge (Sherman 2018). Wicked Local Needham posted an article which explored the ways in which several cities and towns have dispersed funds. The brief synopsis included how five communities prioritized the allocation of their CPA funds between affordable housing, historical preservation, and open space. Cambridge had the highest percentage of funding (80%) dedicated to affordable housing, while Newton and Wellesley devoted more funds to open space preservation, and Needham and Waltham to historical preservation (Lovett 2016). These articles put forward more general information about the CPA along with specific examples of how the funds are used, or can be used, in communities across the state.

Data Analysis

In this section we review our analysis of the data that has been collected by the City of Somerville CPA program and other City Departments.





Data Analysis

CPA Funded Projects Overview for FY18-FY20

From FY18 to FY20, the Somerville CPA allocated a total of \$14,250,646 to 32 eligible projects (CPA project tracking sheet). The average amount of money spent annually, delineated by project type, demonstrates that affordable housing receives the most funding at \$3,287,459, followed by open space and recreation at \$979,852, and historic preservation at \$482,904 (Figure 17). These figures are consistent with the CPA's stated highest priority of creating and preserving affordable housing in a city that is becoming increasingly unaffordable for low to moderate income earners.

Overview of Project Recipients for FY18-FY20

Over the course of FY18, FY19 and FY20, the Somerville CPA funded 32 projects for 19 different project recipients. A significant majority of the project implementers were community organizations (see Figure 18). The community organizations that were selected as CPA project implementers provide a range of services to a diverse population with a variety of needs (see Table 2). In considering funding disbursement based on type of services, community organizations that provided affordable housing and economic services received most of the funding from FY18-FY20, with 41% of CPA funding going

Figure 16: Somerville Museum. Photo by Tony Collins, 2021.

Total Amount Funded by Project Type

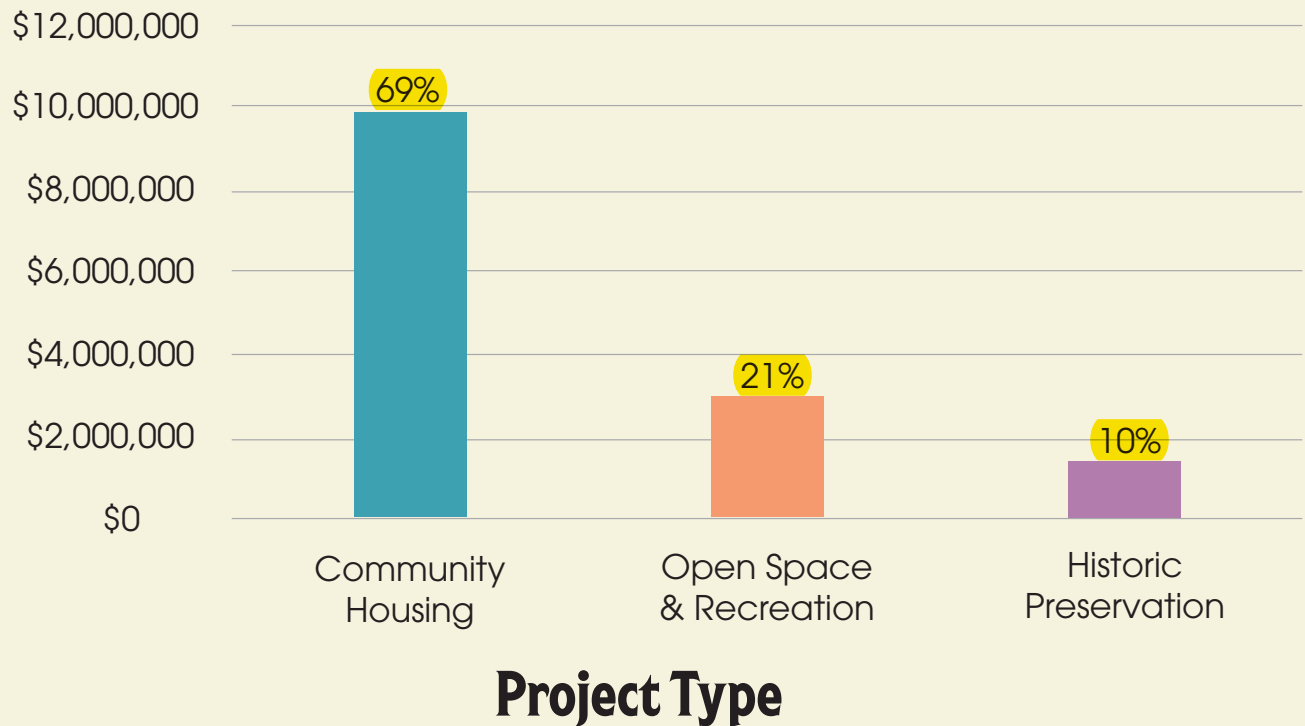


Figure 17: Total CPA Funding FY18-FY20 by Project Type. Created by Bill Coen, 2021.

to affordable housing and 38% of funding going to economic services (see Table 2). It is important to note that these funding levels are heavily influenced by the inclusion of a \$6 million bond awarded in FY18 to the Somerville Community Corporation (SCC) for the "100 Homes Program." This initiative was developed to create 100 new units of affordable housing in Somerville through purchasing existing multi-family homes. To date, SCC has acquired 48 fully deed-restricted rental units in 10 properties that allowed 23 tenants, including five that were in danger of losing their Section 8 vouchers, to remain housed. Five units are designated for homeless households. The \$6 million bond awarded for this project was one of the largest funding designations in the history of the Somerville CPA. While this bond award does impact how funding levels are perceived among community organizations, we felt it was important to include this information to demonstrate the significant impact and potential of using bond funding to scale the impact of CPA funding.

Percentage of Projects Funded by CPA

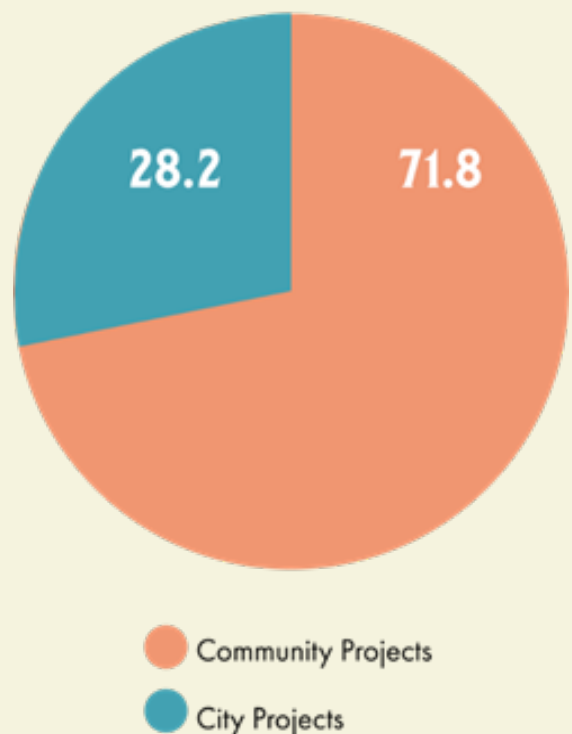


Figure 18: Categories of Projects Funded by Somerville CPA FY18-FY20. Created by Gabby Queenan, 2021.

Table 2. Analysis of Services Provided by Community Organizations Funded by the Somerville CPA (FY18-FY20)

Service Sector	CPA Funded Organization by Service Sector	Funding Disbursement by Service Sector
Affordable Housing	22%	41%
Environmental	15%	3%
Food Security	15%	6%
Shelter	15%	3%
Economic Security	11%	38%
Youth Support	11%	4%
Domestic Violence	4%	0.01%
Historical	4%	4%

* Affordable Housing and Economic Security sectors include a \$6 million bond. Other sectors do not include bond funding.

Source: Gabby Queenan, 2021.

Analysis of Prior CPC and Somerville Community Data

Since the CPA program was first established in Somerville, the CPC has tried to ensure that the program has reflected community priorities. One way for the CPC to remain informed of community priorities and needs, while publicizing the CPA program and its goals, is through qualitative and quantitative community response data collection and analysis. By understanding past survey responses, the CPC can analyze and evaluate trends in community priorities, community aspirations, and any areas for improvement in the CPA program.

Historical CPC survey data was obtained from the City of Somerville online open-source data portal, SomerStat, from years 2018-2021. The 2017 Somerville Community Preservation Act Evaluation had previously highlighted that community surveys for the CPA program should be developed using a greater diversity of outreach events, both in terms of location of events and demographics reached, to promote the

CPA program and survey the public (Kogan 2017). Based on limited demographic data available on many of the survey responses, we used an adaptation of the “COVID-19 Center for Disease Control (CDC) Social Vulnerability Index (SVI)” to investigate which Somerville residents are the most vulnerable for survey outreach negligence. Using qualitative and quantitative data sources, several open data sources we researched the potential of missing community respondents and analyzed correlations from the sampled survey data in the Somerville neighborhoods the CPA serves. With the limitations of the survey methods and the sensitivity of the demographics in this report, we stress caution in the use of this analysis. Although we believe further analysis of survey data is in alignment with CPC goals, we urge continued sensitivity to the information this analysis proposes as well.

The most prominent media platform the CPC uses to promote awareness of the CPA program is the City of Somerville CPA webpage, <https://www.somervillema.gov/departments/community-preservation-act>, shown below in Figure 19 (City of Somerville 2021).

In conjunction with the collection of sampled data, we



Figure 19: City of Somerville Community Preservation Act Webpage. From City of Somerville Website, 2021.

ran a correlation between the neighborhoods of survey distribution and sampled demographics based on the “COVID-19 Center for Disease Control (CDC) Social Vulnerability Index (SVI)”. The aim was to supply an overarching measurement tool to reveal correlations between neighborhood communities (see Figure 20), and CPA outreach. It is important to note that there are 14 listed neighborhoods in Somerville, and 15 assessed districts in the city (City of Somerville 2020). However, only the 12 neighborhoods where the CPC surveys were conducted were used for this correlation analysis.

Historical Survey Research Methods and Tools

Analyses of past CPC survey results shed light on potential gaps in engagement efforts in the CPA process towards the Somerville community. A key focus of the CPC is “identifying barriers and working to accommodate all residents who want to participate in the [civil] process... to include more diverse voices in the decision-making process” (City of Somerville 2020). Recognizing unmet needs of coordinated, civil engagement, the CPC issued a variety of community surveys evaluating the CPC, the Somerville community, and the residents’ value of the community.

The past survey responses explored in this analysis include the Somerville Happiness Survey, Somerville Resident Community Survey, Somerville Resident CPA \$100 Allocation Survey of 2020, and

Community Preservation Act Community Events Survey of 2019. For generalized demographic data cross references, the analysis used 2019 census data from the American Community Survey (ACS), the 2019 US Census Data, and a map of Somerville neighborhood assessment districts (see Figure 19).

The Somerville Happiness Survey 2019 asked 17 questions about Somerville’s city services and residents’ quality of life (Noonan 2021). The results of 1,496 community responses are shown in Figure 21. While the overall results of The Somerville Happiness Survey 2019 are a positive 7.5/10, a key observation was the low Cost of Housing score (2.1/5), where 5 was the highest level of satisfaction (Noonan 2021). Housing was the lowest-ranked item out of six, the others being availability of information about city services, quality of schools, trust in local police, maintenance of streets and sidewalks, and availability of social community events (Noonan 2021). The availability of the survey in multiple languages (Spanish, Portuguese, and Haitian Creole) suggests an attempt to capture a wide array of responses from Somerville’s diverse neighborhoods (Noonan 2021). However, the typical survey “Respondent,” which was a white female renter age 25-35 with household income greater than \$100,000, reveals a lack of diversity in the respondents overall (Noonan 2021). These results provide supportive evidence for the need to address diversity gaps in survey outreach and the need to expand affordable housing options, both of which are consistent with the goals of the CPA program.

