



JOSEPH A. CURTATONE  
MAYOR



## CITY OF SOMERVILLE, MASSACHUSETTS COMMUNITY PRESERVATION COMMITTEE FY22 COMMUNITY PRESERVATION PLAN

### MEMBERS

Laura Beretsky, Chair  
Heather Heimarck, Vice Chair

Andrew Louw  
Tatiana Shannon  
Cristina Kennedy  
Jahan Habib  
Eleanor Rances  
Alan Bingham  
Rose White

### STAFF

Alan Inacio

### Introduction

With the passage of the Community Preservation Act (CPA) in November 2012, the City of Somerville joined 186 other communities in the Commonwealth of Massachusetts, who now receive a steady funding source dedicated to preserving and improving their character and quality of life. The CPA is a Massachusetts state law (M.G.L. c. 44B) that enables adopting communities to create a dedicated fund for preserving open space and historic resources and expanding community housing and outdoor recreation opportunities.<sup>1</sup> Somerville voters passed the Act by 76%, the second-highest passage rate in CPA history.<sup>2</sup> This achievement has provided Somerville the opportunity to use these resources to make the city an even more exceptional place to live, work, play, and raise a family. The goal of the CPA program is to contribute to SomerVision by ensuring that Somerville maintains and enhances the character that makes it a diverse and unique city. This year is the sixth round of the Somerville's CPA funding and the eighth year since the CPA was passed by Somerville voters. A lot has been accomplished: CPA funding is increasing available affordable housing, improving local historic treasures, and improving recreation spaces for Somerville children and adults to play.

### The Community Preservation Committee

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

- Laura Beretsky, (Chair), general public representative
- Heather Heimarck, (Vice Chair) general public representative
- Jahan Habib, Planning Board representative

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

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

- Andrew Louw, Public Space and Urban Forestry Department representative
- Eleanor Rances, Somerville Housing Authority Representative
- Tatiana Shannon, general public representative
- Rose White, general public representative
- Cristina Kennedy, Conservation Commission representative
- Alan Bingham, Historic Preservation Commission representative

## The Community Preservation Plan

The Community Preservation Plan provides an overview of the CPA in Somerville and establishes the Committee's priorities for funding projects. The fiscal year 2022 (FY22) Plan builds on the previous Community Preservation Plans and is based on the City's existing planning documents and resident input. The CPC invited input to inform the FY22 Community Preservation Plan update at a public hearing on April 28, 2021 and through a six-week written comment period. Comments received from residents during the FY22 public comment period are available on the CPA website under the *Apply for CPA Funding* tab and the minutes from the public hearing are available [here](#).

This plan has six sections. The first discusses the priorities of Somerville's CPA program and the proposed FY22 funding allocations across CPA categories. The second describes the sources of proposed CPA funding. The third describes the process the CPC follows to determine which projects to recommend for funding. The fourth section discusses the types of projects that are eligible to receive CPA funding and the fifth details priorities for each of the CPA categories. The sixth and final section provides information on how funding was distributed across projects in previous funding rounds. The draft monitoring and evaluation (M&E) plan for the FY22 Community Preservation Plan is attached as an appendix. The M&E plan details what information the CPC collects, in addition to community input, to inform their decisions about how to set funding priorities and to determine the effectiveness of the CPA program overall.

## Section 1. Somerville Community Preservation Act Priorities

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

### General Priorities

The CPC will prioritize projects that:

1. **Are consistent with the community's values, which includes projects that:**
  - a. Improve accessibility for all members of the community

- b. Incorporate sustainable practices and design<sup>3</sup>
- c. Receive endorsement from other Somerville boards, commissions, departments, or community groups or from city, state, or federal officials
- d. Are consistent with the goals and priorities established in other current planning documents but not explicitly addressed in this plan
- e. Address two or more of the CPA focus areas (i.e., blended projects)
- f. Support Somerville's diversity, including support to immigrants regardless of their status

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

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

## FY22 Funding Allocation

In FY22, the CPC has established the following minimum funding allocations:

<b>Table 1. FY22 CPA Funding Allocations</b>				
<b>Use</b>	<b>Percent of FY22 CPA Revenue</b>	<b>Estimated Amount of FY22 New CPA Revenue</b>	<b>Estimated FY22 Debt Service</b>	<b>Total Available in FY22 for New Projects</b>
Community Housing Reserve or projects	50%	1,598,061	314,500	1,283,561
Open Space and Recreation Reserve or projects	20%	639,225	0	63,225
Historic Resources Reserve or projects	15%	479,418	131,143	348,275
Undesignated/flexible project funds	10%	319,612	0	319,612
Admin and Operating Expenses of Committee	5%	159,806	0	159,806
<b>Total</b>	<b>100%</b>	<b>3,196,123</b>	<b>445,643</b>	<b>2,590,673</b>

For FY14 through FY18, the minimum allocations were 45% for affordable housing, 15% each for historic resources and open space/recreational land, and 20% undesignated. For FY19 through FY21, these allocations were adjusted to 50% for affordable housing, 15% for historic resources, 20% for open space/recreational land, and 10% for undesignated and the same allocations were used in FY22.

Undesignated funding can only be awarded to CPA eligible projects in the affordable housing, historic resources, and open space/recreational land categories. These funds are awarded based on the annual demand in each category and the quality of applications submitted.

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

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

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

The total amount of funding available may change as a result of surcharge revenue beyond or below the original budget, potential funding from the optional FY21 City appropriation, funding rolling over from unspent FY21 administrative funds and any project funding remaining after a project closes. Unspent administrative funds will be allocated to the undesignated category and unspent funds from completed projects will return to the fund from which they originally came. Actual rollover amounts from FY21 and the allocation for the FY21 City appropriation will be finalized in late July/early August once the City of Somerville has closed the 2021 fiscal year.

As in past funding cycles, the final allocation of total FY22 CPA revenue will likely deviate from this distribution due to the actual project applications that the CPC receives and ultimately recommends funding with the City Council's approval. In addition to seeking public comment on the plan, other sources of community input on the minimum allocations are through a voting activity at the CPA table at the SomerStreets events<sup>4</sup> and the CPA survey of residents. Over the four years this data has been collected, the percentage of funds residents think should go to each category has remained constant.

<b>Table 2. Results from SomerStreets Voting</b>				
	<b>Affordable Housing</b>	<b>Historic Resources</b>	<b>Open Space/ Recreation</b>	<b>Flexible</b>
<b>2016</b>	36%	22%	36%	6%
<b>2017</b>	42%	18%	33%	7%
<b>2018</b>	38%	18%	34%	10%
<b>2019</b>	40%	18%	32%	10%
<b>2020</b>	N/A	N/A	N/A	N/A

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<sup>4</sup> There were not SomerStreet events in 2020.

## Results from 2021 CPA Survey for Residents



### CPA Survey Results - Question #2

Where did you hear about CPA ?

- 21% of respondents had heard of CPA from Multiple Sources
- 43% of respondents said they had heard of CPA on the city website
- 36% respondents reported having heard of CPA at a Community Event



### CPA Survey Results - Question #3

Based on your understanding of the CPA, which of the following could the CPA fund? Check all that apply.

- Affordable Housing - 93% of respondents
- Open/Recreational Space- 87% of Respondents
- Historic Preservation- 93% of Respondents



## CPA Survey Results - Question #4

List any projects you know of that have been funded or are currently funded by the CPA.

