

# COMMUNITY PRESERVATION PLAN

August 31, 2022

**\*\*DRAFT DOCUMENT FOR DISCUSSION PURPOSES ONLY\*\***

## FY2023–FY2027

The Boston Community Preservation Committee and the CPA Program Administration prepared this plan, to be updated annually, to help guide the City of Boston's allocation of CPA funds for fiscal years 2023 through 2027 (July 1, 2022-June 30, 2027).

JM GOLDSOHN LLC



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Dear Members of the Boston Community:

We are pleased to present to you the Boston Community Preservation Plan (CP Plan) for FY2023-FY2027.

This plan reflects several months of analysis, engagement, and thoughtful consideration to create goals for the Boston Community Preservation Act (CPA) Program over the next five years, which will be reviewed and updated annually.

The Community Preservation Committee (CPC) and CPA program staff collaborated with the support of a consultant to evaluate the City's existing program to develop strategic goals that will help guide applicants for funding and the CPC's funding recommendations to the Mayor and City Council.

The CPA Program has substantially and directly benefited the Boston community by creating and preserving affordable housing, creating and improving open space and recreation, and preserving historic resources. The City has used CPA funds to support projects in every Boston neighborhood, promote greater equity, and strengthen our City's climate resilience.

We look forward to the next five years to continue to improve the quality of life for you and your neighbors.

Sincerely,

Felicia Jacques, Chair, Community Preservation Committee  
Thadine Brown, Director, Community Preservation Program

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## ACKNOWLEDGMENTS

Thank you to the community members, community-based organizations, including CPA applicants and grantees, and Community Preservation Committee members, City staff and public officials who contributed their time and local knowledge to this report by participating in interviews and surveys. In total, 269 past applicants and community organizations gave their input through a survey, and the project team conducted 25 one-on-one interviews.

### COMMUNITY PRESERVATION COMMITTEE MEMBERS

Felicia Jacques, Chair, Boston Landmarks Commission  
Kate Bennett, Administrator of the Boston Housing Authority  
William Epperson, Deputy Director for Capital Construction at Boston Planning & Development Agency, Associate Commissioner of the Boston Parks and Recreation Commission  
Matt Kiefer, At-Large Business Member  
Michael Parker, Boston Conservation Commission  
Madeligne Tena, At-Large Expertise Member  
Kannan Thiruvengadam, At-Large Civic Engagement Member  
Ying Wang, At-Large Civic Engagement Member  
Carol Downs, Former CPC Member, Boston Planning and Development Agency

### TREASURY DEPARTMENT AND CPA PROGRAM STAFF

Maureen Garceau, First Assistant Collector-Treasurer, City of Boston Treasury Department  
Thadine Brown, Director, Community Preservation  
Margaret Dyson, Trust Manager, City of Boston Treasury Department  
Rachel Guilfoil, Open Space and Recreation Consultant  
Brendan Killarney, Contract Administrator  
Gillian Lang, Historic Preservation Consultant  
Courtney Whelan, Historic Preservation Consultant

### CITY OFFICIALS AND DEPARTMENT REPRESENTATIVES

Joe Bagley, City Archaeologist, Department of Archaeology  
Catherine Baker-Eclipse, Director of Design and Construction, Department of Parks and Recreation  
Mariangely Solis Cervera, Chief of Equity and Inclusion, Equity and Inclusion Cabinet  
Sheila Dillion, Chief of Housing and Director of the Mayor's Office of Housing  
Carrie Marsh Dixon, Executive Director, Boston Parks and Recreation Commission  
Rosanne Foley, Executive Director, Boston Landmarks Commission  
Para Jayasinghe, City Engineer, Department of Public Works  
Reverend Mariama White-Hammond, Chief of Environment, Energy, and Open Space, City of Boston Environment Department  
Nicholas Moreno, Executive Director, Boston Conservation Commission  
Devin Quirk, Director of Real Estate, Boston Planning and Development Agency  
Sally Zimmerman, Former Historic Preservation Consultant, Community Preservation

# EXECUTIVE SUMMARY

## WHAT IS THE CPA?

The Community Preservation Act (CPA) is state enabling legislation (MGL c.44B), that allows municipalities to generate funds to promote affordable housing, historic preservation, open space protection, and outdoor recreation. CPA funds can help improve the quality of residents' lives, enhance neighborhoods, strengthen communities, and promote equity. The Boston residents voted to adopt the CPA in November 2016 with the support of 74 percent of the voters and the municipality has been allocating CPA funds in Boston neighborhoods since 2018.