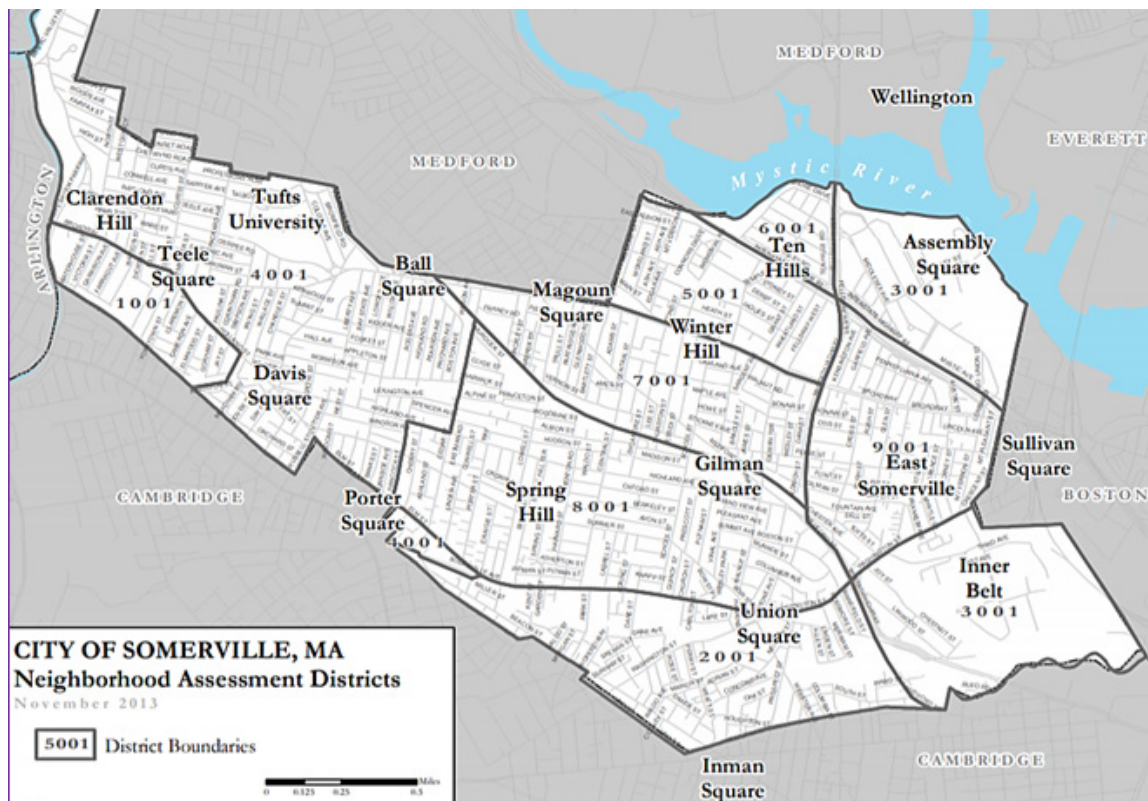


Figure 20: Neighborhoods in Somerville. From *City of Somerville*, 2019.

City of Somerville Community Preservation Survey for Residents, 2021

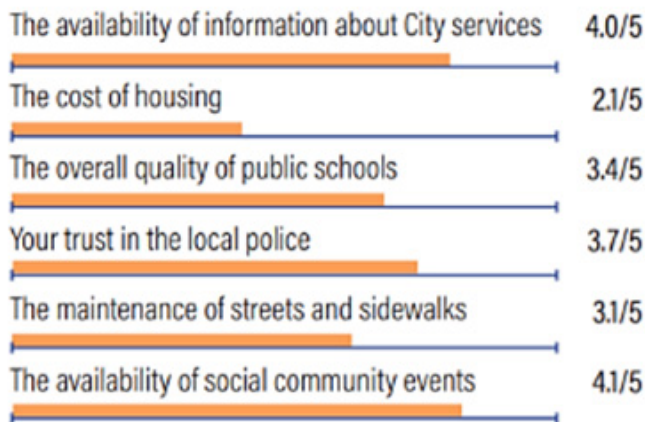
Over the last few years, the CPC has promoted use of the City of Somerville's Community Preservation Act webpage to highlight the CPC, promote the CPA, and showcase the projects it funds for the community (City of Somerville 2021). In 2021, the City of Somerville supplied an online survey (Community Preservation Act Survey for Residents - 2020) to ask for public feedback about the CPA and its impact on the community (City of Somerville 2021). The survey results, available in four different languages (English, Spanish, Portuguese, and Haitian Creole), were obtained from responses completed between August 6, 2020, to March 17, 2021 (City of Somerville 2021).

While most of the survey questions were open ended, one question stood out concerning the outreach of the CPC's publicity of the CPA program in the media. To quantify the impact on the community outreach

in the media, the CPC asked the question: "Where did you hear about the CPA? Check All That Apply" (see Figure 21) (CPC 2021). The total number of survey respondents was 230, yet only 169 answered the aforementioned question (61 respondents left the answer blank). The results are shown in Figure 22 (CPC 2021).

Although the results of this survey found a wide range of effective outreach avenues and media platforms used within the community, it also revealed a significant gap in the program's public relations effort (CPC 2021). Of the total of 230 respondents, 61 (27%) left this answer blank, while 52 (31%) chose "other entries" (CPC 2021). This raises questions about the validity of the responses and also how respondents perceived the term "other entities." "Other entities" may entail local organizing efforts, coalitions of cultural networks, and advertising of the CPA at citywide events (see Figure 23). However, there is still considerable ambiguity stemming from the unanswered questions, suggesting flaws and limitations within this survey process.

How would you rate the following?



Who was the typical Happiness Survey respondent?

Typical Respondent 2019

% Respondents with Similar Profile

Age	25-34
Sex	Female
Housing status	Renter
Race/ ethnicity	White
Annual household income	\$100,000-\$149,000
Length of residency	21+ Years

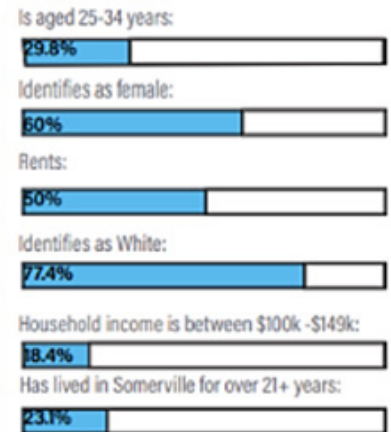


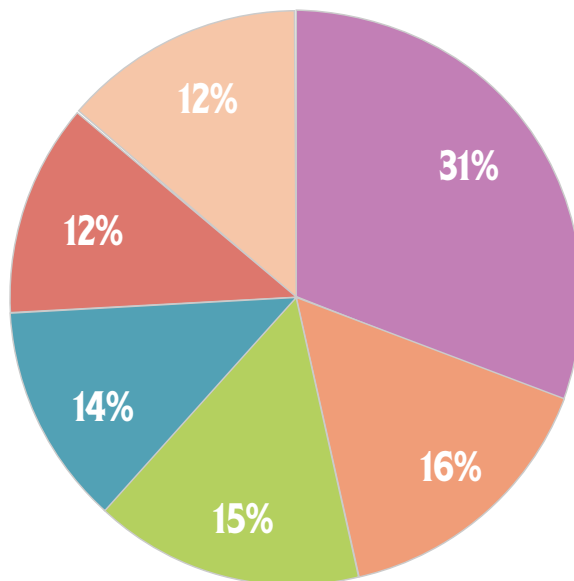
Figure 21: Results from the 2019 Somerville Happiness Survey. From City of Somerville Happiness Survey 2019.

Where did you hear about the CPA? Check all that apply.

169 of 230 Respondents
61 Did Not Answer

Percentage of Respondents
per category

Number of Respondents



Other Entries	52
Social Media	27
SomervilleMA.gov	25
A Friend	23
My Job	21
A News Source	21

Figure 22: Respondent responses to City of Somerville 2020 Community Survey CPA Report. Created by Amber Davis, 2021.

The Community Preservation Act \$100 Survey Comparison 2020

To ask for community input on how the CPC should prioritize the distribution of funds between CPA project categories, in 2020, the CPC issued an online survey, The Community Preservation Act \$100 Survey, available on the City of Somerville CPA webpage (see Figure 24) (City of Somerville 2021). By asking the residents to allocate a hypothetical \$100 (in increments of \$10) to CPA funding of open space and recreation projects, affordable housing projects, or historic preservation projects, residents could show how they would prioritize available financing for projects. A total of 36 respondents participated in this survey. After analyzing the responses to find trends in the data, the survey revealed a strong correlation between the average amount of simulated

money respondents spent on community projects and the current CPA project category allocations (City of Somerville 2021b). This suggests that the CPA is currently distributing funding between project categories in agreement with residents’ values. The results of this survey revealed that 40% of the respondents would distribute \$40 or more towards affordable housing, thus aligning with the preference shown in SomerVision 2040 and CPA stated goals, as reflected below (City of Somerville 2021). Based on the results of these surveys, studying how the CPC physically distributed the surveys to the community could capture another way to interpret outcomes. A more inclusive, comprehensive metric to evaluate the gaps in CPC outreach methods could prove beneficial for all Somerville residents and reveal how the CPA is viewed within their own neighborhoods.

Survey Question: How much would you allocate to each category if you were given \$100?

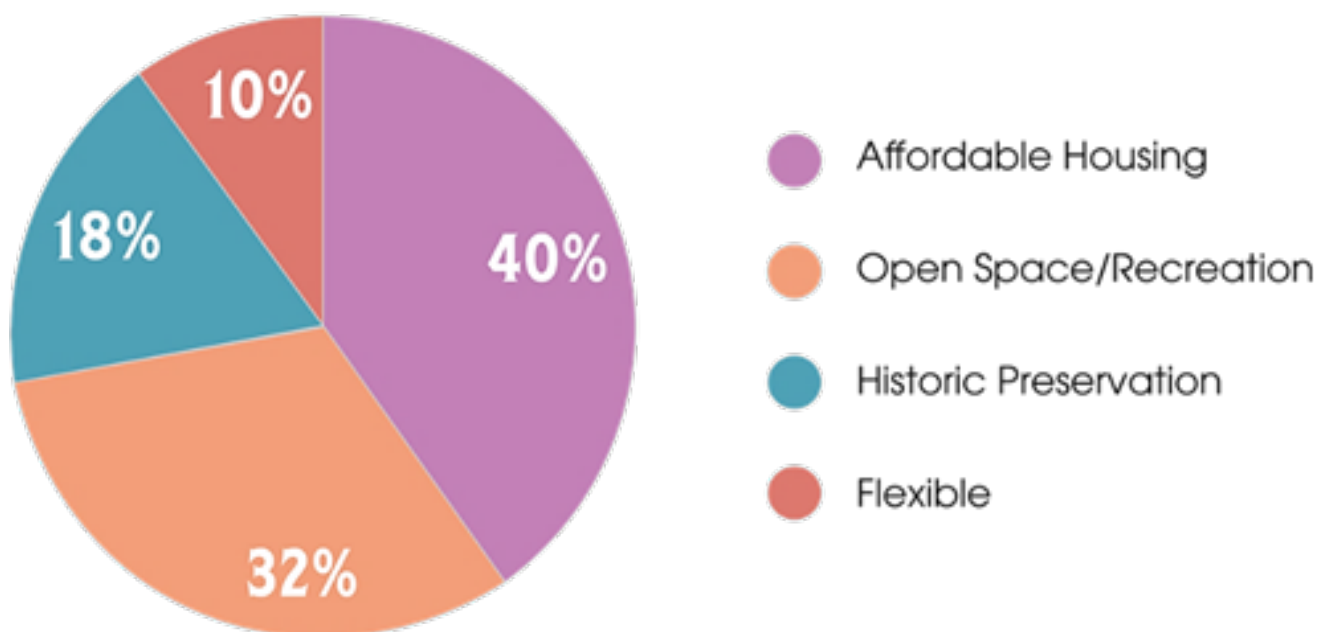


Figure 23: Somerville Community Preservation Act \$100 Survey Results, 2020. Created by Amber Davis, 2021.

CPA Community Response Survey 2019

To measure community prioritization of CPA project categories, the CPC developed a questionnaire in 2019, the CPA Community Response Survey, to distribute at a variety of Somerville community events held throughout the year (City of Somerville 2021). The questionnaire was distributed at 12 community events held throughout Somerville's 14 neighborhoods and received 3,087 responses (City of Somerville 2021). Although the local events where the surveys were conducted were dispersed across Somerville, the survey was only available in English, which raises significant concerns of selective sampling. Are the Somerville local events an effective way to reach and educate members of the Somerville community who otherwise have limited information about the CPA program and the function of the CPC members? To answer this research question, we used a cross tabulation to analyze 3,087 respondents' answers about the importance of the CPA project goals. For reference, the 2019 CPA Community respondents ranked affordable housing as the most important goal for CPC members to pursue, shown below in Table 3 (City of Somerville 2021).

Table 3. CPA Community Response 2019 Survey

	Count	Percent
Affordable Housing	1,238	40%
Open space/recreation	985	32%
Historic Preservation	556	18%
Flexible	308	10%
Total	3,087	100%

Source: Amber Davis, 2021.

One criticism raised about community wide surveys is that historically, minority residents are often overlooked in the survey data analysis and evaluation (Patten and Perrin 2015). In response to the recommendations of the 2017 Somerville Community Preservation Act Evaluation calling for more diverse projects applicants and more outreach to diverse communities, in 2019, the CPC conducted the 2019 CPA Community Response Survey at 12 neighborhood events. Over the course of 12 months, the CPC specifically targeted Somerville neighborhood events celebrating fellowship, diversity, and the local community (City of Somerville 2019).

In theory, this classic survey distribution method is fully justifiable, however, this method of data sampling was noticeably limited, as the sample only captured information from a small segment of the population. Consequently, this sampling method has a high probability for external validity bias, given that little information is known about who is in the community where the events are being held. Analyzing neighborhood demographic census data can help to better understand the population who live in the areas where surveys were distributed.

To determine if the CPC survey responses correlated with the demographics of the neighborhoods in which the events were held, a Pearson's Correlation was conducted using the software program Minitab.

