

# Weymouth CPA Update

## 11.3.2022



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

# The Community Preservation Coalition



Representatives from 8 member communities and 8 at-large members

# Coalition Services

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

*Supported by membership dues from CPA communities*



# The Coalition Website

## www.communitypreservation.org

The screenshot displays the homepage of the Community Preservation Coalition website. At the top left is the logo, which consists of four overlapping squares in red, yellow, green, and blue. To the right of the logo is the text "Community Preservation Coalition" and the tagline "Preserving our past. Building our future." A search bar is located in the top right corner. Below the logo and tagline is a dark teal navigation bar with white text for "About", "News", "CPA Databank", "Technical Assistance", and "Adopting CPA". On the right side of this bar is a white box with a teal border containing the text "175 CPA Communities" and a "Learn More >" link. The main content area features a large background image of a field with trees in autumn. Overlaid on this image is a semi-transparent box with the text "The Community Preservation Act has protected over 29,000 acres of open space in Massachusetts" and a small version of the logo. Below this image is a "CPA News Feed" section with a teal header. It contains three news items: "Governor Baker & The Boston Globe Agree: It's Time to Support CPA Legislation", "November 2018 Statewide Trust Fund Distribution Announced", and "CPA Adoption Update: Two New CPA Towns Bring the Total to 175". At the bottom of the news feed is a "More CPA News >" link. To the left of the news feed is a quote from Governor Charlie Baker, dated 10/20/2018, with a photo of him speaking at a microphone. The quote reads: "Eighteen years is a long time. It's obvious that there needs to be an adjustment made [to CPA]. We would support that mechanism being increased... We would support it and we would sign it." Below the quote is the text "Governor Baker Supports CPA Trust Fund Legislation".

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

Search

175  
CPA Communities  
Learn More >

The Community Preservation Act has protected over 29,000 acres of open space in Massachusetts

**CPA News Feed**

- Governor Baker & The Boston Globe Agree: It's Time to Support CPA Legislation  
In the weeks following the 2018 CPA Trust...
- November 2018 Statewide Trust Fund Distribution Announced  
The Massachusetts Department of Revenue (...)
- CPA Adoption Update: Two New CPA Towns Bring the Total to 175  
Year after year, CPA continues to make...

More CPA News >

**"Eighteen years is a long time. It's obvious that there needs to be an adjustment made [to CPA]. We would support that mechanism being increased... We would support it and we would sign it."**

- Governor Charlie Baker,  
10/20/2018

**Governor Baker Supports CPA Trust Fund Legislation**

# Technical Assistance Resources

The screenshot shows the website for the Community Preservation Coalition. The URL in the browser is <https://www.communitypreservation.org>. The logo features a stylized 'C' made of overlapping colored squares (red, green, blue, yellow) and the text "Community Preservation Coalition" with the tagline "Preserving our past. Building our future." Below the logo is a navigation menu with items: "About", "News", "CPA Databank", "Technical Assistance" (highlighted with a red circle), and "Adopting CPA". To the right of the menu is a search bar and a badge that says "175 CPA Communities" with a "Learn More >" link. Below the navigation menu are three main content areas: "Our Most Popular Articles" with links to "Is Our Project Allowable?", "CPA Restrictions", "CPA Plans & Applications", "CPA Income Limits", "Sec. of Interior's Standards", and "Dept. of Revenue Information"; "Tech. Assistance Articles" with links to "Main Menu", "Open Space", "Recreation", "Historic", "Housing", and "Administrative"; and "Have A Specific Question?" with the text "Ask the Coalition staff using our Technical Assistance Request Form (Coming Soon!)". Below these is a large banner image of a construction site. At the bottom, there is a "CPA News Feed" section with three news items: "Governor Baker & The Boston Globe Agree. It's Time to Support CPA Legislation", "November 2018 Statewide Trust Fund Distribution Announced", and "CPA Adoption Update: Two New CPA Towns Bring the Total to 175". To the left of the news feed is a quote from The Boston Globe: "The Community Preservation Act is so popular for a simple reason: It works, and taxpayers who vote for it can see the tangible results in their parks and neighborhoods. It's improving the quality of life in Massachusetts, and well worth additional investment from the state." Below the quote is a link to "Read the Boston Globe Editorial on Preserving the CPA Program".