*Lena Park | Unity Park Ribbon Cutting. Source: Boston Community Preservation Program*

Boston generates CPA funds through a local real property tax surcharge of one percent. There is also a variable distribution from the State Community Preservation Trust Fund (Trust Fund) each year. From 2018 to 2021, the program brought in nearly one hundred million dollars and funded nearly two hundred grants in the City.

Some of the accomplishments of the CPA program to date are:

- Created 727 new housing units
- Preserved 311 housing units
- Assisted 150 first-time home buyers
- Funded 13 projects for buildings that house organizations that provide social services to the community, including everything from legal services, food pantries, substance abuse recovery programs, immigrant heritage centers, and veterans' assistance programs.

- Funded 31 projects for religious institutions that offer services to the community including food pantries and hosting alcoholics anonymous meetings.
- Improved 40 open space and recreation resources
- Funded 10 projects for planting trees and preserving vegetation
- Acquired, designed, or constructed 31 new open space and recreation resources

***“Overall, I have a positive impression of the CPA and CPC. The CPC brings innovation and a broader lens when looking at projects. The committee members care and want to use the money well. They respect the public element and engage with community members well.” – Excerpt from an interview***



*The Pryde will transform the old William Barton Rogers School into an LGBTQ-friendly senior housing development. Source: Boston Community Preservation Program*

## WHAT IS THE CPC?

The Mayor and City Council appoint a Community Preservation Committee (CPC) to recommend a slate of CPA projects for funding. The CPC approves an annual Community Preservation Plan and recommends an administrative budget, sets priorities, solicits community input, reviews project proposals, and makes recommendations, holding at least one public hearing annually. All CPC meetings are open to the public. Attendance by at least five of the nine members represents a quorum. CPC members will recuse themselves from a vote if they, their colleagues, or family members have a vested interest.

## WHY WAS THIS PLAN CREATED?

This community preservation plan was created to help guide the CPC in their funding decisions. Laying out the goals and priorities for the program will help the CPC prioritize projects to recommend for funding. The City of Boston began this process so that the municipality can have a clear understanding of how the program has progressed so far and what the City aims to do in future years.

## HOW WAS THIS PLAN CREATED?

The Community Preservation Committee (CPC), through the City of Boston, contracted with JM Goldson, a planning consultancy, to assist with the preparation of an updated Community Preservation Plan. The consultant team evaluated the City's existing Community Preservation Program, including the type and location of funded and unfunded projects, comparing the program's performance to its existing Community Preservation Plan and other relevant City plans, as well as measuring equity of fund distribution using a variety of indicators. A summary of findings is included as part of this plan (see the Appendix).

The consultant team solicited input to assist with this analysis from several City departments, the CPC, CPA Program staff, and community organizations through a series of interviews and a survey. More information about the planning process can be found in Chapter 2.

## WHAT DID WE LEARN?

### ANALYSIS REPORT

In developing the Analysis Report, the project team first compared the goals of the current community preservation plan to other plans for the City of Boston, including Imagine Boston 2030, Boston's Housing Plan, the Open Space and Recreation Plan, and more. The following are some of the key findings from this analysis.

- Ultimately, the 2018-19 CP Plan is closely aligned with the other relevant city plans, as described in more details below.
- The CP Plan's goals and priorities are aligned with the other affordable housing goals set by other City plans.
- Currently, there are no City of Boston plans that focus on historic preservation with specific goals and priorities however other City plans have recognized the importance of historic preservation.
- Overall, the CP Plan goals and priorities in the open space and recreation category are aligned with the goals and priorities identified in other City plans, as they are focused on

acquiring new open space, improving existing open spaces, and protecting the natural environment in Boston.