To understand the diversity of each neighborhood, and uncover potential gaps in CPC survey outreach, the inquiry was based on the Somerville “COVID-19 Center for Disease Control (CDC) Social Vulnerability Index (SVI),” in conjunction with Somerville demographic data from the 2019 American Community Survey. As an experimental correlation, all else being constant, we hypothesized that neighborhoods at risk of adverse health outcomes due to rising COVID-19 outbreaks in a community are also at risk for lack of outreach from the CPC (see Figure 24) (Tufts Libraries 2021). COVID-19 outbreaks are often identified in communities of color, populations that are also often underrepresented in survey data (Kantamneni 2020). The “COVID-19 Center for Disease Control (CDC) Social Vulnerability Index (SVI)” includes, but is not limited to, overall percentage of Single Mothers, overall percentage of minority population, overall percentage of poverty households, and overall percentage of residents with English as a Second language (CDC 2020). Research has shown that the population who would benefit the most from community projects, including CPA projects, is the least likely to respond to community surveys (Patten and Perrin 2015). Measuring the “COVID-19 Center for Disease Control (CDC) Social Vulnerability Index (SVI)” provides a generalization of community populations most vulnerable for outreach neglect in community surveys. The variables were cross tabulated. A Google map was built to show the locations of the 12 neighborhood events where the 2019 CPC Community Survey was distributed using census tracts (see Figure 26).



Figure 24: Advertisement for CPA Project. From The Growing Center, 2018

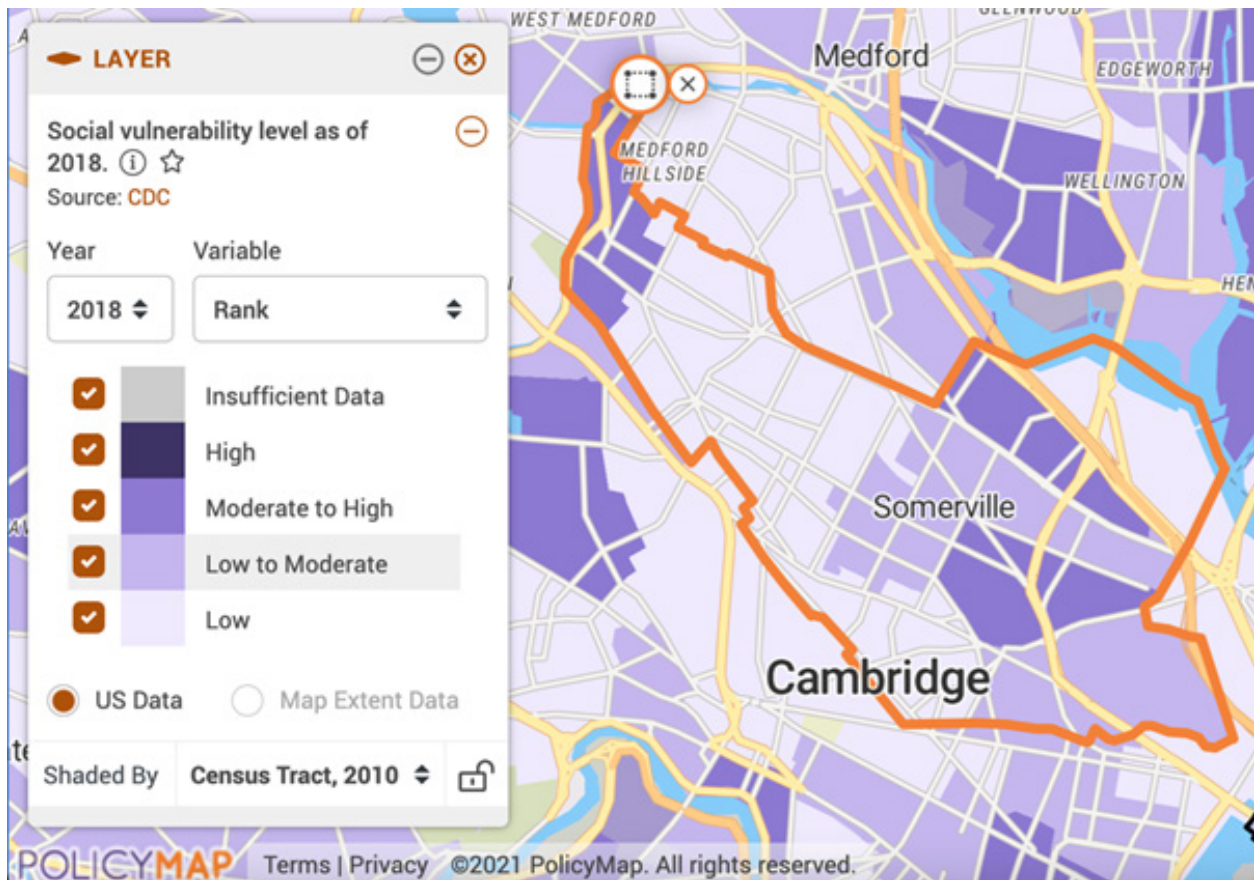


Figure 25: Somerville, MA COVID-19 CDC Social Vulnerability Map. From COVID-19 PolicyMap, 2021.

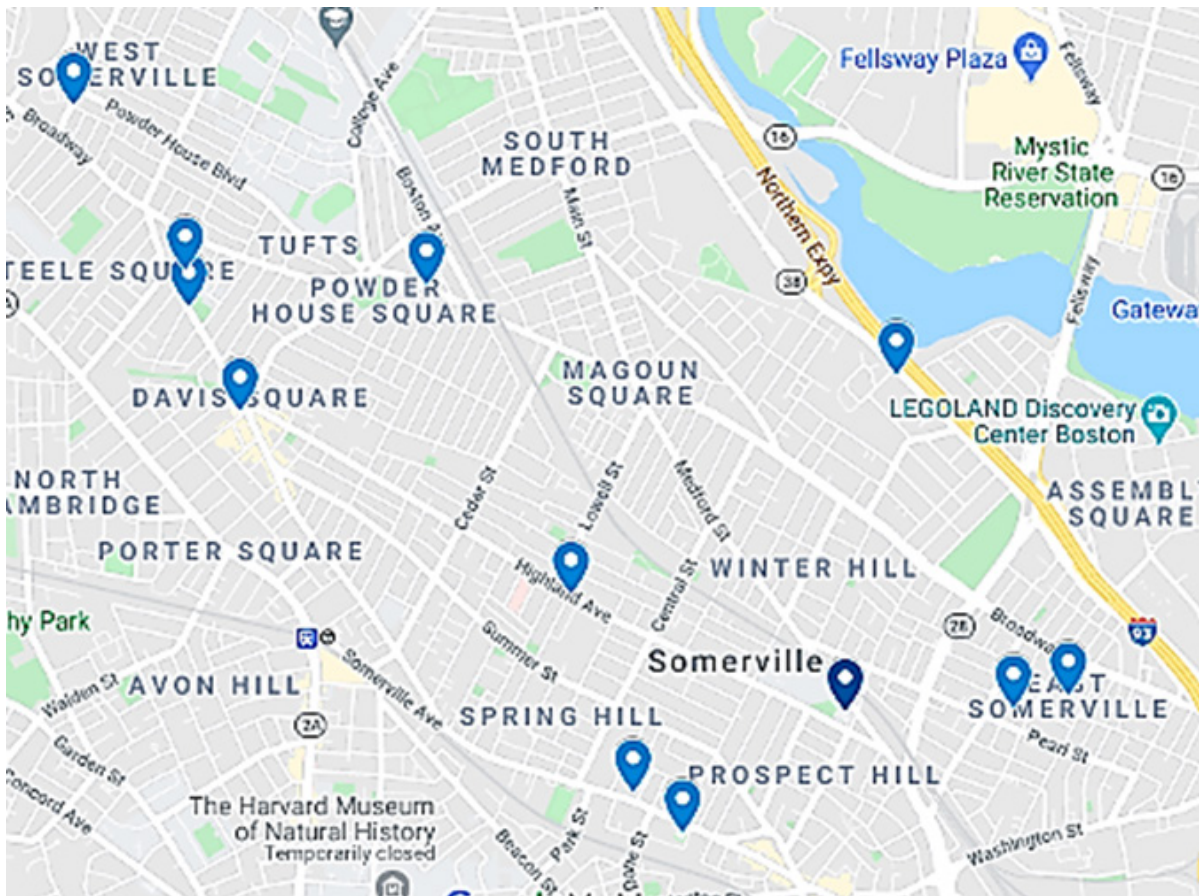


Figure 26: Somerville, MA CPC Events Survey Distribution Sites. Created by Amber Davis in Google Maps, 2021.

Next, a comparison bar chart of the four independent variables of the “COVID-19 Center for Disease Control (CDC) Social Vulnerability Index (SVI)” (percentage of Single Mothers, percentage of minority population, percentage of poverty households, and percentage of English as a Second language) was developed (see Figure 27), with a table of the demographics of each census tract where the CPC Events Survey was distributed (see Table 4) (U.S. Census Bureau (2019)). The purpose was to examine the frequency of the independent variables’ population within the spatial area or census tract, around the neighborhood community event and the CPC event survey.

This analysis used the software program Minitab to see if selected neighborhood demographics of social vulnerability correlate with the responses to the 2019 CPA survey questions by event location. A Pearson’s Correlation matrix scatterplot was produced (Figure 27) using 2019 US Census Data, and 2019 ACS neighborhood data (Census 2019; ACS 2019) to discover if the neighborhood demographics single mothers, percentage of minority population, percentage of poverty households, and percentage of English as a Second language correlate with the responses of responses in the neighborhoods.

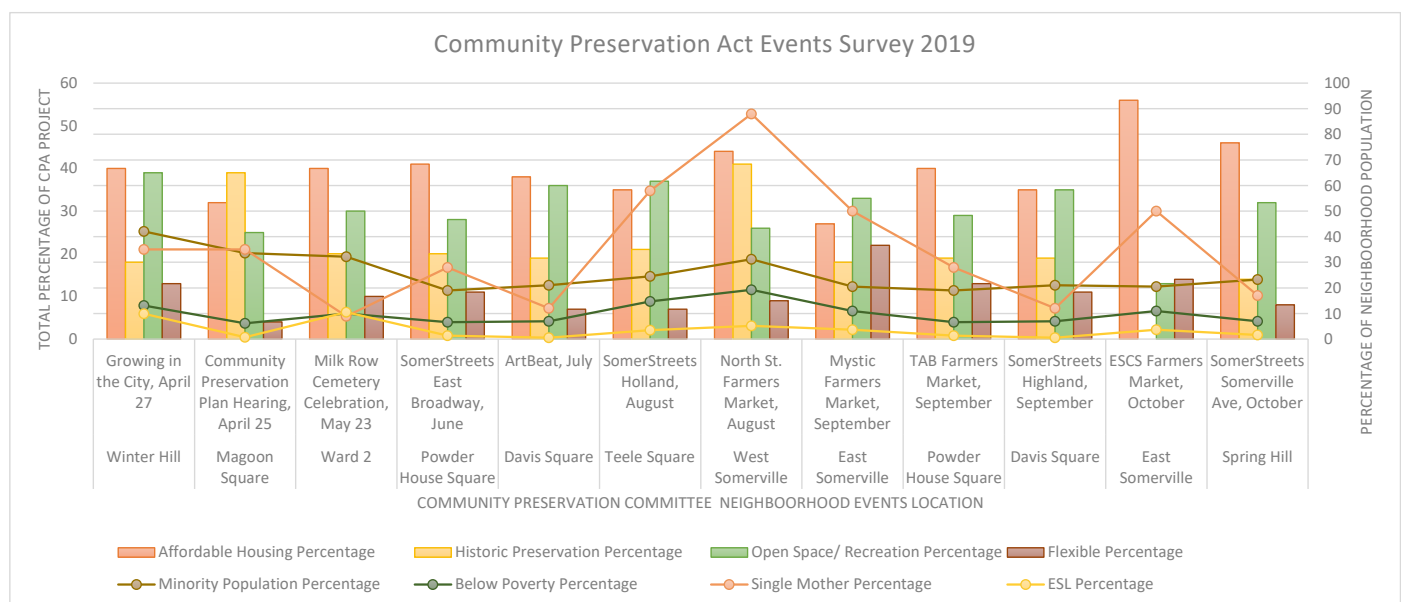


Figure 27: CPA events totals per neighborhood demographics. Created by Amber Davis, 2021

Table 4: Somerville 2019 CPA Survey Results and Demographics of Neighborhoods Where Events Were Held

Neighborhood	Event	Percentage vote by CPA category				Percentage SVI demographic indicators			
		Affordable Housing	Historic Preservation	Open Space/ Recreation	Flexible	Minority Population	Below Poverty Line	Single Mother	ESL
Winter Hill	Growing in the City, April 27	40	18	39	13	42.1	13.1	35	9.9
Magoon Square	Community Preservation Plan Hearing, April 25	32	39	25	4	33.6	6.2	35	0.7
Ward 2	Milk Row Cemetery Celebration, May 23	40	20	30	10	32.2	10	8.9	10.5
Powder House Square	SomerStreets East Broadway, June	41	20	28	11	19	6.6	28	1.3
Davis Square	ArtBeat, July	38	19	36	7	21	7	12	0.5
Teele Square	SomerStreets Holland, August	35	21	37	7	24.5	14.7	57.9	3.5
West Somerville	North St. Farmers Market, August	44	41	26	9	31.2	19.3	88	5.2
East Somerville	Mystic Farmers Market, September	27	18	33	22	20.5	11	50	3.7
Powder House Square	TAB Farmers Market, September	40	19	29	13	19	6.6	28	1.3
Davis Square	SomerStreets Highland, September	35	19	35	11	21	7	12	0.5
East Somerville	ESCS Farmers Market, October	56	0	13	14	20.5	11	50	3.7
Spring Hill	SomerStreets Somerville Ave, October	46	14	32	8	23.3	7	17	1.6

Source: Created by Amber Davis, 2021.