**Community Preservation Coalition**  
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Search

175 CPA Communities  
Learn More >

Home About News CPA Databank **Technical Assistance** Adopting CPA

**Our Most Popular Articles**

- Is Our Project Allowable?
- CPA Restrictions
- CPA Plans & Applications
- CPA Income Limits
- Sec. of Interior's Standards
- Dept. of Revenue Information

**Tech. Assistance Articles**

- Main Menu
- Open Space
- Recreation
- Historic
- Housing
- Administrative

**Have A Specific Question?**  
Ask the Coalition staff using our Technical Assistance Request Form  
(Coming Soon!)

**The Boston Globe**

*"The Community Preservation Act is so popular for a simple reason: It works, and taxpayers who vote for it can see the tangible results in their parks and neighborhoods. It's improving the quality of life in Massachusetts, and well worth additional investment from the state."*

Read the Boston Globe Editorial on Preserving the CPA Program

**CPA News Feed**

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Year after year, CPA continues to make...

More CPA News >

# Over Half the State Has Adopted CPA!

Total of **189** Cities and Towns

**54%** of municipalities

**65%** of Massachusetts residents

**0** communities have revoked



# CPA by the Numbers

## (through end of FY2021)

- Over 14,000 projects approved & \$2.65 billion raised -



**HISTORIC PRESERVATION:** 6,300 appropriations made



**OPEN SPACE:** 32,566 acres preserved



**OUTDOOR RECREATION:** 3,000 projects funded



**AFFORDABLE HOUSING:** 23,400 units created or supported

# The Community Preservation Committee



# 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
- Prepare CPA budget
- Make project recommendations

# CPA Revenue and Expenses



# CPA Revenue Sources

- Local Surcharge Revenue – 1% property tax surcharge
- Annual Trust Fund Distribution
- Interest



# The Statewide CPA Trust Fund

- Funds come from fees charged on documents filed at the Registries of Deeds (\$50 and \$25 as of December 31<sup>st</sup>, 2019)
- The Coalition also lobbies for additional funding from state budget surplus – possibility of \$20 million for CPA Trust Fund this year
- Total November 2021 base match was 43.8% of what communities raised at the local level
- DOR estimated a 35% base match for November 2022