- The CP Plan does not list goals for specific locations, like in the Imagine Boston 2030 report, though those goals can still be achieved by following the goals and priorities outlined in the CP Plan.

Another important component of the report was the analysis of projects that have received CPA funds. The project team analyzed the project descriptions and performed spatial analysis, comparing the projects to various indicators to measure the impacts of the projects. A summary of these findings can be found throughout this document, and a full reporting of the study can be found in the Analysis Report.

The final piece of the Analysis Report was determining the level to which the CPA program has met the goals set out in the plan. The project team analyzed the projects in each CPA category against the goals to determine the specific ways that each goal has been addressed through the funded projects. Most of the goals set out in the original plan have been addressed by the funded projects. A full description of the analysis and findings from this portion of the study can be found in the Analysis Report.

## INTERVIEWS

To learn more about the CPA program in Boston, the project team held one-on-one interviews with 25 individuals, including CPA program staff, CPC members, and representatives from departments that work directly with the CPA program.

Through the interview process, the project team was able to learn about the program from a variety of perspectives. Overwhelmingly, the opinions of the interviewees about the CPA program were positive. Interviewees expressed that the CPA program does important work to provide funding in Boston communities.

Some of the areas for potential improvement brought up by interviewees included refining the application process; increasing the CPA staff capacity; improving coordination between CPA staff, CPC, City Departments, and neighborhood groups; clarifying the role of the CPC; determining how to be more equitable; and refining the goals and priorities in the plan.

A summary of the interview findings can be found in Chapter 2, and the detailed interview findings can be found in the Appendix.

## SURVEY

The project team designed a survey that was sent to over three hundred past applicants and neighborhood organizations in Boston. The survey directed past applicants to answer questions about the application process and asked all respondents about their perspective and opinion about the CPA goals and priorities. Two hundred and sixty-nine people participated in the survey. Some of the key findings are listed below. A summary of the survey and all key findings can be found in Chapter 2, and the detailed survey results can be found in the Appendix.

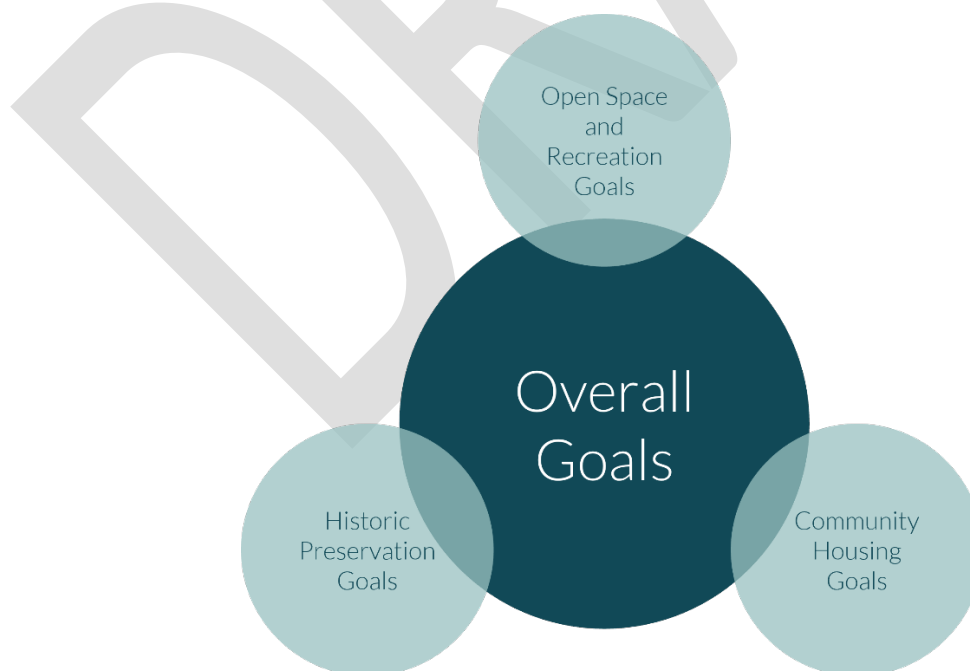
- Past applicants indicated that they find the application to be of medium difficulty, and that the application got slightly easier to complete over time.