- Somerville Museum – 43% most noted individual project
- West Branch Library – 29% 2<sup>nd</sup> most noted individual project
- 57% of respondents could name at least 3 CPA projects
- 79% of respondents could name at least 1 CPA project
- 21% of respondents left the question blank.



## CPA Survey Results - Question #5

If you had \$100, how would you allocate it among the three categories of CPA funding? Each of the three primary categories (Affordable Housing, Open Space and Recreation, Historic Preservation) must have a minimum of \$10.

### Affordable Housing

- 40% - 43% responded as ideal allocation
- 50% - 29% responded as ideal allocation
- 30%/60% - 14% responded as ideal allocation

### Historic Preservation

- 20% - 57% responded as ideal allocation
- 30% - 36% responded as ideal allocation
- 50% - 7% responded as ideal allocation

### Open/Rec Space

- 30% - 57% responded as ideal allocation
- 20% - 21% responded as ideal allocation
- 50% - 7% responded as ideal allocation

### Flexible

- 10% - 43% responded as ideal allocation
- 0% - 50% responded as ideal allocation
- 20% - 7% responded as ideal allocation

**NOTE: The FY21 Survey only received 14 responses so results shown are statistically insignificant.**

## Section 2. Somerville Community Preservation Act FY22 Funding

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

## Estimated Revenue Available in FY22 Funding Cycle

Funds available in the FY22 funding cycle come from two sources: new revenue received in FY22 and unexpended revenue from FY21. As Table 3 demonstrates, the CPC estimates that the City will receive \$3,196,123<sup>5</sup> million in new CPA revenue in FY22. In FY20 Governor Baker signed a legislation that includes a permanent increase in funding for the Community Preservation Act. The legislation increased the recording fees at the Registries of Deeds which provide revenue to the statewide CPA Trust Fund. A change to fees collected by the Registry of Deeds went into effect on January 1, 2020.

The Community Preservation Coalition 2020 annual report reported that while 2020 proved to be a challenging year as the world contended with the COVID-19 pandemic, the CPA continued to be a vital resource for communities—and due to the Coalition’s legislative work, 2020 was one marked with success from beginning to end. The reports adds that January 2020 saw two important events connected to the CPA Trust Fund. First, CPA communities received their disbursements from the delayed \$20 million in FY19 state budget surplus funds, boosting the base state match for November 2019 from only 13% to 24%. At the same time, the long-anticipated CPA Trust Fund increase went into effect, and the results were just as significant as they had projected. The Community Preservation Coalition championed the decade-long effort to pass legislation increasing the fees that generate revenue for the CPA Trust Fund. The new fee schedule at the state’s Registries of Deeds went into effect on December 31st, 2019—and since then, the revenue for the CPA Trust Fund more than doubled. Because of this, over \$55 million was distributed from the Trust Fund in November 2020, and all CPA communities received a 28.6% match on round one of the distributions. The Executive Director, Mr. Stuart Saginor, said that “November 2021 looks promising so far: active real estate market + all 12 months implementing new fee schedule”.

<b>Table 3. Estimated CPA Funds Available in FY22 Funding Cycle</b>	
<b><i>FY22 Revenue</i></b>	<b>3,196,123</b>
Surcharge Revenue	2,580,039
City Appropriation <sup>6</sup>	0
State Match of FY21 Local Revenue	616,084
FY22 Admin Expenses (5%)	(159,806)
FY22 Debt Service 100 Homes	(314,500)
FY22 Debt Service West Branch Library	(131,143)
<b>Total</b>	<b>\$2,590,673</b>

## Borrowing

The CPA legislation allows communities to leverage their CPA revenue by borrowing for eligible projects and using future CPA revenue to pay the resulting debt service. As such, applicants may apply for

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<sup>5</sup> This figure is likely to change because of the financial uncertainty caused by the COVID-19 pandemic.

<sup>6</sup> The FY22 City appropriation will be determined in June 2022 for use in FY23.

funding beyond the amount of revenue currently available. Bonded projects require the approval of two-thirds of the City Council.

The first CPA project in Somerville approved for bonding was the historic rehabilitation of the West Branch Library. The Board of Aldermen approved the \$2.5 million appropriation in FY16. In FY18, an additional bond of \$6 million for the Somerville Community Corporation's 100 Homes project was approved by the Board of Aldermen. FY20 was the first year that debt service was paid on the 100 Homes bond; payments on the West Branch Library bond began in FY21. Based on the current spending rates for the projects and the estimated interest rate, at this time the CPC anticipates paying a total of \$442,779 in debt service in FY22.

### **Section 3. FY21 Funding Cycle Review**

The Community Preservation Committee invites City departments, community organizations and individuals to [submit applications](#) for CPA funding on an annual basis. In FY22, the application process is starting in May with a new call for pre-applications for community proposed projects on City lands and requests for funds for feasibility studies. Following the pre-application step, applicants first submit an eligibility determination form to confirm the proposed project is eligible for CPA funding. Projects deemed eligible are invited to submit full applications and present their projects during a community meeting. CPC makes funding recommendations on projects to the City Council, which gives the final approval.

During FY14, the CPC empowered the [Somerville Affordable Housing Trust Fund](#) (the Trust or SAHTF) to serve as the housing arm of the CPC, leveraging the Trust's 25 years of experience supporting affordable housing. Under this arrangement, the CPC grants all community housing funds to the Trust, and the Trust allocates the funds to CPA-eligible projects and programs. The CPC granted these funds for the first time in January 2015, when the then Board of Aldermen approved an appropriation of \$2.2 million to the Trust, equal to 45% of estimated FY14 and FY15 CPA revenue at that time. Since the start of the CPA in Somerville, over \$9 million has been appropriated to the Trust, with an additional bond of \$6 million for the 100 Homes project. Affordable housing CPA applications are submitted directly to the Trust and follow a separate review process than the CPC's process for open space/recreation land and historic resources applications.

### **Section 4. Allowable Projects**

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



Because CPA funds cannot be used for programming purposes or public art, applicants are encouraged to pair their CPA application with an application for funding from the Somerville Arts Council's [Local Cultural Council grant program](#) when appropriate.

Chart 1. Community Preservation Act Funding Allowable Uses				
	Open Space	Recreational Land	Historic Resources	Community Housing
	Land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh and salt water marshes and other wetlands, ocean, river, stream, lake and pond frontage, beaches, dunes and other coastal lands, lands to protect scenic vistas, land for wildlife or nature preserve and land for recreational use.	Land for active or passive recreational use including, but not limited to, the use of land for community gardens, trails, and noncommercial youth and adult sports, and the use of land as a park, playground or athletic field.  Does not include horse or dog racing or the use of land for a stadium, gymnasium or similar structure.	Building, structure, vessel, real property, document or artifact listed on the state register of historic places or determined by the Somerville Historic Preservation Commission to be significant in the history, archeology, architecture or culture of the city or town.	Housing for low and moderate income individuals and families, including low or moderate income seniors.  Moderate income is less than 100%, and low income is less than 80%, of US HUD Area Wide Median Income.
<b>Acquisition</b> Obtain property interest by gift, purchase, devise, grant, rental, rental purchase, lease or otherwise. Only includes eminent domain taking as provided by G.L. c. 44B.	Yes	Yes	Yes	Yes
<b>Creation</b> To bring into being or cause to exist. Seideman v. City of Newton, 452 Mass. 472 (2008).	Yes	Yes	No	Yes
<b>Preservation</b> Protect personal or real property from injury, harm or destruction.	Yes	Yes	Yes	Yes
<b>Support</b> Provide grants, loans, rental assistance, security deposits, interest-rate write downs or other forms of assistance directly to individuals and families who are eligible for community housing, or to entity that owns, operates or manages such housing, for the purpose of making housing affordable.	No	No	No	Yes, includes funding for Affordable Housing Trust Fund
<b>Rehabilitation and Restoration</b> Make capital improvements, or extraordinary repairs to make assets functional for intended use, including improvements to comply with federal, state or local building or access codes or federal standards for rehabilitation of historic properties.	Yes, if acquired or created with CPA funds	Yes	Yes	Yes, if acquired or created with CPA funds