# CPA Trust Fund Revenue

## *The Impact of the 2019 Legislation*

**Nov. 2018 –  
Oct. 2019**

**\$23,292,000**



**12 Months  
with Old Fee  
Structure**

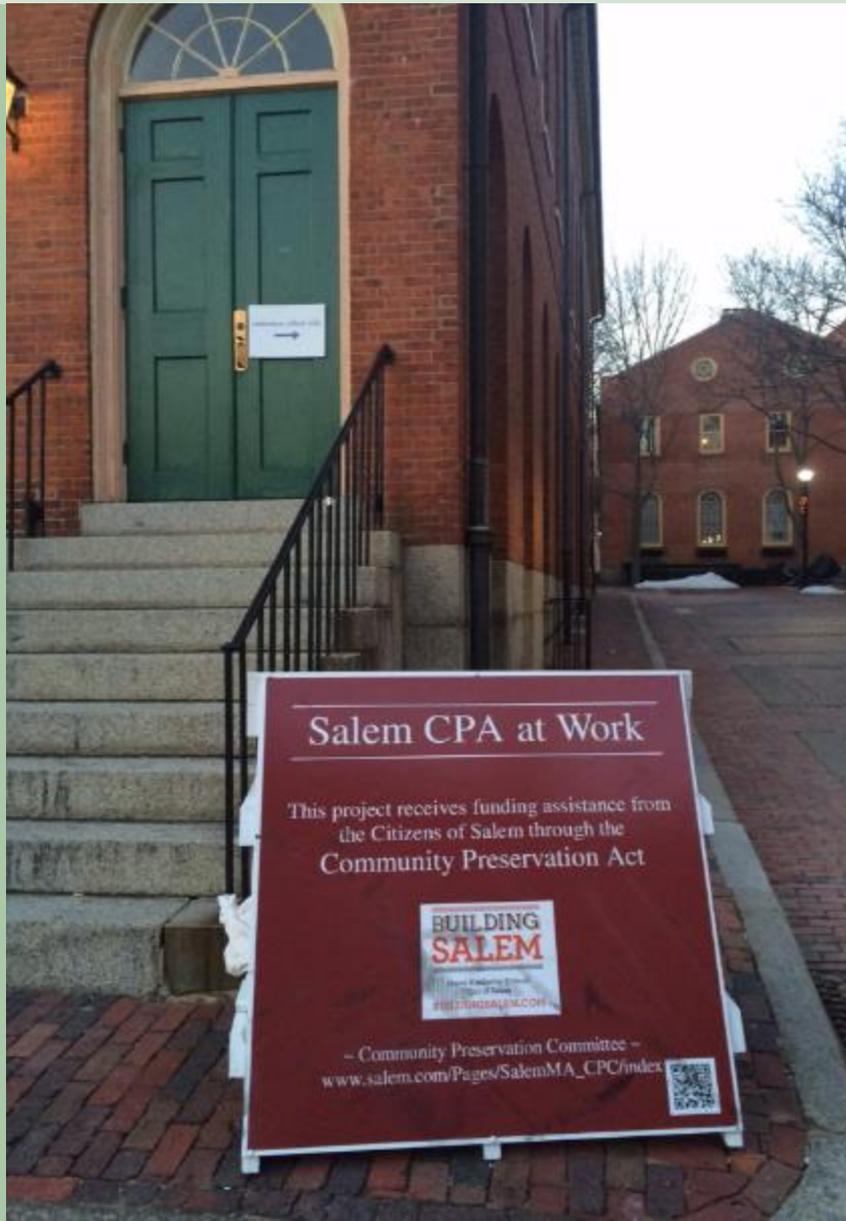
**Nov. 2020 –  
Oct. 2021**

**\$82,640,000**



**12 Months  
with New Fee  
Structure**

# CPA Annual Budget Overview



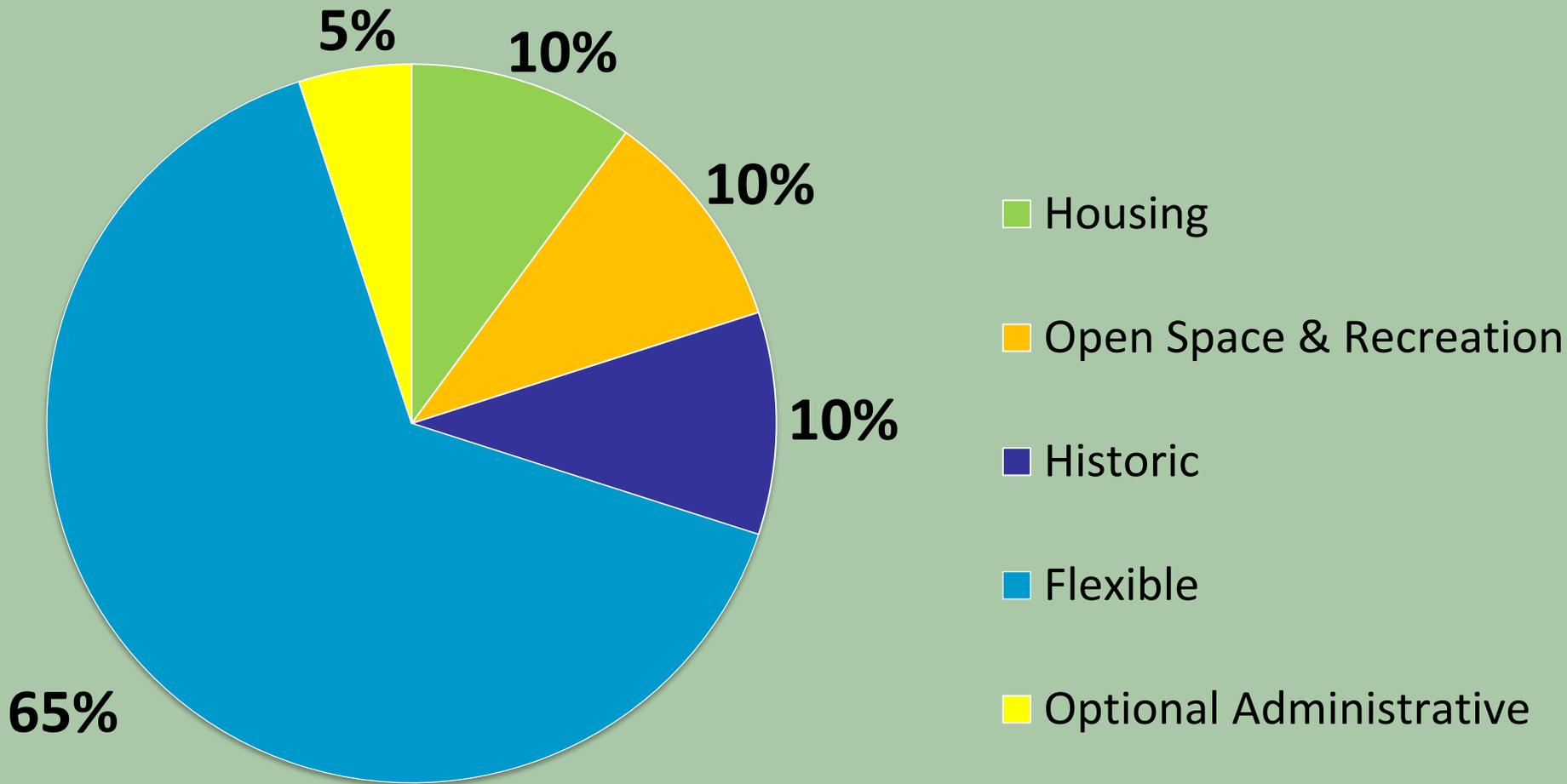
- Usually done at same time as municipal budget
- Requires CPC recommendation to Town Council
- Total budget is based on:

**Estimated local surcharge revenue**

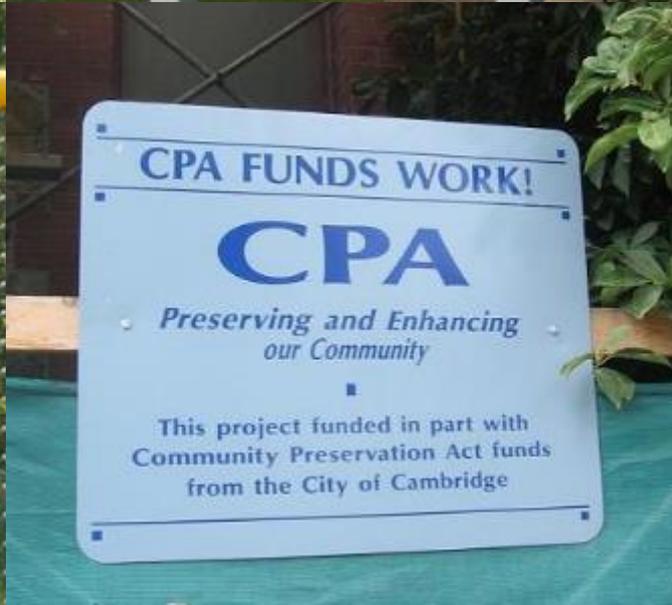
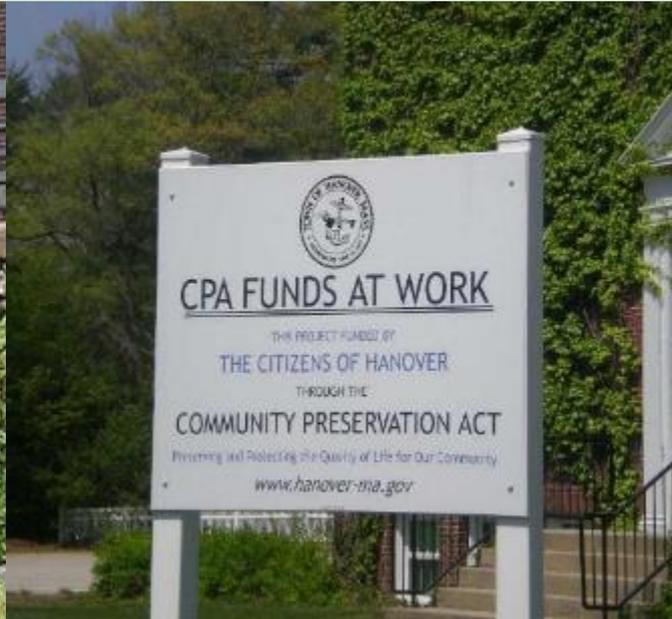
*plus*