- The biggest open space priorities among survey respondents include creating more open space projects in underserved neighborhoods and protecting natural resources to mitigate the impacts of climate change.
- In the active recreation category, most respondents indicated improving parks, playgrounds, or athletic fields in underserved areas and that creating more parks, playgrounds, or athletic fields in underserved neighborhoods was very important.
- The community housing project idea with the most support was ensuring that existing homes stay affordable.
- When asked what types of historic preservation projects are the most important, preserving historic properties that honor historically marginalized populations scored the highest.
- Most respondents agreed that the current model of allocating 50 percent of funds to affordable housing, and 20 percent each to open space and recreation, and historic preservation was a good distribution of funds. The remaining ten percent is allocated to projects in the three program areas as needed.
- One of the concepts mentioned most was climate change. Survey respondents emphasized the need for climate-focused initiatives within projects in every category.
- Survey respondents indicated that CPA funding should go toward creating spaces and opportunities for individuals, children, and families, and to improve conditions in underserved neighborhoods so that all people who call Boston home can feel welcomed and valued.

## WHAT ARE THE CPC'S FIVE-YEAR CPA GOALS?

The CPC created these goals by carefully considering input from each component of the planning process, including the quantitative analysis, interviews, survey, CPC meetings, and working sessions. There are overall goals that apply to all categories, and there are goals within each category as well. The relationship between the overall and category goals are illustrated in the graphic below.

Each of the goals listed below is further described in the following chapters.



## OVERALL CPA GOALS

1. Prioritize CPA funding for projects that further equity by addressing needs in the City's historically underserved neighborhoods and marginalized populations
2. Prioritize CPA funding for projects that directly advance Boston's climate resilience and sustainability
3. Balance the use of CPA funds to support both community-led projects and further City priorities as documented in current City plans.
4. Continue to establish a CPA funding allocation formula annually to help guide CPC recommendations.

## AFFORDABLE HOUSING GOALS

1. Create new units of affordable housing in all Boston neighborhoods including areas with higher median household income to help provide greater opportunities, mobility, and choice while also preventing people from being priced out of their current neighborhoods.
2. Preserve naturally occurring affordable housing, such as through acquisition and preservation programs.
3. Continue to fund CPA funds to promote homeownership to enable household equity growth and help address the racial wealth gap.
4. Consider support for local rental assistance and relief programs to expand the limited reach of existing federal and state housing vouchers.

## OPEN SPACE AND RECREATION GOALS

1. Promote climate equity and resilience by supporting open space and recreation initiatives that help to mitigate the effects of climate change for Boston residents, especially BIPOC populations and neighborhoods that lack access to quality open space and recreation.
2. Create more public open space in historically underserved Boston neighborhoods to promote health equity for BIPOC and other marginalized populations.
3. Rehabilitate existing parks, playgrounds, athletic fields, greenways, and schoolyards in historically underserved Boston neighborhoods to promote health equity for BIPOC and other marginalized populations.
4. Promote healthy local food access in historically underserved Boston neighborhoods such as through funding for community gardens, urban agriculture properties, and community farms.
5. Promote creation of greenways that connect neighborhoods, provide park and recreation amenities, and support multimodal recreational infrastructure including biking and walking.

## HISTORIC PRESERVATION GOALS

1. Support historic preservation projects that help address affordable housing needs.
2. Favor projects that honor the history and historical contributions of Boston's BIPOC and other historically marginalized populations.
3. Further preservation and rehabilitation of properties that provide public access or that provide environmental and/or social benefits.
4. Protect privately-owned properties that are threatened by demolition or demolition by neglect and will provide a demonstrated public purpose.