Method:

Correlation type - Pearson

p: pairwise Pearson correlation (Minitab, 2017).

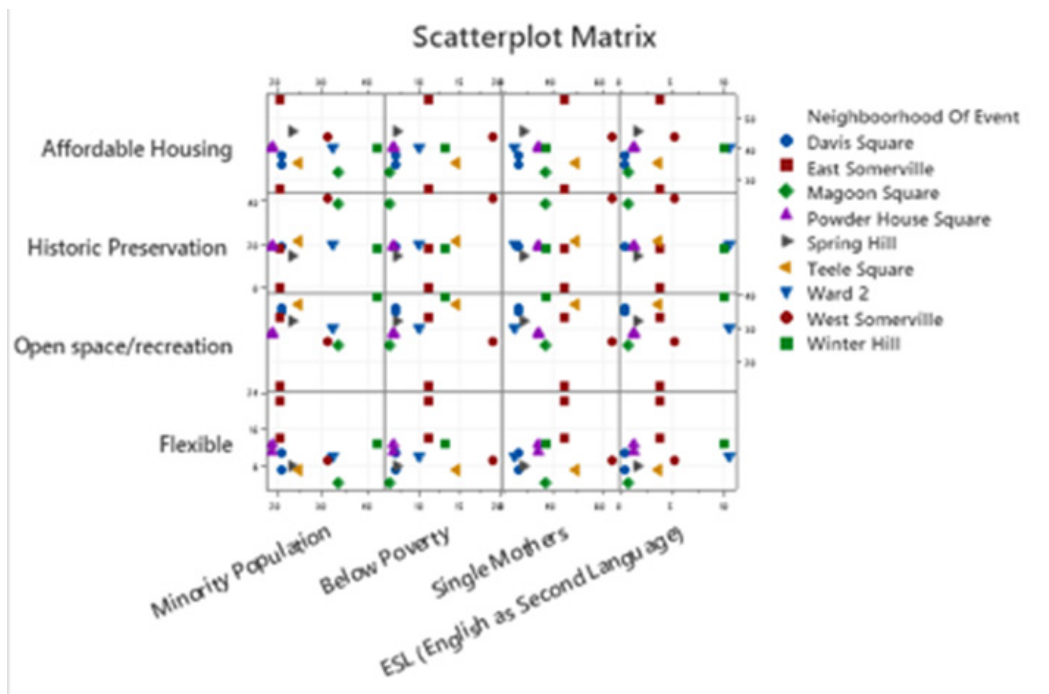


Figure 28: Somerville, MA CPC Events Survey Results Pearson's Correlation Scatterplot Matrix. Created by Amber Davis using Minitab (2017), 2021.

After running this correlation, with a confident interval of 95% (CI=95%), we found that the results are inconclusive. The correlation results of the scatterplots do indicate an overall, albeit small, positive correlation between the responses given per category of CPA at the neighborhood events and the "COVID-19 Center for Disease Control (CDC) Social Vulnerability Index (SVI)" population of the corresponding neighborhoods (see Table 4). Given that these results are due to the small sample size, we believe that caution should be exercised before coming to any conclusions; therefore, a definitive analysis is difficult to conduct without further testing for suitability and variable model fit.

Other methods of finding demographic data can be helpful in discovering alternative ways to capture community data often missed through direct surveys. In the future, the CPC and the CPA should consider conducting spatial evaluations of outreach responses, localized to the neighborhoods and targeted to demographics of social vulnerabilities. This method could provide useful tools for creating inclusive surveys for the Somerville community. Although this analysis is limited in statistical correlation, this test did succeed

in a novel approach of addressing potential gaps in the survey process, especially for underrepresented populations within the Somerville community. Although the analysis is promising, ongoing studies could uncover even greater methods to evaluate CPA survey response data.

Alignment of CPA and Community Goals

To determine if the goals of the CPA program aligned with the goals of the community, three reports were analyzed:

- the Somerville Open Space and Recreation Plan,
- the Affordable Housing Trust Fund Fiscal Year 2017 Report, and
- the SomerVision 2040 comprehensive plan.

The reports lay out goals for the community to accomplish through projects, programs, and operations. There are 137 goals within all three reports that relate to the CPA program. The CPA program funds

projects that have an impact on the goals that fall into seven broad categories.

- Equity - improving access or removing barriers
- Affordable housing
- Public Engagement and Education
- Sustainability
- Open Space and Civic Spaces
- Collaboration
- Planning - fiscal and strategic improvements

Other CPA Programs in Massachusetts

The CPA has been adopted by 186 cities and towns in Massachusetts to date (Community Preservation

Coalition, n.d.). Of the 186 communities that have already adopted the CPA, we investigated five that most closely related to the City of Somerville (see Table 5). We collected selected demographic information, such as population size, population density, poverty rate, racial makeup, median household income, and median property value. Geographic location was also considered and communities were prioritized based on their location in the Greater Boston region. These five communities were invited to participate in interviews with the project team to share details about their CPA programs and draw comparisons with the Somerville CPA program. The following table details our findings of these characteristics for Somerville and the top five most relevant cities.

Table 5. Selected Demographics of Somerville and Similar CPA Cities

	City of Somerville	City of Medford	City of Cambridge	City of Malden	City of Newton	City of Boston
Population Size	81,360	57,341	118,927	60,470	88,414	692,600
Area (square miles)	4.1	8.1	6.39	5.01	18.16	48.34
Population Density (per sq. mi)	19,844	7,079	18,582	12,070.	4,869	14,323
Poverty Rate	11.5 %	8.8 %	12.7 %	15.5 %	4.3 %	18.9 %
Racial Composition						
White	75.8%	75.1%	66.1%	53.1%	76.7%	52.8%
Asian	10.3%	9.9%	16.7%	22.5%	14.8%	9.7%
Black	6.2%	9.2%	10.7%	18.5%	3.0%	25.2%
Hispanic	12.4%	6.5%	9.5%	8.5%	4.9%	19.8%
Median Household Income	\$97,328	\$96,455	\$103,154	\$65,975	\$151,068	\$71,115
Median Housing Value	\$664,700	\$500,800	\$768,300	\$401,900	\$914,700	\$532,700
CPA Adoption Year	2012	2015	2001	2015	2001	2016

Source: Created by Kelsey Tustin using data from US Census Quick Facts 2019, US Census Gazetteer Files 2019, and Data USA 2018.

Data from Interviews

A total of 28 interviews were conducted via phone and video conference depending on the preference and availability of the interviewees. The intent in interviewing these parties was to gather perspectives and collect data which addressed the research questions outlined in the Evaluation Planning Grid (see Appendix B). Interviewees were selected using a purposive sampling strategy to identify interview participants who could represent key stakeholder groups for the CPA program. The below parties were interviewed using a series of open-ended questions (see Appendix C).

- Current and former Somerville CPA managers (2 interviews)
- Current and former Somerville CPC members (7 interviews)
- Somerville Office of Strategic Planning and Community Development Department non-CPA staff, including Affordable Housing Trust Fund delegates (3 interviews)
- CPA managers or equivalent staff in other communities (5 interviews)
- Somerville CPA project applicants (9 interviews)
- Somerville Mayor (1 interview)
- Community Preservation Coalition Director (1 interview)

Among the CPA project applicants who were interviewed, some received funding for all of their project applications and others did not. Applicants included those from both city and community led projects, and their project proposals included all three of the CPA program areas. Some of the project applicants received relatively large grants, while others received smaller grants from the CPA. In addition, some

of the project applicants had received multiple cycles of funding while others had only received funding in one cycle.

The CPA staff in other communities who were interviewed had been in their positions between one and five years. Participating communities had established their CPA programs from five to 19 years. These communities also had a local tax surcharge of between 1 and 1.5%.

The Significance of the CPA Manager

In nearly every interview, the role of the CPA manager was highlighted as key to ensuring the program's success. Both CPA managers that were interviewed noted that the CPA manager position had evolved significantly since the program was first established in 2012. They commented that there are many demands on this position, and the importance of the CPA manager as a bridge builder between the community and the CPC has become a more prominent aspect of the position. One CPA manager noted that often, the direct support and guidance they were able to give to applicants made their applications stronger and increased the likelihood that applicants would put forward a project that the CPC could seriously evaluate,

"The CPA Manager is the glue that keeps it all going and keeps the wheels greased so that grantees can get going with projects."

Both CPA managers commented that the public outreach and engagement efforts of the manager were critical to ensuring the program was well understood by the public and served as a check to make sure that the program continued to align with community goals. In the interviews, one manager commented that they constantly asked themselves, "Where are we as a

city now? What are the community needs now? How do we meet those needs now with our program?" to make sure the program continued to evolve in a way that aligned with community goals. Another manager also noted that because the demands for this role are so substantial, it can be difficult to complete tasks that would be helpful in the long run for the program. One example given was the city historic preservation plan that has been recognized by the CPA staff and stakeholders as important for the CPC to be able to plan for future historic preservation needs. Unfortunately, none of the CPA managers have had the resources and time to conduct this plan. Even with these limitations, both managers noted that they were grateful that the city decided to invest in funding the manager position because some CPA communities have not made the investment of a staff position fully dedicated to the CPA program. From their conversations with CPA leaders in other communities, there seemed to be broad consensus that having a full-time CPA manager was a "game-changer" for their programs to run more effectively.

"CPA managers are what make the program work."

Every applicant for CPA funds who was interviewed noted that they had had an overall positive experience working with the CPA managers and the CPC. Some noted that they felt the CPA manager and the CPC were very direct and reasonable in their feedback about applications. Multiple applicants commented that they appreciated that the CPA managers were responsive to feedback about the program. They appreciated that the managers had made efforts to improve the program over the years based on applicant feedback, which made them feel heard and appreciated. Several applicants noted that the specific feedback they received from the CPA managers was particularly helpful for shaping their project to align with the requirements of the CPA program.

"Having worked with other CPA communities that are not staffed, I can say confidently that having a dedicated staff person is extremely helpful and can be the make-or-break factor on a successful project."

A few applicants that had applied to the CPA program for multiple years noted that because there had been turnover in the staff serving as the CPA manager, there appeared to be at times a loss of institutional knowledge. Three applicants noted that because of the learning curve with new staff, it felt like the program needed more transitional support to ensure that new staff had the resources they needed to successfully serve as the new CPA manager. One applicant indicated that they rely heavily on CPA manager expertise for knowing if a project will work with the program requirements. When there was staff turnover, it "seemed like some of that technical expertise about the program was lost in the process." Another applicant noted that the CPA manager seems to serve as the "keeper of all relevant CPA laws and regulations" and that it was essential for this technical information to be passed down in detail from manager to manager.

Current and previous CPC members that were interviewed also expressed a great deal of appreciation for the CPA manager. Several members noted repeatedly that the CPA manager kept the program running smoothly and enabled the CPC members to do their jobs effectively. One member noted that the application process in particular happens during a period when the CPA manager fulfills particularly critical responsibilities.

"The application process is very dependent on who is the CPA manager because there is so much hand holding, especially for underserved applicants."

When discussing the topic of a CPA leadership role with other CPA communities, the need for proper staffing was a common theme among interviewees. All interviewees highlighted that having a staffed administrative CPA role is fundamental to the organization and activity of the program and CPC. One respondent affirmed that dedicated program staff should be required when the CPA is adopted in new communities. Another interviewee emphasized that while it was important to have a dedicated person in the role, the CPA work only took up a small portion of her time because they have an extremely streamlined and well-organized process. This was unique, however, since all of the other interviewees acted in roles which supported the CPA full-time. Having a dedicated CPA staff person seemed to be particularly important in communities where the CPA was relatively new and not yet well-established because the initial processes to get the program up and running were described as particularly onerous.

Community Outreach and Engagement Challenges

Nearly every interviewee mentioned that community outreach and engagement were areas for improvement in the CPA program. Outreach was identified by both CPA managers and CPC members as a key component of ensuring the success of the CPA program, but also a significant challenge. One CPC member commented that the CPA program has a “huge PR problem” because not enough people are aware of the program, and that “we should be getting more support from the city with financial or staff resources to make that critical PR happen.” While some CPC members felt that community outreach and engagement were the responsibility of the CPA manager, others felt that CPC members or other city department staff should be performing this task. One CPC member noted that the

CPA manager “has enough on their plate right now, never mind also coordinating publicity.” The issue of lack of resources and public awareness about the program came up repeatedly in interviews.

