The Community Preservation Act: Funding Impacts and Community Values

a 10th anniversary study
commissioned by the Community Preservation Coalition and Citizens’ Housing and Planning Association

Tufts University Urban and Environmental Policy & Planning
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Acknowledgements

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We are deeply indebted to the numerous Community Preservation Committee members and other involved citizens who agreed to be interviewed for this project. Without their cooperation, our research would not have been possible. We wish them luck in all future CPA endeavors.

Finally, we offer particular thanks to the Field Projects Instruction Team of Rachel Bratt, Rusty Russell, Jeremy Robitaille, and Jack Melcher. They devoted countless hours to ensuring that this project would be a worthwhile experience, and for that we are extremely grateful.
Abstract

The Project Team undertook an evaluative research project commissioned by two clients, Citizens’ Housing and Planning Association (CHAPA) and the Community Preservation Coalition (CPC). The purpose of this project is to understand how communities utilize the Community Preservation Act and value its potential. The study is intended to benefit the Clients, CPA communities, and State government decision makers. The study aims to help these stakeholders understand how the legislation and its implementation can be improved, and how more communities can be encouraged to take advantage of the CPA’s benefits. In order to accomplish these goals, the team researched five case study communities in the Boston Metro Area and used their findings to develop stakeholder recommendations. Recommendations address the need for increased financial and technical resources, information, and outreach in order for communities to utilize the CPA to its full potential.
This study explores the value of the Community Preservation Act for five communities with unique histories, values, and resources. CPA communities are passionate about their history and determined to plan for a successful future. While the team’s findings indicate that the communities confront challenges of resources, expertise, and awareness, it is clear that the Community Preservation Act is an important tool that empowers Massachusetts cities and towns to preserve the past as they plan for the future.

In honor of the Tenth Anniversary of the passage of the Community Preservation Act (CPA), the Project Team undertook an evaluative research project for two clients, Citizens’ Housing and Planning Association (CHAPA) and the Community Preservation Coalition (CPC). The purpose of this project is to understand how CPA communities utilize the Act and value its potential. The study is intended to benefit the Clients, CPA communities (both those considering and having adopted the Act), and State government decision makers. The study aims to help these stakeholders understand how the legislation and its implementation can be improved, and how more communities can be encouraged to take advantage of the CPA’s benefits. In order to accomplish these goals, the team conducted five case studies of diverse municipalities in the Greater Boston area: Hamilton, Hanover, Maynard, Needham and Quincy.

The team interviewed stakeholders and decision makers in each case study community to answer a set of research questions aimed at understanding how they implemented the CPA to preserve their collective resources. From these case studies, the team developed a set of findings that can be used to advise the Clients on future action, guide other communities as they attempt to pass or implement the Act, and support desired changes to the CPA legislation. The case studies revealed tensions and complementarities between the Act’s core program areas: open space, affordable housing, historic preservation, and recreation. Several of the communities viewed the Act as a hedge against
development pressure, allocating much of their resources especially towards open space. Historic preservation was also a well-funded area, providing opportunities for communities to celebrate their heritage, though it also was sometimes used as a way to fund municipal projects that lacked resources but were not particularly historic in nature. Parks and recreation was a particularly valuable program area in several communities, particularly those with young children, though CPA committee members in several locales cited the difficulty of allocating recreation funds in the absence of undeveloped land. Finally, affordable housing, though acknowledged and praised as a goal, has received variable support through CPA funding. Committee members cited various causes for this lack of funding including a lack of technical expertise or municipal infrastructure to develop new housing, and insufficient funds for significant projects and land acquisition.

The study’s findings reflect that the CPA is of significant value to the municipalities studied, although there are still some challenges that may have prevented the communities from realizing the Act’s full potential. These challenges include a need for more opportunities to share resources and information; the difficulties of administering an additional tax in hard economic times; the challenges of community involvement and public visibility for projects and process; and the subtle nuances of the enabling legislation. In spite of these challenges, all case studies revealed that the Community Preservation Coalition is strongly appreciated for the guidance and support that it provides.

Based on these findings, the team has five recommendations. The first is that some changes to the enabling legislation should be considered, to guarantee state matching funds and clarify allowable uses. Second, information about the CPA should be made more accessible and available through best practices, clear guidelines for reporting funding allocation data, and improved online interfaces. Third, cities and towns must work together to provide support for CPA passage and implementation. A regional approach could be very effective, especially for affordable housing. The fourth recommendation is that resources for affordable housing must be increased, specifically technical
project support and coalition-building advocacy. Finally, the team encourages the Community Preservation Coalition and local Community Preservation Committees to consider community engagement to be a major component of their work. Community engagement should involve two components: outreach to residents to build support and awareness of CPA projects, and community process to identify collective assets and establish community values. Community engagement will limit the possibility of repeal battles in the future, and ensure that the Act fulfills its potential to preserve and maintain the vital community assets of the Commonwealth’s diverse cities and towns.
chapter 1
project overview
Project Overview

The purpose of this project is to understand how communities that have adopted the Community Preservation Act (CPA) utilize the Act and value its potential. The study is intended to benefit the Clients, CPA communities (both those considering and having adopted the Act), and State government decision makers. The research attempted to determine how communities allocate funds between the Act’s four program areas: affordable housing, historic preservation, open space, and recreation.

Project Description

The Community Preservation Act empowers communities to preserve the past as they plan for the future. It is a tool that gives cities and towns resources to identify their community assets and make local planning decisions to preserve and enhance them. In honor of the Tenth Anniversary of the passage of the Act, this study is an evaluative research project commissioned by two clients, Citizens’ Housing and Planning Association (CHAPA) and the Community Preservation Coalition (CPC). The study was commissioned to evaluate the success and progress of the CPA in the decade since it was passed. Both Clients are involved in the implementation of the Act. CHAPA “is the non-profit umbrella organization for affordable housing and community development activities throughout Massachusetts” which represents stakeholders from throughout the building industry including developers, architects, tenants, and municipal leaders. CHAPA’s mission is to encourage the production and preservation of housing that is affordable to low-income families and individuals. The CPC is “an alliance of open space, affordable housing, and historic preservation organizations that works with municipalities to help them understand, adopt, and implement the CPA.” CHAPA is a member of the Community Preservation Coalition.

The scope of the project is an analysis of five case study municipalities. Each team member conducted research for one case study, and the final project draws
findings and recommendations based on the team’s analysis of the studies. Research primarily involved stakeholder interviews and other qualitative methods, but also included evaluation of study municipalities’ funding allocation patterns. Findings and recommendations are intended to advise the Clients on future action, guide other communities as they attempt to pass or implement the Act, and support desired changes to the CPA legislation.

**Project Goals**

The purpose of this project is to understand how communities that have adopted the CPA utilize the Act and value its potential. It is intended to benefit the Clients, CPA communities (both those considering and having adopted the Act), and State government decision makers. The study aims to help these stakeholders understand how the legislation and its implementation can be improved, and how more communities can be encouraged to take advantage of the CPA’s benefits.

To accomplish these goals, the research attempted to determine how communities allocate funds between the Act’s four program areas: affordable housing, historic preservation, open space, and recreation. The project focused particular attention on affordable housing, both because one of the Clients is an affordable housing advocate and because previous studies of the Act have indicated that this program area may be underutilized. The team interviewed stakeholders and decision makers in each case study community to answer six central questions:

- What are the factors that led to the community’s adoption of the CPA?
- What did stakeholders expect of the CPA, and have those expectations been met?
- What benefits does the CPA bring to the community? Are these benefits quantifiable?
- What factors determine the community’s allocation of funds to the core program areas?
- What has been the experience regarding the use of CPA funds for affordable housing?
- Is there a long-term need for the CPA in the community? Why or why not?
CPA Context and Overview

About the Act

In the 1980s, communities in Massachusetts faced pressures from the combined effects of rapid development and significant cutbacks in federal funding to state and local governments. Responding to these pressures, Robert Durand, former State senator and Secretary of Environmental Affairs, introduced the Community Preservation Act to the State Legislature in 1988. His idea originated from land banks on Martha’s Vineyard, Nantucket, and across Cape Cod, which were funded through local real estate transfer taxes. Durand spent the next 12 years working with stakeholders to strengthen political support for the bill, ultimately expanding the scope of the legislation to include affordable housing and historic preservation as well as open space preservation.

Other statewide policies in place during the debate about the CPA – and today – might have influenced the way communities and stakeholders view the Act. Proposition 2 ½, for example, is a measure adopted in 1980 that effectively prohibits communities in Massachusetts from raising their property taxes, with certain exceptions for new growth and voter-adopted overrides. Because the CPA surcharge is not subject to limitation by Proposition 2½, many communities view the CPA as a valuable source of extra revenue that can fund projects that would be otherwise ignored.

Similarly, it is impossible to discuss legislation related to affordable housing in Massachusetts without considering the presence of M.G.L. Chapter 40B. Chapter 40B was enacted in 1969 to address the shortage of affordable housing caused in part by exclusionary municipal policies. 40B allows developers creating partially affordable projects to propose denser developments than the local zoning code allows so that their projects can be profitable. Communities with less than 10% of their housing stock designated affordable cannot appeal these developments. Since many communities still have not reached their 10%
goal, any decision to fund affordable housing with CPA funds is considered a step towards independence from 40B’s perceived threat. (See Appendix A)

The CPA was finally signed into law on September 14, 2000, and it is truly unique throughout the country for its innovative funding mechanism, broad coalition of project areas, and the flexibility with which it allows communities to allocate funds. In recent years the CPA has served as a model for other states seeking to empower local communities to fund projects and make planning decisions in spite of funding cutbacks. In New York State, for example, a Community Preservation Act focused solely on parks and open space was proposed in 2005 and has been gradually gaining momentum in counties across the state. The Massachusetts CPA is increasingly viewed by other states as a successful model of an alternate funding mechanism for smart growth.

The Community Preservation Act is a powerful and unique piece of legislation that allows communities to identify and preserve their vital community resources in core program areas. Municipalities adopt the Act by popular vote, initiated by legislative majority or popular referendum. To date, 143 communities in Massachusetts have passed the CPA, most recently Dighton, which voted affirmatively on April 10, 2010. This means 41% of communities have now passed the CPA. (See Appendix B) Communities raise funds for projects in the four core areas through a property tax surcharge. These funds are matched by the State with fees collected by Registries of Deeds. In the early years, matching funds were usually 100%; in recent years, the State match has decreased to 74% in 2008 and 40% in 2009. (See Appendix C) This decrease could be attributed to the decline in the housing market, or to the increasing number of cities and towns that have passed the CPA.
Cities and towns that adopt the CPA create a Community Preservation Committee, which reviews proposals and makes allocation recommendations. The Committee must include one member each from the municipality’s conservation commission, historical commission, planning board, parks and recreation commission, and housing authority. The Mayor or other designated officials may appoint up to four additional Committee members. The Committee’s recommendations are voted on by the municipal legislative body, which can approve, reject, or increase funding for projects. The Committee must annually designate at least 10% of funds to affordable housing, open space, and historic preservation, though it can decide to put funds into “reserves” that carry over from year to year. Committees self-report data on these allocation decisions to the Community Preservation Coalition, which then aggregates and reports the results. From 2001-2009, the CPC reports that historic preservation and affordable housing each received 25% of total allocation, open space 34%, and recreation and mixed-use each 10%. As of 2006, 20% of CPA communities reported no spending on affordable housing.6

The legislation outlines very specific “allowable uses” of CPA funds in each program area. The legislation itself refers to affordable housing as “community housing,” and these two terms are often used interchangeably, though the CPC refers specifically to affordable housing in its materials. As such, in this report the area is referred to as “affordable housing,” though it is important to acknowledge the potential connotations of the distinct terms. Community housing includes units affordable to families at 100% of area median income (also called moderate income housing), and at 80% (low-income housing).

Some communities have created their own tools to understand these rules; the CPC provides a useful chart that describes what specific actions may be taken. This broad mandate provides CPA communities with a great deal of flexibility to determine their funding allocations. As of writing, a bill to provide the CPA with even more flexibility is under consideration. The two key provisions are an increase in the annual minimum State match to 75%, and creation of an allowable use for rehabilitating existing outdoor parks. Currently, the CPA can only be used to rehabilitate recreation projects created or acquired with CPA funds, and this limitation creates significant obstacles for cities and towns with little open space available for acquisition.7
<table>
<thead>
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<th>Open Space</th>
<th>Historical Resources</th>
<th>Recreational Land</th>
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<tr>
<td>Land to protect existing and future well fields, aquifers and recharge</td>
<td>Building, structure, vessel or real property listed or eligible for listing</td>
<td>Land for active or passive recreational use including, but not limited to, the use of</td>
<td>Housing for low and moderate income individuals and families, including low or</td>
</tr>
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<td>areas, watershed land, agricultural land, grasslands, fields, forest</td>
<td>on the state register of historic places or determined by the local historic</td>
<td>land for community gardens, trails, and noncommercial youth and adult sports, and the</td>
<td>moderate income seniors, Moderate income is less than 100%, and low income is less</td>
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<td>land, fresh and salt water marshes and other wetlands, ocean, river,</td>
<td>preservation commission to be significant in the history, archeology,</td>
<td>of land as a park, playground or athletic field</td>
<td>than 80%, of US HUD Area Wide Median Income</td>
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<td>stream, lake and pond frontage, beaches, dunes, and other coastal lands,</td>
<td>architecture or culture of the city or town.</td>
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<td>lands to protect scenic vistas, land for wildlife or nature preserve and</td>
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<tr>
<td>land for recreational use</td>
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<td>Create</td>
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<td>Yes</td>
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<td>Support</td>
<td>No</td>
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<td>No</td>
<td>Yes, including funding for community's affordable housing trust</td>
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<th>Rehabilitate/Restore</th>
<th>Yes, if acquired or created with Community Preservation funds</th>
<th>Yes, if acquired or created with Community Preservation funds</th>
<th>Yes, if acquired or created with Community Preservation funds</th>
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Source: Community Preservation Coalition

Figure 2: Community Preservation Fund Allowable Spending Purposes
Methodology and Limitations

Previous Studies

Few comprehensive studies have been published that examine the progress and impacts of the CPA on communities across the state. With only four antecedents, it is important to note the impact of previous studies on the scope of this project, specifically in its approach to affordable housing and open space. Two studies of the CPA’s effect on open space preservation praise the Act for its flexibility and power to encourage smart growth decisions, calling the CPA “another mile-stone in Massachusetts’ conservation story.” The two studies pertaining to affordable housing, however, indicate that the CPA may not successfully encourage affordable housing production and that it essentially transfers money from the state’s poorest and most populous communities to its more affluent cities, suburbs, and resort communities. The team considered these antecedents as it developed its research methodology. (See Appendix D)

Research Methodology

As the CPA enters its 10th year, there is an opportunity to address the findings of previous studies and develop a new understanding of how cities and towns value the CPA. The team used a case study methodology to examine its central research questions and gain a qualitative understanding of how communities utilize and value the CPA. Research was conducted primarily through interviews using predetermined questions created by all members. These questions were based on the research interests and goals of the Clients. (See Appendix E) Team members also reviewed municipal planning documents, local media sources, and archival material to develop a comprehensive picture of each town. Some interviewees were predetermined but additional sources were identified over the course of the interview process. Interviewees included members of Community Preservation Committees, officials from other municipal offices, and citizens directly involved in the CPA allocation process. General community members were not included in the study. (See Appendix F)
Case Study Selection

The team selected the five case study communities using a series of relevant criteria. Four selections were to be towns, and one a city. Starting with a list of all CPA municipalities in the Commonwealth, the team first eliminated communities beyond 495. Second, communities that adopted the CPA after 2006 were excluded in order to ensure that enough projects had been completed to effectively evaluate CPA’s effects. Finally, the team eliminated cities and towns that had been studied by the 2009 Tufts Field Projects Team, or with potential conflicts of interest. The team sorted and selected the remaining towns based on median income, population density, and ease of access. These criteria were considered by the team and the Clients to have the most potential to affect the implementation of the Act. The final selections, Hamilton, Hanover, Maynard, Needham, and Quincy, have a range of population densities, diverse geographic locations, and a distribution of median incomes roughly representational of CPA communities in the Boston Metro Area. (See Appendix G)
Study Limitations

This study has several methodological limitations. Since many of the interviewees are direct participants in the allocation process, they have an inherent stake in the success of the CPA in their communities. Interviewing only decision makers and members of the local Committee might also create an incomplete picture of the Act because it asks interviewees to speculate on the opinions of constituents. Interviewees may incorrectly remember information or anecdotes. Interviewees are also inherently biased and may consciously withhold information. Another important limitation of this study is its focus on Boston Metro Area communities, which are closer to the resources of the Coalition, have more access to public transportation, and tend to be of higher income than the rest of the Commonwealth. These limitations will be addressed in the findings and recommendations of the study, which will include important areas for further research.

General Findings

Readers of this study will see five distinct communities with unique histories, values, and resources. Interviewees in these communities greatly value the CPA and believe that it has powerful long term potential for the future. They confront challenges of resources, expertise, and public awareness, but have seen great success in the creation of projects in all four program areas. Committee members are proud of the contribution that their projects have been made to their communities, and they all credit the CPA with allowing them to fund vital community projects that would have otherwise gone unsupported.
(Endnotes)

1 CHAPA. http://www.chapa.org/?q=mission
Hanover has acutely felt the pressures of rapid development and growth over the past decade. The Community Preservation Act has provided Hanover with an invaluable tool for channeling growth and protecting valuable open space, as evidenced by the fact that the town has allocated nearly 70% of their CPA funding towards open space and recreation projects. Studying the successes of the Community Preservation Act in Hanover is essential for similar high growth communities considering adopting the Act.
Community Profile

Families flock to the affluent South Shore bedroom community of Hanover because of its family-friendly reputation. With 28.8% of its residents under age 18, Hanover’s school aged population exceeds the state average by nearly 5%.

Although the town was originally home to several prominent industries including shipbuilding, in recent years commerce has mostly disappeared except along the Route 53 retail corridor. At the same time, Hanover has experienced rapid residential growth for most of the post-WWII suburban boom era. Development first began when Route 3’s terminus came to the town, and growth has continued at a rapid rate, particularly in the past two decades.

By the 1990s the town still contained an abundance of developable land, but this space has been threatened by the needs of a growing population. Between 1990 and 2008 the town’s population increased by nearly 20% to just under 14,000.

In 1999, the Boston Globe identified Southeastern Massachusetts as “the state’s growth frontier, a region in transition from bucolic economic backwater to bustling suburban hot spot.” Mass Audubon’s “Losing Ground” report identified Hanover as having one of the State’s highest amounts of forestland converted to development between 1999 and 2005. This surge in development has raised Hanover’s median home value from about $252,000 in 2000 to well over $500,000 today.

Passing the CPA

The 2000 passage of the Massachusetts Community Preservation Act and its potential to empower smart growth decisions came at the perfect time for Hanover. Mary Dunn, Co-Chair of the Open Space Committee, recalled the sense of urgency
felt by citizens concerned by “rampant development” and the loss of “wonderful property. The idea was to get this passed so that we would have funding to compete with developers.” Although open space preservation had been common in Hanover in the 1960s, the passage of Proposition 2½ had curtailed the town’s ability to raise taxes and therefore to purchase land. This limited fundraising ability rendered the town unable to compete with developers for land, and open space advocates seized upon the CPA as a tool to regain this lost ability. The North and South Rivers Watershed Association issued a rallying cry in its October 2004 Newsletter: “We all want to preserve what we cherish. We do not want to lose our town to unfettered development.”