## Eligibility

The appendix at the end of this Plan contains an eligibility chart that will help define what types of projects are allowed and what does not qualify as a CPA project. These [eligibility charts](#) help interpret the [state law](#).

CPA funds are primarily limited to capital projects and include the purchase, construction, and preservation of affordable housing, open space, parks, recreational spaces, and historic resources. Restoration and renovation are allowable for historic resources, parks, recreational spaces, and open space. CPA funds may not be used for operation, maintenance, or programming. More detailed information and definitions of allowable projects are outlined in the [CPA legislation](#).

# CHAPTER 1: OVERVIEW

## INTRODUCTION

The Community Preservation Act (CPA) is state enabling legislation (MGL c.44B), that allows municipalities to generate funds to promote affordable housing, historic preservation, open space protection, and outdoor recreation. CPA funds can help improve the quality of residents' lives, enhance neighborhoods, strengthen communities, and promote equity. The Boston residents voted to adopt the CPA in November 2016 with the support of 74 percent of the voters and has been allocating CPA funds in Boston neighborhoods since 2018.

The CPC and CPA Program staff will use this plan to help decide how to recommend allocating CPA funding. The CPC encourages future applicants seeking CPA funds to refer to this plan to guide their CPA requests and encourages the Mayor's Office and the City Council to use this plan to guide decisions on allocation of funds.

This plan is created in accordance with the Community Preservation Act (CPA), Massachusetts General Laws c. 44B s.5(b)(1). The law states: "The community preservation committee shall study the needs, possibilities, and resources of the city or town regarding community preservation, including the consideration of regional projects for community preservation."

*"I love what the CPA represents, and you all have funded some great projects. I hope the work continues." – Survey respondent*

## CPA ELIGIBILITY

The CPA provides funding for four general project types: community housing, historic preservation, open space, and outdoor recreation. See eligibility chart included in the appendices.

**Community Housing:** The City can use CPA funds to acquire, create, preserve, and support community housing for households with incomes at or below 100 percent of the area median income. The area median income for the Boston-Cambridge-Quincy, MA-NH HUD Metro FMR Area is \$120,800. Community Housing is defined by the CPA legislation as "low- and moderate-income housing for individuals and families, including low- or moderate-income senior housing." Some of the CPA-funded housing projects in Boston resulted in newly constructed affordable units, acquisition of market-rate units to convert to permanently affordable units, and direct housing assistance for income-eligible first-time homebuyers. Throughout this document community housing and affordable housing (the more commonly used term outside of CPA) are used interchangeably.

**Historic Preservation:** The city can use CPA funds for historic preservation of buildings, structures, documents, artifacts, and vessels including acquisition, preservation, rehabilitation, and restoration. The property must be listed on the State Register of Historic Places or determined to be locally significant by the Boston Landmarks Commission. The State Register of Historic Places is maintained by the Massachusetts Historical Commission.

**Open Space & Recreation:** The City can use CPA funds to acquire, create, and preserve open space and natural resources. Open space is defined as “land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh and saltwater marshes and other wetlands, ocean, river, stream, lake and pond frontage, beaches, dunes and other coastal lands, lands to protect scenic vistas, land for wildlife or nature preserve and land for recreational use.” Some examples of open space projects in Boston include planting trees and vegetation in several projects, including on the Charles River Esplanade, Cedar Grove Cemetery, Mount Hope Cemetery, and Belle Isle Marsh; design and construction of new parks; and renovations to existing parks and playgrounds, such as adding sea level rise mitigation features to Langone Park in the North End.