## Section 5. FY22 Priorities by CPA Category

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

### Open Space and Recreational Land

#### Context

The term open space is commonly used in Somerville to describe all of the City's 163 acres of green space and land for active and passive recreation, including all of its parks, playgrounds, and fields. The CPA legislation, however, has two terms to describe this land: recreational land, which includes active and passive recreation, and open space. The distinction between the two in the CPA legislation is somewhat confusing, as open space is defined to include recreational land in addition to natural habitat land. However, open space and recreational land have different allowable uses (see Chart 1 above).

In Somerville, land for active or passive recreational use accounts for the vast majority of the City's 163 acres of open space, including all of its parks, playgrounds, and fields. A very small amount of open space in the City is not recreational land, including the wetlands and shores of the Alewife Brook and Mystic River. While the Committee prioritizes the preservation of this land, it also recognizes that most of the work to be done in Somerville relates to improving existing and creating new space for active and passive recreation. The Committee has therefore decided to address these two focus areas together and create one set of priorities for them.

#### Priorities

The CPC will prioritize projects that:

1. **Support the acquisition of land for and creation of new publicly accessible open space and recreational land.** In SomerVision, the City's 20-year comprehensive plan, residents called for adding 125 new acres of publicly accessible open space and recreational land to the City's current stock<sup>7</sup>. The CPC will prioritize projects that move the City towards this goal. Between 2010 and 2018, 15.03 new acres of usable open space have been created in Somerville representing 12% progress towards our SomerVision. An additional 4.87 acres<sup>8</sup> are in progress for a total of 19.9 new acres of open space. CPA funds to date have been used to purchase the 0.04 acre parcel at 5 Palmer, which is adjacent to the Capuano School/Glen Park, and a 0.13 acre parcel at 35 Richardson.
2. **Expand access to and use of the Mystic River and Alewife Brook corridors.** Somerville has over two miles of shoreline that provide opportunities for walking, boating, and fishing, among other

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<sup>7</sup> The 125 acre goal has been retrained in the draft SomerVision 2040.

<sup>8</sup> There is an additional 4.9 acres of open space in progress at ArtFarm, 5 Palmer, 35 Richardson and the Community Path Extension.

recreational activities. The CPC will prioritize projects that expand opportunities for residents to enjoy their shoreline.

3. **Improve the health of the wetlands and shores of the City's water resources.** While expanding access to the Mystic River and Alewife Brook, it is essential to improve the health of the wetlands and shores of these waterways through efforts including invasive species control.
4. **Rehabilitate and restore existing recreational land according to need.** The CPC will prioritize the rehabilitation of existing fields, parks, and playgrounds that are in the worst condition. The City's 2016-2021 Open Space and Recreation Plan provides baseline data on the condition of these parcels, updated from the 2008-2013 plan. In the 2016-2021 plan, 20% of Somerville's open spaces were determined to be in poor condition (16 out of 85). CPA funds supported improvement of Hoyt-Sullivan Park, Prospect Hill Park, Community Growing Center, School Garden Classrooms, Community Path Repaving, South Street Farm, Winter Hill Community Innovation School, Lou Ann David park (former Powderhouse School Park), and Allen Street St Playground. CPA funds are currently supporting improvements in 7: Dilboy Auxiliary Fields, Henry Hansen Park, Blessing of the Bay Park, Central Hill playground and three schoolyards: Brown School, West Somerville Neighborhood School, Healey School Tot Lot.
5. **Creatively and coherently combine multiple uses that meet community need.** In a City as densely populated as Somerville, sharing space is an imperative. Wherever possible, projects seeking CPA funding should include multiple uses and demonstrate how these uses meet community need.
6. **Expand urban agriculture opportunities.** Residents regularly express a desire for expanded urban agriculture opportunities. Demand for Somerville's 232 community garden plots, for example, far outstrips supply, with 122 individuals on waitlists at eight of the City's 12 gardens that have shared their data. Projects should seek to incorporate expanded urban agriculture opportunities, including new community garden plots, wherever possible and appropriate.

## Historic Resources

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

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

## Community Housing

### Context

The revitalization of Somerville, spurred on in part by the extension of the Green Line (GLX) through the heart of the city, has made clear the need for more housing, and affordable housing in particular. Currently, 10%, or approximately 3,400 units, of Somerville's housing stock is affordable. Of these units, 97% are rental, the remaining are home ownership. It is recommended that households spend no more than 30% of their income on housing. In Somerville, 38.7% of renters and homeowners are paying more than 30% of their income on housing. If you are paying more than 50% of your income in housing costs, you are considered severely burdened. In Somerville, 17.8% of renters and 19.0% of homeowners are paying more than 50% of their income on housing. The Metropolitan Area Planning Council (MAPC) estimates that Somerville's population will grow by 17% to 25% (roughly 13,000 to 19,000) by 2030, adding further demand to an incredibly tight housing market that has consistently seen vacancy rates well below those considered healthy for years.

In SomerVision, residents set a goal of adding 6,000 new housing units to the city's stock by 2030, 1,200 of which would be permanently affordable. Eight years into SomerVision, 1,917 units of housing have been created, of which 387 are permanently affordable. CPA funding has contributed to the creation of over 90 of these units. MAPC's report on the impact of the GLX suggests this may not be sufficient. It estimates the city will need anywhere from 6,300 to 9,000 units to accommodate increased demand, 35% of which (2,205 to 3,105) should be affordable.

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

### Priorities

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

1. **Provide for affordability in perpetuity as required by the Community Preservation Act.** Housing created, acquired, or rehabilitated with CPA funds must always serve individuals who meet the income limits outlined above. A permanent deed restriction on these units will guarantee that they remain affordable into perpetuity, thereby ensuring that the City's affordable housing stock will remain robust over time.
2. **Preserve expiring-use units.** According to the MAPC, the affordability restrictions on 272 affordable units in Somerville were expected to expire by 2020, equivalent to 8% of the city's dedicated affordable housing stock. Another 723 units will expire after 2020. Extending the affordability of these units into perpetuity will prevent displacement of existing residents and serve as a cost-effective strategy for maintaining affordable units in Somerville.

3. **Support mixed-use and transit-oriented development.** Research shows that housing located within walking distance of jobs, services, and public transportation is usually more affordable than housing that requires individuals to drive, and residents made clear they support this type of housing in the SomerVision process.