Citizens were concerned not only by the amount of development but also by its character. “Without CPA, we could end up with a lot more large home subdivisions or commercial development that could put more strain on the town’s resources,” stated Community Preservation Committee Coordinator Margaret Hoffman. In addition, the town had recently voted in favor of acquiring a large parcel of farmland, known locally as the Cervelli property, for use by Hanover Parks and Recreation, a use highly valued by this family-oriented community. When residents realized that state matching funds could be used to mitigate the financial burden of this purchase, the Community Preservation Act gained even more supporters.

Inspired by CPA activities in neighboring towns such as Norwell, Steve O’Leary of the Open Space Committee spearheaded the movement and collected enough signatures to get the CPA onto the ballot for the 2004 Presidential election. The timing of this vote concerned some CPA advocates, since voter turnout would be much higher than for the May town election, and it was assumed that voters less educated about the details of the CPA might
react negatively to any proposed tax increase. These fears proved unfounded, and Hanover voters passed the CPA with 54% of the vote. The town chose to adopt the full 3% surcharge, with exemptions for low-income taxpayers and the first $100,000 of each home’s assessed value. Setting the surcharge at less than the maximum was never discussed. Because of this ease of passage, CPA advocates “felt like from then on out we had the stamp of approval of the whole town.” This feeling of trust may have been the primary factor behind the Hanover CPC’s willingness to be creative in future projects.

Projects and Process

Despite its origins in the Open Space Committee, the CPC in Hanover is not dominated by open space advocates. Section 4-19 of The General Bylaws of Hanover allows for three at-large members on the Committee in addition to the representatives required by the enabling statute. Town Moderator Doug Thomson was very involved in the CPA campaign before he was elected to the position and is careful to choose prospective members whose interests and skills complement those of the existing Committee Members. Two of these at-large positions were up for reappointment in 2009, and Thomson chose fiscally conservative replacements in order to provide the CPC with the restraint many viewed as necessary in an economic downturn.

One of the first steps taken by the Hanover Community Preservation Committee was to commission plans for each CPA program area. The Committee approves projects that conform to the spirit of the plans, but does not require any specific funding formula beyond the 10% allocations required by the state. Having clear

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**Hanover Demographics**

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<tr>
<td>Population</td>
<td>13,995</td>
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<tr>
<td>Population Density</td>
<td>843</td>
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<td>(per square mile)</td>
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<tr>
<td>Median Household</td>
<td>$97,364</td>
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<tr>
<td>Income</td>
<td></td>
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<td>Median Home Value</td>
<td>$524,638</td>
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<td>Subsidized Housing</td>
<td>9.8%</td>
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<tr>
<td>Inventory</td>
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Figure 5: Hanover Demographics
Sources: 2000 Census Data, City-Data.com, and DHCD Subsidized Housing Inventory
but flexible plans in place provides the Committee and those proposing projects with clear guidelines for project approval, and limits the occurrence of case-by-case decision-making on the part of the Committee members alone. As Thomson described, “Every project that is deemed legitimate is brought to the town. My gut feeling is that it is best to have the CPC vet all the projects and then let the town decide at Town Meeting.” Hoffman echoed this sentiment, describing Hanover’s process as “a good system that promotes democracy…. ultimately the decision is made by the residents at Town Meeting.” The majority of those interviewed felt that this high degree of flexibility allows the CPA to better conform to community needs.

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<thead>
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<th><strong>Hanover CPA</strong></th>
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<tr>
<td><strong>Year Passed</strong></td>
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<tr>
<td><strong>Surcharge</strong></td>
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<td><strong>Recreation Expenditures</strong></td>
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Figure 6: Hanover CPA Data  
Source: MassGIS  
Note 1: The above chart includes future CPA expenditures on bonded projects, such as $2,500,000 for a recreation project, $1,430,000 for a mixed-use affordable housing/open space/recreation project, and $800,000 for a mixed-use open space/historic preservation project.  
Note 2: Expenditures for mixed-use projects have been divided equally across applicable categories.

The CPA’s flexibility has allowed Hanover’s CPC to fund projects that it may not have originally envisioned, even having created plans. While the CPA was originally promoted as a tool for acquiring open space, over time projects that meet CPA requirements but do not necessarily fall into the three core project areas have received a significant portion of the funding. CPA funding “has become the only pot of money that is free of the budgetary constraints that all the other departments are under,” according to Dunn. The school district has increasingly sought CPA funds for maintenance of schools that have been designated as historic. In addition, the youth sports oriented residents of Hanover have voted to designate significant annual funds towards Parks and Recreation. The conversion of the Cervelli property into the King Street Recreation area cost considerably more than originally expected. The initial approval by the town to purchase the land at $1,430,000 for conversion into open space and
recreation facilities occurred before CPA passage in 2004, but was bonded through the CPA upon its adoption. An additional $2,500,000, also funded by bonds, was requested and approved in 2008, making this project by far the most expensive funded by the Hanover CPC. Total allocation towards the property to date is $4 million. Although open space is included in the property, it seems to be viewed primarily as a recreation project. While Hanover’s CPC values the flexibility to fund such diverse projects, Dunn suggests that “some sort of guidelines as to how to allocate funds so that … there’s a longer-term strategy”\textsuperscript{13} would be useful.

Although open space and recreation generally receive the most attention in Hanover, adoption of the CPA has greatly expanded the town’s ability to preserve its historic resources. Prior to 2005, historic funding by the town was limited to $1000 per year for the Stetson house, which was built in 1716 and houses the Hanover Historical Society. Since then, the CPC has allocated funding for the preservation of the town’s historic documents, cemeteries, and flagpoles, in addition to purchasing the historic Murtha property for conversion into affordable housing. According to one Committee member, the availability of CPA funding has also allowed historic preservation in Hanover to be done in a much more professional manner.

**Housing**

The Hanover CPC is aware that among the CPA’s core program areas, affordable housing has the most potential to be politically contentious. The Hanover Housing Authority Affordable Housing Plan, funded by the CPA, suggests that affordable housing can “conjure images of potential neglect, plunging property values, increased crime, and even tensions concerning class and race.”\textsuperscript{14} In order to combat such negative associations, the Plan describes the potential for affordable housing to meet the needs of the elderly, large families in need of bigger homes, and town employees. Since at the time of its drafting Hanover did not meet the 10% threshold necessary to be able to appeal 40B developments, the Plan describes the CPA’s potential to provide the town with an opportunity to “chart its own course on affordable housing development.”\textsuperscript{15}
One step along this course was the creation of an affordable housing trust fund in 2009. The Committee chose to create this fund based on its congruence with the goals stated in the Affordable Housing Plan. With a trust fund, the CPA can allocate large amounts of money to the trust as a whole rather than having to risk a vote at Town Meeting on a case-by-case, once a year basis. As CPC Chair Diane Campbell, who represents the Housing Authority on the Committee, stated, “We did the housing plan, and that gave us the backup we needed. We don’t have to go running to Town Meeting for everything anymore!”16 The trust fund mechanism provides greater freedom to affordable housing developers in Hanover, and the trust’s financial potential is amplified by contributions from the town’s General Fund in addition to the CPA.

The potential of Hanover’s affordable housing trust fund was quickly put into action. Hanover had for years owned a tract of land that had been donated with the condition that it be developed for senior housing, but the town had never had the funds to build upon the land. The CPC approved money in 2008 for a feasibility study, and subsequently provided funding to create affordable units in the approved Barstow Village development. Soon after, a 40B development was proposed near Route 3 in Hanover (Hanover Mariner, November 11, 2009). The State issued a two year moratorium on the proposed development because Barstow Village, when completed, would raise the town’s affordable housing stock above the 10% threshold. The provision of affordable housing on Hanover’s own terms agrees with the spirit of the Affordable Housing Plan, which states that “there are needs that extend beyond what would be required to reach the 10% threshold, and the Town should attempt to exert some control related to the appropriateness of new development.”17 There is no clearer example of the CPA’s ability to empower local communities to make planning decisions and decide their own future.

There is no clearer example of the CPA’s ability to empower local communities to make planning decisions and decide their own future.
Campbell believes that the success of Barstow Village will encourage future affordable housing developments in Hanover. The project’s focus on senior housing may also have reduced the perceived stigma of affordable housing in the town. “It’s really important to be concerned about the image you present to the community. Starting the provision of affordable housing with an elderly program is a good way.”\(^{18}\) Hanover’s use of the trust fund and creation of a prominent senior housing development suggests useful strategies for building political viability of affordable housing.

**Combining Project Areas**

One of the first projects tackled by the newly formed Hanover CPC involved combining the three core project areas of affordable housing, historic preservation, and open space. Hanover resident Jacquelyn Murtha had purchased an historic home dating to the 1840s but put the building up for sale when updating the structure became too overwhelming (*Hanover Mariner*, May 20, 2009). Because Section 6-26 of the General Bylaws of Hanover prevents structures over 75 years old from being torn down without first being assessed by the Historic Commission, the CPC immediately saw a project opportunity.\(^{19}\) An informal agreement was reached with Habitat for Humanity to develop the home as affordable housing with the town’s assistance. In addition, several acres of adjoining open space would be preserved. The property, 645 Center St., was purchased with CPA funds for $800,000. While the purchase was being finalized, however, Habitat for Humanity changed leadership and lost interest in the project.\(^{20}\) When the Hanover CPC issued a Request for Proposals regarding the property, no one responded. Eventually a developer was found, but the project cost had risen significantly. In addition, the barn on the property, originally designated for conversion into affordable housing as well, was found to be in much worse structural condition than first believed. To date, the Murtha project is still not completed, despite its having been one of the first initiated by the Committee and some observers believe that it has not been the best use of CPA funds. A *Hanover Mariner* article from May 20, 2009 states that “Some residents
took issue with the high cost of restoring the property only to allow affordable housing in the building, which would benefit just a few residents.”

Despite the problems with the Murtha property, however, several of the Committee members interviewed remain positive about the potential for combining uses. (See Appendix I)

Challenges and Considerations

The Community Preservation Act in Hanover has been nearly free of controversies, and the few that have arisen have not appeared to be serious in nature. Determining the appropriate usage of CPA funds has sometimes been an issue, especially regarding requests from the school district, which owns several historic buildings and has submitted multiple requests for maintenance projects. Although most have been deemed by the CPC to be appropriate, some Committee members expressed concern. “Either we’re rewarding the schools for inconsistent maintenance or we’re helping out where we can,” mused CPC member Peter Johnson.21

Most recently, the Hanover CPC has attracted attention from the North and South Rivers Watershed Association (NSRWA) regarding its funding of a study that led to the designation of Hacketts Pond dam as an historical structure. The Association, which helped to pass the CPA in Hanover, objected to this action due to the harm dams can cause to watersheds and the precedent it sets for other dams to be preserved as historic resources. The Hanover CPC has engaged in outreach activities such as holding a joint public meeting with the Watershed Association to discuss the issue.
“When they hear that it’s not a dollar for dollar match, they say ‘What happened to the CPA? Should we get rid of it?’”

Most Committee members in Hanover agree that the average citizen is aware of the CPA. Coordinator Margaret Hoffman has had large signs placed at all project sites. In addition, the CPC has made an effort to publicize their actions at local events such as annual Hanover Day, a festival held in celebration of the town. The Committee also plans to name one of their upcoming projects after an historical figure or place in the town, and will subsequently create pamphlets on the subject to be distributed to the public. Residents are less likely to be aware of changes in the CPA’s state match, however, often believing that the state still matches CPA funds dollar for dollar, and “when they hear that it’s not a dollar for dollar match, they say ‘what happened to the CPA? Should we get rid of it?’” explained Thomson.\textsuperscript{22} Most interviewed agreed, though, that repeal is not an actual threat.

All policy makers interviewed in Hanover view the Community Preservation Act as a long-term tool for Hanover. In addition to the inherent value of CPA funded projects, the decision to issue bonds to fund the King Street Recreation area has added additional incentive to maintain the act. To date, Hanover has bonded nearly $4 million to purchase and develop the property. If they were to repeal the act, taxpayers would have to bear the full weight of repaying these bonds rather than having the cost mitigated through State matching funds. Thomson is concerned that the bonds have the potential to be a political tool for keeping the CPA. “You don’t want to kill the CPA if you’ve got eight more years left to pay on a bonded project. There are those who might do that to keep CPA from ever coming up for reconsideration. You’ve got a good argument against repeal.”\textsuperscript{23}
Conclusion

More than five years after the Community Preservation Act was passed in Hanover, its popularity continues, due largely to the visibility and popularity of individual projects. All six Hanover interviewees unequivocally believe that the Community Preservation Act has added significant value to their town, and agree that most if not all CPA projects would not have happened without the Act. The value of the CPA, said Hoffman, “can’t be measured in dollars. They’re the things that improve the quality of life in a community.” Other high-growth communities might consider Hanover an example of how to successfully use the CPA to channel development and control growth. Hanover’s successful use of Community Preservation Plans might also be a useful model for other communities. In addition, CPA communities struggling with how to meet housing requirements might consider following Hanover’s strategy of creating an affordable housing trust and creating affordable developments that reflect the town’s values. Such strategies will ensure a long, successful tenure for the CPA in any community. As Campbell said, “my sense is that it’s not going anywhere.”
(Endnotes)

1 Hanover Housing Authority. “Planned Production” Affordable Housing Plan (Hanover, MA: Hanover Housing Authority, 2008).
2 Hanover Housing Authority. “Planned Production” Affordable Housing Plan (Hanover, MA: Hanover Housing Authority, 2008).
4 Hanover Housing Authority. “Planned Production” Affordable Housing Plan (Hanover, MA: Hanover Housing Authority, 2008).
5 Mary Dunn, personal interview, March 11, 2010.
7 Margaret Hoffman, interview, March 24, 2010.
10 Town of Hanover. General Bylaws (Hanover, MA, Town of Hanover, 2009).
12 Mary Dunn, interview, March 11, 2010.
13 Mary Dunn, interview, March 11, 2010.
14 Hanover Housing Authority. “Planned Production” Affordable Housing Plan (Hanover, MA: Hanover Housing Authority, 2008).
15 Hanover Housing Authority. “Planned Production” Affordable Housing Plan (Hanover, MA: Hanover Housing Authority, 2008).
16 Diane Campbell, interview, March 9, 2010.
17 Hanover Housing Authority. “Planned Production” Affordable Housing Plan (Hanover, MA: Hanover Housing Authority, 2008).
18 Diane Campbell, interview, March 9, 2010.
19 Town of Hanover. General Bylaws (Hanover, MA, Town of Hanover, 2009).
20 Diane Campbell, interview, March 9, 2010.
21 Peter Johnson, interview, April 1, 2010.
chapter 3
needham
Needham, Massachusetts

With a price tag of around $18 million, the Needham Town Hall renovation holds the distinction of being the state’s largest CPA project to date. Because of both the high level success and visibility afforded to the CPC in Needham by this and other projects, Needham should be considered a model for other communities considering similar large undertakings with CPA funds.
Project Visibility Meets Historic Value

Community Profile

Accessible via a short commuter rail ride from downtown Boston, Needham is a bedroom community with history dating back to the early 1700’s. Although originally an agricultural community, the town’s poor soil made farming difficult and by the 19th century the town had developed an industrial economy. In the 20th century, Needham became primarily residential. Nearby Route 128 is home to one of the nation’s first industrial parks, and the highway corridor remains a major economic engine for the town and the State today. Needham’s history, business district, excellent school system, and involved community make it a highly desirable suburb for many families.¹

Needham’s 29,095 residents are highly educated, family oriented, affluent, and very active in civic life. The town’s median household income is approximately $113,000; the median single-family home price in 2008 was $699,433.² Between 1990 and 2000 the population of Needham grew 4.9%, while its school age population increased by 20.6%.³ This growth has strained area schools, facilities, and public resources.

Passing the CPA

The Community Preservation Act was first brought to Town Meeting in 2003. Confident that the Act would pass easily, a small group of community members, one of which led the Needham Housing Authority at the time, requested that the legislation be added to the yearly ballot. This request was rejected. At the time, few other communities had adopted the Act and many in the town were hesitant to consider the passage of unprecedented legislation.
About a year later, more communities had adopted the CPA and advocates for each of the core funding areas had formed a coalition with specific projects in mind. The Director and the Chairman of the Parks and Recreation Committee asked that the legislation be reconsidered. It was generally felt that combining a small tax increase with CPA-leveraged bonds in order to fund large projects, such as the renovation of Town Hall and creation of additional public housing units, would be preferable to attempting a massive tax override under Proposition 2 1/2. Because popular capital projects beyond Needham’s current budget were involved in the discussion, many of the Town Selectmen gave their support to passage of the CPA.

Despite this positive change in public opinion, a few members of the Needham Finance Committee remained unconvinced of the CPA’s potential. Once they became aware of the success other towns had experienced with the CPA, this group became advocates of the legislation. Also, exemptions for low-income residents and the first $100,000 of taxable residential property value contributed to CPA support. According to Patricia Carey, staff liaison to the Needham Community Preservation Committee, “having the ability to choose the exemptions for low-income residents protected the people who wouldn’t be able to take this extra weight in their taxes.” Convinced of all of these benefits of the CPA, voters in Needham passed the CPA with a 58% majority in the 2004 town election. The surcharge was set at two percent.

**Projects and Process**

Needham’s nine member Community Preservation Committee includes representatives from the Conservation Commission, the Historical Commission, the Housing Authority, the Park & Recreation Commission,
and the Planning Board. In addition, two representatives are appointed by the Board of Selectmen and two by the Town Moderator. A staff liaison is appointed by the Town Manager to work with the CPC.6

CPA projects in Needham are initiated by town boards and commissions, non-profit organizations, and residents. Approval is based solely upon compliance with state and local CPA requirements and allocation is decided on a case by case basis. In general, each proposal is presented at the May Town Meeting, where CPA appropriations are decided by a simple majority vote.7 As of October 2009, the CPA funding available in Needham for the three core areas was as follows: $40,180 in open space ($920,000 was appropriated at the October 2009 Special Town Meeting for a project to be addressed later in this case study), $233,380 for community housing, $0 in the historic preservation fund (about $15 million was recently put towards the Town Hall project at the May 2009 Town Meeting, emptying the historic preservation fund) and $604,711 in the general fund (millions were also taken out of the general fund to be put towards the renovation of Town Hall at the May 2009 Town Meeting).8

**Historic Preservation: Town Hall**

Historic preservation is important in Needham. The town has two main historic districts that contain at least eighteen homes identified by the Massachusetts Register of Historic Places, and the Massachusetts Cultural Resources Information System (MACRIS) lists 81 historic properties in Needham with an additional 45 to be added in 2010.9 Among the most visible and celebrated of these is Town Hall. Located on the square in the town’s center, surrounded by bustling restaurants and shops, the importance and historic context of Town Hall grows with Needham’s population. Erected

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<td>Median Home Value</td>
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<td>Subsidized Housing Inventory</td>
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Figure 8: Needham Demographics
Sources: 2000 Census Data, City-Data.com, and DHCD Subsidized Housing Inventory
in 1902, its exterior and auditorium have long needed repair, and renovation was felt by the community to be overdue. In addition, the building’s space had become too small for the growing number of town employees. CPA passage in 2004 provided the opportunity for completion of these renovations with minimal impact to the town’s budget.

