

Implementing the Community Preservation Act



**Community
Preservation Coalition**
Preserving our past. Building our future.

About the Coalition



Representatives from 4 member communities and 2 at-large members

The Community Preservation Coalition

- Technical assistance
- Website
- Email newsletter & bulletins
- CPA advocacy and legislation
- Ballot measures (adoption, changes)
- Training conferences, webinars,
presentations, publications, workshops

*Supported by membership dues from CPA communities
(Example: Dues for surcharge level of \$750k to \$999k is \$3,500)*

Coalition Website

www.communitypreservation.org

http://communitypreservation.org/ Community Preservation C... x

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HISTORIC PRESERVATION

Success Stories

OPEN SPACE

Success Stories

OUTDOOR RECREATION

Success Stories

COMMUNITY HOUSING

Success Stories

Working For The Community Preservation Act

The Community Preservation Coalition is an alliance of open space, affordable housing, and historic preservation organizations working with municipalities to help them understand, adopt, and implement the Massachusetts Community Preservation Act (CPA).

The Coalition was formed in the 1990s with the goal of achieving passage of the Community Preservation Act. With leadership and help from our diverse Steering Committee, the Coalition works to preserve Massachusetts communities' unique character by advocating for and supporting the Community Preservation Act, advancing smart growth and sustainable development for communities across the Commonwealth.

Coalition Seeking Associate Director

With the departure of Kathy Roth, the Coalition is currently accepting applications for

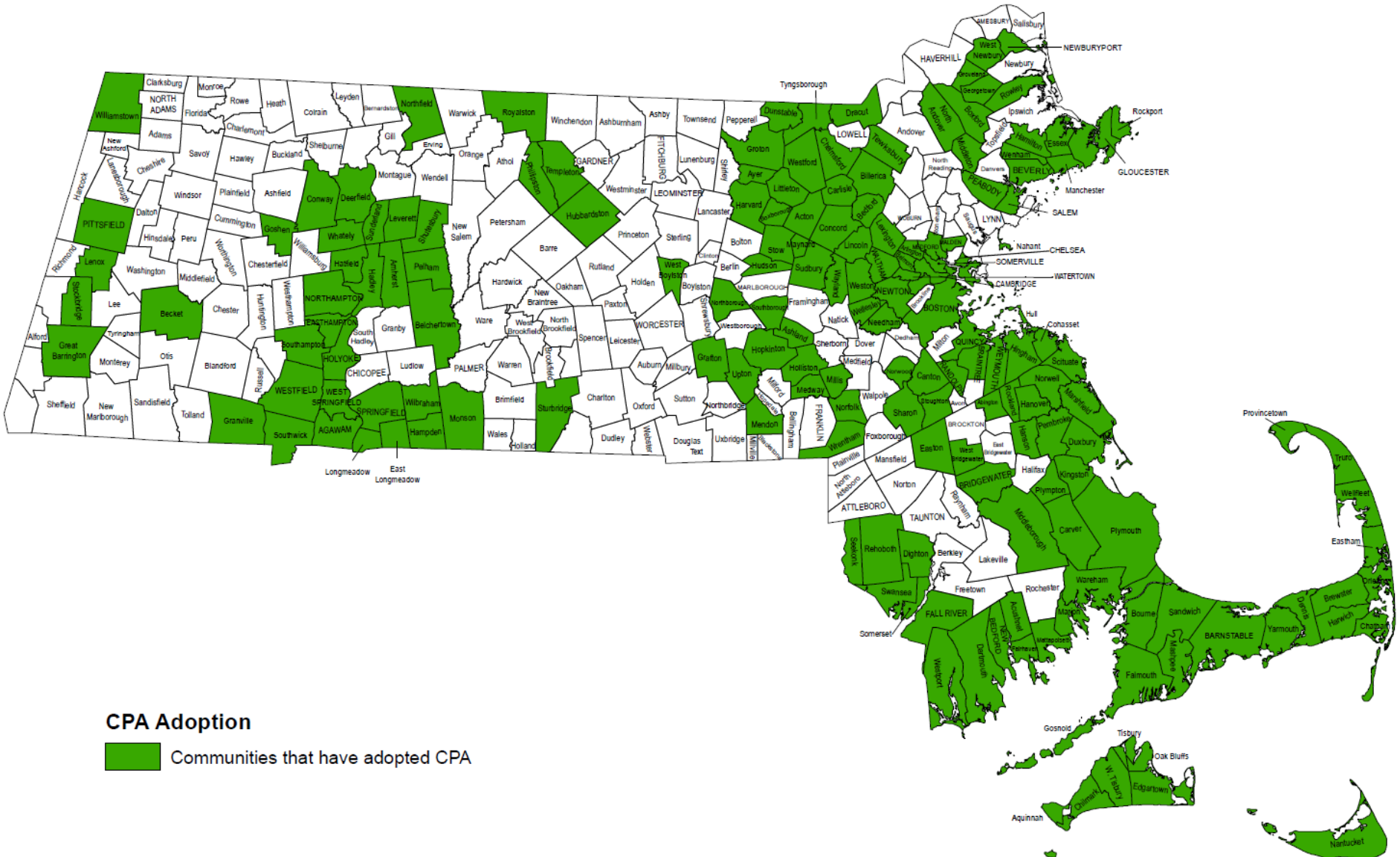
Latest CPA News

CPA Adopted in Boston, Springfield and Nine Other Communities


Follow the link for election results from all 16 communities that voted on CPA!