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

**Prevent homelessness and/or provide housing units or other support for homeless and formerly homeless households.** According to the City's 2019 point in time survey, while homelessness in Somerville remains low (260 sheltered and 8 unsheltered individuals), homelessness has significant negative impacts on the individuals and families facing the loss of their homes. The CPC will prioritize projects and programs that support these households.

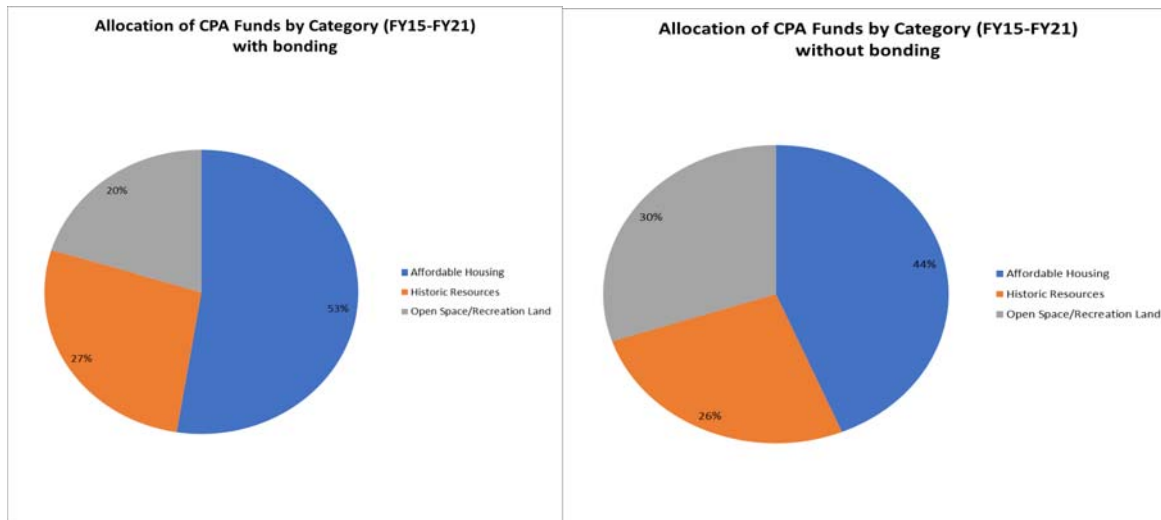
## Section 6. CPA Supported Projects

Since the Community Preservation Committee began accepting project applications in FY15, the Somerville CPA program has provided over \$26 million for projects in all three areas, including \$3.4 million in state funds. An additional \$1,000,000 for the ArtFarm project is pending City Council approval. This money has supported 86 projects: 28 historic resources, 31 open space/recreation land, and 27 housing. Twenty-six projects are managed by the City (30%), 51 are managed by community groups (59%), and nine are collaborations between the City and a community group (10%). Table 4 details CPA funding since adoption.

Table 4. CPA Funding by Category (without bonding) <sup>9</sup>								
Category	FY15	FY16	FY17	FY18	FY19	FY20	FY21	Total
Community Housing	2,206,028	1,834,675	880,416	1,200,402	1,396,986	951,599	1,005,071	\$9,475,177
Historic Resources	1,660,996	600,288	585,467	158,100	747,175	543,436	267,863	\$4,563,325
Open Space/Recreation Land	227,463	695,160	777,239	2,203,008	71,000	622,000	528,188	\$5,124,058
<b>Total</b>	<b>\$4,094,487</b>	<b>\$3,130,123</b>	<b>\$2,243,122</b>	<b>\$3,561,510</b>	<b>\$2,215,161</b>	<b>\$2,117,035</b>	<b>\$1,891,122</b>	<b>\$19,162,560</b>

<sup>9</sup> These are appropriations and encumbrances only and include project funds awarded to date.

\*In FY16, the Board of Aldermen approved bonding \$2.5 million for the historic preservation of the West Branch Library. In FY18, the Board of Aldermen approved bonding \$6 million for the acquisition of affordable units through the 100 Homes project. The debt service payments for the 100 Homes bond began in FY20; debt service payments for the West Branch Library bond began in FY21.



For more details about Somerville's CPA funded projects, see the FY21 mid-year report.

**Table 5. CPA funding since adoption**

<b>Community Preservation Act Fund</b>	<b>FY14 Actual</b>	<b>FY15 Actual</b>	<b>FY16 Actual</b>	<b>FY17 Actual</b>	<b>FY18 Actual</b>	<b>FY19 Actual</b>	<b>FY20 Actual</b>	<b>FY21 thru April</b>	<b>FY22 Est</b>	<b>Total</b>
<b>Total Funding Available</b>	<b>2,681,180</b>	<b>6,223,963</b>	<b>4,868,257</b>	<b>2,776,974</b>	<b>4,053,077</b>	<b>2,888,260</b>	<b>2,364,018</b>	<b>3,201,234</b>	<b>3,201,234</b>	<b>n/a</b>
<b>Current Fiscal Year Revenue</b>	<b>2,681,180</b>	<b>3,542,783</b>	<b>2,889,136</b>	<b>2,588,146</b>	<b>2,669,272</b>	<b>2,888,260</b>	<b>2,364,018</b>	<b>3,201,234</b>	<b>3,201,234</b>	<b>27,597,896</b>
Surcharge Revenue	1,323,320	1,430,721	1,546,198	1,664,815	1,794,507	1,953,030	1,971,394	2,580,038	2,580,038	16,844,061
City Appropriation*	1,355,671	1,200,000	510,844	500,000	500,000	500,000	100,000	0	0	4,666,515
State Match of Previous Year's	0	904,917	829,456	420,681	370,465	432,342	289,304	616,084	616,084	4,479,333
Interest	2,189	7,145	2,638	2,650	4,300	2,888	3,320	5,112	5,112	35,354
<b>Rollover from Previous Fiscal Year</b>	<b>0</b>	<b>2,681,180</b>	<b>1,979,121</b>	<b>188,828</b>	<b>1,383,805</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>n/a</b>
<b>Appropriations and Encumbrances</b>	<b>56,769</b>	<b>4,188,072</b>	<b>3,191,950</b>	<b>2,329,797</b>	<b>3,645,578</b>	<b>2,313,785</b>	<b>2,228,074</b>	<b>2,309,109</b>	<b>2,876,510</b>	<b>23,139,644</b>
Committee admin expenses (up to	56,769	93,585	61,827	86,675	84,068	98,624	111,039	62,344	159,806	814,737
Open Space and Recreation	0	227,463	695,160	777,239	2,203,008	71,000	622,000	528,188	639,225	5,763,283
Historic Resources Projects	0	1,660,996	600,288	585,467	158,100	747,175	543,436	267,863	348,275	4,911,600
Community Housing Projects	0	2,206,028	1,834,675	880,416	1,200,402	1,396,986	951,599	1,005,071	1,283,561	10,758,738
Community Housing Debt Service	0	0	0	0	0	0	312,153	314,500	314,500	941,153
Historic Resources Debt Service	0	0	0	0	0	0	0	131,143	131,143	144,286
<b>Rollover Funding Available for</b>	<b>2,681,180</b>	<b>1,979,121</b>	<b>188,828</b>	<b>1,383,805</b>	<b>0</b>	<b>0</b>	<b>202,755</b>	<b>0</b>		<b>n/a</b>
Open Space and Recreation	402,177	706,131	0	710,000	0	0	0	0	TBD	n/a
Historic Resources Reserve	402,177	0	0	0	0	0	0	0	TBD	n/a
Community Housing Reserve	1,206,531	594,755	0	0	0	0	0	0	TBD	n/a
Undesignated Project Funding	670,295	678,234	188,828	673,805	0	0	0	0	TBD	n/a
State Match	0	0	0	0	0	0	202,755	0		n/a
Current Year's Unallocated City	-	-	-	-	-	-	-	-	TBD	n/a