The Town Hall renovation holds the distinction of being the State’s largest CPA project to date, and Needham’s experience with the project indicates that CPA funds can be used for large projects without negatively impacting the other program areas. Approved in May of 2009, total appropriations amount to over $18 million, with about 80% ($15 million) coming from CPA funds. Approximately $7 million of this will be leveraged as 20-year bonds against future CPA revenues. The remaining 20% came from town’s general revenues. Renovation began in March 2010 and is expected to take 18 months, with completion scheduled to coincide with the town’s Tercentennial celebration in 2011. In spite of this large funding outlay, Carey states that the Town Hall project “didn’t stop the town from funding projects but they always kept it in the back of their minds they were going to need the bulk of the CPA funds for future use.”

In addition to the renovation of Town Hall, the Historic Preservation Committee has used CPA funds to inventory all historic buildings in the town in a program called The Heritage Project. However, convincing property owners to register their homes is often a difficult task due to the increased regulations and tear-down prohibitions associated with historic properties. Needham’s experiences with the Project might be helpful for other communities hoping to create such a survey in the future.

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<td>Recreation Expenditures</td>
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Figure 9: Needham CPA Data
Source: MassGIS
Note 1: The above chart includes future CPA expenditures on bonded projects, such as $7,200,000 for a historic preservation project.
Note 2: Expenditures for mixed-use projects have been divided equally across applicable categories.
Affordable Housing: High Rock Homes

Needham is an affluent community consisting mainly of homeowners; renters comprise only 1,700 of the town’s 10,000 households. As of April 2010, 7.7% of the town’s housing stock is deemed affordable under the 40B statute. As a community, Needham is conscious of the need to provide more affordable housing, so increasing the town’s affordable housing stock is a priority for the CPC. In 2007 the town created the Needham Affordable Housing Plan and the Project Development plan. The Plan projects that the town will be able to meet its 10% minimum by 2017. If total housing growth continues on its current trajectory, this would require the creation of at least an additional 600 affordable housing units.

A step towards this 2017 goal, the successful High Rock Homes development was a highly visible and widely supported project, both by town officials and residents. The success of the development may be attributed in part to the fact that the town did not need to purchase any new land for development, as the site was already owned by Needham Housing Authority. Twenty units of single-family public housing sat on the land prior to construction.

In 2006, the town allocated approximately $325,000 to support the predevelopment work of the proposed High Rock Homes project; the final plan would add nineteen additional units in farmhouse-style duplexes. The project was completed in 2008 and used a total of $869,500 in CPA funds; the development remains part of the Needham Housing Authority.

Town Meeting will vote on several other affordable housing projects.
in Spring 2010. When asked about the support housing projects usually receive from the community, a CPC member stated, “given that we have the 10% fund of affordable housing money, and it is the only thing that 10% can go towards, the Selectmen are usually very supportive of affordable housing proposals that come to the CPC.”

Needham also benefits from the valuable expertise of the Needham Housing Authority and NOI, a nonprofit housing advocate in the town. Leaders of these organizations help develop plans and identify opportunities for affordable housing that can successfully utilize CPA funds. An example of this expertise is the decision to create more units on already existing public housing property, in order to minimize community impact and reduce funding needs. The CPC currently has about $300,000 in the affordable housing fund, with $201,000 to be added at the May 2010 Town Meeting. The CPC plans to spend $65,000 of this to replace boilers in three units managed by the Needham Housing Authority.

**Open Space: The Volante Parcels**

Among the three CPA core funding areas, Needham CPC members generally agree that open space has received the least attention. This may be largely due to the fact that Needham is a dense, built-out community with not much land left to preserve. What little open land does exist is often privately owned by residents not willing to sell. Also, since the CPC cannot designate funds to improve land that was not originally purchased with CPA money, the town is prohibited from maintaining and improving the many acres of open space that are already in place. The Committee has used open space CPA funds to create several trails, protect wetlands, and add fencing and signage for the new
“Many of the projects that are now coming forward would have never made the cut if there were no CPA.”

trails. In late 2009, the CPC purchased two parcels of land using $902,000 of funding from the CPA open space allocation; the Volante Parcels, which comprise about five acres. Since the parcels were purchased with CPA funding the Committee plans to use an additional $40,000 of CPA funds to make improvements. (See Appendix J)

Challenges and Considerations

Despite the fact that one of the major projects that generated interest in the CPA is now approved and under construction, members of the CPC as well as town officials and Selectmen still see a great need for the Act. Furthermore, given the fact that Needham bonded Town Hall for a twenty-year period, repealing the CPA would not be beneficial since it would eliminate the State match used to pay the bonds.

As Committee and Historic Commission member Jack Cogswell put it, “many of the projects that are now coming forward would have never made the cut if there were no CPA; the fact that there is a dedicated fund available makes many of these unique projects much more easily passed at Town Meeting. They don’t have to get into the priority list with all the other projects.”16 Carey agreed that the CPA adds value to Needham. “It really is valued here. People are proud of High Rock Homes and the other smaller projects. The projects that get funded are very visible to the community and add value to Needham. I think the community is pleased to know they are saving up for those things.”17 Lee Newman, Needham ‘s Town Planner stated, “There is absolutely a need for the CPA. There are more affordable housing needs to be met, there are more open space needs to be met, and the CPA really becomes a vehicle through which to fund those kinds of projects that wouldn’t otherwise be funded in the town’s traditional budget. So if the CPA isn’t there then some of those projects just don’t get done.”18
Conclusion

Needham has done a great deal with the CPA in a short period of time. The Act is well regarded and brings value to the community, and is clearly understood by both residents and town officials. Most, if not all of the projects proposed and completed with CPA funding would not have happened without the Act. Needham’s success with the Town Hall renovation should be a model for other communities considering similar large undertakings with CPA funds. Needham’s success with affordable housing indicates the importance of having technical expertise available to guide the CPC as it solicits and plans affordable housing creation. In addition, the ability to recognize community-specific opportunities, such as land already owned by the town, can alleviate common obstacles to affordable housing provision. Because of this and many other factors, Needham is a shining example of what the CPA can do for a community.
(Endnotes)

3 Town of Needham. Community Preservation Plan (Needham, MA: Town of Needham, 2010).
4 Patricia Carey, personal interview, March 5, 2010.
5 Town of Needham. Community Preservation Plan (Needham, MA: Town of Needham, 2010).
7 Town of Needham. Community Preservation Plan (Needham, MA: Town of Needham, 2010).
8 Patricia Carey, interview, March 5, 2010.
9 Town of Needham, Town Plan (Needham, MA: Town of Needham, 2010).
11 Patricia Carey, interview, March 5, 2010.
14 Town of Needham. Affordable Housing Plan (Needham, MA: Town of Needham, 2007).
15 Interviewee requesting anonymity, personal interview, March 12, 2010 (used with permission).
17 Patricia Carey, interview, March 5, 2010.
Maynard has a dynamic Community Preservation Committee which is devoted to bettering the town. However, several factors have prevented the town from fully utilizing the legislation, including a limited tax base and a lack of awareness among residents of the funding opportunities available through the CPA. Many in the community believe that the regionalization of Community Preservation Act resources would remove many of the barriers to project completion faced by Maynard and other small communities.
Community Profile

Founded in 1871 as a mill town on the Assabet River, Maynard is located approximately 25 miles west of Boston and was initially part of the towns of Sudbury and Stow. The economic vitality of the town is closely linked with the original mill complex, which was converted to office space in 1950 and anchors the town’s compact, commercial downtown area. Today, the town has a population of approximately 10,437 and because of its high population density, it is considered a micro-urban area rather than a suburban area. With a median household income of $78,190 and a median home value of approximately $326,617, the town has a modest tax base compared to surrounding communities and attracts many first-time home buyers. The town’s housing stock is varied, with a mix of modest, single-family homes and duplex housing units to condominiums and large houses on generous lots. The community also has a number of historic resources and a wide range of landscapes, including the Assabet River National Wildlife Refuge and the Glenwood Cemetery, which is on the National Registry of Historic Places.

Passing the CPA

In 2001, a small group of residents and the town planner began discussing the possibility of bringing the CPA to Maynard. In order to get a sense of local support for the measure, the group met with the Board of Selectmen, who discouraged moving forward with a vote. According to Selectman Sally Bubier, who at the time was part of the discussions as a concerned citizen, the consensus was that residents would not support the CPA at that time. “The community really wasn’t in a place to be visionary,” she said. “We didn’t think about investing in ourselves.” Others
felt that the CPA had no credibility since it had passed just a year earlier and did not yet have a record of success. In addition, since a local override of Proposition 2 ½ to build a new school was proposed during the same election cycle, town officials felt that voters would not be receptive to two tax increases in a single year.

Four years later the issue resurfaced when Jack MacKeen, a highly involved resident, spearheaded a grassroots effort to inform residents about the CPA and its potential as a reliable funding source for Maynard. MacKeen’s Community Development Plan Implementation Committee generated local publicity and organized a citizens’ committee that hosted numerous neighborhood meetings and coffee gatherings. As part of the campaign, MacKeen aimed to assuage earlier reservations by highlighting the number of other towns that had by that time adopted the Act. At Town Meeting, he argued that Maynard was missing out on vital state funding to which it was entitled because CPA communities were subsidized through deed transaction fees paid by the rest of the State. “Those in the audience who have bought a house, sold a house, or refinanced a house – your money is now going to Acton, to Lincoln, to Sudbury, to Cambridge,” he said. By adopting the CPA, he argued, Maynard could receive these benefits as well, particularly since the State match was expected to remain at 100% for several years. MacKeen’s appeal influenced the Selectmen to reconsider the CPA.

The combination of budgetary flexibility with increased awareness of funding needs in Maynard solidified the appeal of the CPA. Town Selectman Brendon Chetwynd, a former member of the planning board, described CPA allocation as “more streamlined than the normal budgetary process.” Projects can receive funding from the CPA with relatively more ease than from other
municipal financing techniques such as tax overrides and bonding. In modest towns like Maynard, these added complexities make it unlikely that large projects, however beneficial, will receive funding. At the time of this debate, a series of State-funded studies had begun to raise awareness of the funding needs of many of the town’s precious resources. Carolyn Britt, the town planner, described that “Critical state resources – from the funding provided for the Community Development Plan and the re-zoning of the downtown area to the partial funding of the historic surveys – got people thinking about what needed attention,” and how the CPA could potentially help fund projects in the community. CPC Chairman Doug Moore stated “there would be resistance to some of the CPA projects if they had to be paid for out of the standard tax revenue stream.”

The CPA passed in Maynard on May 1, 2006 with a 66% affirmative vote. The surcharge was set at 1.5% and the measure included all allowable exemptions. The exemptions and lower surcharge level were chosen in an effort to “reflect the community’s demographics” and make the tax affordable to as many people as possible, especially senior citizens and businesses. As a “bare-bones, live-within-your-means town” that “spends with a lot of thought and scrutiny,” the general consensus was that the decision to reduce the tax burden for as many people as possible was essential for the adoption of CPA.

Maynard’s first step in CPA implementation was to create a Community Preservation Committee and a Community Preservation Plan, which is used to guide the review of proposals. MacKeen chose not to serve on the Committee – he wanted others in the community to have an opportunity to play a part in the CPA – but

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<td>Subsidized Housing Inventory</td>
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Figure 11: Maynard Demographics
Sources: 2000 Census Data, City-Data.com, and DHCD Subsidized Housing Inventory
was instrumental in the development of the plan. He described how helpful neighboring communities, such as Concord, Stow, and Dracut, were during the Committee’s initial phase. “I’ve found that there has been a real openness across CPA communities,” said MacKeen. Maynard’s CPC continues to follow the CPA activities in other towns and rely on the Community Preservation Coalition as a resource for understanding the nuances of the CPA. This process of information sharing has enhanced the ability of the Committee to evaluate project proposals and allocate funds appropriately.\(^{21}\)

**Projects and Process**

The Maynard CPC evaluates each project proposal based solely on whether it fits CPA criteria. Of the eleven approved projects to date, five are classified as historic preservation, three are recreation, three are open space and one is affordable housing.\(^{22}\) Town officials submit the majority of proposals, many of which have been rejected because they did not conform to CPA criteria. “We don’t want [the CPA] to be perceived as a piggy bank for the town’s projects,” said Moore.\(^{23}\)

All interviewees mentioned the efforts taken by the Committee to ensure that funding decisions comply with CPA guidelines, even if it means turning down projects with strong community support or demonstrated need. Maynard’s emphasis on careful stewardship of financial resources seems to be reflected in the CPC’s funding choices. Several interviewees pointed to examples of CPA towns that have had allocations challenged as the reason they are so careful in reviewing proposals. Committee members expressed eagerness to see amending legislation pass in order to free them from such restrictions and to help them meet town

### Maynard CPA

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Figure 12: Maynard CPA Data  
Source: MassGIS
needs, particularly in regards to recreation. They hope this new flexibility might lead to greater community involvement and help the CPA achieve its potential.

**Historic Preservation**

Committee members indicate that historic preservation has received the most funding because proposed projects in this area have been manageable with a limited budget. In spite of the projects’ small size, the CPC regards endeavors such as surveying Glenwood Cemetery, restoring the Veterans’ Memorial, and cataloguing historic artifacts as significant achievements because they have been so well received by the community. CPC member Peg Brown recalled the enthusiasm expressed by residents upon the unveiling of a new bronze eagle at the Veterans’ Memorial during the Memorial Day parade. “I think people were thrilled to see something positive happening. A lot of our projects have been funded, but not completed yet, so people can’t visually tie the CPA to an actual, physical project. I think more of that will come in the future.”

The Committee also created a banner to hang on the cemetery fence in order to draw attention to their accomplishments.

**Open Space**

Maynard has an active Conservation Commission, and the CPC expresses interest in funding open space projects in the future. However, several Committee members noted the limits imposed on CPA activities by Maynard’s high population density and corresponding lack of available land. “We’re very small and compact,” said MacKeen. “We have very few developable or re-developable properties.” This was also noted in Maynard’s Community Development Plan as a key factor that limited growth and development.

The CPC’s cautious approach to funding high-cost projects and careful consideration of long-term impacts also poses challenges to the preservation of open space. In each of the three years since the CPA was passed, $10,000 has been set aside for open space. According to Moore, the Committee believes that this accumulation will eventually allow the town to purchase
land when it becomes available. “Early on we rejected a proposal to form an open space trust for $300,000 because we decided not to lock-up that much money for a project that was to-be-determined.”29 The Committee takes this same approach when presented with proposals to leverage CPA funds and have turned down requests for bonding, state-grants and other funding opportunities that would “lock-up” money.30

**Affordable Housing**

“Housing is our weakest link,” said CPC member Jane Audrey-Neuhauser.31 While several CPC members spoke about the need for affordable housing in Maynard, particularly to provide senior citizens with downsizing options, in their first round of funding the Committee “allocated $12,000 for an affordable housing plan to be developed by the trust, but the money is still sitting there, not being used.” Another interviewee noted that affordable housing was considered a useful way to fulfill the town’s 40B requirements.32 CPC members partially attributed the fact that housing has received the least amount of funding to the difficulty of recruiting committee members to administer the affordable housing trust. In 2009, a group from Concord approached the Selectman’s office about a house in Concord that was scheduled to be demolished. “They were looking for a Habitat for Humanity project or a lot to move the house to,” Audrey-Neuhauser said. “If the housing trust had been up and running it might have been able to have been turned into affordable housing.”33 There are currently only two people who have volunteered to serve on the trust’s committee, and no proposals or inquiries regarding affordable housing projects have been generated.34,35

Several CPC members and town officials describe that a lack of town resources and expertise has resulted in “missed opportunities.” “There’s an old church that’s for sale for $140,000 that could be turned into permanent affordable housing, but it takes a lot of human investment,” said Bubier. “Other pieces of the CPA – like open space and historic preservation and recreation – take less staff time.”36
The high cost of creating affordable housing units was mentioned by at least two Committee members, who noted that the town’s low tax base can’t generate enough money to fund affordable housing in the short-term. As a way to address this funding barrier and bridge the expertise gap, Carolyn Britt suggested a regional approach, such as the formation of a regional non-profit housing entity that could help towns implement the CPA. Regional and inter-community cooperation would be an asset to a community like Maynard, which has limited financial and municipal resources. A pool of money and expertise would potentially offer the town an opportunity to stimulate proposals for new affordable housing initiatives. (See Appendix K)

**Challenges and Considerations**

The findings of this case study indicate that the CPA has been an underutilized resource in Maynard, in part due to the challenges of affordable housing creation and open space preservation in a town of limited means. Maynard also encounters challenges of community engagement. Because they themselves do not initiate proposals, Committee members expressed an especially strong interest in receiving more project proposals from community groups and residents. Brown believes that passage of the proposed CPA amendments, which would expand allowable uses, would “open the floodgates” of new project proposals from both the town and community groups. At one point, a neighborhood coalition submitted a widely supported proposal for a toddler playground to be built in an old school yard. Several CPC members expressed disappointment in not being able to fund the project, since recreation...
projects on existing town land are not allowable.

The CPC has taken more proactive measures towards community engagement, though they have not been entirely successful. The first action taken by the newly formed CPC was to inform residents of the availability of CPA funds through word of mouth and advertisement in the local *Beacon-Villager*. Despite these efforts, Committee members and town officials reported that generating awareness in the community has been challenging. Brown questioned whether residents “understand the concept of the CPA,” and all interviewees agreed that clarifying and publicizing allowable uses would most likely increase the number of proposals received by the CPC. Moore predicted that as the number of CPC-funded projects increases, the community and residents will “begin to see the value” of the CPA and get more involved. Chetwynd believes that a large project such as The Assabet River Rail Trail, a $10 million recreation project that has received a large CPA allocation, will boost residents’ awareness of the CPA. However, he acknowledges that the Trail will likely have more long-term value than short-term value due to its 15-20 year projected completion window. Committee members believe that their careful stewardship of reserve funds has the potential to make money available when large projects are proposed.

**Conclusion**

Overall, the CPA is considered a valuable policy tool that advances the goals of the town, enhances quality of life for residents, and moves the community forward. Maynard does encounter challenges that are particularly related to its position as a small town of relatively modest means and a dense town with few opportunities for land acquisition. In spite of these challenges, a consensus exists that the CPA brings both short-term and long-term value to Maynard. Many interviewees, including Britt and MacKeen, believe that none

The proposed CPA amendments would “open the floodgates” of new project proposals from both the town and community groups.
of the projects funded by the CPA would have moved forward without the support of the Act. Several also referred to the CPA as a good value. As Brown said “when taxpayers can say, ‘Look at what my money bought: restoration of the Memorial Park monument, further development of the Rail Trail, preservation of valuable historic town artifacts – all for $45!’ Who can argue against that?”44
(Endnotes)


4 Community Preservation Committee. Town of Maynard Community Preservation Plan (Town of Maynard, MA, 2007).


7 Community Preservation Committee. Town of Maynard Community Preservation Plan (Town of Maynard, MA, 2007).


13 An article is an item to be voted on at the Town Meeting. Secretary of the Commonwealth. “Citizens’ Guide to Town Meetings” http://www.sec.state.ma.us/cis/cistwn/twnidx.htm (accessed on April 25, 2010).