“I honestly do not know if the average person knows what the CPC is or the CPA program, or remotely how to get involved.”

Both CPA managers commented that outreach by the CPC is essential to ensure that there is a greater awareness of the CPA program, but in-person opportunities are currently limited due to COVID-19. Outreach via social media, website postings, email listservs and the new Somerville CPA YouTube video were identified as new and effective measures to engage the public remotely. Several CPC members expressed excitement about the potential of the new YouTube video to serve as a resource for community outreach. Online outreach was mentioned in several interviews as an equalizer in some regards, since social media eliminates the travel required for meetings and allows community members to participate from the comfort of their homes. However, the “digital divide” was also mentioned in several interviews as preventing the CPA program from being able to reach all Somerville residents. Both the CPA managers and several CPC members commented that being out in the community was the best way to engage with residents. Many interview participants also noted that in-person events created opportunities for CPC members to hear about community priorities firsthand. Both the CPA managers and many CPC members emphasized that improved outreach would also be key for ensuring that diverse applicants applied for program funding.

“We have a perennial problem in government of getting the non-squeaky wheels to come forward with projects.”

A majority of the applicants interviewed had found

out about the CPA program via word of mouth or independent research. Several applicants expressed doubt that the average Somerville resident would even be aware that the CPA program exists. One applicant suggested that the CPA program could do a better job using their applicant network to help amplify funded projects to spread the word in different communities. By using organizations that already have familiarity with the program, the applicant theorized that it might be easier to help drum up excitement about other CPA projects.

Regarding CPA outreach and engagement, all interview participants from other CPA communities suggested that it was highly important to have as much information as possible publicly accessible online either on the city's website or as a freestanding website dedicated to the CPA. They felt that it was important for residents to know where their tax dollars are going and the status of each project through both the website and public meetings with the CPC. One interviewee outlined that they try to be as transparent and informative as possible by posting all application components on the website, including the eligibility form, how to apply, samples of grant agreements, what happens after a project is funded, an interactive heatmap of past/current projects, press releases, different languages to translate various documents, how to contact staff, and other staff files.

"The more public you can make your meetings, the better."

Several other interview participants from other CPA communities also mentioned the importance of signage, which helps to publicize different projects (see Figure 29 for example of CPA signage). One interviewee advocated for meeting with various committees and departments, trying to get articles in the newspaper, advertising through the different newsletters put forth by the city, or reaching out to department heads as much as possible. The latter, in



Figure 29: Winter Hill Community Innovation Garden Sign. Photo by Tony Collins, 2021.

particular, can help department leaders think about projects that they might not have realized could be funded through CPA. It can also be helpful when CPC members are part of other boards where they can connect about what projects may be eligible and how to apply.

"Hopefully when they think of a project, they'll think of us."

Interviewees from other CPA communities also mentioned that it's very important to prioritize outreach to non-municipal groups, which results in a wider range of applicants and more unique projects. One CPA manager suggested that there are many other types of projects that could be supported by CPA funds, especially historic preservation, but it's a matter of educating outside organizations to let them know what they can apply for and educating the committee about what projects are eligible for CPA funds.

Program Effectiveness and Opportunities for Improvement

Several interview participants emphasized that although the CPA program has three very specific program areas that it seeks to fund, the real goal of the program is to improve the lives of Somerville residents. Several city staff, CPC members, and applicants noted that the CPA program has had and continues to have strong alignment with SomerVision 2040 in particular. One applicant reflected that,

“The CPA program increased appreciation of the role of the three different program areas in protecting the fabric of the community. This was likely the first time that advocacy groups and community partners from these three areas were working in the same space.”

Several project applicants noted that the CPA program is crucial to ensuring that projects get completed and that the program can help fill a sometimes small, but still essential, funding void to get projects started and eventually across the finish line. A few interview participants remarked that the CPA program could be more effective in meeting its goals if it funded more blended projects, or projects that support multiple CPA program areas in one application. Two city staff commented that blended projects seemed like real opportunities for the CPA program to make progress in multiple areas. One CPC member noted that their vision for the CPC was “effectively capitalizing on resources through the use of more blended projects.” CPC members celebrated the progress that the program is making, even with finite resources.

“We have made enormous progress with the CPA program and we are really

making big changes in this city, even with somewhat limited resources.”

Nearly every interview participant mentioned that the CPA program has been especially helpful for the city to make progress in meeting its goals for affordable housing. Interestingly, even applicants who were applying for projects for the other two program areas noted the significance of the CPA program in supporting affordable housing in Somerville. One city staff member expressed that,

“The CPA program has been absolutely critical in helping the City of Somerville make great progress in working towards our affordable housing goals.”

A CPC member expressed that it seemed at times like the program was making the biggest difference with affordable housing and open space in the community, but not as much with historic preservation. Another CPC member noted that the CPC may need to discuss long-term visioning for the open space program goal as this was difficult in such a dense urban community. One applicant commented that,

“For open space projects, the CPA program is really limiting. Somerville already has limited open space and on top of that, the CPA program does not fund things like maintenance which is so critical to ensuring we have safe and accessible parks. At times, it seems like the CPA program is running into conflict with the goals of open space.”

The two CPA managers identified different goals for open space, with one noting that the program is primarily focused on creating new open space and the other pointing out that because Somerville has such limited undeveloped space, they are really focused on increasing access to open space. This was an interesting differentiation and likely points to the fact

that the CPA program has had to adjust to limited open space opportunities and alter their open space funding strategies over time.

Nearly all of the applicants, city staff and CPC members expressed that the CPA program was extremely effective overall and that it was helping the city to meet its overarching goals. Several applicants expressed their appreciation for the impact of the CPA program in supporting their initiatives. Multiple applicants referred to the CPA program as “an extraordinary resource” for the City of Somerville and the community organizations that help to shape the community.

“This program is a life saver for non-profits because usually we do not have the revenue margins to do the capital investments unless we run a capital campaign which takes many years. The city has been so supportive over the years and we are so grateful for their commitment to the community through the CPA program.”

One manager noted that the Somerville CPA program has become a model for other Massachusetts CPA communities. This manager also noted that the success of the Somerville CPA has helped to encourage the Community Preservation Coalition to invest more resources into providing support and guidance for CPA programs in urban areas, a development that the Somerville CPA encouraged based on their experience facing different challenges than those of suburban CPA programs.

When discussing the effectiveness of Somerville’s CPA with the Community Preservation Coalition, the Coalition stated that Somerville seems to be excelling in its program and is often a model for other communities for inclusion and community education. They noted that Somerville’s documentary was a

great way to inform the public about the CPA and its projects, and it could be a model for other communities to design their own informational videos. In terms of prioritizing equity within the program, the Coalition said that “Somerville is on the cutting-edge.” More generally, the CPA was designed to allow flexibility, so there is no standard approach to how the program operates. The CPA program is “very special and very unique.”

Need for Additional CPA Program Funding

The majority of interview participants noted that there is more demand for CPA program funding than is currently available. Both CPA managers noted that the Somerville CPA program is well-loved, and as such, the program simply cannot keep pace with the demand for its grants.

“With more funding, the CPA program could better support the goals of the city.”

As the city has set more aggressive targets, such as Mayor Curtatone’s recently announced 2,000 affordable housing unit goal, the managers felt that the CPA program could play a big role in achieving these goals if the city secured additional funding for the CPA. Several applicants expressed hope that funding for the program would be increased in the near future given the prior successes of the program. One applicant noted that if funding levels could not be increased, the CPA program should “maybe concentrate on funding smaller scope projects, especially for open space.”

There were different opinions about the best sources for new CPA program funding. While one CPC member expressed support for increasing the tax surcharge, another cautioned against an increase because they were worried the public would perceive this as “a very

expensive program.” One city staff member suggested that there could be potential for the CPA to capitalize on more public-private partnerships, but this option should be evaluated carefully to keep it in line with community goals. Bonding was mentioned in several interviews as a potential new tool for CPA funding. One city staff member urged caution however, stating that bonding should be used selectively and has so far only been used for city-led projects due to the debt service obligations of this mechanism. Still, several applicants and city staff voiced support for bonding as a funding mechanism, with one staff member saying, “Bonding is the real game changer. Being able to use that for the 100 Homes Program was a big deal to make that initiative happen.”

When asked about funding mechanisms used in other CPA communities, responses varied. One respondent discussed their city’s willingness to bond, and therefore their ability to do larger and more impactful projects. For example, this community was able to purchase a \$15 million parcel of land through CPA bonding. While most of the open space allocation will go to this project over the coming years, it is still a project that they would not otherwise have been able to accomplish without bonding as a long-term mechanism. The respondent also stated that the city would need to keep the CPA active over the coming years because bonding “locks you into existence for a longer period of time.” However, this interviewee also mentioned that there are limitations to bonding, such as staffing capacity and other resources necessary to support long-term projects. A different interviewee said that their community did one project that was bonded, but the board is not keen on pursuing this for future projects since it is such a long-term commitment. Another interviewee mentioned that their community tried to pursue a bonded project, but they are having challenges due to lack of project planning. Another interviewee stressed that their program did not have any additional funding from the city, and won’t for

a long time because of their limited budget due to COVID-19. This interviewee had an interesting observation, which was that the addition of local funding can only change with a vote, so it is important to accomplish this in the initial vote, if possible. Another interviewee also stated that the CPC needs to be consistently trained in how bonding works if they are going to move forward with using this mechanism, which can be difficult considering that the members’ terms are only for two or three years depending on the community. This interviewee said that “the option is on the table, but it has to be something that everyone is around.”

The interviewee from the Community Preservation Coalition discussed how it is possible to increase CPA funding by adjusting the surcharge or exemptions through a community vote, but suggested that it is important to consider the pros and cons to having a higher surcharge. While it can result in more funding for the program, it is still going to be more expensive for citizens and therefore can be controversial. The public could hear about the city or town trying to increase the surcharge and therefore get angry, putting the entire program at risk of being eliminated. While this has never actually happened in the program’s 20-year history, it is still important for any community to consider before diving into what can be a burdensome process to change the structure in place.

Developing an Effective and Representative CPC

Several city staff and applicants highlighted the importance of the CPC in ensuring that the program met its goals. The CPA managers noted that previously, members with construction skills and affordable housing expertise have been particularly useful to the CPC when evaluating project applications. These members can also provide guidance for

project applicants and have brought a critical lens to application review. Both managers expressed that CPC members who were well-connected within the community have been helpful in spreading awareness about the CPA, recruiting applicants for the program, and providing a perspective on whether the program continued to be in line with community goals. One CPC member expressed that skills of collaboration and negotiation were essential to ensuring the CPC operated effectively. Several CPC members noted that they felt that they wanted to build more connections with other CPC members and wanted additional training support to help them develop in their roles. One CPC member remarked that they had attended a training by the Community Preservation Coalition when they first joined the CPC, but other members commented that their obligations as CPC members were unclear at times and did not mention the Coalition training.

Both the CPA managers and CPC members noted that while these skillsets have been useful for the CPC, increasing diversity on the CPC has been challenging. One manager commented that the CPC is “not really representative” of the city in terms of age or race. Another noted that “the volunteer nature of the CPC role is in itself a barrier” for diversity because members must have the time and resources to serve on the Committee. Several CPC members suggested that the CPC is not currently representative of the Somerville community because it lacks people who are low income or people of color. One CPC member suggested that the CPC should try to “overrepresent these underserved groups to ensure their voices are heard.” Another CPC member commented that it seems like the CPC is “functionally middle class” but this does not represent the entirety of Somerville. In reflecting on the lack of representation on the CPC, one CPC member suggested,

“We should really look at the applicants

who are coming to us who represent underserved populations and do CPC member recruitment with these applicants and their connections.”

One CPA manager expressed that this issue of lack of representation is not a problem that is unique to the CPC, though, as all volunteer positions tend to struggle with this issue. Describing how the program considered making their materials accessible in additional languages to try to address the language barrier with the program, another manager lamented that the costs were too high to translate all of the materials that CPC members have to regularly review. Both managers commented that even though there has been a high level of interest in applying to be a CPC member, it has been challenging to recruit and select new members that meet both their diversity goals and their desire for particular skillsets, such as expertise in one of the three CPA program areas. Both managers noted that there may be opportunities for additional reflection internally within the CPC to touch base about process, including CPC member recruitment during the semi and annual report periods.