## Appendix: FY22 Community Preservation Plan Monitoring and Evaluation Plan

### Introduction

With the passage of the Community Preservation Act (CPA) in November 2012, the City of Somerville joined 154 other communities in the Commonwealth of Massachusetts, and is now one of 186 communities, that have a steady funding source dedicated to preserving and improving their character and quality of life. The CPA is a Massachusetts state law (M.G.L. c. 44B) that enables adopting communities to create a dedicated fund for preserving open space and historic resources and expanding community housing and outdoor recreation opportunities.<sup>10</sup> Somerville voters passed the Act by 76%, the second highest passage rate in CPA history.<sup>11</sup> This achievement represents an exciting opportunity to make Somerville an even more exceptional place to live, work, play, and raise a family.

FY22 is the eighth CPA funding round for the City. The size of the program in the first six years is impressive- funding of over \$26 million has been allocated for 86 projects across the three funding categories (affordable housing; historic resources; and open space and recreation land). This includes \$3.4 million received from the state in matching funds. Projects have ranged in size from \$4,510 for the restoration of a stained-glass window in the residence at 83 Belmont St. to a \$6 million bond for the 100 Homes project.

To be successful, it is necessary for every program to be clear about what it is trying to achieve and to collect data along the way to know if the program is moving in the right direction to achieve its goals. The purpose of this monitoring and evaluation (M&E) plan is to supplement the FY22 Community Preservation Plan by detailing what the Community Preservation Committee (CPC) envisions the Community Preservation Act program in Somerville will achieve over short and long terms and how it will measure the progress of both the program as a whole and the individual projects it funds.

### Goals of Somerville's CPA Program

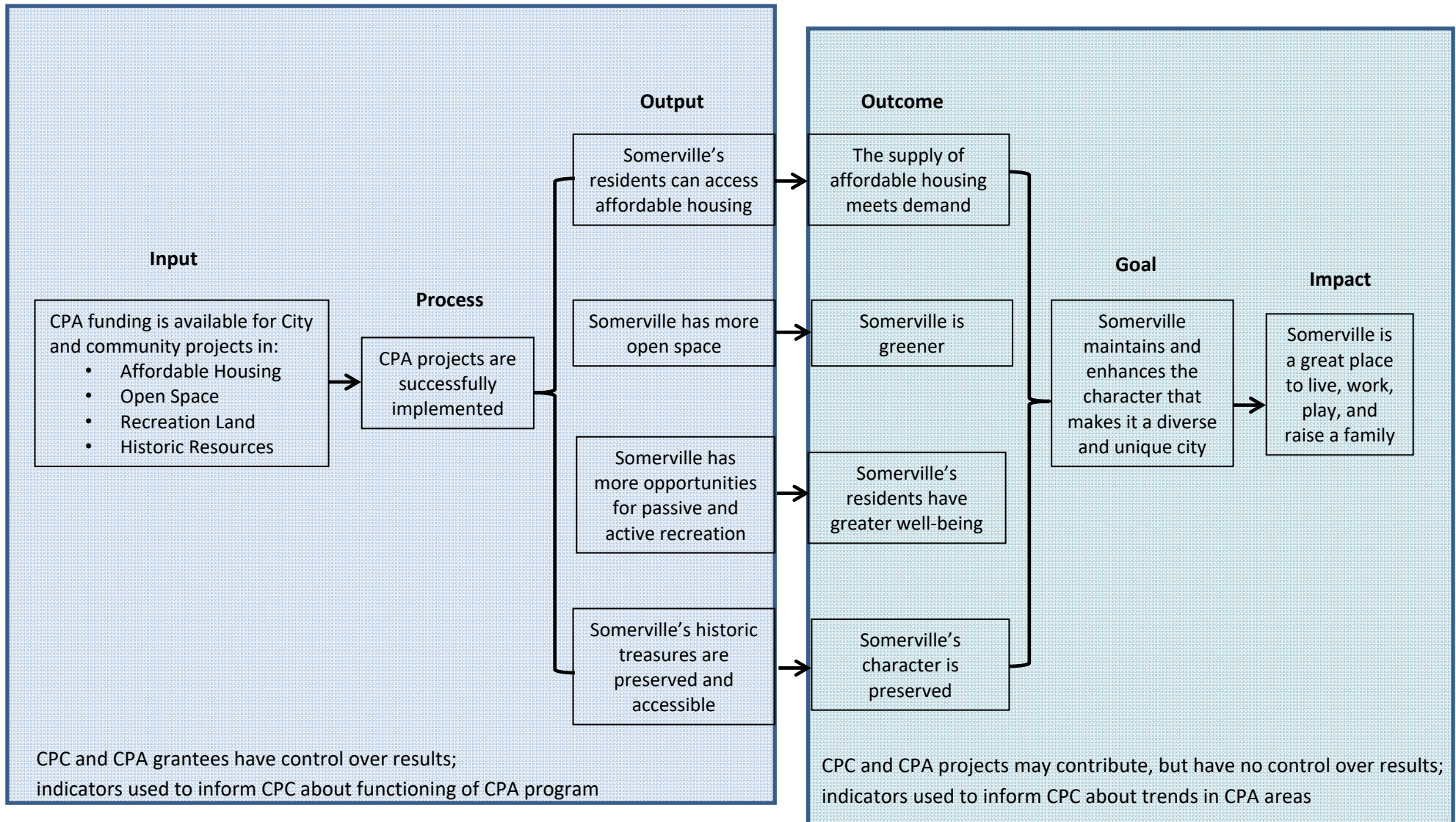
SomerVision's goal is to *foster vital, healthy, inclusive, and distinctive urban neighborhoods that are the best possible places to live, work, play, do business, learn and serve*. The goal of the CPA program is to contribute to SomerVision by ensuring that ***Somerville maintains and enhances the character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

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<sup>10</sup> The CPA legislation uses the term community housing to refer to housing for individuals and families with incomes below 100% of area median income (AMI). This document uses the terms community housing and affordable housing interchangeably.

<sup>11</sup> Excludes Cape Cod communities that passed the predecessor to the CPA.