16 Carolyn Britt, interview, March 24, 2010

17 Doug Moore, interview, March 17, 2010.

18 Community Preservation Committee. Town of Maynard Community Preservation Plan (Town of Maynard, MA, 2007).


21 C. David Hull, interview, March 10, 2010.


23 Doug Moore, interview, March 17, 2010.


27 Maynard is 5.24 square miles. Of that, a quarter is taken up by the Assabet River Wildlife Refuge and another sizable proportion is designated as open space, leaving just over 3.2 square miles. C. David Hull, interview, March 10, 2010.
Community Preservation Committee. Town of Maynard Community Preservation Plan (Town of Maynard, MA, 2007).

Doug Moore, interview, March 17, 2010.

Doug Moore, interview, March 17, 2010.

Jane Audrey-Neuhauser, interview, March 10, 2010.

Anonymous interview.

Jane Audrey-Neuhauser, interview, March 10, 2010.


C. David Hull, interview, March 10, 2010.


C. David Hull, interview, March 10, 2010.

Carolyn Britt, interview, March 24, 2010


Doug Moore, interview, March 17, 2010.


Hamilton has struggled to fully utilize the Community Preservation Act. The burden of an additional surcharge on residents’ tax bills and challenges of community engagement have left some residents questioning the Act’s importance in an economic downturn. In order to realize the potential of the CPA in Hamilton and similar communities, Committee members must walk a fine line between projects that preserve the character of the town and others that acknowledge its potential for the future.
Discovering New Potential

Community Profile

Situated on Boston’s North Shore, Hamilton is a quiet town with true New England pastoral beauty and a legacy of open space stewardship. Since 1961, the Essex County Greenbelt Association has preserved nearly 13,000 acres of land in the region.\(^1\) Large single-family estates and a network of public trails related to Hamilton’s equestrian heritage mark the town’s landscape. Significant to the town are the Gordon Conwell Theological Seminary and the Pingree School, a private secondary school located on the Pingree Family Estate.

Hamilton’s median income is $91,524 and its median home value is $517,200, although several interviewees commented that this figure presents an inflated view of wealth in the town. Many longtime residents have few sources of income aside from liquidation of property assets.\(^2\) However, transportation access and a strong school system have attracted a large number of young professionals to Hamilton, which has at times caused tension between the values of the old and new segments of its population. This tension is heightened by the town’s limited financial resources from its minimal tax base. Hamilton has no manufacturing or industrial-zoned land and has only a small commercial district near its commuter rail station. Many long-time residents resist any demand that new property taxes might place on their already strained finances. With little revenue aside from property taxes, Hamilton struggles to fund the public school system needed for its new families.

Passing the CPA

The feeling that the CPA would provide funds for projects that needed attention, and the appeal of the State match were the main factors that contributed to Hamilton’s passage of the CPA, at a surcharge of 2%, on May 12, 2005.\(^3\)
However, Hamilton’s first attempt to adopt the CPA failed at Town Meeting in 2002. Opponents highlighted that the Act is an additional property tax. This campaign convinced many voters, as Hamilton’s property tax rate was already one of the highest on the North Shore. In addition, some residents were skeptical of the State’s ability to match funds. When the CPA was brought to the town for the second time in 2005, campaigners provided convincing data from CPA communities that had received 100% matches. Convincing evidence of the availability of matching funds persuaded many residents that Hamilton was missing out on “free” State money, and they shifted from fearful to eager about the possibilities of the legislation to fund projects. According to Planning Board member Edwin Howard, there was a “perceived feeling that [the CPA fund] would be ‘play money’ to address some of the marginal problems that exist.”

Projects and Process

Since the Act’s adoption, the Hamilton CPC has been fairly conservative in distributing CPA funds. “We often use a ‘seed money’ concept,” described lifelong Hamilton resident and committee member Ray Whipple. Rather than granting the entire amount of funding requested for projects, the CPC often provides a portion and encourages applicants to solicit additional funding sources to complete the project. “They want to make sure there is buy-in from other groups,” stated CPC Coordinator Christine Berry. Additionally, the Committee is more apt to support proposals that benefit large numbers of residents. For example, a resident recently approached the Committee to request that a sidewalk be built to connect to a public trail. It was concluded that the project as proposed would not benefit enough residents, but the CPC advised the resident about how he might revise the plan in order to connect to a larger network of trails and be eligible for CPA funding.
Many of the projects entirely funded by the CPC have been long overdue refurbishment projects, which generally attain unequivocal support in the community. In 2007, the Committee spent over $100,000 to renovate both the heating system in Town Hall and twenty-two kitchenettes in Hamilton Housing Authority apartments. The following year, the Committee funded a Massachusetts Department of Environmental Protection (DEP) landfill site assessment. The project had been delayed several times, despite mounting pressure from the DEP, due to its astronomical cost. The assessment was justified as a proper use of CPA funds based on the town’s intent to utilize the closed landfill as open space.8

CPA funds have also been used to pay for “improvements that are not absolutely critical and are difficult to justify in departmental budgets,” stated Whipple, who believes that it is important for the Committee, which represents diverse interests, to fund things that improve the entire town.9 Rather than focusing on large projects, which can be difficult to complete, Hamilton Selectman Dave Carey said that the Hamilton CPC prefers to fund a larger quantity of smaller projects. For example, Whipple’s ancestors have lived in Hamilton for over 370 years, and some of his family’s gravestones have been lost over the years. The CPC recently repaired broken stones in Hamilton cemeteries so that other families do not suffer the same loss. In this manner, small amounts have been distributed to a range of projects.

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<td>Subsidized Housing Inventory</td>
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Figure 14: Hamilton Demographics Sources: 2000 Census Data, City-Data.com, and DHCD Subsidized Housing Inventory


**Housing**

Hamilton’s Housing Authority, through which all CPA affordable housing projects are administered, is part of a small regional coalition. After being approved at Town Meeting, projects are contracted out to the Ipswich Housing Authority. Final approval and payment to the contractor upon completion are done by Hamilton Housing Authority Chairman and CPC member Leigh Keyser.\(^{10}\)

Despite its cooperation with Ipswich and the fact that Hamilton has an affordable housing stock of only 3.1%, the majority of Hamilton’s CPA funding for affordable housing has gone to renovating interiors rather than building or acquiring more units.\(^{11}\) Opportunities to convert homes into affordable housing have arisen, but some Committee members are reluctant to secure affordable housing not situated near the commuter rail on the assumption that low income people do not own cars. This means that only downtown buildings are considered for conversion to affordable housing. Given the high cost of land in the area, the creation of affordable housing under these constraints is nearly impossible to a town with limited funds. Before limiting its search for properties to the downtown area, however, the CPC might question the notion that affordable housing units must be in proximity to public transit. Affordable housing units created by CPA funds are available to residents at 80% or 100% of AMI, a level of income certainly able to own a car, especially if they already reside in a suburban or exurban community where auto transit is necessary. As such, CPCs in towns such as Hamilton could possibly explore converting houses into affordable housing units even if they are a distance away from transit.

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<td>$141,200</td>
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<tr>
<td>Recreation Expenditures</td>
<td>$126,000</td>
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Figure 15: Hamilton CPA Data
Source: MassGIS
Severe infrastructure constraints, such as a lack of a municipal sewer system, heighten the difficulties of securing affordable housing in Hamilton and increase the need for considering creative solutions. Septic systems have to be installed on any housing developments, increasing costs. One interviewee commented that a local developer has been unable to renovate the upstairs of his downtown building because the septic system cannot handle the additional strain. These and other problems make the provision of affordable housing seem financially unviable to several CPC members.

Open Space

Despite the desire of some Committee members to preserve open space, the high cost of land acquisition makes open space projects challenging in Hamilton. CPC member Tom Catalano said that open space is “the most expensive and the hardest thing to appreciate.” The CPC’s deliberations in February 2010 about the purchase of 52 acres of land with an asking price of three times its value illustrates this challenge. According to an interviewee, town bylaws prevent the payment of more than the appraised value of land. Although the parcel’s asking price recently dropped to the appraised amount of $700,000, some Committee members are still hesitant to buy. Catalano is wary of acquiring too much passive open space, and would like to see land used instead for active recreation such as lacrosse and soccer, which are popular sports in Hamilton. They believe that supporting these sports will garner support for the CPA from residents who may not be invested in the other goals of the Committee. (See Appendix L)
Challenges and Considerations

Committee members generally feel that if the CPA were to be proposed today, it would have a difficult time passing. Especially in the context of a recession, some CPC members have questioned the Act’s long-term viability, as many residents are unable to afford the town’s already high property taxes.\(^{13}\) Howard explained that many residents have been burdened by the recent economic downturn, and Catalano used the phrase “equity rich and cash poor” to describe many of Hamilton’s residents.\(^{14}\) Carey stated that the “four luxuries [the CPA’s core program areas] are thrown out the window when you have to pay the electric bill.” He also explained that if residents believe that the CPC is spending their precious tax dollars too freely the Act might get repealed.\(^{15}\) A steep decline in State matching funds to 35% in 2009 also posed challenges for the CPA in Hamilton, since the 100% match was a strong argument for adopting the Act. CPC members emphasized that passage of pending legislation to restore the state match to 75% would somewhat mitigate these challenges.

Perhaps highlighting the questions of CPA viability in Hamilton, during the course of this study Selectman and Budget Process Committee Chairman Bill Bowler announced at a public meeting that he would seek to repeal the CPA. The CPC, he asserted, had “made a policy decision that it would not fund school-related projects because the school district has other sources of funds.” While it is true that at this time the CPA has not funded any school projects, Catalano emphasized that Bowler misinterpreted the CPC’s intentions. “The DOR [Department of Revenue] guidelines put school funding in, at best, a gray area, and probably an area the CPA isn’t meant to go” (Hamilton Wenham Chronicle, March 31, 2010). But concerns about funding guidelines are not the only reason the CPC is hesitant to fund the public schools. Some CPC members expressed concerns that 68% of the town’s 2010 revenues will go to the school system, and indicated that by directing CPA funds to support projects in other departments, revenue distribution could be more balanced.\(^{16}\) One Committee member pointed to the 2008 funding of the construction of a
building to house the Fire Department’s historic 1916 Model T chemical truck as an example of this strategy.

While the potential threat of repeal calls attention to tensions within the town, Bowler’s action has presented the Committee with a new opportunity to take on “big projects that will impact the community.”¹⁷ Committee members believe that such projects, rather than projects that might be significant to the town’s historic identity but gain little attention, are essential for raising new awareness and convincing residents of the CPA’s benefits.¹⁸ For even as some residents might question the importance of the CPA, several Committee members agreed that many Hamilton residents still are unaware of the CPA. Coordinator Christine Berry writes articles, submits press releases, advertises for project proposals, and stays in regular contact with the Community Preservation Coalition, yet as Carey described, “nobody knows what it is in Hamilton.”¹⁹ If it is ever brought to vote, resident awareness will be essential to preventing a successful repeal.

Berry claimed, however, that the recent attention the CPA has received due to Bowler’s public request to repeal has actually been positive for community awareness, as many residents voice their support for the Act. Still, some Committee members agreed that open space preservation would always be funded in Hamilton, even if the CPA were repealed,²⁰ and Catalano indicated that historic preservation would still receive funding without the CPA. However, he doubted that affordable housing would receive any attention in Hamilton without the CPA.²¹ Repeal cannot be brought to a vote without a resident petition.

"The four luxuries are thrown out the window when you have to pay the electric bill."
Conclusion

Hamilton has funded a wide range of CPA projects, though the reduction of the State match has caused the Committee to spend less freely in recent years. Now that it has been five years since CPA adoption, “the CPC wants to fund a project that the town will rally around,” said Berry. Such a project could be the provision of lacrosse fields, or the realization of a proposed partnership with the Harborlight Community Partners. A collaboration with Harborlight would produce the first affordable housing units created by the CPA in Hamilton. The development of CPA-funded sports fields could also alleviate pressure on local youth leagues and reduce criticism of the Committee’s failure to fund projects for town schools. The Hamilton-Wenham School District would greatly benefit from such fields. Both project opportunities show the potential of the CPA to gain new town support and change the future of Hamilton’s landscape.
(Endnotes)

5 Edwin Howard, interview, March 5, 2010.
6 Ray Whipple, interview, March 5, 2010.
7 Christine Berry, interview, April 23, 2010.
9 Ray Whipple, interview, March 5, 2010.
10 Leigh Keyser, interview, March 5, 2010.
15 Dave Carey, interview, March 11, 2010.
17 Christine Berry, interview, April 23, 2010.
18 Dave Carey, interview, March 11, 2010.
19 Dave Carey, interview, March 11, 2010.
21 Christine Berry, interview, April 23, 2010.
chapter 6
quincy
Quincy has the distinction of being one of the few cities to have passed the Community Preservation Act. The CPA has been a powerful tool for resisting development and preserving Quincy’s community legacy, but there are challenges of implementation that must be considered in such a diverse, growing city. This study of Quincy’s experience with the CPA might assist other larger municipalities as they attempt to pass and utilize the Act.
Community Profile

Located on Quincy Harbor to the south of Boston, Quincy is a moderate-sized city with 92,339 residents. The city is easily accessible to Boston by public transportation. Quincy residents proudly note that their city is second only to Boston in number of historical sites. The city’s Colonial history is identified with the lives of John and John Quincy Adams, which has earned the city the moniker “City of Presidents.” Though the Adamses knew Quincy as an agricultural community, granite quarrying and shipbuilding became the primary industries in the city beginning in the 1830s. Preservation of the city’s unique Colonial, Industrial, and Maritime culture is an important priority for many residents.

The city retained its industrial character for much of the 20th century, serving as a site for steel production and shipbuilding during World War Two. The city also boasted an enviable network of open space into the late 20th century. A 1986 planning study of the city noted that “the availability and beauty of the many recreational areas and facilities enrich the lives of [Quincy’s] citizens.” Despite these amenities, economic opportunities have decreased over the past few decades, and the housing market has seen a dramatic fall since its peak in 2004-5. The city is currently undertaking a Downtown Revitalization plan to create a vibrant, walkable Quincy Center District. As Nancy Callanan, Director of Community Development for the city stated, the revitalization process is “essential for the health of the city of Quincy.”

A desire for affordable housing close to Boston has brought many new residents to the city over the past several decades. Though in 1986 the majority of Quincy residents had lived in their homes for 20-30 years, by 2006 over 75% had lived in
their homes for less than 20 years.\textsuperscript{6,7} With this change has come cultural diversity, as 20% of Quincy’s population is now Asian. The majority of these new residents are Chinese, many of them recent immigrants with little knowledge of English.\textsuperscript{8} The Boston Chinatown Community Master Plan refers to Quincy as “Chinatown South,” noting that Quincy’s Asian population is three times the size of Chinatown’s.\textsuperscript{9} Though Asian service organizations have begun to proliferate, integrating this new community into Quincy’s collective identity and planning vision is an important challenge for this changing city.

**Passing the CPA**

The Community Preservation Act in Quincy was championed between 2004 and 2006 by Steve Perdios, now Chair of the Community Preservation Committee. In his role as Spokesperson of the Quincy Environmental Network (QEN), Perdios was looking for ways to fund the preservation of open space. Perdios and the QEN felt that the fundamental character of the city was threatened by the massive growth of development, but knew that they were just “pounding the table talking about open space” if they didn’t have any funds to support land acquisition.\textsuperscript{10} Upon learning about the CPA, the group went to the Community Preservation Coalition for education and advocacy support. In the summer of 2005 they held a public meeting and gathered several hundred signatures in support of the CPA, but the City Council did not include it on the ballot that fall. Resistant Council members cited concerns about administrative costs and difficulties, the impact of the surcharge on taxpayers, and the perception of levying a new tax in a contested election year. Some members also believed that the CPA would not be helpful because the city had no open space left.\textsuperscript{11}
After this defeat, the QEN redoubled its efforts and launched a campaign to include the measure in the ballot for the following fall. Several newspaper articles published at that time supported the CPA. A *Patriot Ledger* article dated October 21, 2006 argued that in such a large community even a very small individual contribution would make a very big difference. Bolstered by this public support, the QEN was able to collect 4,000 signatures and Quincy passed the CPA with a 57% majority vote in November of 2006. Perdios credited the low surcharge (1%) and the exemption for the first $100,000 of property value with making the Act more palatable to voters.

According to both CPA advocates and the media, the Act was originally perceived and intended as an open space measure. Christopher Walker of the *Patriot Ledger* even referred to the Act as a “surtax for open space purchases” (September 28, 2006). Nonetheless, during the campaign for CPA passage, the QEN did attempt to form a coalition between advocates for all CPA areas by reaching out to the Quincy Historic Society, Quincy Community Action Programs (a social services organization that does work in affordable housing), South Shore Neighborhood Housing Services, and the Department of Parks and Recreation. Neighborhood Services was the only of these to provide substantial assistance in the advocacy process.\(^12\) The commitment to open space on the Committee persists: both mayoral appointments, one of whom is Perdios, are QEN members.

**Projects and Process**

**The First Year**

Perhaps reflecting its orientation towards open space, the CPC’s first major undertaking was

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<td><strong>Median Home Value</strong></td>
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<td><strong>Subsidized Housing Inventory</strong></td>
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*Figure 17: Quincy Demographics*  
*Sources: 2000 Census Data, City-Data.com, and DHCD Subsidized Housing Inventory*
to acquire three large open space sites totaling 18 acres. This project was a great success for the city and the Committee because it demonstrated the real power of the CPA to influence the character of Quincy’s landscape. $5.4 million was bonded over 5 years to fund the important acquisition. The Committee was conscious not to take on debt that would extend beyond the period in which the CPA was guaranteed to be active. It did not want, as member Connie Driscoll described, to “hold the citizens of Quincy hostage.”

Also notable in the first year was the allocation of $100,000 for restoration of the Souther Tide Mill, an historic mill that remains in a considerable state of disrepair but truly represents the city’s historic character. One CPC member noted that his father worked in the Mill his entire life. Though this project has been planned for over three years, as of April 2010 none of the funds have been used. The recent approval by the city’s Conservation Commission of a public rowing facility on an adjacent site has caused political controversy, as the two uses are viewed by some as incompatible. The Mill has also recently been in the public eye because it was nearly destroyed by storms in late winter 2010. Since the disaster, Perdios has resumed action to garner support for preserving the Tide Mill (Patriot Ledger, February 16, 2010).