In interviewing other CPA communities, one interviewee dove into the diversity of the CPC members, which they felt was lacking. When reviewing CPA applicants, CPC members tend to prioritize people with relevant knowledge rather than people who will increase representation. Interviewees emphasized that it can be immensely helpful to have CPC members with relevant expertise for projects that involve housing, historic preservation, or open space. People are nominated from other boards across the city, so CPC membership is often based on who is interested in serving, and does not involve a holistic search process with diversity goals in mind. Another community, however, expressed that nearly half of the committee was made up of people of color, including the CPC Chair. She stated that expertise can always

be learned, so diversity should be encouraged just as much as those skills and knowledge. “People assume that just because someone doesn’t have educational experience, they don’t have lived experience.” While her committee currently has a good balance of both, as terms in that community are only two years, this balance could always change for better or for worse. When asked if they could do better, she responded, “Could we do more? Always.” Even though they are doing the right work within the community, the committee “could have more voices of people who are on the ground, in the grit. I don’t think we have enough of that.”

The representative of the Community Preservation Coalition noted that the Community Preservation Plan (CPP) is “the crux” of any CPC. It is the job of the CPC to understand what the community needs from the CPA program, which is a challenging task but an important one to work into the CPP. It is also their responsibility to determine which applications fit into the plan and work to achieve the goals and priorities outlined in the CPP. It is also important for the CPC to keep in mind that they can always use the expertise of the Coalition for advice when they are uncertain about applications.

Striving for Equity

Multiple interview participants noted that the CPA program appeared to strive to be equitable in terms of who the program served and how funding was distributed. There was consensus that the CPA program served many different populations, from researchers to children to those struggling with housing instability. Many interview participants expressed an appreciation for how many different issues and consequently different groups were benefiting from the CPA program.

“The CPA program is a statement of valuing diversity in the community because it has invested in areas that are

traditionally underserved.”

Two applicants, however, commented that while the CPA program has been effective in supporting affordable housing goals to some degree, it did not go far enough in addressing some of the biggest barriers to finding housing for particularly vulnerable populations like homeless and disabled individuals. Both applicants observed that the housing market in Somerville is incredibly challenging and it can be difficult just to enter the market in some cases. One applicant expressed that the CPA program should not only fund affordable housing acquisition and construction, but also fund services for those individuals that most need affordable housing, such as providing case managers. They commented “they should not just throw money at the issue once, but really invest in the long-term stability of these individuals to really address housing issues.” This applicant commented that at this time, supporting services is not allowed under the state CPA statute, but they were working with the city to hopefully request changes via a home rule petition.

Concerns regarding who was best served by CPA projects came up in several interviews. One applicant expressed that some projects seemed to only serve segments of the population rather than the whole community. This applicant also commented that serving the most vulnerable people should be the priority of the CPA. Another applicant noted that the CPA community engagement for the project seems skewed based on who was able to attend the public meetings that day and felt they had the resources and agency to attend.

“Just because something is public, that doesn’t mean that it is equitable.”

One applicant also encouraged the CPA program to reevaluate its metrics for measuring success by looking beyond just the number of individuals reached by projects, to instead focus on which populations

are being reached. They urged the CPA to support engagement with groups that could receive greater benefits from participating in the program, such as Head Start families, ESL students, and homeless individuals. Another applicant suggested that the CPA should hold more public meetings at intervals throughout the year to provide basic information about the program and share examples of funded projects. They felt that these additional public meetings would clarify what types of projects are appropriate for CPA funding and would likely engage a more diverse pool of applicants who may currently feel uncertain about whether their projects are eligible. They noted that these meetings could be for the general public or targeted for organizations, but there would likely be secondary benefits of increasing awareness of the CPA program in general. Another applicant perceived tension between community and city project applications and cautioned the CPA to “stay alert to the power and resource imbalances between city and community applicants.”

Other applicants felt strongly that the CPA program was more balanced in its approach to city-led versus community-led projects, “Having worked with other CPA communities, I can say very confidently that the City of Somerville does a good job making sure the projects are really community driven, not just a backfill of the Somerville open space budget.” One CPC member noted that it was an issue that they had considered in reviewing applications because it could be argued that the “scales were tipped slightly in the favor of the city applications” which tended to be completed by staff already well versed in the city grant application processes.

Several CPC members noted that with additional investments in community outreach and engagement, they hoped that the program would attract a more diverse pool of program applicants. In reflecting on the lack of diversity in project applicants and

communities served, one CPC member remarked that, “We need to do a better job of getting information out in different languages and we need to find a way to fund these translations sustainably for the long term.”

The CPA program does not collect information about the demographics of the organizations that apply to the program, but multiple CPC members commented that this might be worthwhile to consider for the future. A few of the CPC members questioned whether the people of color and low-income populations were underrepresented in terms of who the CPA projects served as well as applicants coming before the CPC.

“We do not have a true diversity in applicants coming before us and I do not feel we have had enough conversations as the CPC to try and address this issue.”

Several other CPA communities also identified equity as a top priority for their programs. One respondent felt that low-income neighborhoods and communities of color likely received more funding than other groups. Particularly within the housing and open space realms, this is because not as many projects go to the wealthier areas where the neighborhoods are older and more densely developed with single-family homes. Projects tend to go to where there are ample parks and affordable housing opportunities. This respondent also believed that having a map of where the CPA projects are located within the community can help to encourage an equitable distribution of funds. Another interviewee said that they do have a heat map to track which neighborhoods are being funded, which is helpful not only for the CPC and CPA manager to ensure that funds are being distributed equitably, but also it is public facing (on the website) which informs the public about where the funds are going and holds the CPC accountable. This interviewee agreed that low-income neighborhoods receive funding more than wealthier neighborhoods, especially in regard to

affordable housing. They try to find creative ways to emphasize equity and vulnerability through specific guidelines and keep it as a main topic of conversation within the CPC. This interviewee said that sometimes it can be beneficial if a specific area receives a significant number of projects funded in a given year because it can help to “revamp an underserved neighborhood.” While this might mean another neighborhood is neglected that year, that community can be prioritized the following year similarly.

“We’re always looking at trying to find a balance of serving communities and spreading the funds.”

A representative of the Community Preservation Coalition agreed that more data should be collected to evaluate the equity of CPA programs within communities. However, the Coalition believed that this issue was getting better over recent years because of legislation that was recently passed allowing CPA to fund outdoor recreation projects. This was previously limiting for urban areas, which tend to have more low-income, diverse neighborhoods and less open-space opportunities that don’t involve recreation. Funding outdoor recreation projects allows more cities to adopt the CPA. This interviewee also suggested that the funding can be favorable for vulnerable populations especially during an emergency like the pandemic, where they saw a spike in CPA funding rental assistance programs.

“It’s not locked up. It’s not heavily mandated on what you must spend it on year to year. If something like last year happened again, this is a pool of resources that can be used.”

The CPA Application Process

Each of the interview participants had a different

perspective on the CPA application process. Several applicants noted that they did not feel the application process was difficult at all. One of the applicants who submitted proposals for community-led projects commented that they felt the application process was very reasonable and straightforward, especially compared to the federal grant program applications that this applicant had had to deal with previously. They particularly emphasized that they appreciated that the calendar for the CPA program lined up well with their schedule and that enough time was given to complete the application. A few applicants, however, stressed that the application process was very difficult for their smaller organizations. These applicants both submitted community-led project proposals and commented that the sheer volume of paperwork required to submit their applications was a burden for their organizations. Both also noted that they had technology limitations, in particular Adobe, which was needed to submit their applications. These same applicants also noted, however, that they appreciated that the application process was very democratic and transparent as well. Nearly all of the applicants expressed appreciation for the CPA manager in supporting them during the application process in particular. They felt that the direct guidance they received from the CPA managers and the CPC helped to strengthen their applications to the program.

In interviewing other CPA communities, it appears that application processes varied significantly between communities. While some communities alter their applications each year to try and better accommodate the applicants and their needs, other communities have come up with processes that are extremely clear and streamlined in order to eliminate confusion and save time for all involved. One community suggested that their two-step process has worked very well for them over the years. In the first step, the applicants are reviewed to determine if the project is eligible for funding. In the second step, there is a meeting with the

CPC where the members can ask questions to project applicants for clarity and then the projects are ranked by high, medium, and low priority. This can be difficult when too many are ranked as high priority because there is only so much funding that can be allocated. If this is the case, the CPA administrator reviews the budget and determines which projects can proceed to the next stage. One helpful aspect of this process is that applicants can get deferred to the next round of funding if they are not able to be considered due to lack of funding. Ultimately, it was affirmed that projects which provide more of a public benefit (which is usually affordable housing) are going to be ranked higher than historic preservation, even those that are open and accessible to the public.

When asked about CPA structures and processes in other CPA communities, all interviewees discussed the lengthy process of funding CPA projects. One interviewee offered that each project requires three to four council meetings before it becomes approved, in addition to the CPC review process. Another interviewee agreed that “overall, it’s a slow-moving process.” On the other hand, another interviewee put forth that it is crucial for CPCs to ensure that project planning is well thought out before it is funded. It can be challenging if this is not done in depth because if unexpected obstacles arise, it can be difficult or impossible to alter the scope of a project after it has been approved, which puts the project at risk of being cancelled. Incremental implementation of projects may be worth the extra time required. Another CPA manager agreed with this and mentioned that they are going to start strategic planning in order to be more efficient and effective with allocating these funds. It was suggested by all interviewees that guidance and standardization of different CPA processes and structures, including the project application process, would be helpful to communities at large. This was discussed later in several interviews with CPA leaders in other communities, who mentioned that it would

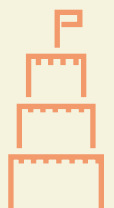
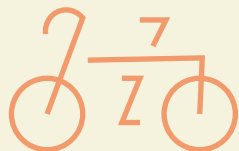
be helpful for the Community Preservation Coalition to provide best practices used by other communities. One interviewee emphasized that a guidebook for how to get started would be helpful, especially since the communities tend to rely on each other anyway. For example, Newton’s CPA was a helpful reference when Somerville began their CPA program, and later, Somerville’s CPA program helped Medford get their CPA program off the ground.

The Community Preservation Coalition representative also stated that ample thought and planning should be put into the application structure. While it can be lengthy, “this aspect of the overall program should be robust.” A well-structured project application will help to bolster the likelihood that funded projects are executed effectively.

“If the application is asking the right questions, they won’t run into many issues.”

Findings & Recommendations

In this section we report our findings from our literature research and interviews. We also provide recommendations for our project partner.





Findings and Recommendations

CPA Manager

Findings

The CPA manager was identified as one of the most significant factors in the success of the CPA program, but they may need additional resources and support to

Recommendations

The CPA program should explore whether adding an additional staff person would be feasible for the program to support the CPA manager. If adding a new staff person is not feasible, the program should explore whether there are more opportunities for support from the staff in other city departments. For example, in regards to outreach and publicity, opportunities for existing departmental staff to support CPA community engagement would be one way to delegate additional responsibilities that currently fall primarily on the CPA manager.

In the interest of preserving institutional knowledge, the CPA program should evaluate its current CPA manager transitional materials annually to determine if additional resources or updates are needed. An emphasis should be made on including relevant CPA regulations that the manager must know well and important contacts in other departments that support the CPA program in other aspects. This will ensure smooth transitions in the future as staff move on to new roles.

Figure 30: Mission Church, 130 Highland Avenue, Somerville, MA. Roof repair and preservation funded under historic resources in FY2019. Photo by Tony Collins, 2021.

CPC Members

Findings

The Somerville CPC members were identified as critical to ensuring that the CPA program is run effectively and efficiently. However, CPC members are currently not perceived by stakeholders to be reflective of the community.

Recommendations

The CPA manager and CPC should discuss their membership as a group and develop concrete objectives for the future of CPC composition. The CPA program should consider developing semi-annual progress reports and reflection discussions facilitated by the CPA manager to ensure that the program is on track with its goals and that all CPC members are in agreement about the direction of the CPC.

CPA Program Funding

Findings

There is a high demand for CPA program funding in Somerville and nearly all stakeholders agreed that current funding mechanisms cannot keep pace with demand.

Recommendations

The CPA program should explore opportunities for developing new funding in the short and long term for the program. New funding options, such as bonding for open space project, and increasing the tax surcharge, should be vetted by the CPA program.

CPA Application Process

Findings

Despite the fact that some project applicants had difficulties with the CPA application process, there was consensus that with guidance from the CPA manager and the CPC, the application was feasible for a variety of project applicants.

Recommendations

The CPA program should evaluate whether additional technological support should be provided for community project applicants who lack the resources, such as Adobe, to complete the application.

Community Outreach and Engagement

Findings

There was agreement among all stakeholders that **community outreach and engagement are areas of weakness for the program currently.** Community outreach and engagement were also identified as essential to ensure that a diverse pool of applicants is participating in the program.

Recommendations

The CPA program should develop a formal community outreach and engagement strategy with concrete metrics to measure the success of efforts. Ideally, outreach and engagement efforts will be led by the CPA manager and will be supported by existing staff

in other city departments who already have access to resources to run effective outreach campaigns. Outreach and engagement efforts should include carefully developed strategies to ensure that all residents are reached, including but not limited to distributing outreach materials in different languages and coordinating in-person outreach events in all neighborhoods. Methods for outreach and engagement when in-person opportunities are limited should occur online via web-based tools such as web conferences, social media, email outreach, or through the city's CPA webpage. The CPA program should evaluate the potential benefits of continuing to provide online hearing opportunities in an effort to boost meeting attendance, even after Covid-19 in-person meeting restrictions have been lifted.