**Estimated Trust Fund Distribution  
(November)**

# Creating the CPA Budget



# Spending CPA Funds



# What is Eligible for CPA Funds?

## CPA Allowable Uses Chart

	Open Space	Historic	Recreation	Housing
Acquire	YES	YES	YES	YES
Create	YES	NO	YES	YES
Preserve	YES	YES	YES	YES
Support	NO	NO	NO	YES
Rehabilitate and/or Restore	NO (unless acquired or created with CPA \$\$)	YES	YES	NO (unless acquired or created with CPA \$\$)

# Who is Eligible for CPA Funds?

## Yes

- Government entity
- 501c3 nonprofit

## Caution

- Non-incorporated entities
  - Individual homeowners
- Privately-owned commercial historic buildings

# Allowable Uses of CPA for Historic Preservation



**Under CPA, an historic resource is defined as a building, structure, vessel, real property, document or artifact that is either:**

- listed on the State Register of Historic Places; or
- determined by the local Historic Commission to be significant in the history, archeology, architecture, or culture of the city or town.

**CPA funds may be spent on the following uses for Historic projects:**

- Acquisition
- Preservation
- Rehabilitation and/or Restoration

# CPA and Digitization

Massachusetts Department of Revenue Division of Local Services  
Nayjeef R. Bal, Commissioner Robert G. Nunes, Deputy Commissioner & Director of Municipal Affairs



October 31, 2008

Mr. Rosario C. Malone  
City Clerk  
Waltham City Hall  
610 Main St.  
Waltham, MA 02452

Re: Community Preservation Act  
Our File No. 2008-409

Dear Mr. Malone:

You asked whether monies in the Waltham Community Preservation Fund may be expended for purposes of record retention. You indicated that you intend to have document scanning work performed with respect to vital records, records of City Council matters, and other filings in the Clerk's Office. You inquire as to "what age the record needs to be to qualify under the Community Preservation requirements."

The Community Preservation Act, G.L. c. 44B, § 1, authorizes the city's community preservation committee to "make recommendations to the [City Council] ... for the acquisition, creation, preservation, and restoration of historic resources ...." G.L. c. 44B, § 5. "Historic resources" are defined to include "a building, structure, vessel, real property, document or artifact that is listed or eligible for listing on the state register of historic places or has been determined by the local historic preservation commission to be significant in the history, archeology, architecture, or culture of a city or town." G.L. c. 44B, § 2. Monies may be expended from the Community Preservation Fund only to implement the "the recommendations of the community preservation committee" for eligible purposes, and "provid[e] administrative and operating expenses to the committee." G.L. c. 44B, § 7.

To be eligible for community preservation expenditures, the records in question must have been "determined by the local historic preservation commission to be significant in the history, archeology, architecture, or culture" of Waltham. G.L. c. 44B, § 2. Since the documents are already in the possession of the Clerk's Office, community preservation funds would be available only for the "preservation" and "restoration" of these records. "Preservation" is defined to mean the "protection of personal or real

# CPA Recreation/Open Space Land Acquisitions

Always requires a Conservation Restriction, approved by the state and held by a third party



# Weymouth Open Space & Recreation CPA Land Acquisitions

- Woodbine Road (2007)
- Hollis Kibby Estate (2009)
- 4 Mutton Lane (2010)
- King Oak Hill Property (2011)

# CPA Spending Rules

- No supplanting general municipal revenue
- No maintenance or operating expenses
- Recreation – Outdoor projects only
- Land Purchases – Must file permanent restriction with the state, held by 3<sup>rd</sup> party
- You can pay for CPA projects with bonds issued against future CPA Revenue

# The Coalition is here to help you!

**Technical Assistance  
Hotline:**  
**617-367-8998**

**Stuart Saginor**

Executive Director

**Chase Mack**

Communications Director

**Hiring Soon!**

Associate Director





# **Community Preservation Coalition**

*Preserving our past. Building our future.*

**Questions?**