### Allocation Process

Generally, members of the CPC agree about the mission and scope of its role in the city. Votes to fund projects are usually not initiated until the Committee reaches a consensus. New Committee Member Coleman Barry describes the project selection process as “comprehensive,” with lengthy, frequent

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<td>Open Space Expenditures</td>
</tr>
<tr>
<td>Recreation Expenditures</td>
</tr>
</tbody>
</table>

Figure 18: Quincy CPA Data
Source: MassGIS
Note: The above chart includes future CPA expenditures on bonded projects, such as $4,000,000 for an open space project.
meetings involving detailed discussion of each proposal. The Committee’s deliberation process could be described with three words: values, verbs, and visibility.

The Committee consistently and deliberately considers its values when deciding what projects to fund. These values, which may stem from the CPC’s origins in the QEN and the nature of the “organized advocacy population” in Quincy, include resistance against development and the preservation of the city’s unique Colonial, Industrial, and Maritime culture. These values are not expressed in a plan, but are clear in the language used throughout discussion. Individual Committee members seem equally disposed to preserving natural and historic resources in the community, and also to providing support for interpreting and cataloguing these resources.

Quincy’s CPC follows the provisions of the CPA enabling statute as thoroughly as possible by routinely referring to the “verbs” of the CPA. They consult a chart which describes the actions that may be taken in each program area. This conscientious process, along with the Committee’s decision to limit bonding to five years, portrays the image of a Committee careful and attentive to the spirit of the Act and the good of their community.

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### Determining Project Eligibility

**It’s all about the VERBS!**

<table>
<thead>
<tr>
<th>Acquire</th>
<th>Open Space</th>
<th>Historic</th>
<th>Recreation</th>
<th>Housing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create</td>
<td>Yes</td>
<td>-</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Preserve</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Support</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Yes</td>
</tr>
<tr>
<td>Rehabilitate and/or Restore</td>
<td>Yes – if acquired or created w/CPA $$</td>
<td>Yes</td>
<td>Yes – if acquired or created w/CPA $$</td>
<td>Yes – if acquired or created w/CPA $$</td>
</tr>
</tbody>
</table>

Source: quincyma.gov
Finally, the Committee considers the visibility of proposed projects out of a desire to show positive results to its constituents. It encourages CPA signage on projects, and phases long-term projects so that their most visible components are completed first. Despite these efforts, however, Committee members realize that public awareness about the CPA in Quincy is not as strong as it could be.

The City of Quincy often requests CPA allocations for the restoration of city buildings and for projects of particular importance to the Mayor or Planning Director. Most recently, the Planning Director sought funds for improvements to the North Quincy Branch Public Library, a mid-century Modern building that is used primarily as a community center for North Quincy’s Asian residents. After realizing that the project could not be funded with CPA recreation dollars, the Planning Director asked the CPC to fund the project with historic preservation funds. Though the CPC considered it unlikely that the Historic Commission would give historic status to a 1963 building, it gave the project the benefit of the doubt pending Historic Commission evaluation. Eventually, “the Mass Historic application was deemed too time consuming by the Planning Dept. and the project was funded by CDBG funds instead of the CPA.” This process illustrates the nuances of administering the CPA in Quincy.

**Notable Projects**

Though the $130,000 total that the CPC has allocated towards the project has not yet been touched, the Souther Tide Mill is a perfect example of the CPC’s focus on the preservation of Quincy’s proud history and unique environmental assets. The Mill, constructed in 1806, is one of the few remaining tidal grist and saw mills in the United States but is considered a “haven for homeless people” and an eyesore. The Mill’s need for stabilization became acute during flooding and storms of 2010, and as of writing the Committee is considering allocating “emergency funds” to stabilize the structure. The Committee created the emergency provision in 2009 to allow projects needing immediate
intervention to circumvent the official application process. Other notable historic projects include restoration of the historic La Farge windows in the Thomas Crane Public Library, preservation of municipal documents, funding for historic research surveys of the city, and several projects relating to Quincy’s founding fathers. According to Historic Commission representative Tony Ricci, advocates consider the CPA to be an incredible boon to the historic preservation agenda of the City of Presidents.¹⁸

Other important projects approved by the Committee have involved open space preservation and recreational facility enhancement, much of which has revolved around the creation of educational trail signage along Quincy’s waterfront. These projects underscore the Committee’s focus not only on enhancing spaces but also on emphasizing and interpreting Quincy’s unique resources. A major allocation in 2009 was $358,000 for the acquisition of Faxon Park, near the center of the city. Created by the Civilian Conservation Corps in the 1930s, the park has recently become threatened by encroaching developments such as “Avalon at Faxon Park.” (See Appendix M)

Challenges and Considerations

City Politics

In general, the obstacles and conflicts encountered by the Quincy CPC relate to the city’s diverse character, large population, and representative (rather
than direct, or Town Meeting) form of government. Although city politicians do for the most part support and appreciate the CPC, a two-year Mayoral cycle and a down economy have caused the city to apply to the Committee for projects only marginally related to the CPA. The city also has proved less than helpful in promoting CPA visibility, with the Committee receiving scant treatment on the city’s website and at times a perceived attitude in City Hall that is somewhere in between benign neglect and active ignorance. Nonetheless, all Committee members interviewed for this report emphasized that they never feel political pressure to fund projects and that their working relationship with the city is positive overall.

Prioritizing Open Space

The conflict between development and open space preservation is a challenge faced by many municipalities. While the QEN’s advocacy for open space was the impetus for enacting the CPA, some members of the Committee wonder whether the preservation of open space as an end goal is really worthwhile.\(^\text{19}\) The success of the QEN and the CPA, which are somewhat indistinguishable from one another, has led to an environment in which every abutter “with an empty unbuildable lot or parcel next door wants the CPA to buy it.”\(^\text{20}\) The feasibility and utility of acquiring scattered parcels in a mostly developed city has been questioned by some. Committee members expressed hope that over time, CPA funds will be used for more affordable housing and recreation projects, particularly if pending changes to the legislation are passed that increase flexibility for recreation spending.

Affordable Housing

CPA funding for affordable housing has been underutilized in Quincy. No proposals for affordable housing were made to the Committee in 2010. Over the past three years the Quincy CPC has allocated only $410,000 for affordable housing, compared to $8,322,600 for open space and $676,800 for historic preservation. Of that total, $385,000 was for two projects, both proposed by South Shore Neighborhood Housing Services, the housing organization that supported the CPA campaign in 2006.
Many interviewees discussed that soliciting affordable housing proposals was “like pulling teeth.” All Committee members expressed a desire to fund more affordable housing projects, and described that they have attempted to reach out to housing and veterans’ organizations. Some speculated that the lack of proposals was due to Quincy’s already significant affordable housing network, noting that the city has more than the ten percent affordable housing stock required by 40B. However, the city still does have an affordability problem: 35.5% of homeowners and 38.8% of renters in Quincy pay over 35% of their monthly income towards housing. The FY2008-2009 Action Plan notes that a priority housing strategy for the city is to “foster and maintain affordable housing for households at or below 80% of median.” Given these needs, even with HOME and CDBG funds “there is never enough money to go around” for all of the housing projects planned for the city.

Committee members also speculated that high capital costs and a general lack of technical “savvy” might limit the number of successful proposals for affordable housing. In its first year, the Committee received many “far-fetched” proposals for projects beyond the CPA’s funding capacity. Steve Perdios commented that “We have seen very few applications from affordable housing advocates because they are less organized, I think, than open space advocates. And there are fewer people and organizations geared up to implement an affordable housing project.” Several Committee members expressed hope that over time, organizations might learn how to craft better proposals, allowing the Committee to fund more projects.

“We have seen very few applications from affordable housing advocates because they are less organized, I think, than open space advocates.”
The Quincy CPC expressed a particular desire to fund housing for veterans and needy families. Much of the allocated funds to date have been dedicated to the creation of three veteran-designated units. At its March 2010 meeting, the Committee debated the relative merits of creating new and high cost affordable units as opposed to providing a large number of small subsidies to help “established Quincy families” prevent foreclosure. Committee members also showed a decided preference for assisting for first-time homebuyers, a desire in line with the city’s housing action plan. This discussion potentially reveals a desire to aid struggling Quincy families without encouraging or supporting new low-income residents. This issue is particularly palpable in a city where a large minority Asian population has recently begun to settle, and where a long-established low-income neighborhood (Germantown) continues to need services and affordable housing.

It is also possible that the Committee might not be reaching out to affordable housing providers as aggressively as its members describe. Nancy Callanan, Quincy’s Community Development Director, was not aware that the CPC was actively seeking more housing projects and was not receiving as many proposals as it would like. In fact, at the beginning of the interview she noted that she believed the CPA was doing as much as it could for affordable housing. She expressed that she was under the impression that the Committee designated most of their funds towards open space. She said that affordable housing nonprofits were aware that funds were available from the CPA, but they believed that there was not much funding available for housing. This communication breakdown should be considered an important lesson for the CPC in Quincy and any city with a large, social services-oriented sector to address.
Outreach and Community Engagement

Some members admit that outreach is a weakness of the Committee. Outreach practices include an annual announcement and presentation by Committee Chair Steve Perdios, newspaper announcements, and the aforementioned efforts at increasing visibility. Perdios also appears in a YouTube video that describes the benefits of the CPA for Quincy. However, it may be that all of these efforts are insufficient in a city as large and diverse as Quincy. Anecdotal evidence collected through research for this study indicates that many local service providers have little knowledge or understanding of the CPA’s potential to benefit them or their constituents. This presents a significant challenge to successful utilization of the CPA because the quality and quantity of proposals received by the Committee depends on the involvement of the advocacy infrastructure already in place in the city.

Even with successful outreach, there are challenges to administering a fund designed to preserve the character of a community where residents are increasingly diverse and may not share the same values or experiences. The discussion of the North Quincy Branch Public Library, for example, revealed that no CPC members had ever visited the site. Though the Committee believes in the importance of their work for the entire city, it may be that there are now more things of value to Quincy than its founding fathers, green spaces, and iconic waterfront. With no minority, specifically Asian, representation on the Committee and little outreach to non-English media sources, it is questionable whether the Committee is truly representing the full constituency of Quincy.

Conclusion

Despite recent attention to the Souther Tide Mill in the Spring of 2010 and the impacts of the economic downturn on municipal finances, the Community Preservation Act in Quincy has generally receded from public discourse since its passage in 2006. A pair of opposing editorials regarding the CPA published by the Patriot Ledger in the fall of 2009 represent the extent of
recent public comment. Though city residents appear to know little about the Act, the Committee believes that the city of Quincy would be fundamentally different today without it. The ability to preserve major parcels of open space is a powerful legacy for the Committee’s first years, and members credit their successful projects with increasing the quality of life throughout the city. Increasing public awareness, finding ways to provide much-needed affordable housing in the city, and incorporating Quincy’s diverse population into the process will be the Committee’s primary challenges in years to come.
(Endnotes)

1 Citydata.com
2 City of Quincy. Quincy Planning Study (Quincy, MA: City of Quincy, 1986).
4 Department of Planning and Community Development. An Urban Renewal Plan for the Quincy Center Urban Revitalization District (Quincy, MA: City of Quincy, 2009).
5 Nancy Callanan, interview, March 25, 2010.
7 City of Quincy. Quincy Planning Study (Quincy, MA: City of Quincy, 1986).
15 Steve Perdios, correspondence, April 23, 2010.
16 Quincy CPC Meeting, March 18, 2010.
17 Tony Ricci, correspondence, April 21, 2010.
26 Steve Perdios, correspondence, April 23, 2010.
27 Nancy Callanan, interview, March 25, 2010.
chapter 7
findings and recommendations
Findings and Recommendations

The five municipalities studied for this report reflect the diversity and dynamism of CPA communities throughout the Commonwealth. From rapidly growing, family-oriented Hanover to proudly historical, recently changing Hamilton, CPA communities are clearly passionate about their history and determined to plan for a successful future. While the team’s findings indicate that there remain some challenges, it is clear that the Community Preservation Act is a deeply valued and important tool for communities to make vital planning decisions about community resources.

Findings

Findings respond to the six central research questions asked during the team’s interviews. They reflect the value and success of the CPA in each case study community, as well as some of the challenges the Committees face and how they attempt to overcome them.

What are the factors that led to the community’s adoption of the CPA?

While the reasons for passing the Community Preservation Act varied between communities, most communities had a clear goal in mind. Quincy and Hanover saw the Act as a weapon to combat development and preserve open space; Hanover and Needham valued the Act’s potential to create new recreational resources for youth and families. Several communities built strong coalitions of advocates in multiple core program areas, and this further strengthened their campaign. Needham also saw the value of the Act to help with the creation of affordable housing and the restoration of its historic City Hall. All communities valued the potential to fund historic preservation projects through the Act.

Successes in other towns influenced all study communities to pursue the CPA, and all case study communities attempted twice before the Act was successfully adopted. Hanover, for example, was inspired by the success
of the CPA in Norwell. Interviewees in Maynard indicated that they were hesitant to advocate for CPA adoption until there was evidence that nearby towns had found it valuable. Needham and Hamilton also experienced success only after opponents were convinced that enough other towns would be able to provide guidance. Quincy succeeded only after direct grassroots appeal to voters.

The ability to receive State matching funds and increase revenue for public projects was also a frequently noted incentive that led to community adoption. Larger communities such as Hanover and Quincy noted their ability to raise large amounts of funds with relatively low individual contributions. Maynard interviewees expressed a desire to benefit from the matching funds to which they had already “paid in” through their Deeds fees. Both Maynard and Hamilton valued the CPA as a way to fund projects that would be otherwise ignored in a town with little disposable income. Several communities cited the importance of being able to determine their surcharge and exemptions in order to minimize the Act’s effect on individual taxpayers.

**What did stakeholders expect of the CPA, and have those expectations been met?**

Communities that had a specific goal in mind, such as Hanover and Quincy’s interest in open space or Needham’s renovation of Town Hall, were all able to achieve those goals and felt that their expectations had been met. These communities also funded other projects that they believed improved quality of life. Interviewees in all case studies said that most if not all of the projects funded by the CPA would not have received monies without the Act.

All case study communities indicated that the support of the Community Preservation Coalition was essential to the continued success of the CPA. Support was especially useful for navigating the difficult language of the legislation and its allowable uses.

Stakeholders in several communities noted that the decrease in State matching funds was of concern, though interviewees in Quincy and Maynard
said that any amount of matching funds was helpful. Hamilton interviewees noted that changes in the State match weakened the community’s trust of the Act and belief in its effectiveness. The overall effects of the recession have also increased tensions surrounding taxes and government funding in several of the study communities, including Hamilton and Hanover.

**What benefits does the CPA bring to the community? Are these benefits quantifiable?**

In all case study communities, interviewees believe that the CPA adds value to their communities, but this value was hard to quantify. Phrases used include “quality of life,” “added value,” and “proud,” and many communities expressed the value for citizens to see the big projects that their small contributions make possible. The value that the CPA has added to Hanover “can’t be measured in dollars. They’re the things that improve the quality of life in a community.” An interviewee in Needham praised the CPA by expressing that “the projects that get funded are very visible to the community and add value to Needham. I think the community is pleased to know they are saving up for those things.”

Several communities appear to favor funding many small projects over supporting few large projects. For Hamilton and Maynard, this is a result of both the modest tax base in the town and the fiscally conservative nature of the CPC. Communities additionally noted that they wanted the CPA’s benefits to reach as many people as possible. Needham, Quincy, and Hanover have all undertaken at least one large project funded in part by municipal bonds; the impact of Needham’s Town Hall and Hanover’s King Street recreation area on public visibility highlights the power of these large projects.

**What factors determine the community’s allocation of funds to the core program areas?**

Several Committees experience a deficiency of acceptable or desirable proposals in at least one of the core program areas. This may be attributable to a lack of public awareness, a lack of savvy for creating proposals, or a lack
of understanding about the potential of the CPA. Many Committees receive a significant number of their proposals from the City or Town government itself, and Maynard for example has expressed that they would like to see more proposals from nonprofits and community groups. Quincy receives very few proposals for affordable housing. Most towns do not have an allocation plan beyond the minimum required by the legislation, though it is clear that each Committee has an ethos that informs their allocation decisions and approach to projects. Hanover, however, has created commission plans for each core program area to guide decisions. These plans do not designate any funding allocation requirements beyond the requisite 10%, but they do seem to contribute to the success of the CPA in the town. Hanover is also the only case study town to have successfully created a project that combines multiple CPA program areas; other towns have encountered opportunities for such projects but have not been able to take advantage of them.

Committee members in most study communities believe that increasing the visibility of CPA projects will improve the number and quality of project proposals and benefit the Committee and community. However, visibility in different communities varies. In Hanover and Needham, several CPA projects have been extremely visible and interviewees indicated that the average citizen is very aware of the Committee’s work as a result. In Quincy, the Committee indicated that they were very interested in promoting visibility through their projects, but the diversity and size of the city presents a challenge to accomplishing that goal. Maynard and Hamilton have to date produced only small projects, and struggle with increasing visibility.

Many CPCs struggle to balance public opinion with their own view of stewardship as they make their funding allocation decisions. For example, common to many of the case study communities was a tension between funding for historic preservation or open space, and funding for recreation. These two areas in several communities seem to represent a subtle conflict that exists between lifelong residents and newcomers. Hamilton’s experience with the threat of repeal because of the CPC’s reluctance to fund school projects is the extreme case of this dynamic, but several other studies revealed similar struggles of a subtler nature.
Data on these funding allocation decisions, including the designation of program areas and allowable uses, are very inconsistent between towns. Such discrepancies make tracking and analyzing funding decisions very difficult, and also prohibit effective comparison between CPA communities.

*What has been the experience regarding the use of CPA funds for affordable housing?*

Research showed that developing affordable housing often requires access to expertise beyond the scope of what is available to communities, particularly smaller towns. Maynard consistently cited a lack of local expertise to advise the development of affordable housing, and Hamilton contracts out any affordable housing development to the Ipswich Housing Authority. Needham, on the other hand, is fortunate to have a group of housing experts in the community as well as a non-profit organization working to increase the number of affordable homes in the community. These circumstances are reflected in the allocation data for these communities.

Funding is also a significant limitation to the ability of communities to produce affordable housing. In cash-poor towns such as Maynard and Hamilton, creation of affordable units is simply too expensive to be a reasonable goal. The towns that had particular success with affordable housing, Needham and Hanover, were also aided by the availability of town-owned land. Developing on this land significantly reduced the capital requirements for affordable housing creation.

As previously noted, absence of viable affordable housing proposals is a challenge in several study communities. In Quincy, this absence is in spite of a large affordable housing infrastructure within the City and an active Community Development Department. Several communities noted that the CPA was a valuable tool that enabled them to create affordable housing according to local goals and capabilities.
Is there a long-term need for the CPA in the community? Why or why not?

Interviewees in all case studies agree that there is a long-term need for the CPA in their communities. The power of the CPA to fund projects that would otherwise not receive funding, and the success noted by all communities in accomplishing the intended goals of the legislation, certainly support this. However, public enthusiasm and awareness for the Act tends to subside in the years following the initial vote. In Needham and Hanover, long-term bonding commitments make continuation of the CPA necessary to fund debt repayment, suggesting that bonding may be used as a political tool for keeping the CPA in place and in public view. Quincy Committee members specifically avoided this prospect, choosing to bond for only the five years during which the CPA is guaranteed.