As part of these improved outreach and engagement efforts, the CPA program should improve its existing community survey distribution and collection process. Surveys should always include demographic questions to determine which populations are being reached. Future surveying, when permitted safely in accordance with Covid-19 restrictions, should also include in-person opportunities where residents are met in their communities to provide direct feedback.

Program Effectiveness

Findings

The CPA program is perceived by all stakeholders that engage with the program as highly effective overall. In terms of affordable housing, the CPA program was identified by the majority of stakeholders as having made the most substantial progress in supporting the overarching goals of Somerville.

Recommendations

The program areas of both open space and historic preservation would benefit from long-term visioning by the CPC. The CPA program should consider developing long-term goals for these two program areas in particular to ensure that future CPA projects help the city to make tangible progress in addressing these two issues. In addition, the CPA program should consider how to best incentivize more blended projects moving forward. This may include providing additional staff guidance for blended project applications or targeted outreach for blended project opportunities. Supporting projects that meet multiple project goals will help to ensure that project funds are used effectively.

Program Equity

Findings

While there was general consensus that the CPA program is intended to be equitable, there was also agreement that the program has room for improvement on this issue.

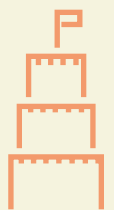
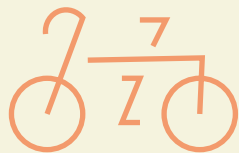
Recommendations

Improving community outreach and engagement will be essential to building the equity of the program and the aforementioned outreach and engagement planning recommendations should be pursued accordingly. The CPC should also continue to assess the project application process and how city- or community-led projects may be differently advantaged by the process. In addition, the CPC should evaluate what metrics it asks project applicants to capture in terms of populations served. With an emphasis on collecting data about vulnerable populations served, the CPA program might encourage projects to reach a wider audience and encourage projects that already serve these communities to participate in the program. Furthermore, the CPA program should consider whether they want to support changes to the Massachusetts

CPA statute to expand some of the current restrictions of the program. Issues such as supporting services versus affordable housing units should be considered.

Conclusion

In this section we review our program evaluation, provide areas for future research and the broader implications of our project.





Conclusion

Summary of Key Findings and Recommendations

Several key findings and recommendations were developed over the course of the evaluation.

- **CPA Manager:** The CPA manager was identified as one of most significant defining factors of the success of the CPA program. CPA managers may need additional resources and support to meet all the demands of their position. The CPA program should explore opportunities to support existing CPA managers with an additional staff person or existing staff in other departments. In addition, the transitional materials shared between CPA managers should be revisited annually to ensure there is strong documentation of processes, regulations and contacts that can be passed from manager to manager as transitions take place.
- **CPC Members:** The Somerville CPC members are critical in their role to ensure that the CPA program is run effectively and efficiently. However, the CPC composition is not perceived by stakeholders to be reflective of the community. **The CPA manager and CPC should discuss their membership goals as a group and develop concrete objectives for the future of CPC composition.** Furthermore, the CPA program should consider developing semi-annual progress reports and reflection discussions facilitated by the CPA manager to ensure that the program is on track with its goals and that all CPC members are in agreement about the direction of the CPC. These discussions will also foster better dialogue and a deeper understanding of varying perspectives as the CPC members evaluate

Figure 31: Morse-Kelley Playground. Photo by Tony Collins, 2021

applications.

- **CPA Program Funding:** Current CPA funding levels cannot keep pace with demand for the program. The CPA program should explore opportunities for developing new funding in the short and long term for the program. The CPA program should vet funding options, such as bonding for historic preservation and open space projects, and increasing the tax surcharge to expand the impact of the program.
- **CPA Application Process:** With critical guidance provided by the CPA manager and the CPC, the CPA application is feasible for a variety of project applicants. However, the CPA program should evaluate whether additional technological support should be provided for community project applicants who lack the resources, such as Adobe, to complete the application.
- **Community Outreach & Engagement:** Community outreach and engagement were identified as areas for significant improvement for the CPA program. It is recommended that the CPA program develop a formal community outreach and engagement strategy with concrete metrics to measure the success of efforts. Community outreach and engagement initiatives should focus on engaging all neighborhoods in Somerville. Ideally, outreach and engagement efforts will be supported by existing staff in other city departments who already have access to resources to run effective outreach campaigns. The CPA Manager has been identified as the person who should be responsible for community outreach and engagement, with CPC members taking on a supporting role.
- **Program Effectiveness:** The CPA program is perceived by many stakeholders as highly effective overall. The CPA program has made substantial progress in supporting the overarching affordable housing goals of Somerville. However, the program areas of both open space and historic preservation

would benefit from long-term visioning by the CPC. The CPA program should consider developing long-term goals that are consistent with SomerVision 2040 and other strategic plans for these two program areas. Long-term visioning would ensure that future CPA projects help the city to make tangible progress in addressing these two issues.

- **Program Equity:** The CPA program has room for growth in terms of operating as a truly equitable and inclusive program. Improving community outreach and engagement will be essential to building the equity of the program and the aforementioned outreach and engagement planning recommendations should be implemented accordingly. The CPA should continue to implement innovative endeavors, such as the documentary about the CPA program, to educate the public and introduce the program to those who have not yet heard of it. In addition, the CPC should evaluate what metrics it asks project applicants to capture in terms of populations served. With an emphasis on collecting data about vulnerable populations served, the CPA program might encourage projects to reach a wider audience and encourage projects that already serve these communities to participate in the program. Furthermore, the CPA program should consider whether they want to support changes to the Massachusetts CPA statute to expand some of the current restrictions for the program. Issues such as supporting services versus affordable housing units should be considered.

Areas for Further Inquiry

Public awareness and perceptions of the CPA program

Additional research is needed on the extent of public awareness about the CPA program. Due to time and

resource constraints, this evaluation primarily focused on collecting primary research data from stakeholders that were already intimately familiar with the CPA program. While an analysis of historical community survey data was conducted, the limited number of surveys and lack of demographic data in several of the surveys was a considerable limiting factor in the research. Future program evaluations should include a community survey which includes demographic data and survey distribution should be carefully crafted to ensure that all Somerville community members are reached.

Needs Assessment

This evaluation primarily focused on program process and initial outcomes. In order to conduct a full impact evaluation of the CPA program, a needs assessment must be conducted first. A needs assessment could provide critical baseline information about the three program areas the CPA seeks to support (outdoor recreation and open space, affordable housing, and historic preservation). Without knowing the extent of the needs in Somerville for these three program areas, it will be difficult to know the extent of the impact the program has made in fulfilling these needs.

Historic Preservation Plan

Historic preservation was mentioned repeatedly in interviews as an area that needs additional exploration in Somerville. There was general consensus that there was not enough information currently about what the historic preservation needs are in Somerville. A long-term vision for historic preservation in Somerville with identified needs and opportunities would be extremely beneficial for planning in the city. The CPA program could evaluate project applications more effectively with a sense of how the program could support this long-term vision with a detailed historic preservation

plan.

Opportunities for Open Space

The limited amount of open space available for preservation in Somerville has presented challenges for the community and was mentioned repeatedly in interviews as an area of concern. Several interview participants mentioned that the city may need to think creatively about how to maximize the use of existing spaces. In particular, exploring partnerships with the Massachusetts Department of Conservation and Recreation (DCR) to improve access and recreation opportunities for existing parks within the community may be a worthwhile endeavor. As DCR is the largest landholder of open space in Somerville, it will be critical for the city to work closely with the agency to develop alignment on long-term visioning for state parks in the community.

Broader Implications

CPAs in Other Communities

At this time, no other formal program evaluations have been conducted in other CPA communities. It is our hope that this evaluation will provide some information which could be useful in other CPA communities, but also that this evaluation will motivate other CPA communities to explore conducting their own program evaluations. Having more data about how effectively these programs are running in and across communities will help to bolster public awareness about CPA programs, but also more easily enable CPA communities to learn from one another's program

strengths and weaknesses.

Community Preservation Coalition

The Community Preservation Coalition should further promote their existing CPA community resources, particularly those materials that provide guidance on the CPA application process and CPC member recruitment. If these materials are found to be lacking, the Coalition should consider developing further resources to help communities improve their CPA programs. The Coalition should also provide more extensive guidance on conducting CPA program evaluations with the potential development of a program evaluation guide to assist new and existing CPA communities.

Massachusetts CPA Program and Legislation

Several concerns were mentioned in the interviews regarding the current limitations of the Massachusetts CPA statute. The Community Preservation Coalition and other advocates for the Massachusetts CPA program should consider opportunities to amend the current CPA statute that could strengthen the intended goals of the program. Adjustments to how funding can be allocated for affordable housing services or park maintenance under the open space and recreation program goal should be evaluated.

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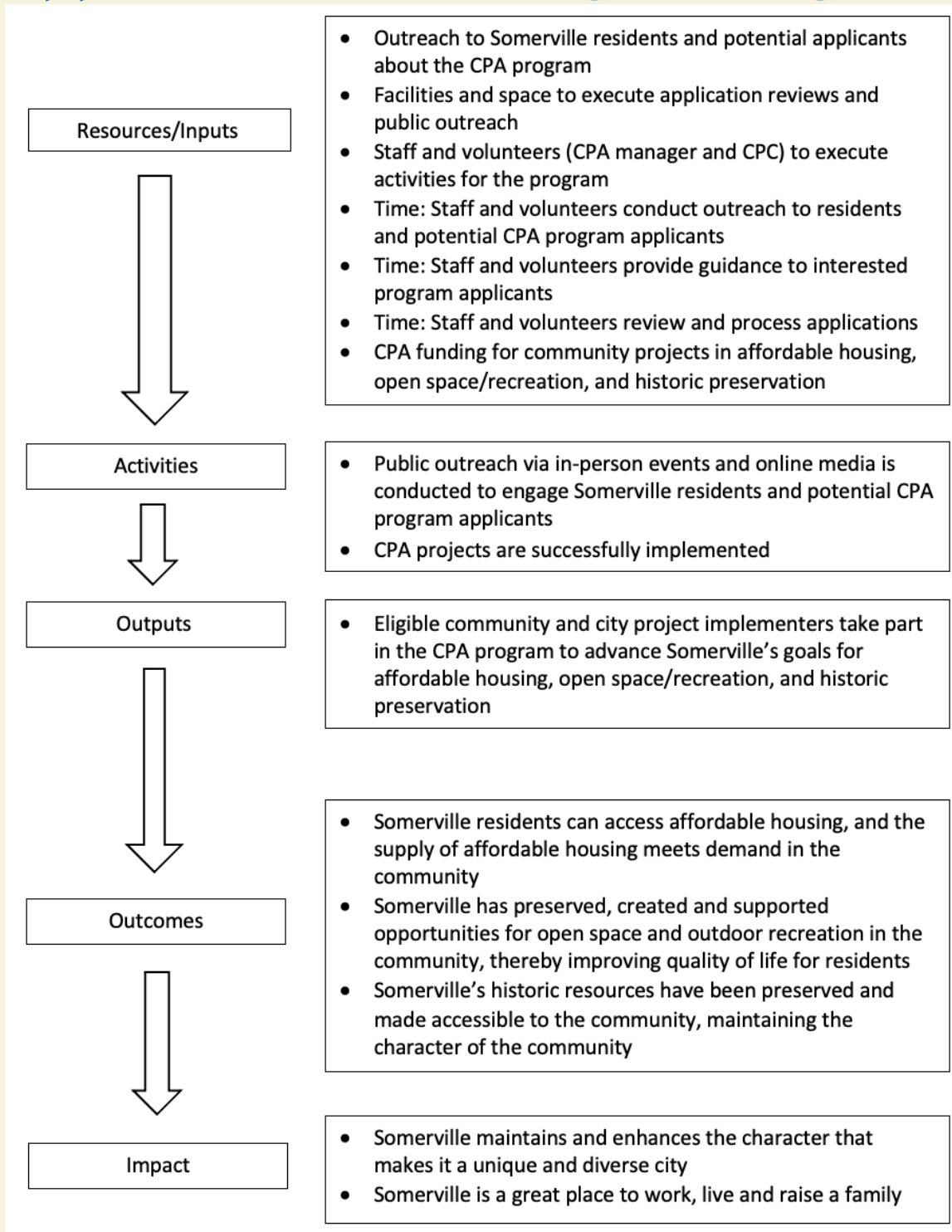
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Appendices