[Click here for the full story](#)

172 CPA Communities



CPA Adoption

 Communities that have adopted CPA

CPA by the Numbers

(through FY2016)



HISTORIC PRESERVATION: Over 4,400 appropriations made



OPEN SPACE: 26,297 acres preserved



OUTDOOR RECREATION: About 1,700 projects funded



AFFORDABLE HOUSING: Over 10,000 units created or supported

- Over 9,000 projects approved & \$1.75 billion raised -

CPA Plan – Within the First Year

- Assess Community Preservation needs of your city (Review Master Plan, Open Space Plan, Housing Plan, etc.)
- Meet with other committees and boards
- Hold public hearing to get input on CPA priorities
- Prepare *Community Preservation Plan*

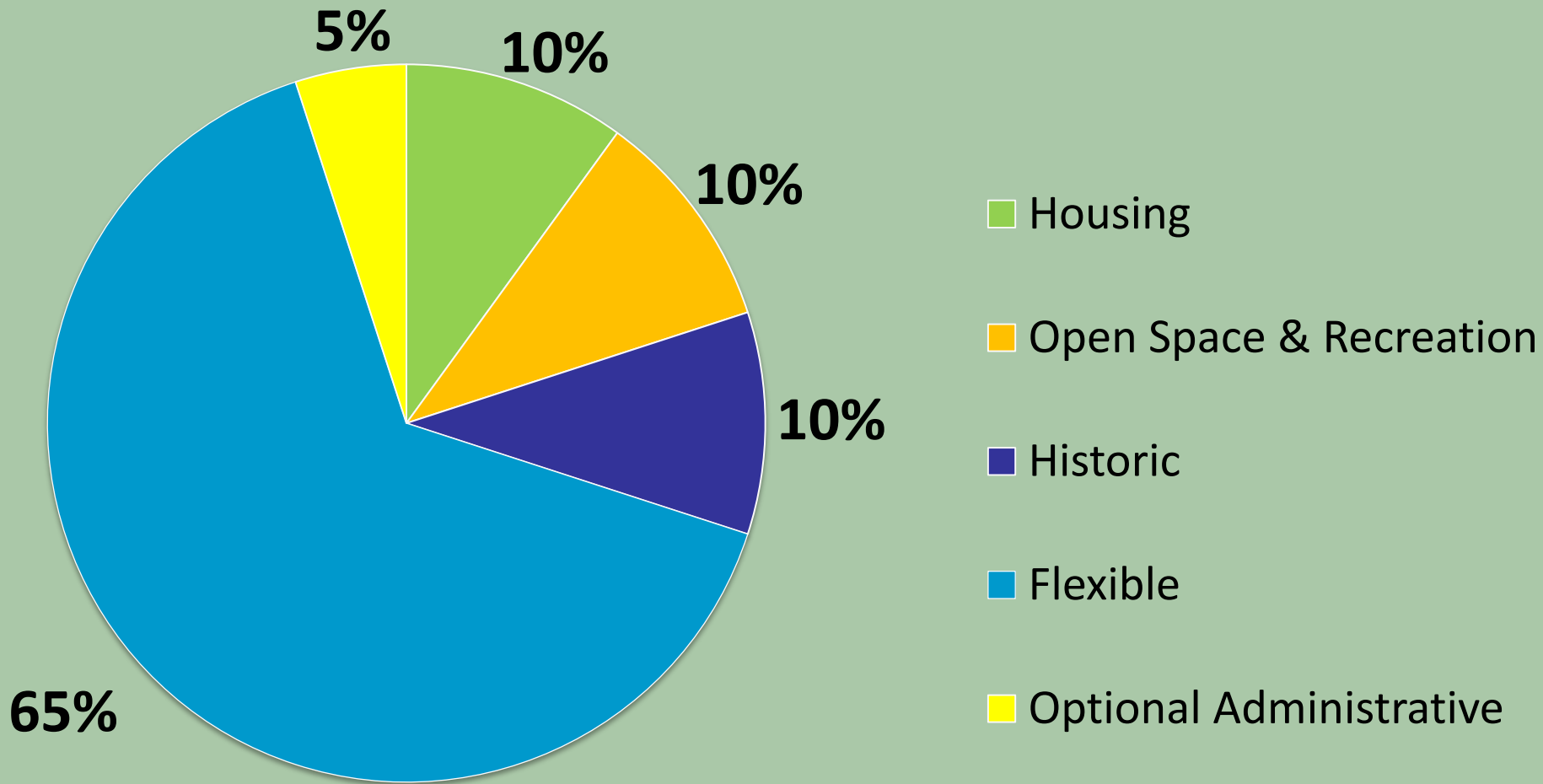
CPC Ongoing Requirements

- Hold at least one public hearing per year
- Update *Community Preservation Plan*
- Review CPA account balances & spending to ensure compliance with the Act allowable uses
- Prepare CPA budget for legislative body
- Make project recommendations to legislative body

CPA Annual Budget

- Usually done at same time as municipal budget (so FY18 budget is done this spring)
- Final deadline for budget: Before tax rate set
- Requires CPC recommendation to legislative body
- CPA budget is based on total expected revenue (local surcharge plus state match)

CPA Annual Spending/Set-aside Requirements



CPA Annual Budget

- Required minimum spending (or reserve):
 - 10% of total revenue for housing projects
 - 10% for historic projects
 - 10% for open space & recreation projects
- Optional:
 - Up to 5% for administrative expenses
 - Appropriations for new CPA projects
 - Balance goes in a “budgeted reserve”

Note: Interest is credited back to CPA Fund

CPA FY2016 Budget

- Required Reserves: **based on local revenue only (\$854,863) – no state distribution in FY16**
 - 10% each for housing reserve, historic reserve and open space reserve
- CPC should recommend these transfers to City Council now
- Funding source would be “Fund Balance” (unspent funds from FY16)

CPA FY2017 Budget

- Required Reserves: **based on estimated local revenue (appx. \$855,000) plus state match of \$175,904**
10% each for housing reserve, historic reserve and open space reserve
- CPC should recommend these transfers to City Council now.
- Funding source would be “Fund Balance” (unspent funds from FY16)

Administrative Account

- Beginning in FY18, CPC can request up to 5% of estimated revenues for expenses to run CPC
- Unspent balance returned to undesignated fund at end of FY
- For CPC expenses only, not reimbursements to other municipal departments or to pay other municipal staff

Administrative Account