Declining state matching funds and the current economic crisis affected case study communities differently. The decreased state match has lessened the financial incentives and political appeal of the Act in study communities such as Hamilton. Other communities noted the benefits of the CPA to provide funding for projects in spite of declining municipal tax revenues, and the opportunities to contract projects at lower prices in a weak economy. Several Committees experienced some level of pressure from the municipal government to fund government projects that had been strained by declining tax revenues.

In Maynard and Quincy, where the CPA is relatively new, Committee members feel strongly about the long-term need for the CPA but the general community seems to be unaware of the CPA’s value. These circumstances may affect perception of long-term need in the future, though Committee members are confident that the success of their projects will convince constituents of the value and power of the CPA.
Recommendations

The team’s analysis of the findings yielded five core policy recommendations. These recommendations are aimed at the three stakeholders that were identified in the project goals: the Clients, communities that have passed or are considering passing the CPA, and government decision makers. The team created a separate “recommendation fact sheet” for each of these stakeholders, which can be distributed with the executive summary for advocacy and information purposes. These also include a “toolkit” that outlines opportunities to increase community engagement. (See Appendix M-Q) The recommendations focus on the challenges of capacity, information, and community awareness that were identified by the findings.

Some changes to the legislation should be considered.

A minimum state match must be guaranteed in order to maintain the power and appeal of the CPA. The team’s findings indicate that State matching funds are an important incentive for passage of the CPA, and an attribute of the legislation greatly valued by CPA communities. Guaranteeing match funds will allow communities to plan ahead and maintain trust in the State’s support for their projects. Additionally, clarifying the allowable uses would allow the Coalition to focus its efforts on advocacy and training, and would minimize the possibility of misapplication of CPA funds.

Information about the CPA should be more accessible and available.

Communities should share their challenges and best practices. Since case study communities all noted the importance of seeing successful use of the CPA in other towns, a clear and available way to share and access information should increase the appeal of the Act throughout the Commonwealth. In order to ensure that information is shared successfully, stricter standards and clearer guidelines for data recording and reporting are essential. Without such requirements, the ability of communities and the Coalition to evaluate challenges and successes is significantly limited. Another key element of
information accessibility and availability is an attractive and easy-to-navigate online interface. Clear presentation of CPA community data would enhance the information sharing that helps all Committees make successful decisions. Available online data will also increase citizen awareness of CPA decisions and improve the accountability of Committees to their constituents; online accessibility is a key to taxpayer trust. The team recommends that the Coalition consider creating a website template that communities can use to present their CPA information without a great deal of funding or expertise.

**CPA cities and towns should work together.**

A regional approach to the CPA would increase the opportunities for many cities and towns. Small, low-density towns are often unable to raise the capital necessary to execute any more than very small project. Other towns experience barriers in designating open space due to lack of available land, or in building affordable housing due to lack of affordable, available land or development expertise. Collaborating regionally to share resources and allocations could strengthen the power of the CPA and enable regions to make more effective changes to their landscapes. Regional collaboration could also enable information sharing.

**Affordable housing resources should be increased.**

Communities need technical support and advocacy to help them create successful affordable housing projects. All communities studied expressed a desire to create affordable housing for valued residents such as veterans, the elderly, teachers and policemen. However, only two of the five case study communities successfully created affordable housing projects to their satisfaction. Without more support to develop coalitions, solicit proposals, and create successful project plans, CPA communities will continue to underutilize their affordable housing resources.
The Coalition and local CPA Committees should reconsider their role in communities.

Community engagement should be viewed as an essential component of Coalition and Committee activity. Community engagement should involve two components: outreach to residents to build support and awareness of CPA projects, and community process to identify collective assets and develop a set of values for the Committee to uphold. The team’s research showed that in communities without a strong public outreach effort, interest and awareness of the CPA wanes in the years after the Act is passed. This might affect the nature and number of successful proposals submitted to the Committees, and also encourage CPA opponents to propose repeal of the Act. Now that the CPA has been in place for ten years, emphasis must be shifted from developing support for passage of the CPA to engaging citizens to support their Committee’s progress. Furthermore, some case study communities demonstrated a level of disconnect between the values held by the CPC and their constituents. Since the Act is intended to empower communities to plan for their futures in a way that honors their collective values, it is essential that Committees truly understand what their constituents value.

To ensure that community engagement efforts are successful, the team suggests that the Coalition dedicate resources to training Committees to engage their constituents. The team also encourages Committees to view themselves not only as stewards but as community advocates. Techniques for building support and awareness should include community meetings, multi-lingual outreach materials, improved signage, and diverse media campaigns. Building a community-wide, asset-based preservation agenda should involve strategies such as asset mapping and collective visioning. A stronger focus on community engagement will limit the possibility of repeal battles and ensure that the Act fulfils its potential to preserve and maintain the vital community assets of Massachusetts’s diverse cities and towns.
Further Research

This 10th anniversary study provides a useful perspective on the challenges and successes that CPA communities experience. However, there are more opportunities for research that would further enhance understanding of the Act. First, a similar study of communities beyond I-495 would provide the statewide perspective that this study, focused on the Boston Metro Area, cannot. Attention to the experiences of rural communities would be especially instructive. Second, a study of communities that did not vote to pass the CPA would help advocates understand what hurdles communities must overcome before they consider the CPA to be attractive or worthwhile. Such a study might be particularly revealing because Sunderland’s CPA initiative did not pass its vote in Town Meeting on May 1, 2010. Third, a quantitative study that focuses specifically on municipal finance data would better reveal how communities use the 10% minimum requirement each project area, CPA reserve accounts, and bonding practices.

Finally, direct-to-citizen research, involving surveys and focus groups, would help stakeholders understand how individual constituents view the CPA. Reaching out to local nonprofits and advocacy groups could also help stakeholders understand how the CPA is valued by those not directly involved in the allocation and decision making process. In the future, the Coalition might be able to use such research to develop ways to educate citizens throughout the Commonwealth about the possibilities of the Community Preservation Act to enhance, preserve, and sustain what they value in their communities.

“There is absolutely a need for the CPA. There are more affordable housing needs to be met, there are more open space needs to be met….If the CPA isn’t there then some of those projects just don’t get done.”
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appendices
Appendix A: Legislation

The Community Preservation Act (CPA) was enacted by the Massachusetts legislature on September 14, 2000. The policy was designed to as a tool to enable municipalities to create and preserve vital community resources in four program areas: open space, historic preservation, affordable housing, and recreation. Municipalities adopt the Act by popular vote, initiated by legislative majority or referendum. The CPA allows participating communities to levy a property tax surcharge of between 0.5% and 3.0% to be put in a dedicated fund, which is then allocated between the three core program areas and recreation. Communities then receive matching funds from the state, which are raised from transaction fees levied by the Registry of Deeds. Open space, historic preservation, and affordable housing must receive at least 10% of the funds, with the remaining 70% divided among appropriate uses or saved at the town’s discretion. Up to 5% may be used for administration.

Each CPA community must form a local Community Preservation Committee, whose 5-9 members must include representatives from the Conservation, Parks, and Historical commissions, the Planning Board and the Housing Authority. The Committee studies and evaluates proposed uses for the CPA funds in the program areas and makes funding allocation recommendations to the municipal legislative body. Projects are proposed by involved residents, non-profit organizations, and municipal departments.

A bill to amend the CPA is currently under consideration by the Massachusetts legislature that will provide CPA communities with additional flexibility. If passed, the amendments will increase the annual minimum CPA trust fund match to 75%; allow communities to combine a traditional 1% CPA property tax surcharge with up to 2% of other municipal revenue in order to fund their local CPA account, which will provide a higher level of state matching funds; provide a new optional commercial exemption for the first $100,000 of property value for commercial and industrial properties, which
will benefit small businesses; and allow communities to rehabilitate existing outdoor parks and other recreational resources. Currently rehabilitation projects are restricted to recreational resources that were acquired or created with CPA funds.¹ The perceived value of the amending legislation is extremely high in many CPA communities. Many individuals, local officials, and non-profit organizations have advocated heavily for its passage, as it is widely considered to be essential to the CPA’s long-term viability.

(Endnotes)

Status of Community Preservation Act Adoption

- CPA Passed Through a Local Referendum
- CPA is on an Upcoming Ballot

Last Updated: 5.3.2010

Source: Community Preservation Coalition
Appendix C: CPA State Match Chart
Appendix D: Literature Review

In 2006, a study of the CPA’s impact on affordable housing was published by the Massachusetts Housing Partnership. Using a case study approach, author Ann Dillemuth asserts that CPA funds have primarily been designated to preserve existing affordable units, while very little CPA funding has gone to create new units. Also, it indicates that the presumably equitable distribution of CPA resources in its first five years misrepresents affordable housing because of Cambridge’s disproportionately high allocations in that area.

In July 2007, Harvard University’s Rappaport Institute for Greater Boston issued a study that generated significant controversy among CPA advocates. *The Massachusetts Community Preservation Act: Who Benefits, Who Pays?*, by Robin Sherman and David Luberoff, executive director of the Rappaport Institute, challenged the CPA’s equity, efficiency, and transparency. The study suggests that the CPA’s state match mechanism essentially transfers money from the state’s poorest and most populous communities to its more affluent cities, suburbs, and resort communities. The report also contends that data reporting requirements are inadequate and inefficient and that those deficiencies, along with low transparency and accountability, have weakened the overall effectiveness of the CPA.

Another 2006 study, appearing in the Journal of Planning Education and Research, took a different approach to the CPA. “Implementing Growth Management: The Community Preservation Act” by Elisabeth M. Hamin, Margaret Ounsworth Steere, and Wendy Sweetser explores the Act’s function as a smart growth tool that empowers local communities to make sustainable growth decisions in the absence of a statewide smart growth plan. The study reflected the importance of flexibility and local independence for the CPA’s success.
The Community Preservation Act was also featured in a chapter by Matthew Zieper in the 2010 book *Conservation Capital in the Americas: Exemplary Conservation Finance Initiatives*. The chapter presented a comprehensive history of the CPA and offered a detailed review of the policy’s impacts and successes. Also highlighted were components of the CPA that could be applicable to public land conservation efforts in other parts of the United States, in particular the aspects of the legislation that enable communities to shape their own growth and future development. The chapter praised the CPA particularly for its flexibility and focus on local autonomy.

(Endnotes)

1 Dillemuth, Ann. The Community Preservation Act and Affordable Housing in Massachusetts: Learning from the First Five Years (Boston, MA: Massachusetts Housing Partnership, 2007).


Appendix E: List of Interview Questions

IDENTITY | Describe your town. Give me your impressions of the makeup of this town. What makes this community special? What do you value in your town? What is valued?

How did you get involved with the CPC?

How would you describe the people that make up this community?

What is your vision for Hamilton? How do you imagine the town’s future?

Give me a sense of your town’s history. What is the cultural significance of the town?

CULTURE-HISTORY-SENSE OF PLACE-IDENTITY

MOTIVES | What are the factors that led to the community’s adoption of the CPA?

Who was in charge of the campaign? What are their interests?

For the residents that did not want to adopt the CPA, what were their primary arguments/concerns?

What are the predominant non-profit organizations, businesses that push community involvement or have specific agendas that match CPA projects?

How did your community determine the exemptions and surcharge level?

PERCEPTIONS AND EXPERIENCES | What are the perceptions of local government officials about the CPA? Of local citizens?

What were your expectations of the CPA when it was passed? Have they been met?

How have people reacted to the CPA decisions within your community? Generally have there been positive responses from citizens? Negative? Or none at all

If you didn’t have the CPA, what do you think the city would be doing for affordable housing? Open space? Historic preservation?

To what extent do you think the average citizen of your city/town is aware of or cares about the CPA? The local CPC’s capabilities
Do decision makers make an attempt to communicate the value of CPA projects to the community? If so, do you think this is successful?

What positive experiences have you had with the CPA?

What negative experiences have you had with the CPA?

**VALUE** | What value do you think the CPA adds to the community? Is this value quantifiable, or is it more a general perception, such as changes in quality of life?

Do you think the CPA has helped enhance your community’s understanding of its history?

What nonprofits/intervening organizations have a stake in the CPA areas in your community? How have non-profits been involved in the process to acquire CPA funds?

As far as housing goes, what thoughts have consultants passed on in regards to the community and potential projects?

**ALLOCATION** | What factors led to the community’s allocation of funds to the different core program areas? Does the community have a CPA plan to guide its decisions, or are funds allocated in response to whatever projects are presented (e.g. are the community’s decisions proactive or reactive)?

How much money is in reserves for each core concern?

How will the community spend the pooled CPA money to meet is core goals if the funds have not been used yet? Is there an intended use for such pooled funds?

What is the turnout of the CPC town meetings? Who comes? Who or what are they interested in and associated with?

What prompts project acceptance in your town?

Generally, who makes up the applicants for CPA projects?

**AFFORDABLE HOUSING** | Of the core program areas, affordable housing is sometimes seen as the most controversial. What has the experience been regarding affordable housing in the community?

In your mind, how can towns meet their affordable housing goals? What would be the best implementation method?
Who is the affordable housing watchdog within this community? How strong are affordable housing advocates in the town/city?

Do you think that people would be receptive to combining affordable housing projects with other core program areas (ie, affordable housing adjacent to recreation, or in an historic building)?

**TAKING THE BROAD VIEW | Is there a long-term need for the CPA in the community?**

**Why or why not?**

How often or do you use the CPC’s services to help guide you through a project? Or do you ever look into the CPA work of other communities?
Appendix F: List of Interviewees

The case studies detailed in the report relied heavily on information provided by stakeholders in each community. Below is a list of individuals interviewed for each case study. A number of subjects chose not to be identified in this report, and other individuals were consulted outside of formal interviews. These sources are not listed. An asterisk (*) indicates that the subject is a member of the local Community Preservation Committee.

**Hanover**
Diane Campbell*
Mary Dunn
Margaret Hoffman
Peter Johnson*
Hal Thomas
Doug Thomson

**Maynard**
Jane Audrey-Neuhauser*
Carolyn Britt
Peggy J. Brown*
Sally Bubier
Brendon Chetwynd
C. David Hull*
Jack MacKeen
Doug Moore*

**Needham**
Janet Bernado*
Partrica Carey
Jack Cogswell*
Richard Gatto
Lee Newman
Sheila Pransky*

**Hamilton**
Christine Berry
Dave Carey*
Tom Catalano*
Edwin Howard *
Leigh Keyser*
Ray Whipple*

**Quincy**
Coleman Barry*
Nancy Callanan
Connie Driscoll*
Steve Perdios*
Tony Ricci*
Appendix G: Methodology

In order to examine the central research questions posed by this study, the team utilized case-study methodology. Although time and travel constraints prevented the examination of the CPA across the State, the team nonetheless wished to develop an inquiry that was as comprehensive as possible. Therefore, the selection process began with the aim of compiling a group that was roughly representational of all CPA communities in terms of income, density, and location.

The team began by applying a series of limits to all Massachusetts municipalities that had adopted the CPA. First, the team eliminated communities beyond Interstate 495 in order to ensure ease of access by team members. In doing so, the original goal of choosing communities roughly representational of the State as a whole shifted to instead choosing communities representational of CPA communities in the Boston Metro Area. This shift would prove significant when examining the income and density of each community, as median income and average density differ significantly in certain parts of the State. Second, communities which adopted the CPA after 2006 were excluded so that each potential case study had completed at least one CPA-funded project. Finally, certain cities and towns were eliminated for one of three reasons: they were studied by the 2009 Field Projects team, potential conflicts of interest existed due to Project Team or Client ties, or the Clients requested that they be excluded due to “unique circumstances.”

After applying these limits to the study pool, the team proceeded to the actual selection process. Many variables were considered as determining factors, including ethnic and racial makeup, average educational attainment, CPA funding structure, median income, and density. The latter two were chosen as the primary sorting factors. In addition, the Clients requested that at least one city be selected. Only two cities remained in the study pool and since Quincy is more accessible by public transit, it was chosen as the first case study.
The remaining case studies were to be towns. The team decided on income as the most important sorting factor and determined that the distribution of median incomes of these case studies should be roughly proportional to that of all CPA communities in the Boston Metropolitan Area. Since these communities tended to have high median income, the team decided to select three towns above median and only one below. The remaining study pool was thus divided into two groups: below median income and above median income.

The first group, towns with incomes below the metropolitan median, contained nine communities. The accessibility of each by car and commuter rail was considered, and based on this factor Maynard was chosen. The second group, towns with income above the metropolitan median, consisted of twenty three communities. This group was further divided into three subgroups according to density. One town from each subgroup was to be chosen, assuming these choices were dissimilar in terms of income and location. The team selected Lexington, Needham, and Hamilton as the final three case studies.