Appendix A: CPA Program Logic Model



Appendix B: CPA Program Evaluation Planning Grid

Evaluation Question	Constructs	Data Sources	Analytic Approach
1. What progress has the Somerville CPA achieved in regard to its goals since 2018?	<ul style="list-style-type: none"> Somerville current city level goals Somerville CPA stated goals Projects completed from FY18-FY20 to support goals 	<ul style="list-style-type: none"> Interviews with prior and current Somerville CPA managers Interviews with prior and current Somerville CPC members Interviews with Somerville Affordable Housing Trust representatives Interviews with Somerville Mayor and/or City Councilor Interviews with CPA applicants Somerville city level plans (<i>Somervision</i>, <i>Open Space</i> etc.) capturing city goals CPA projects completed from FY18-FY20 	<ul style="list-style-type: none"> Compare Somerville city goals to Somerville CPA stated goals, with an emphasis on how FY18-FY20 projects have supported said goals Compile data from interviews Code and tabulate all compiled interview data Conduct a qualitative content analysis of interview data to identify major themes, commonalities, or discrepancies between the interviewed parties
2. How is the Somerville CPA program serving all community members?	<ul style="list-style-type: none"> Somerville community members currently served by the CPA program Somerville community members not currently served by the CPA program 	<ul style="list-style-type: none"> Interviews with prior and current Somerville CPA managers Interviews with prior and current Somerville CPC members Interviews with Somerville Affordable Housing Trust representatives Interviews with Somerville Mayor and/or City Councilor Interviews with CPA applicants CPA projects completed from FY18-FY20 including implementer data 	<ul style="list-style-type: none"> Compile data from FY18-FY20 projects and analyze populations served by completed projects Compile data from interviews Code and tabulate all compiled interview data Conduct a qualitative content analysis of interview data to identify major themes, commonalities or discrepancies between the interviewed parties
3. How can the Somerville CPC be more representative of the community?	<ul style="list-style-type: none"> Current Somerville CPC demographics Demographics of Somerville 	<ul style="list-style-type: none"> Interviews with prior and current Somerville CPA managers Interviews with prior and current Somerville CPC members Interviews with Somerville Mayor and/or City Councilor Interviews with CPA applicants Census data for Somerville 	<ul style="list-style-type: none"> Compile data about current CPC demographics and compare with Somerville demographics data Compile data from interviews Code and tabulate all compiled interview data Conduct a qualitative content analysis of interview data to identify major themes, commonalities or discrepancies between the interviewed parties

4. How could the Somerville CPC function in a way that better supports the mission and management of the CPA program as well as the goals of the overall community?	<ul style="list-style-type: none"> • Current Somerville CPC structure and processes • Issues identified with current Somerville CPC processes and structure 	<ul style="list-style-type: none"> • Interviews with prior and current Somerville CPA managers • Interviews with prior and current Somerville CPC members • Interviews with Somerville Affordable Housing Trust representatives • Interviews with CPA applicants 	<ul style="list-style-type: none"> • Compile data from interviews • Code and tabulate all compiled interview data • Conduct a qualitative content analysis of interview data to identify major themes, commonalities or discrepancies between the interviewed parties
5. What kind of outreach is occurring to the general public and potential project applicants about the Somerville CPA program?	<ul style="list-style-type: none"> • Current outreach strategies by the Somerville CPA manager • Current outreach strategies by the Somerville CPC 	<ul style="list-style-type: none"> • Interviews with prior and current Somerville CPA managers • Interviews with prior and current Somerville CPC members • Interviews with Somerville Affordable Housing Trust representatives • Interviews with CPA applicants • Grey literature documenting Somerville CPA outreach 	<ul style="list-style-type: none"> • Compile and analyze data from grey literature documenting prior Somerville CPA outreach • Compile data from interviews • Code and tabulate all compiled interview data • Conduct a qualitative content analysis of interview data to identify major themes, commonalities or discrepancies between the interviewed parties

6. What other effective CPC structures exist currently in Massachusetts and how could their models and strategies be incorporated into the Somerville CPA program?	<ul style="list-style-type: none"> • CPC structures in other communities • Current Somerville CPC structure and processes 	<ul style="list-style-type: none"> • Interviews with CPA managers in other communities • CPA assessment reports from other communities and Massachusetts 	<ul style="list-style-type: none"> • Compile and analyze data from CPA assessment reports in other communities and for the CPA Massachusetts program • Compile data from interviews • Code and tabulate all compiled interview data • Conduct a qualitative content analysis of interview data to identify major themes, commonalities or discrepancies between the interviewed parties
7. How do Somerville CPA applicants perceive the program's effectiveness?	<ul style="list-style-type: none"> • Somerville CPA community applicants' views of the CPA program 	<ul style="list-style-type: none"> • Interviews with CPA applicants • Survey data from FY18-FY20 of Somerville residents' feedback about the CPA program 	<ul style="list-style-type: none"> • Analyze and code data from prior Somerville resident CPA surveys • Compile data from interviews • Code and tabulate all compiled interview data • Conduct a qualitative content analysis of interview data to identify major themes, commonalities or discrepancies between the interviewed parties

<p>8. How could the Somerville CPA application process be improved to ensure that a wider pool of applicants can successfully navigate the process?</p>	<ul style="list-style-type: none"> • Current Somerville CPA application process • Concerns identified with the Somerville CPA application process 	<ul style="list-style-type: none"> • Interviews with prior and current Somerville CPA managers • Interviews with prior and current Somerville CPC members • Interviews with Somerville Affordable Housing Trust representatives • Interviews with CPA applicants 	<ul style="list-style-type: none"> • Compile data from interviews • Code and tabulate all compiled interview data • Conduct a qualitative content analysis of interview data to identify major themes, commonalities or discrepancies between the interviewed parties
<p>9. What other types of projects or opportunities could be supported by Somerville CPA funds?</p>	<ul style="list-style-type: none"> • Types of projects currently funded by Somerville CPA program • Types of CPA projects funded in other Massachusetts communities 	<ul style="list-style-type: none"> • Interviews with prior and current Somerville CPA managers • Interviews with prior and current Somerville CPC members • Interviews with Somerville Affordable Housing Trust representatives • Interviews with CPA applicants • Interviews with CPA managers in other communities • CPA assessment reports from other communities and Massachusetts 	<ul style="list-style-type: none"> • Compile and analyze data from CPA assessment reports in other communities and for the CPA Massachusetts program • Compile data from interviews • Code and tabulate all compiled interview data • Conduct a qualitative content analysis of interview data to identify major themes, commonalities or discrepancies between the interviewed parties

Appendix C: Interview Questions

Research questions addressed by interviews: What progress has the CPA achieved regarding its goals since 2015? How can the CPC be more representative of the community? How could the CPC function in a way that better supports the mission and management of the CPA program? What kind of outreach is occurring to the public and potential project applicants about the CPA program? What other types of projects or opportunities exist that could be supported by CPA funds?

Interviews were conducted via phone or video conference depending on the preference and availability of our interviewees. The intent in interviewing these parties was to gather perspectives and collect data about the CPA program.

- Current and former Somerville CPC members
 - For how long have/were you been involved as a CPC Member?
 - What are your responsibilities as a CPC Member?
 - What do you believe are the goals of the Somerville CPA program?
 - Do you believe the Somerville CPA program goals align with the City of Somerville's overarching goals?
 - To the best of your knowledge, what progress has the CPA achieved in meeting its goals since its beginning?
 - What kind of outreach is occurring to the general public and potential project applicants about the CPA program?
 - Do you advertise the CPA program and outreach to potential applicants, or is this the role of the CPA manager?
 - Once applications have been received, how do you select those to consider, and decide which ones to fund?
 - How do you ensure that CPA funds are distributed equitably?
 - Have you found that the same applicants return to apply for CPA funding? What are your thoughts on this?
 - Do you feel that people of color and low-income residents in Somerville are over/underrepresented in the projects funded by CPA (i.e., in terms of populations served or actual project applicants)?
 - What are your measures of success in overseeing CPA funding?
 - What is/was your greatest challenge as a CPC member?
 - What is/was your greatest accomplishment as a CPC member?
 - What skills do CPC members have that allow the CPC to function well?
 - Do you feel that the CPC is representative of the Somerville community? Why/why not?
 - How could representation be improved on the CPC?
 - How could the CPC function in a way that better supports the mission and management of the CPA program?
 - What is your vision for the future of the CPA program?

- Current and former Somerville CPA Managers
 - For how long have/did you serve as CPA Manager for the City of Somerville?
 - How would you describe your responsibilities as CPA Manager?
 - What do you believe are the goals of the Somerville CPA program?
 - Do you believe the Somerville CPA program goals align with the City of Somerville's overarching goals?
 - To the best of your knowledge, what progress has the CPA achieved in meeting its goals since its beginning?
 - What are/were the greatest challenges you encountered as CPA manager, in its process and outcomes?
 - What are/were your greatest success stories?
 - What skills do CPC members have that allow the CPC to function well?
 - Do you feel that the CPC is representative of the Somerville community? Why/why not?
 - What kind of outreach have you seen occur to the general public and potential project applicants about the CPA program?
 - How could the CPC function in a way that better supports the mission and management of the CPA program?
 - What is your vision for the future of the CPA program?

- Mayor's Office of Strategic Planning and Community Development Department
 - What is your role with the City of Somerville? How long have you been in this position?
 - What has been your engagement with the Somerville CPA Program?
 - Can you describe the relationship between the CPA program and the Somerville Affordable Housing Trust Fund? How was this partnership established?
 - In your opinion, how has the Somerville CPA Program helped in addressing Somerville's affordable housing goals?
 - What progress has the CPA program made in addressing the affordable housing needs of Somerville (i.e., metrics in terms of projects created or residents served)?
 - Are there any particular CPA affordable housing projects that you are particularly proud of?
 - What is your vision for the CPA program in terms of its ability to support affordable housing in Somerville?
 - What are the perceived goals of the Somerville CPA program and how well do they align with the City of Somerville's overarching goals?
 - How could the Somerville CPC function in a way that better supports the mission and management of the CPA program?
 - Do you have any feedback on how the Somerville CPA program could better support the affordable housing needs of Somerville?

- CPA managers or equivalent staff in other communities
 - How long have you lived in and/or worked in your community? What is your position?

- Are your CPA structures and processes working effectively?
- What are your measures of success in managing the CPA program?
- How do you advertise the CPA program? How do you do outreach to potential applicants?
- How do you solicit projects, select those to consider, and decide which ones to fund?
- How do you ensure that CPA funds are distributed equitably in your community? And, do communities of color and low-income neighborhoods receive CPA funding to the same degree as other neighborhoods?
- Are people of color and low-income residents represented on your CPC committee? How could representation be improved?
- What funding mechanisms are used for your CPA program?
- What other types of projects or opportunities could be supported by CPA funds?
- Does your CPA program use long term funding opportunities for CPA projects that extend past the annual grant cycle?
- Do you require a restrictive easement or designation for open space/recreation projects (like historic preservation projects)?
- Do you feel that it's important to keep the CPA webpage updated? What information do you think it most important to show here?
- Somerville CPA project applicants
 - How long have you worked with your organization and what is your role with the organization?
 - When and how did you first become aware of the Somerville CPA program?
 - Can you describe your process of working with the Somerville CPA program (for example, how many project applications have you submitted, what has your experience been like working with the CPA program manager and CPC)?
 - For the projects you did receive grant funding for, what populations did those projects serve (i.e., elderly, youth, specific Somerville neighborhoods etc.)?
 - Do you have any feedback about the CPA application process?
 - What changes could the Community Preservation Committee (CPC) make to improve the application and project development process for this program?
 - How effective do you believe the Somerville CPA program is?
 - What do you believe are the goals of the Somerville CPA program?
 - Do you think the CPA program is supporting the City of Somerville in meeting their overarching goals for the city?
 - How could the CPC function in a way that better supports the mission and management of the CPA program?
- Somerville Mayor
 - Could you please tell us a little bit about your experience when the Community Preservation Act (CPA) was first passed on the ballot in Somerville in 2012? What was your experience like building this new program in Somerville?

- What were your hopes for the CPA program when it was first introduced in Somerville?
 - Do you feel that the CPA program today aligns with what you were expecting back in 2012?
 - How do you see the CPA program fitting in with the overarching goals of Somerville?
 - Are there CPA program achievements that you are particularly proud of (i.e., projects funded that you feel have made a significant impact in Somerville)?
 - What is your vision for the future of the CPA program in Somerville?
- Massachusetts Community Preservation Coalition Director
 - How long have you worked for the Community Preservation Coalition and what is your role with them?
 - What are your thoughts on the Somerville CPA program?
 - (Follow up questions on Somerville specifically...)
 - What changes could the Community Preservation Committee (CPC) make to improve the application process, public engagement, and outreach for this program?
 - How effective do you believe the Somerville CPA program is?
 - How could the Somerville CPC function in a way that better supports the mission and management of the CPA program?
 - What are the best ways for CPCs to work effectively to oversee their CPA programs?
 - What are some measures of success for different CPA programs?
 - How do you help ensure that CPA funds are distributed equitably within different communities? Or, how do see cities achieve this?
 - Do you believe that communities of color and low-income neighborhoods receive CPA funding to the same degree as other neighborhoods?
 - Do you notice any trends with very successful or unsuccessful CPA-funded projects? What are those?
 - If CPCs are looking to increase their CPA funding, what steps would you suggest they take?
 - What are some unique or special scenarios in which CPA funds have been used?
 - Do you think any significant changes will occur to CPA legislation in the near future?