## CPA Results Chain



## Monitoring Matrix

	Indicators	FY15	FY16	FY17	FY18	FY19	FY20	FY21	Frequency	Source	Assumptions
<b>Impact:</b> Somerville is a great place to live, work, play, and raise a family.	Average satisfaction with Somerville as a place to live (out of 10)	8.2	N/A	8.1	N/A	TBD	N/A	TBD	Every other year	Somerville Happiness Survey	<ul style="list-style-type: none"> <li>CPA is one of many contributors to making Somerville a great place to live, work, play, and raise a family.</li> </ul>
	Average level of pride in being a Somerville resident (out of 10)	8.2	N/A	8.2	N/A	TBD	N/A	TBD	Every other year	Somerville Happiness Survey	
<b>Goal:</b> Somerville maintains and enhances the character that makes it a diverse and unique city.	Racial diversity	White non-Latino: 66.7% Asian: 9.5% Hispanic or Latino: 9.5% Black or African American: 7.5% American Indian or Alaska Native: 0.3% Multi-racial: 3.3% Other: 3.2%	N/A	N/A	N/A	N/A	TBD	N/A	Every 5 years	ACS	<ul style="list-style-type: none"> <li>Project implementers have sufficient resources beyond CPA to provide programming in CPA supported spaces after CPA funding ends.</li> <li>CPA projects are sufficiently</li> </ul>

	Indicators	FY15	FY16	FY17	FY18	FY19	FY20	FY21	Frequency	Source	Assumptions
	Age diversity	Under 5: 5.3% 5-19: 11.1% 20-34: 42.6% 35-54: 24.0% 55-64: 7.7% 65+: 9.2%	N/A	N/A	N/A	N/A	TBD	N/A	Every 5 years	ACS	<p>maintained after CPA funding ends to provide lasting community benefit.</p> <ul style="list-style-type: none"> <li>The CPC receives a sufficient diversity of proposals to make progress across the CPA categories.</li> </ul>
	Economic diversity	Income under \$25,000: 18.9% \$25,000- \$49,999: 18.1% \$50,000- 74,999: 17.2% \$75,000- \$99,999: 13.8% \$100,000- 149,999: 18.7% \$150,000+: 13.4%	N/A	N/A	N/A	N/A	TBD	N/A	Every 5 years	ACS	
	# of artists registered for Somerville Open Studios	392	354	358	380	TBD	0 <sup>12</sup>	TBD	Annually	SOS records	

<sup>12</sup> SOS was cancelled for 2020 because of the COVID-19 crisis.

	Indicators	FY15	FY16	FY17	FY18	FY19	FY20	FY21	Frequency	Source	Assumptions
	# of City organized events celebrating Somerville's history and culture	54	53	45	46	30	TBD	TBD	Annually	Arts Council, Historic Preservation records	
	Average satisfaction with neighborhood beauty/physical setting	7.1	N/A	7.8	N/A	TBD	N/A	TBD	Every other year	Somerville Happiness Survey	
<b>Outcome 1:</b> The supply of affordable housing meets demand.	% of housing stock that is affordable (disaggregated by perpetual, time limited)	9.69%	N/A	N/A	N/A	N/A	TBD	N/A	Every 5 years	2015 Somerville Housing Needs Assessment	
	Total number of affordable units (disaggregated by % of AMI) <i>3,178 rental Voucher: 1,217 30%: 2,583 50%: 140 60% 289 80%: 54 112 Ownership 80%: 77 110%: 35</i>		N/A	N/A	N/A	N/A	TBD	N/A	Every 5 years	2015 Somerville Housing Needs Assessment	
	% of households who are rent burdened (>30% of income spent on housing)	38.7% (8,114/20,947)	N/A	N/A	N/A	N/A	TBD	N/A	Every 5 years	2015 Somerville Housing Needs Assessment	

	Indicators	FY15	FY16	FY17	FY18	FY19	FY20	FY21	Frequency	Source	Assumptions
	% of households who are severely rent burdened (>50%)	17.8% (3,722/20,947)	N/A	N/A	N/A	N/A	TBD	N/A	Every 5 years	2015 Somerville Housing Needs Assessment	
	% of households cost burdened (>30%)	38.7% (4,318/11,239)	N/A	N/A	N/A	N/A	TBD	N/A	Every 5 years	2015 Somerville Housing Needs Assessment	
	% of households severely housing cost burdened (>50%)	19.0% (2,134/11,239)	N/A	N/A	N/A	N/A	TBD	N/A	Every 5 years	2015 Somerville Housing Needs Assessment	
	# of affordable units expiring in next five years	279-285	N/A	N/A	N/A	N/A	TBD	N/A	Every 5 years	2015 Somerville Housing Needs Assessment	
	Somerville Community Corporation average wait time	3-5 years	N/A	N/A	N/A	N/A	TBD	N/A	Every 5 years	2015 Somerville Housing Needs Assessment	
	Average satisfaction with cost of housing (out of 5)	2.6	N/A	2.2	N/A	N/A	TBD	N/A	Every other year	Somerville Happiness Survey	
	# homeless individuals in Somerville	Unsheltered : 6 Sheltered: 152	Unsheltered: 6 Sheltered: 159	Unsheltered: 22 Sheltered: 120	Unsheltered: 10 Sheltered: 124	Unsheltered: 8 Sheltered: 260	TBD	TBD	Annually	Point in Time survey	

	Indicators	FY15	FY16	FY17	FY18	FY19	FY20	FY21	Frequency	Source	Assumptions
<b>Output 1:</b> Somerville's residents can access affordable housing	# of new units created with CPA funds (% reuse)	15 (7- 100 Homes; 8- Glen St.) 47% reuse (100 Homes)	30 (25- Mystic Water Works, 5- 100 Homes) 100% reuse	8 (8- 100 Homes)	25 (100 Homes)	3 (100 Homes)	TBD	TBD	Annually	AHTF records	
	Annual # of households receiving rental assistance through CPA funds	24 (7- PASS, 17- Better Homes)	33 (7- PASS 2, 17- Better Homes, 9- ShortStop )	33 (7- PASS 3, 17- Better Homes, 9- ShortStop)	33 (7- PASS 3, 17- Better Homes, 9- ShortStop)	TBD	TBD	TBD	Annually	AHTF records	
	% of CPA funded housing projects that are mixed use	0	0	0	0	0	0	TBD	Annually	AHTF records	
	% of CPA funded housing development projects that are transit-oriented	100% (163 Glen St.)	100% (Mystic Water Works)	N/A	N/A	N/A	TBD	N/A	Annually	AHTF records	
<b>Outcome 2:</b> Somerville is greener.	Open space as % of total land area	N/A	6.8%	N/A	N/A	N/A	N/A	TBD	Every 5 years	Somerville Open Space and Recreation Plan	

	Indicators	FY15	FY16	FY17	FY18	FY19	FY20	FY21	Frequency	Source	Assumptions
	# of new trees in Somerville (disaggregated by CPA, non-CPA)	441 (non-CPA)	59 (non-CPA)	94 (non-CPA)	401 (non-CPA)	347 (non-CPA)	TBD	TBD	Annually	City records	
	Annual EPA grade for Mystic River	A-	A-	A-	A-	A-	TBD	TBD	Annually	US Environmental Protection Agency	
	Annual EPA grade for Alewife Brook	D	D+	D+	D+	D	TBD	TBD	Annually	US Environmental Protection Agency	
	# of new acres of open space (disaggregated by CPA, non-CPA)	2.47 (non-CPA)	0.49 (non-CPA)	5.76 (non-CPA)	0.17 (CPA)	0	0	TBD	Annually	City records	
	# of conservation restrictions recorded	0	0	0	0	0	1	TBD	Annually	CPA records	