Upon submitting the initial case study selection to the Clients, they expressed concern that the chosen communities were heavily concentrated in MetroWest and suggested that Lexington be replaced by a town on the South Shore in order to include a high-growth community. Since the CPA can be used as a powerful tool to combat development and promote smart growth, it seemed important that one case study reflect these particular challenges. As a result, the team chose to replace Lexington with Hanover, creating a final list of Hamilton, Hanover, Maynard, Needham, and Quincy.
Please note: any variation in data between sources reflects the need for strong and consistent data reporting requirements. This is one of the report’s recommendations.
Hanover CPA Expenditures

- Affordable Housing: 12%
- Historic Preservation: 14%
- Open Space: 18%
- Recreation: 56%

Needham CPA Expenditures

- Historic Preservation: 92%
- Affordable Housing: 6%
- Recreation: 1%
- Open Space: 1%
Appendix H: Funding Allocation Pie Charts
<table>
<thead>
<tr>
<th>Year</th>
<th>Type/Description</th>
<th>Status</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>Affordable Housing &amp; Historic Preservation</td>
<td>In Progress</td>
<td>$150,000</td>
</tr>
<tr>
<td></td>
<td>Renovation and restoration of a farmhouse for community housing at 645 Center Street,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>Affordable Housing</td>
<td>Planning Stage</td>
<td>$275,000</td>
</tr>
<tr>
<td></td>
<td>Transfer funds to Hanover Affordable Housing Trust Fund to develop affordable community housing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>Historic Preservation</td>
<td>In Progress</td>
<td>$60,000</td>
</tr>
<tr>
<td></td>
<td>Fund a study to evaluate the building needs of the historic Town Hall, the John Curtis Free Library, Stetson House, the Curtis School, and the Council on Aging/Grange Hall, including historic preservation and any necessary repairs. This study is part of a full town building needs study.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>Historic Preservation</td>
<td>Planning Stage</td>
<td>$40,000</td>
</tr>
<tr>
<td></td>
<td>Develop needs assessment of the historic town-owned cemeteries and create a plan for restoration and preservation.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>Historic Preservation</td>
<td>Planning Stage</td>
<td>$45,000</td>
</tr>
<tr>
<td></td>
<td>Preservation of historically important town documents by scanning documents and preserving originals.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>Historic Preservation</td>
<td>In Progress</td>
<td>$13,040</td>
</tr>
<tr>
<td></td>
<td>Continue the work by the Historical Society for the restoration and care of the historical collection.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>Open Space</td>
<td>Planning Stage</td>
<td>$10,000</td>
</tr>
<tr>
<td></td>
<td>Funds to be used by the Open Space Committee for appraisals, surveys, and technical or legal assistance which may be needed in connection with open space preservation projects.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>Historic Preservation</td>
<td>In Progress</td>
<td>$275,000</td>
</tr>
<tr>
<td></td>
<td>Abate asbestos tiles and re-tile floors at the Sylvester School, one of the Town’s historic buildings.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>Historic Preservation</td>
<td>Complete</td>
<td>$1,250</td>
</tr>
<tr>
<td></td>
<td>Fund restoration and repair of the Stetson House Cobbler Shop roof.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>Historic Preservation</td>
<td>In Progress</td>
<td>$15,400</td>
</tr>
<tr>
<td></td>
<td>Preserve and improve the structural integrity and enhance security of the physical structures of the Stetson House, one of the most historically significant properties in Hanover, and its adjacent buildings; restoration and/or protection of all of the contents within each building.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>Open Space</td>
<td>In Progress</td>
<td>$13,410</td>
</tr>
<tr>
<td></td>
<td>Improve trails on conservation parcels throughout town, including but not limited to Colby Phillips, Luddam’s Ford, Project Dale, Factory Pond, Merry Property, Clark Bog, French’s Stream, Willow Road and Plain Street.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>Recreation</td>
<td>Planning Stage</td>
<td>$2,500,000</td>
</tr>
<tr>
<td></td>
<td>Engineering and construction of new recreation infrastructure and fields at King Street site.</td>
<td></td>
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</tr>
</tbody>
</table>
### Hanover CPA Projects

<table>
<thead>
<tr>
<th>Year</th>
<th>Type/Description</th>
<th>Status</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>Affordable Housing  &lt;br&gt;Fund the Legion Drive Housing Authority feasibility and site study.</td>
<td>Complete</td>
<td>$32,000</td>
</tr>
<tr>
<td>2007</td>
<td>Historic Preservation  &lt;br&gt;For restoration of the John Curtis Free Library exterior front wood columns.</td>
<td>Complete</td>
<td>$10,260</td>
</tr>
<tr>
<td>2007</td>
<td>Affordable Housing, Historic Preservation &amp; Open Space  &lt;br&gt;645 Center Street: To acquire a parcel of land for use as open space and affordable housing (potentially with Habitat for Humanity), including preservation of historic barn and house, and conversion to two housing units.</td>
<td>Complete</td>
<td>$800,000</td>
</tr>
<tr>
<td>2006</td>
<td>Affordable Housing  &lt;br&gt;Preparation of a Housing Plan for the town which is fully compliant with DHCD and 40B guidelines for the preparation of “Affordable Housing Plans” and “Planned Production”.</td>
<td>Complete</td>
<td>$35,000</td>
</tr>
<tr>
<td>2006</td>
<td>Historic Preservation  &lt;br&gt;Preparation of a Historical Preservation Plan for the town in conjunction with the town’s Master Plan update, and Recreation and Open Space Plan update.</td>
<td>Complete</td>
<td>$20,000</td>
</tr>
<tr>
<td>2006</td>
<td>Open Space  &lt;br&gt;Preparation of a new five-year Recreation and Open Space Plan for the Town</td>
<td>Complete</td>
<td>$17,500</td>
</tr>
<tr>
<td>2006</td>
<td>Recreation  &lt;br&gt;Preparation of a new five-year Recreation and Open Space Plan for the Town.</td>
<td>Complete</td>
<td>$17,500</td>
</tr>
<tr>
<td>2006</td>
<td>Recreation  &lt;br&gt;Preparation of a needs assessment, feasibility study, conceptual design, and cost estimate for new and improved recreational fields and related facilities at the King Street (Cervelli) property.</td>
<td>Complete</td>
<td>$35,000</td>
</tr>
<tr>
<td>2006</td>
<td>Open Space &amp; Recreation  &lt;br&gt;Acquire the King Street (Cervelli) property, the premium piece of large open space remaining in Hanover. Approximately half of this property is high quality open farmland which would provide ample active recreation space. The back area is ideal for walking trails and would provide a connection between several large conservation properties creating nearly 300 acres of contiguous, town-owned open space.</td>
<td>Complete</td>
<td>$1,430,000</td>
</tr>
</tbody>
</table>

Source: Community Preservation Coalition
<table>
<thead>
<tr>
<th>Year</th>
<th>Type/Description</th>
<th>Status</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>Affordable Housing</td>
<td>Planning Stage</td>
<td>$25,000</td>
</tr>
<tr>
<td></td>
<td>Hire a housing consultant to assist in formulating substantive and procedural requirements to meet the town’s Affordable Housing Plan goals.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>Affordable Housing</td>
<td>Complete</td>
<td>$25,000</td>
</tr>
<tr>
<td></td>
<td>Provide funds to non-profit Charles River Center to replace windows and doors in six 40B units for residents with developmental disabilities.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>Affordable Housing</td>
<td>In Progress</td>
<td>$370,000</td>
</tr>
<tr>
<td></td>
<td>Provide funds to Needham Housing Authority to bring the final four of 20 units at High Rock Estates down to 80% area median income from 110%. This was part of a project previously funded by CPA.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>Historic Preservation</td>
<td>Planning Stage</td>
<td>$14,029,233</td>
</tr>
<tr>
<td></td>
<td>Construction and renovation of the historic Town Hall.</td>
<td></td>
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</tr>
<tr>
<td>2009</td>
<td>Open Space</td>
<td>Complete</td>
<td>$50,000</td>
</tr>
<tr>
<td></td>
<td>Transfer funds to Needham Conservation Fund to allow Conservation Commission to respond promptly to open space and land management opportunities.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>Recreation</td>
<td>Planning Stage</td>
<td>$25,000</td>
</tr>
<tr>
<td></td>
<td>Compile legal information related to existing easements to trail systems throughout Needham.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>Historic Preservation</td>
<td>Complete</td>
<td>$1,000,000</td>
</tr>
<tr>
<td></td>
<td>Design funds for the preservation and renovation of Town Hall, built in 1902.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>Open Space</td>
<td>In Progress</td>
<td>$5,500</td>
</tr>
<tr>
<td></td>
<td>Preservation projects as outlined in the Trails Master Plan.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>Open Space</td>
<td>Complete</td>
<td>$25,000</td>
</tr>
<tr>
<td></td>
<td>Transfer funds to Needham Conservation Fund to allow Conservation Commission to respond promptly to open space and land management opportunities.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>Affordable Housing</td>
<td>Complete</td>
<td>$175,000</td>
</tr>
<tr>
<td></td>
<td>Subsidize a portion of the construction costs of the High Rock Estates project in order to increase the number of units that can be sold at 80% or less of the area median income.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>Historic Preservation</td>
<td>Complete</td>
<td>$50,000</td>
</tr>
<tr>
<td></td>
<td>Conduct a feasibility study analyzing options for renovating the Town Hall.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>Open Space</td>
<td>In Progress</td>
<td>$12,000</td>
</tr>
<tr>
<td></td>
<td>Replace the perimeter fences at Greene’s Field and Mill’s Field to help preserve these open spaces by limiting vehicle access.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>Affordable Housing</td>
<td>Complete</td>
<td>$324,500</td>
</tr>
<tr>
<td></td>
<td>Fund design, engineering and legal work to bring the High Rock Estates project to the construction stage, which will allow replacement of 20 of 80 existing homes to duplexes for low/mod incomes.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Year</td>
<td>Type/Description</td>
<td>Status</td>
<td>Amount</td>
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</tr>
<tr>
<td>2006</td>
<td><strong>Historic Preservation</strong></td>
<td>In Progress</td>
<td>$25,000</td>
</tr>
<tr>
<td></td>
<td>Fund Heritage Project to map historic structures; identify additions to the historic inventory; and identify grants, tax incentives and deed restrictions.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td><strong>Recreation</strong></td>
<td>Complete</td>
<td>$22,000</td>
</tr>
<tr>
<td></td>
<td>Replace water bubblers at six parks to stop deterioration of land due to leaking.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td><strong>Recreation</strong></td>
<td>Complete</td>
<td>$47,700</td>
</tr>
<tr>
<td></td>
<td>Replace water bubblers at six parks to stop deterioration of land due to leaking.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td><strong>Recreation</strong></td>
<td>In Progress</td>
<td>$58,000</td>
</tr>
<tr>
<td></td>
<td>Create new access at Ridge Hill by installing two footbridges, which will allow safe use of two trails.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td><strong>Open Space &amp; Recreation</strong></td>
<td>Complete</td>
<td>$20,000</td>
</tr>
<tr>
<td></td>
<td>Develop an Open Space and Recreation Plan; link trails and green space corridors once plan is complete.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Community Preservation Coalition
## Maynard CPA Projects

<table>
<thead>
<tr>
<th>Year</th>
<th>Type/Description</th>
<th>Status</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>Historic Preservation</td>
<td>Planning Stage</td>
<td>$40,000</td>
</tr>
<tr>
<td></td>
<td>Rebuild the historic stone wall at the corner on Main and Nason Streets; repair the water fountain that is part of the wall.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>Historic Preservation</td>
<td>In Progress</td>
<td>$4,000</td>
</tr>
<tr>
<td></td>
<td>Fund a Ground Penetrating Radar (GPR) survey of Glenwood Cemetery where unmarked graves of victims of the 1919 Spanish Flu epidemic may be located.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>Historic Preservation</td>
<td>In Progress</td>
<td>$12,500</td>
</tr>
<tr>
<td></td>
<td>Provide funds to the Maynard Historical Society to 1) have the collection surveyed, 2) purchase photographic equipment to record the collection, and 3) provide appropriate storage for the most important artifacts.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>Open Space</td>
<td>In Progress</td>
<td>$4,000</td>
</tr>
<tr>
<td></td>
<td>Provide funds for GIS map updates and public opinion poll to update the Open Space Plan.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2009</td>
<td>Open Space</td>
<td>Complete</td>
<td>$10,000</td>
</tr>
<tr>
<td></td>
<td>Add $10,000 to the Maynard Conservation Fund to support land purchase and tax title takings of land identified as important for conservation by the Conservation Commission.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>Affordable Housing</td>
<td>Planning Stage</td>
<td>$12,000</td>
</tr>
<tr>
<td></td>
<td>Provide startup funds to support a Maynard Affordable Housing Trust.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>Historic Preservation</td>
<td>Complete</td>
<td>$27,000</td>
</tr>
<tr>
<td></td>
<td>Restore, repair, and stabilize the Veterans’ Park Memorial; replace eagle that had topped the central memorial.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>Historic Preservation</td>
<td>Complete</td>
<td>$5,000</td>
</tr>
<tr>
<td></td>
<td>Commission a facility study to determine what restoration is required to maintain the historic Coolidge School.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>Open Space</td>
<td>Complete</td>
<td>$10,000</td>
</tr>
<tr>
<td></td>
<td>Add money to the Conservation Fund for the purpose of acquiring open space.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>Recreation</td>
<td>Complete</td>
<td>$20,000</td>
</tr>
<tr>
<td></td>
<td>Install sprinkler/irrigation system to preserve the heavily used Alumni Field.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>Recreation</td>
<td>Complete</td>
<td>$18,000</td>
</tr>
<tr>
<td></td>
<td>Install sprinkler/irrigation system to preserve Crowe Park, which is heavily used by the Maynard Charitable Baseball Corp.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>Recreation</td>
<td>In Progress</td>
<td>$40,000</td>
</tr>
<tr>
<td></td>
<td>Install sprinkler/irrigation system to preserve Crowe Park, which is heavily used by the Maynard Charitable Baseball Corp.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Community Preservation Coalition
<table>
<thead>
<tr>
<th>Year</th>
<th>Type/Description</th>
<th>Status</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>Affordable Housing</td>
<td>In Progress</td>
<td>$10,000</td>
</tr>
<tr>
<td>2009</td>
<td>Affordable Housing</td>
<td>In Progress</td>
<td>$180,000</td>
</tr>
<tr>
<td>2009</td>
<td>Historic Preservation</td>
<td>Planning Stage</td>
<td>$26,000</td>
</tr>
<tr>
<td>2009</td>
<td>Historic Preservation</td>
<td>Planning Stage</td>
<td>$7,444</td>
</tr>
<tr>
<td>2008</td>
<td>Historic Preservation</td>
<td>Complete</td>
<td>$25,500</td>
</tr>
<tr>
<td>2008</td>
<td>Historic Preservation</td>
<td>Complete</td>
<td>$11,000</td>
</tr>
<tr>
<td>2008</td>
<td>Historic Preservation</td>
<td>In Progress</td>
<td>$60,000</td>
</tr>
<tr>
<td>2008</td>
<td>Historic Preservation</td>
<td>Complete</td>
<td>$9,000</td>
</tr>
<tr>
<td>2008</td>
<td>Recreation</td>
<td>In Progress</td>
<td>$2,500</td>
</tr>
<tr>
<td>2007</td>
<td>Historic Preservation</td>
<td>Complete</td>
<td>$8,200</td>
</tr>
<tr>
<td>2007</td>
<td>Historic Preservation</td>
<td>Complete</td>
<td>$16,346</td>
</tr>
<tr>
<td>2007</td>
<td>Historic Preservation</td>
<td>Complete</td>
<td>$9,900</td>
</tr>
<tr>
<td>2007</td>
<td>Historic Preservation</td>
<td>Planning Stage</td>
<td>$30,000</td>
</tr>
<tr>
<td>2007</td>
<td>Historic Preservation</td>
<td>Planning Stage</td>
<td>$35,000</td>
</tr>
<tr>
<td>Year</td>
<td>Type/Description</td>
<td>Status</td>
<td>Amount</td>
</tr>
<tr>
<td>------</td>
<td>------------------</td>
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</tr>
<tr>
<td>2007</td>
<td>Open Space</td>
<td>In Progress</td>
<td>$113,000</td>
</tr>
<tr>
<td></td>
<td>Fund a study of the existing environmental condition of the landfill area and review the potential for its reuse.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>Open Space</td>
<td>Complete</td>
<td>$1,200</td>
</tr>
<tr>
<td></td>
<td>Purchase a laptop to be used to carryout the Mass. Conservation Mapping Assistance Partnership Program.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>Recreation</td>
<td>Complete</td>
<td>$25,000</td>
</tr>
<tr>
<td></td>
<td>Fund trail preservation on portions of the White Dot Trail at Chebacco Woods.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>Recreation</td>
<td>Complete</td>
<td>$23,300</td>
</tr>
<tr>
<td></td>
<td>Fund a portion of the Pleasant Pond Landscape Improvement Plan, specifically, materials for the stone wall and Gate House, landscaping, and electrical work.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>Recreation</td>
<td>Complete</td>
<td>$4,200</td>
</tr>
<tr>
<td></td>
<td>Create park recreation areas with picnic tables, bike racks, and trash receptacles in public areas of town.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>Recreation</td>
<td>In Progress</td>
<td>$25,000</td>
</tr>
<tr>
<td></td>
<td>Preservation work at Patton Park.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>Recreation</td>
<td>In Progress</td>
<td>$32,000</td>
</tr>
<tr>
<td></td>
<td>Fund the construction of a stream crossing needed to complete the pedestrian/bicycle pathway along Woodbury Street.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>Affordable Housing</td>
<td>In Progress</td>
<td>$35,000</td>
</tr>
<tr>
<td></td>
<td>Hire a community housing coordinator.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>Affordable Housing</td>
<td>In Progress</td>
<td>$120,000</td>
</tr>
<tr>
<td></td>
<td>Help the Hamilton Housing Authority with their affordable housing project on Railroad Avenue, including kitchenette upgrades.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>Historic Preservation</td>
<td>In Progress</td>
<td>$65,000</td>
</tr>
<tr>
<td></td>
<td>Repair the Town Hall heating systems.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>Historic Preservation</td>
<td>In Progress</td>
<td>$6,000</td>
</tr>
<tr>
<td></td>
<td>Rehabilitate headstones in the Hamilton Cemetery.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>Historic Preservation</td>
<td>In Progress</td>
<td>$2,500</td>
</tr>
<tr>
<td></td>
<td>Construct a plaque commemorating the burial site of Chief Masconomet.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>Open Space</td>
<td>In Progress</td>
<td>$27,000</td>
</tr>
<tr>
<td></td>
<td>Obtain a conservation restriction protecting the School Street well.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>Recreation</td>
<td>In Progress</td>
<td>$10,000</td>
</tr>
<tr>
<td></td>
<td>Conduct a feasibility study on potential new usages of the old Hamilton Library site, such as for affordable housing or recreation.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2006</td>
<td>Recreation</td>
<td>In Progress</td>
<td>$4,000</td>
</tr>
<tr>
<td></td>
<td>Repair drainage problems at the Patton Park Baseball Field.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Community Preservation Coalition
## Quincy CPA Projects

<table>
<thead>
<tr>
<th>Year</th>
<th>Type/Description</th>
<th>Status</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>Affordable Housing</td>
<td>Rent and utilities for one year for the Commission of the Family Transitional Housing Program</td>
<td>Planning Stage</td>
</tr>
<tr>
<td>2009</td>
<td>Historic Preservation</td>
<td>Turning Mill Restoration Study.</td>
<td>Planning Stage</td>
</tr>
<tr>
<td>2009</td>
<td>Historic Preservation</td>
<td>Fence restoration at the Josiah Quincy House.</td>
<td>Planning Stage</td>
</tr>
<tr>
<td>2009</td>
<td>Historic Preservation</td>
<td>Restoration of the historic Forbes Hill Water Tower.</td>
<td>Planning Stage</td>
</tr>
<tr>
<td>2009</td>
<td>Historic Preservation</td>
<td>Restoration of headstones at Sailor’s Home Cemetery.</td>
<td>Planning Stage</td>
</tr>
<tr>
<td>2009</td>
<td>Open Space</td>
<td>Purchase of Hojo’s Site property.</td>
<td>In Progress</td>
</tr>
<tr>
<td>2009</td>
<td>Recreation</td>
<td>Creation of nature trails by the Quincy Housing Authority.</td>
<td>Planning Stage</td>
</tr>
<tr>
<td>2009</td>
<td>Recreation</td>
<td>Boulevard Beautification Project at East Squantum Street.</td>
<td>Planning Stage</td>
</tr>
<tr>
<td>2009</td>
<td>Affordable Housing</td>
<td>Capitol Improvements on existing Neighborhood Housing Services of the South Shore residences.</td>
<td>Planning Stage</td>
</tr>
<tr>
<td>2008</td>
<td>Historic Preservation</td>
<td>Design and install a new room for the historic Souther Tide Mill.</td>
<td>Planning Stage</td>
</tr>
<tr>
<td>2008</td>
<td>Historic Preservation</td>
<td>Repoint the exterior of the Adams Academy Library and replace the furnace.</td>
<td>In Progress</td>
</tr>
<tr>
<td>2008</td>
<td>Historic Preservation</td>
<td>Repair a large stained glass window in the Thomas Crane Public Library.</td>
<td>Planning Stage</td>
</tr>
<tr>
<td>2008</td>
<td>Historic Preservation</td>
<td>Restoration and protection of historic city records held in the City Clerks office.</td>
<td>Planning Stage</td>
</tr>
<tr>
<td>2008</td>
<td>Historic Preservation</td>
<td>Study/assessment of all historically significant structures in Quincy Center.</td>
<td>Planning Stage</td>
</tr>
<tr>
<td>2008</td>
<td>Historic Preservation</td>
<td>Study of the restoration required to strengthen the remaining structure of Turning Mill.</td>
<td>Planning Stage</td>
</tr>
<tr>
<td>2008</td>
<td>Open Space</td>
<td>Purchase of seven acres of the old Howard Johnson site off the South East Expressway.</td>
<td>Planning Stage</td>
</tr>
<tr>
<td>2008</td>
<td>Open Space</td>
<td>Negotiate with property owners to purchase land or rights to land at Glendale Park and 168 School Street.</td>
<td>Planning Stage</td>
</tr>
</tbody>
</table>
## Quincy CPA Projects