Common Uses

- Hire administrative assistance
- Professional help: Appraisals, consultants, legal assistance, general studies
- Due diligence on project recommendations
- Newspaper ads for public hearing
- Misc. expenses

The CPA Trust Fund

- Administered by the Department of Revenue (DOR)
- Funds come from \$10 and \$20 fees charged at the Registries of Deeds
- All towns received at least 20.6% match this year

Borrowing Permitted under CPA

- Can only bond against local surcharge, not state match
- Two-thirds vote needed to pass bonded projects at Legislative Body
- Cannot pay debt service on non-CPA bonds

Determining Project Eligibility

It's all about the VERBS!

	Open Space	Historic	Recreation	Housing
Acquire	Yes	Yes	Yes	Yes
Create	Yes	-	Yes	Yes
Preserve	Yes	Yes	Yes	Yes
Support	-	-	-	Yes
Rehabilitate and/or Restore	Yes – if acquired or created w/CPA \$\$	Yes	Yes	Yes – if acquired or created w/CPA \$\$

Basic Tenets of CPA Spending

- No supplanting general municipal revenue
- No maintenance or operating expenses
- Recreation – Outdoor projects only
- Asset Purchases – Must file permanent restriction with the state, held by 3rd party
- Historic – Follow flow chart for projects
- Projects may not be voted on at City Council unless CPC has first issued a positive recommendation
- Municipal Boards apply for funding to CPC

How do CPA Projects Happen?

Project proponents submit applications to Community Preservation Committee (CPC)



CPC reviews projects, gets input



CPC recommends list of projects to Legislative Body



Majority vote of Legislative Body required for each project to get CPA \$\$\$



Project Recommendations

- Should include amount in dollars and the funding source (which CPA account?)
- Should include name of board/commission or other party that is carrying out project
- Should include details of the project
- Should include CPA “verbs” that justify project
- CPC may include specific conditions

Sample Project

Recommendation/Warrant Article

ARTICLE 36. To see if the Town will vote to appropriate \$53,500 from the Historic Resources Reserve of the Community Preservation Fund to fund Phase I of the Boxford Town Clerk's project for preservation of historic town records; said funds to be expended under the direction of the Community Preservation Committee and Town Clerk.

Legislative Body Actions Are Limited

- Approve recommendations of CPC
- Reject recommendations of CPC
- Reduce amount recommended by CPC
- Reserve amount recommended by CPC to applicable reserve account, rather than approving the project (rarely used)

New Bedford's Project Ideas

What projects
are you
considering?