	Indicators	FY15	FY16	FY17	FY18	FY19	FY20	FY21	Frequency	Source	Assumptions
	% of households within ¼ mile (5 minutes) of open space (disaggregated by type)	N/A	Total: 99.5% Playgrounds: 95.9% Passive parks: 41.4% Fields: 58.8% Plazas: 13.8% Community gardens: 49.5%	N/A	N/A	N/A	N/A	TBD	Every five years	Somerville Open Space and Recreation Plan	
<b>Output 2:</b> Somerville has more open space.	# of improved open spaces (CPA, non-CPA)	1- Marshall St. Playground	1- Kennedy School Playground	2- Argenziano Playground, Cremin Playground	2- Hoyt-Sullivan, Lincoln	1- Winter Hill	1-Prospect Hill	TBD	Annually	City records	
	Quality of open space (disaggregated by #/% poor, good, excellent)	N/A	Poor: 20% (17/85) Good: 59% (50/85) Excellent: 21% (18/85)	N/A	N/A	N/A	N/A	TBD	Every five years	Somerville Open Space and Recreation Plan	

	Indicators	FY15	FY16	FY17	FY18	FY19	FY20	FY21	Frequency	Source	Assumptions
<b>Outcome 3:</b> Somerville's residents have greater well-being.	% of Somerville youth with a healthy BMI by grade, disaggregated by gender	Grade 1: Male- 50.2%; Female- 58.0% Grade 4: Male- 47.5%; Female- 53.3% Grade 7: Male- 41.0%; Female- 44.5% Grade 10: Male- 58.7% Female- 71.8%	Grade 1: Male- 54.2% Female- 53.7% Grade 4: Male- 46.4% Female- 54.8% Grade 7: Male- 52.3% Female- 44.4% Grade 10: Male- 50.0% Female- 43.9%	Grade 1: Male- 77% Female- 66% Grade 4: Male- 49.7% Female- 59.8% Grade 7: Male- 46.6% Female- 50.3% Grade 10: Male- 53.8% Female- 52.1%	TBD	TBD	TBD	TBD	Annually	Somerville Public Schools	
	Average satisfaction with appearance of neighborhood parks and squares (out of 10)	7.7	N/A	7.2	N/A	TBD	N/A	TBD	Every other year	Somerville Happiness Survey	
	Average level of self-reported happiness (out of 10)	7.8	N/A	7.6	N/A	TBD	N/A	TBD	Every other year	Somerville Happiness Survey	
	Average level of self-reported life satisfaction (out of 10)	8.0	N/A	7.8	N/A	TBD	N/A	TBD	Every other year	Somerville Happiness Survey	

	Indicators	FY15	FY16	FY17	FY18	FY19	FY20	FY21	Frequency	Source	Assumptions
<b>Output 3:</b> Somerville has more opportunities for passive and active recreation.	# new parks (disaggregated by CPA, non-CPA)	1.Communit y Path extension (non-CPA) 2. Symphony Park (non-CPA)	1. Partners Healthcar e open space (non-CPA) 2. Millbrook Lofts open space (non-CPA)	0	0	0	0	TBD	Annually	City records	
	# of new community garden plots (disaggregated by CPA, non-CPA)	0	0	0	20 (Lincoln, non-CPA)	0	TBD	TBD	Annually	City records	
<b>Outcome 4:</b> Somerville's character is preserved.	% of local historic district buildings applying for HPC grants	N/A	N/A	N/A	N/A	N/A	N/A	TBD	Annually	OSPCD records	
	# of cases HPC reviews for Local Historic District repair, alteration and renovation	56	69	73	86	TBD	TBD	TBD	Annually	Certified Local Government report	
	# of demolition requests (disaggregated by preferably preserved)	33 (10 preferably preserved)	30 (9 preferably preserved )	25 (8 preferably reserved)	37 (13 preferably preserved)	TBD	TBD	TBD	Annually	Certified Local Government report	

	Indicators	FY15	FY16	FY17	FY18	FY19	FY20	FY21	Frequency	Source	Assumptions
	# of new preservation restrictions recorded	0	0	0	0	0	TBD	TBD	Annually	CPA records	
<b>Output 4:</b> Somerville's historic treasures are preserved and accessible.	# of historic buildings preserved with CPA funds	6 (City Hall, Milk Row Cemetery, Prospect Hill Tower, Somerville Museum, Mystic Water Works, Temple B'nai Brith)	1 (West Branch Library)	2 (83 Belmont St., Grace Baptist Church)	1 (Elizabeth Peabody House)	1 (Mission Church,)	0	TBD	Annually	CPA records	
	# of historic buildings made ADA accessible with CPA funds	2 (Temple B'nai Brith)	1 (Somerville Museum, West Branch Library)	1 (Grace Baptist Church)	0	0	0	TBD	Annually	CPA records	
	# of historic collections preserved	2 (City Archives, Somerville Museum)	0	1 (Central Library)	1 (City elections records)	0	0	TBD	Annually	CPA records	
<b>Process:</b> CPA projects are successfully implemented .	% of CPA funded projects that are completed within 3 years	72% (8/11)	0% (0/9)	8% (1/12)	N/A	17% (2/12)	TBD	TBD	Annually	CPA records	<ul style="list-style-type: none"> <li>Project implementers have sufficient</li> </ul>

	Indicators	FY15	FY16	FY17	FY18	FY19	FY20	FY21	Frequency	Source	Assumptions
	% of projects that achieve their measures of success <sup>13</sup>	N/A	N/A	8% (1/12)	N/A	17% (2/12)	TBD	TBD	Annually	CPA records	capacity and funding to implement the projects they propose. <ul style="list-style-type: none"> <li>The CPC is high functioning , in tune with community priorities, and possesses a breadth of experience across the</li> </ul>
	% of CPA funded projects that combine multiple uses (blended)	13% (Mystic Water Works, Prospect Hill Park- 2/16)	0%	0%	11% (Prospect Hill Park- 1/9)	0%	0%	TBD	Annually	CPA records	
	Geographic coverage of CPA projects	7/7 wards	7/7 wards	7/7 wards	7/7 wards	7/7 wards	7/7 wards	TBD	Annually	CPA records	
	% of CPA implementers that report the CPA program has benefited their organization	NA	NA	80%	100%	78%	TBD	TBD	Annually	CPA records	

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<sup>13</sup> CPA applicants were first required to set measures of success for their projects in FY17.

	Indicators	FY15	FY16	FY17	FY18	FY19	FY20	FY21	Frequency	Source	Assumptions
	Estimated annual CPA revenue	\$6,223,963 <sup>14</sup>	\$2,878,304	\$1,924,661	\$1,984,489	\$1,986,473	\$2,220,788	TBD	Annually	CPA records	CPA areas amongst its members. <ul style="list-style-type: none"> <li>• The CPC and the CPA Manager work effectively with applicants to ensure funded projects are realistic and eligible for CPA funding.</li> <li>• Meaningful projects are proposed by City departments and community organizations.</li> </ul>

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<sup>14</sup> FY15 revenue total is the combined revenue from FY14 and FY15.