<table>
<thead>
<tr>
<th>Year</th>
<th>Type/Description</th>
<th>Status</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>Recreation Fund the Beechwood Knowl Outdoor Environmental Education Classroom, a major enhancement to a park that will provide a location for students to observe nature from a safe location just outside the adjacent marsh.</td>
<td>Planning Stage</td>
<td>$20,000</td>
</tr>
<tr>
<td>2008</td>
<td>Recreation Install trail signs along Wollaston Beach Trail.</td>
<td>Planning Stage</td>
<td>$40,000</td>
</tr>
<tr>
<td>2008</td>
<td>Recreation Install signs connecting a walk along the Quincy Coastal Heritage Trail.</td>
<td>Planning Stage</td>
<td>$6,300</td>
</tr>
<tr>
<td>2007</td>
<td>Affordable Housing Fund the Neighborhood Housing Project.</td>
<td>Complete</td>
<td>$220,000</td>
</tr>
<tr>
<td>2007</td>
<td>Historic Preservation Structural repair of the Souther Tide Mill building.</td>
<td>Planning Stage</td>
<td>$100,000</td>
</tr>
<tr>
<td>2007</td>
<td>Historic Preservation Install historic signs/museum displays around the locations of historic quarries.</td>
<td>Planning Stage</td>
<td>$45,000</td>
</tr>
<tr>
<td>2007</td>
<td>Historic Preservation Repair of the Fore River Clubhouse.</td>
<td>Planning Stage</td>
<td>$10,000</td>
</tr>
<tr>
<td>2007</td>
<td>Historic Preservation Restore and replace roof balustrade at the Quincy Homestead.</td>
<td>Planning Stage</td>
<td>$30,000</td>
</tr>
<tr>
<td>2007</td>
<td>Historic Preservation Restore and re-point the façade of the Adams Academy.</td>
<td>In Progress</td>
<td>$35,000</td>
</tr>
<tr>
<td>2007</td>
<td>Historic Preservation Restore the bell tower at United First Parish.</td>
<td>Planning Stage</td>
<td>$80,000</td>
</tr>
<tr>
<td>2007</td>
<td>Open Space Purchase 271 Sea Street property.</td>
<td>Complete</td>
<td>$5,200,000</td>
</tr>
<tr>
<td>2007</td>
<td>Open Space Purchase Joyce property in West Quincy.</td>
<td>Complete</td>
<td>$900,000</td>
</tr>
<tr>
<td>2007</td>
<td>Recreation Create new ecological gardens around the Hough’s Neck Area.</td>
<td>Planning Stage</td>
<td>$10,000</td>
</tr>
<tr>
<td>2007</td>
<td>Recreation Create a community garden in the Germantown neighborhood.</td>
<td>Planning Stage</td>
<td>$10,000</td>
</tr>
<tr>
<td>2007</td>
<td>Recreation New boardwalk to local beach in Quincy.</td>
<td>Complete</td>
<td>$72,000</td>
</tr>
<tr>
<td>2007</td>
<td>Open Space Purchase of Hazeltine property to expand Faxon Park.</td>
<td>Complete</td>
<td>$3,300,000</td>
</tr>
</tbody>
</table>

Source: Community Preservation Coalition
Community Preservation Act: Funding Allocation and Community Impacts

Recommended Legislative Changes

**Guarantee a minimum state match.**

State matching funds are an important incentive for passage of the CPA.

Without a guaranteed minimum, cities and towns have difficulty planning for the future and are hesitant to take on large or creative projects.

Communities expressed concern that recent declines in state match have weakened public support for the CPA and trust in the Commonwealth.

**Simplify legislative language.**

Committees and the Coalition devote a significant amount of time to evaluating projects’ viability under the CPA.

Simplifying the legislative language would minimize the possibility of misapplication of CPA funds.

Create simple guidelines for reporting and recording funding allocation data.

**Expand allowable uses for recreation and open space.**

Allow communities to use CPA funds to maintain and enhance pre-existing recreation and open space sites.

Urban and suburban communities with little undeveloped land experienced barriers to utilizing open space and recreation funds.

Purchasing land for open space or recreation is prohibitively expensive for many small communities.
Community Preservation Act: Funding Allocation and Community Impacts

Recommendations for the Community Preservation Coalition

**Legislation.**

Encourage legislators to amend the enabling statute to guarantee a minimum state match.

Advocate for simplification of allowable uses so that the Coalition and CPCs can devote more time to advocacy and outreach.

Expanding allowable uses for open space and recreation is essential for urban and suburban communities, and for small towns with little disposable income.

**Information.**

Strengthen data reporting standards and increase data availability. Standards could be incorporated into a future amendment to the Act.

Provide more opportunities for CPA communities to share challenges and best practices. This will improve project quality and creativity, and encourage new cities and towns to adopt the Act.

Assist CPA communities as they enhance their online interfaces. Consider creating a CPA website template. Embrace the importance of an online presence for CPA process and successful projects.

**Regionalization.**

Build on informal regional networks to encourage nearby cities and towns to share resources and information.

Consider future opportunities to enhance regional CPA networks. Such opportunities could include regional funding allocation, regional open space networks, or regional requirements for affordable housing.
Affordable housing.

The Coalition should assist Committees to develop coalitions and alliances with affordable housing experts and advocates in their communities.

Coalition members should provide technical support for planning and developing affordable housing projects.

Encourage dialogue in Committees about what affordable housing means for their community. Encourage them to develop a housing plan and promote the plan to their constituents.

Community Engagement.

Support and train Committees to understand the importance of community involvement and develop techniques for outreach and engagement.

Encourage and help Committees to promote their successes through media campaigns, signage, and direct outreach.

Advocate for a CPA community process to identify collective assets and develop a set of values for the Committee to uphold.

Engage residents evaluate the success of the CPA in meeting community needs.

Ensure that Committees reflect community-wide demographics through thoughtful mayoral appointments.
Community Preservation Act: Funding Allocation and Community Impacts

Recommendations for CPA Cities and Towns

**Information.**

Share your challenges and best practices with other cities and towns, and provide support to communities that are interested in enacting the CPA.

Develop an attractive and accessible online presence to share data and publicize successful projects.

Make your financial data easy to find and easy to understand.

**Regionalization.**

Collaborate with other CPA communities in your region to develop projects and identify assets.

**Affordable housing.**

Strengthen or pursue coalitions with affordable housing experts and advocates in your community or others nearby.

Consider the value of affordable housing for your community and how it can best be presented to constituents.

**Community engagement.**

Reach out to residents to build awareness and support of CPA projects. This should help generate more community-based proposals and prevent the possibility of repeal battles.

Develop a strategy to involve all constituents in setting a CPA agenda. Engage residents to identify collective assets and develop a set of values for the Committee to uphold.
**A CPA Community Engagement Toolkit**

**Strategies for Building Awareness and Developing a Community Process**

<table>
<thead>
<tr>
<th>GOAL: build awareness of and support for CPA</th>
<th>GOAL: identify community-wide assets and values</th>
</tr>
</thead>
<tbody>
<tr>
<td>STRATEGIES:</td>
<td>STRATEGIES:</td>
</tr>
<tr>
<td>visible signage</td>
<td>asset-mapping</td>
</tr>
<tr>
<td>attractive and easy-to-navigate websites</td>
<td>community members create</td>
</tr>
<tr>
<td>events and programming</td>
<td>individualized maps that show places and</td>
</tr>
<tr>
<td>media publicity campaigns</td>
<td>sites of meaning.</td>
</tr>
<tr>
<td>multilingual materials</td>
<td>asset maps can be created in workshops or schools and then combined to identify preservation principles and opportunities for projects.</td>
</tr>
<tr>
<td>coalition building with nonprofits</td>
<td>determine sacred spaces</td>
</tr>
<tr>
<td>enhance education about CPA places</td>
<td>sacred spaces are sites considered essential and inviolable by community members. These spaces often do not correspond to those identified on formal inventories. CPC members should familiarize themselves with these spaces.</td>
</tr>
<tr>
<td>frequent open meetings in locations that are accessible and open to diverse community members</td>
<td>engage community leaders</td>
</tr>
<tr>
<td></td>
<td>cities and towns should engage community leaders to participate in the CPA process.</td>
</tr>
<tr>
<td></td>
<td>innovative public input campaigns</td>
</tr>
<tr>
<td></td>
<td>public art, participation in cultural or local celebrations, community storytelling and oral history projects.</td>
</tr>
</tbody>
</table>
MEMORANDUM OF UNDERSTANDING
BETWEEN
TUFTS UNIVERSITY FIELD PROJECTS TEAM NO. 3
AND
CITIZENS’ HOUSING AND PLANNING ASSOCIATION (CHAPA) AND THE
COMMUNITY PRESERVATION COALITION (CPC)

I. Introduction

Project (i.e., team) number: 3
Project title: The Community Preservation Act: Funding Allocation and Community Impacts
Client: Citizens’ Housing and Planning Association (CHAPA) and the Community Preservation Coalition (CPC)

This Memorandum of Understanding (the “MOU”) summarizes the scope of work, work product(s) and deliverables, timeline, work processes and methods, and lines of authority, supervision and communication relating to the Field Project identified above (the “Project”), as agreed to between (i) the UEP graduate students enrolled in the Field Projects and Planning course (UEP-255) (the “Course”) offered by the Tufts University Department of Urban and Environmental Policy and Planning (“UEP”) who are identified in Paragraph II(1) below (the “Field Projects Team”); (ii) Team 3, further identified in Paragraph II(2) below (the “Client”); and (iii) UEP, as represented by a Tufts faculty member directly involved in teaching the Course during the spring 2010 semester.

II. Specific Provisions

(1) The Field Projects Team working on the Project consists of the following individuals:

1. Mona Funiciello   email address: mfuniciello@hotmail.com
2. Ellen Kokinda     email address: ellen.kokinda@tufts.edu
3. Diana Limbach    email address: diana.limbach@tufts.edu
4. Maritza Martinez email address: maritza.martinez@tufts.edu
5. Elizabeth Panella email address: elizabeth.panella@tufts.edu
(2) The Client’s contact information is as follows:

Client name: CHAPA
Key contact/supervisor: Karen Wiener
Email address: kwiener@chapa.org
Telephone number: 617-742-0820
FAX number: 617-742-3953
Address: 18 Tremont Street, Suite 401, Boston, MA 02108
Web site: www.chapa.org

Client name: CPC
Key contact/supervisor: Katherine Roth
Email address: Katherine.roth@communitypreservation.org
Telephone number: 617-367-8998
FAX number: 617-367-8788
Address: 33 Union Street, 4th Floor, Boston, MA 02108
Web site: www.communitypreservation.org

(3) The goal/goals of the Project is/are:

The goal of the project is to evaluate the success and progress of the Community Preservation Act (CPA) since it was first enacted 10 years ago. This goal will be addressed through five case studies conducted by the Project Team of communities within Massachusetts that have enacted the CPA. These case studies will attempt to determine:

- What factors led the communities to adopt the CPA.
- What mechanisms the communities use to allocate funding.
  - How the communities divide available funds between the three CPA focus areas (affordable housing, open space, and historic preservation) and recreation.
  - How specific projects are selected, beyond the standard project evaluation that each local CPC includes on its application materials.
- What value the CPA has for the community.
  - How the CPA is perceived by local government officials.
  - How the CPA is perceived by residents.
  - What their expectations were and whether those expectations been met.
  - What barriers or stumbling blocks have been confronted by communities as they use or attempt to use CPA funds.
Whether the communities believe the CPA has a long-term utility, or if the CPA was adopted to attain short-term, project specific goals.

Whether the CPA was enacted based on a single lobby, or with the support of a broad coalition.

• To what extent communities have been successful at using CPA funds to produce or fund affordable housing.
  o What barriers may prevent affordable housing from being developed in CPA communities.
  o What might be done to strengthen the CPA’s ability to promote affordable housing in member communities.

(4) The methods and processes through which the Field Projects Team intends to achieve this goal/these goals is/are:

• Each team member will be responsible for one case study community, which will be selected by the team based on specific criteria:
  o At least one City will be selected.
  o All communities must be located within 495 and be accessible to at least one team member for on-site research.
  o Communities must have approved the CPA in or before 2006.
  o Selected communities will have a range of median household incomes, population sizes and densities.
  o Selected communities will have a range of average educational attainments, if possible.
  o Communities with conflict of interest will not be selected: Newburyport, Wayland, Sharon, Lincoln, Boxford or Plymouth.
  o Communities studied by 2009 Field Projects Team 4 will not be selected: Weston, Wellesley, Newton, and Walpole.

• Selected communities will be approved by the clients before research begins to ensure there are no unique circumstances that would make a selected community undesirable as a case study.

• The team will gather information about chosen communities through research in local newspapers, state databases, the CPC database and information available from the town itself (including archival material, public records, and website contents).
• Once background research has been conducted, the team will interview stakeholders, decision makers and local officials in designated communities. These potential interviewees could include members of the local Community Preservation Committee, city or town managers, city or town planners, members of the municipal boards that cover the three areas of interest (housing, open space, historic preservation), nonprofit stakeholders and intervenors, and citizen advocates who are or have been involved in CPA-related campaigns. No surveys, focus groups, or any other studies targeting the general public will be conducted.

(5) The work products and deliverables of the Project are (this includes any additional presentations for the client):

The team will give an oral presentation and produce a written report on the project described above, including an executive summary, separate chapters for each CPA community examined, as well as a brief introductory chapter to provide an overview of the CPA, methodological information, and other necessary context for general reader.

(6) The anticipated Project timeline (with dates anticipated for key deliverables) is:

March 4th – 2nd Meeting with CHAPA & CPC to discuss the team’s progress thus far in our interviewing process within the selected communities. Additional meetings may be scheduled during the month of March if necessary.
April 9th – First draft of the team’s report delivered to clients and faculty advisor.
April 16th – Client must return any report suggestions to the team.
April 20th, 27th & May 4th – These dates are set aside for Field Project final presentations. The team will discuss the preferred presentation date with CHAPA and CPC.
May 7th – Final report is due to instruction team.

(7) The lines of authority, supervision and communication between the Client and the Field Projects Team are (or will be determined as follows):
CHAPA and CPC agreed that communication throughout the project’s process can and should remain open; correspondence via phone and email is encouraged should any issues or questions arise that do not require an in-person meeting. The clients also made clear that any findings should not be shared with the media or any members of the public until they have been reviewed by CHAPA and CPC. The research findings may be politically sensitive and the clients stressed the importance of neutrality and discretion in both interviews and interactions with the public.

(8) CHAPA will reimburse the team for transportation related costs not exceeding $100. The team will provide CHAPA with an invoice when payment is requested.

III. Additional Representations and Understandings

A. The Field Projects Team is undertaking the Course and the Project for academic credit and therefore compensation (other than reimbursement of Project-related expenses) may not be provided to team members.

B. Because the Course and the Project itself are part of an academic program, it is understood that the final work product and deliverables of the Project (the “Work Product”) – either in whole or in part – may and most likely will be shared with others inside and beyond the Tufts community. This may include, without limitation, the distribution of the Work Product to other students, faculty and staff, release to community groups or public agencies, general publication, and posting on the Web. Tufts University and the Field Projects Team may seek and secure grant funds or similar payment to defray the cost of any such distribution or publication. It is expected that any issues involving Client confidentiality or proprietary information that may arise in connection with the Project will be resolved between the Client, the Field Projects Team and a Tufts instructor directly responsible for the Course (or his or her designee). However, given the politically sensitive nature of the research (as described in Section II.7), the team agrees to share findings with both Clients before any public presentation of the research.

C. The Team and Clients discussed that research findings can and may be used to inform improvements in the CPA legislation and administration, and to support potential efforts to strengthen the CPA through legislative measures. The Clients will not be able to alter the text or conclusions of the study. Any political use of the findings should be discussed with the Team prior to use. The Team will not make raw data available to the
Clients, however in the project timeline (II.6) one week is allotted for the Clients to make comment on a draft of the report prior to public submission.

D. It is understood that this Project may require the approval (either through full review or by exemption) of the Tufts University Institutional Review Board (IRB). This process is not expected to interfere with timely completion of the project.

E. It is understood that both CHAPA and CPC are equal clients for the Project and no aspect of the research data or final report shall be discussed with only one of the contacts. Research questions that pertain only to one organization may be discussed with the relevant Client at the discretion of the Team, but will be available to both Clients upon request.
IV. Signatures

Karen Wiener  
For: CHAPA  
Date: __________ 2010

Katherine Roth  
For: CPC  
Date: 2-10-_________ 2010

Representative of the Field Projects Team  
By: Elizabeth Panella  
Date: 2-23-2010

Tufts UEP Faculty Representative  
By: Rachel Bratt  
Date: __________ 2010
IV. Signatures

Karen Wiener
For: CHAPA
Date: 2/16/2010

Katherine Roth
For: CPC
Date: _______ 2010

Alice Panella
Representative of the Field Projects Team
By: Elizabeth Panella
Date: 2/23/2010

Tufts UEP Faculty Representative
By: Rachel Bratt
Date: _______ 2010
FWA00002063

Re: IRB Study # 1002036
Title: The Community Preservation Act: Funding Allocation and Community Impacts
PI: Mona Funiciello
Co-Investigator(s): Ellen Kokinda, Diana Limbach, Maritza Martinez, Elizabeth Panella
Faculty Advisor: Rachel Bratt
IRB Review Date: 2/17/2010

February 18, 2010

Dear Mona,

Your Application for Exempt Status for the above referenced study has been reviewed. This study qualifies as exempt from review under the following federal guidelines:

Exempt Category 2 as defined in 45 CFR 46.101 (b). For complete details please visit the United States Department of Health and Human Services Office (DHHS) for Human Research Protections (OHRP) website at: http://www.hhs.gov/ohrp/humansubjects/guidance/45cfr46.htm#46.101

Please know that this exemption does not relieve the investigator of any responsibilities relating to the research subjects; equal care must still be taken to ensure that subjects experience no harm to themselves or to their legitimate interests.

Furthermore research should be conducted in accordance with the ethical principles, (i) Respect for Persons, (ii) Beneficence, and (iii) Justice as outlined in the Belmont Report.

Any changes to the protocol or study materials that might affect the exempt status must be referred to the Office of the IRB for guidance. Depending on the changes, you may be required to apply for either expedited or full review.

If you have any questions, please contact the Office of the IRB at (617) 627-3417.

Sincerely,

Yvonne Wakeford, Ph.D.
IRB Administrator

Appendix S: Institutional Review Board Approval