Windrush Farm, North Andover



Shovel Shop, Easton



Credit: Marc Belanger

Declaration of Independence, Mendon

In CONGRESS July 4, 1776. A DECLARATION
By The REPRESENTATIVES of the UNITED STATES
OF AMERICA. In GENERAL CONGRESS Assembled
When in the Course of human Events, it becomes necessary for one People to dissolve
the political Bands which have connected them with another, and to assume among
the Powers of the Earth, the separate and equal Station which the Laws of Nature &
of Nature's GOD entitle them; a decent Respect to the Opinions of Mankind re-
quires that they should declare the Causes which impel them to the Separation.

We hold these Truths to be self-evident, that all Men are created equal,
that they are endowed by their Creator with certain unalienable Rights, that
among these, are Life, Liberty, and the Pursuit of Happiness: — That to secure
these Rights, Governments are Instituted among Men, deriving their just
Powers from the Consent of the Governed, that when any Form of Govern-
ment becomes destructive of these Ends, it is the Right of the People to alter-
or to abolish it, and to institute new Government, laying its Foundation
on such Principles, and organizing its Powers in such Form, as to them
shall seem most likely to effect their Safety & Happiness. Prudence, indeed,
will dictate that Governments long established should not be changed for

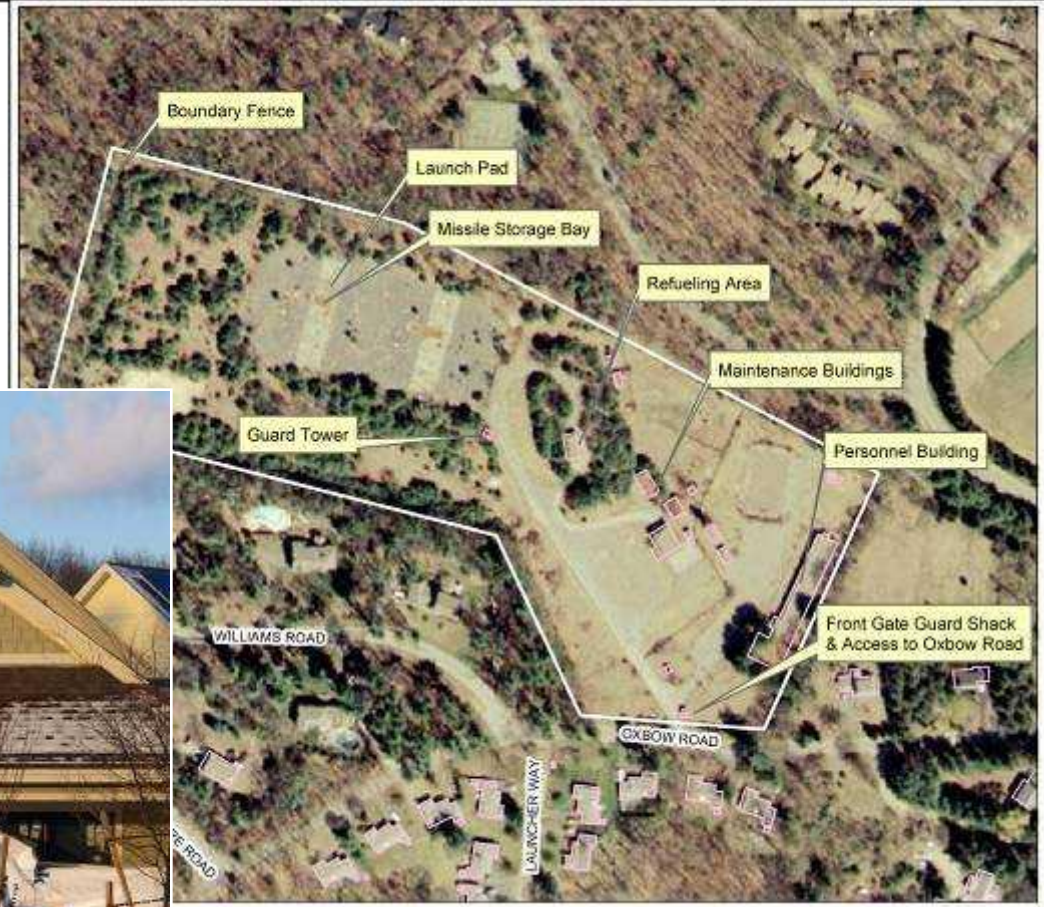
Town Hall, Needham



Lenox Library, Lenox



89 Oxbow, Wayland



Clipper City Rail Trail, Newburyport



Angino Farm, Newton



Specialty Housing

Douglas House, Lexington



Vet's Housing, Hingham

Contact Us

**Technical Assistance
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Executive Director

Chase Mack

Communications Director





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Questions?