	Indicators	FY15	FY16	FY17	FY18	FY19	FY20	FY21	Frequency	Source	Assumptions
<b>Input:</b> CPA funding is available for City and community projects in: Affordable Housing, Open Space, Recreation Land, and Historic Resources.	Annual % allocation in each CPA area	45%-housing 15%-open/rec 15%-historic 20%-flexible 5% admin	45%-housing 15%-open/rec 15%-historic 20%-flexible 5% admin	45%-housing 15%-open/rec 15%-historic 20%-flexible 5% admin	45%-housing 15%-open/rec 15%-historic 20%-flexible 5% admin	50%-housing 20%-open/rec 15%-historic 10%-flexible 5%- admin	50%-housing 20%-open/rec 15%-historic 10%-flexible 5%- admin	TBD	Annually	CPA records	<ul style="list-style-type: none"> <li>Funding for the Community Preservation Act continues through the support of residents, the City's administration and Board of Aldermen, and the state.</li> </ul>
	Annual state match received	\$904,917	\$829,456	\$420,681	\$370,465	\$432,342	\$492,059	TBD	Annually	CPA records	
	Annual optional City appropriation (\$ and %)	\$2,555,671 <sup>15</sup> (41%)	\$510,844 (18%)	\$500,000 (26%)	\$500,000 \$(19%)	100,000 (%4.5)	TBD	TBD	Annually	CPA records	
	Annual dollar amount awarded to projects (disaggregated by area)	\$4,179,487 (\$227,463-open/recreation; \$1,745,996-historic; \$2,206,028-housing)	\$5,630,123 (\$695,160 - open/recreation; \$3,100,288-historic; \$1,834,675-housing)	\$2,243,122 (\$777,239 open/rec; \$585,467-historic; \$880,416-housing)	\$3,602,409 (\$2,242,669 open/rec; \$158,100-historic; \$1,201,640 - housing)	\$2,219,049 (\$74,888 open/rec; \$747,175-historic; \$1,396,986 - housing)	\$2,117,035 (\$622,000 open/rec; \$543,436-historic; \$951,599-housing)	TBD	Annually	CPA records	

<sup>15</sup> FY15 city appropriation includes FY14 appropriation

	Indicators	FY15	FY16	FY17	FY18	FY19	FY20	FY21	Frequency	Source	Assumptions
	# of new CPA projects funded (disaggregated by area and recipient)	17 (4- open/rec; 8- historic; 5- housing and 6 City; 11 Community)	14 (5- open/rec; 4- historic; 5- housing and 7 City; 7 Community)	14 (8- open/rec; 4- historic; 2- housing)	14 (7- open/rec; 2- historic; 5- housing)	12 (3- open/rec; 5- historic; 4- housing)	10 (3- open/rec; 2- historic; 5- housing)	TBD	Annually	CPA records	
	# of CPA EDF applicants/ho using applications each year (disaggregated by type, new/already funded)	17 (6 City department s; 11 Community) (19 new/0 previous)	17 (4 City department s; 14 Community) (8 new/9 previous)	18 (4 City; 12 community ) (8 new/10 previous)	14 (8 City; 6 community ) (4 new/10 previous)	12 (3 City; 9 community ) (3 new/12 previous)	10 (2 City; 8 community ) (3 new/10 previous)	TBD	Annually	CPA records	
	% of EDF applicants that submit full proposals <sup>16</sup>	73% (22/30) <sup>17</sup>	61% (18/28)	86% (12/14)	59% (10/17)	%67 (12/18)	%79 (11/14)	TBD	Annually	CPA records	

<sup>16</sup> Does not housing applications because the SATHF utilizes a one-step application process

<sup>17</sup> Counts each of the three EDFs submitted by the Somerville Museum as funded, as the projects were combined in the full applications



	Indicators	FY15	FY16	FY17	FY18	FY19	FY20	FY21	Frequency	Source	Assumptions
	% of EDFs/housing applications funded each year (disaggregated by recipient)	63% (19/30) Community: 68% (13/19) <sup>18</sup> City: 80% (8/10)	50% (14/28) <sup>19</sup> Community: 50% (8/16) City: 75% (6/8) Joint Community/City: 75% (3/4)	74% (14/19) Community: 60% (6/10) City: 86% (6/7) Joint: 100% (2/2)	TBD	TBD	TBD	TBD	Annually	CPA records	

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<sup>18</sup> Counts each of the three EDFs submitted by the Somerville Museum as funded, as the projects were combined in the full applications

<sup>19</sup> Counts Central Library Mold Remediation as funded- EDF submitted in FY16, but the project was funded in FY17

## **Data sources**

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

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

## **Evaluation design**

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

## **Data use and dissemination**

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

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

## Acronym List

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

## Glossary

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

demonstrate change and that detail the extent to which programs results are being or have been achieved. Indicators can be measured at each level: input, process, output, outcome, and impact.

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

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

## Indicator definitions

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

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

Average satisfaction with appearance of neighborhood parks and squares	Average response to the question <i>How satisfied are you with the appearance of parks and squares in your neighborhood?</i> with a range of 0 being very unsatisfied and 10 being very satisfied on the Somerville Happiness Survey.
# of cases HPC reviews for Local Historic District repair, alteration and renovation	Total number of cases put before the Somerville Historic Preservation Commission for their consideration relating to the changes to the exterior of historically significant buildings that are listed as local historic districts.
# of demolition requests (disaggregated by preferably preserved)	Total number of requests presented to the Somerville Historic Preservation Commission to remove or take down an entire structure. A building is preferably preserved if it is determined by the HPC to be historically significant and that it is in the public interest for the building to be preserved or rehabilitated rather than demolished.
% of local historic district buildings applying for HPC grants	Percentage of existing local historic district buildings that apply for a Local Historic District Property Owner's small grant in a given fiscal year.
# of historic buildings preserved with CPA funds	Number of historic buildings that receive CPA historic preservation or rehabilitation funding
# of historic buildings made ADA accessible with CPA funds	Number of historic buildings that become accessible, in compliance with Americans with Disabilities Act standards, through CPA funding, in whole or in part.
# of new preservation restrictions recorded	Number of historic preservation restrictions recorded on buildings that receive CPA historic resources funding.
# of historic collections preserved	Number of historic collections, such as documents or artifacts that are preserved in whole or in part through CPA funding.
% of CPA funded projects that are completed within 3 years	Percentage of CPA funded projects that are fully complete and closed out within three years of the signing of a grant agreement or memorandum of agreement.
% of projects that achieve their measures of success	Percentage of CPA funded projects that report they have achieved their measures of success in their final report. Measures of success were not required to be part of CPA applications until the FY17 application round.
# of CPA EDF/housing applicants each year (disaggregated by type, new/already funded)	Number of organizations/departments that submit an eligibility determination form each year disaggregated by City/community and never applied for CPA funding before/has already received CPA funding.
% of CPA funded projects that combine multiple uses (blended)	Percentage of CPA funded projects that include work in more than one CPA category (affordable housing, historic resources, open space/recreation land).
Geographic coverage of CPA projects	Number of Somerville wards (out of 7) where a CPA project received funding each year.
% of CPA implementers that report the CPA program has benefited their organization	Percentage of respondents to the annual CPA implementer survey that respond "Yes" to the question <i>Has your organization benefited from being part of the Somerville CPA program beyond receiving funds?</i>
Estimated annual CPA revenue	Total amount of new CPA revenue estimated for the fiscal year as approved by the Board of Aldermen through the annual budgeting process.
Annual % allocation in each CPA area	Percentages allocated for each of the CPA areas each year, as detailed in the annual Community Preservation Plan (affordable housing, historic resources, open space/recreation land).
Annual state match	Total amount of CPA match funding received from the Commonwealth of Massachusetts.
Annual optional City appropriation (\$ and %)	Amount of funding appropriated by the City of Somerville to the CPA Fund from Free Cash, both in dollar amount and as percentage of the annual CPA budget.

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