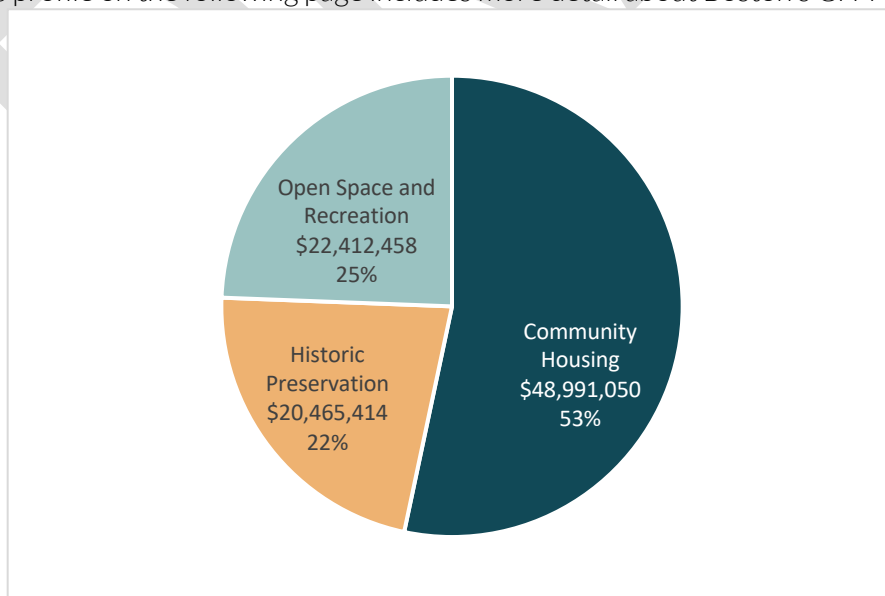
The City can use CPA funds for recreational land use in the same ways that it does for open space. However, with recreational land use projects, it is also possible to fund the rehabilitation and restoration of existing outdoor recreation land (it is not necessary for these to have been acquired or created using CPA funds, as it is with rehabilitation and restoration of open space). The CPA legislation defines recreational use as including but not limited to “the use of land for community gardens, trails, and noncommercial youth and adult sports, and the use of land as a park, playground or athletic field.” Some of the recreation projects in Boston include the creation of community gardens and walking trails in parks.

## BACKGROUND

### CPA IN BOSTON

Boston adopted the Community Preservation Act through a ballot initiative in November 2016. 74 percent of Boston voters voted in favor of adopting the CPA. Boston generates CPA funds through a local property tax surcharge of one percent and a variable distribution from the State Community Preservation Trust Fund.

The City implemented its first round of CPA funding in 2018 and has appropriated more than 91 million dollars to community preservation projects across the CPA funding categories (note, the CPA Projects profile on the following page includes more detail about Boston’s CPA-funded projects):



Up to five percent of total CPA funds may be spent for CPC administration. In addition, the CPA statute requires a minimum of ten percent be spent or reserved for each of the following CPA categories:

1. Community housing
2. Historic preservation
3. Open space

The total percentage of CPA funds allocated to each CPA category above the ten percent minimum is determined on a discretionary basis by the Community Preservation Committee (CPC), Boston's City Council and others.

The CPC has been following a funding allocation target. Five percent of the CPA budget is set aside each year for administrative costs. The remainder of the budget is available for CPA-eligible projects. Of the project budget, the CPC has target allocations of 50 percent of funds for affordable housing, 20 percent for open space and recreation, 20 percent for historic preservation, and 10 percent that can be allocated to any CPA category.

The CPC has used this allocation formula as a guideline since 2019. In 2018, the first year of the program, the funding was allocated as 20 percent to affordable housing and 40 percent each to historic preservation and open space and recreation. According to staff, this initial allocation with priority for historic preservation, open space, and recreation projects was based on the CPC's desire to focus first year funding on shovel ready projects that could have an immediate positive impact for Boston community members.

#### WHO DECIDES HOW THE FUNDS ARE SPENT?

Boston established a Community Preservation Committee (CPC) as required by MGL c.44B, which is responsible for making funding recommendations to the City's Mayor. The mayor then submits the recommendations to City Council, which hosts a public hearing. The City Council has the authority to approve or deny the CPC's recommendations. The City Council can also approve the CPC's recommendation at a reduced funding amount. The City Council may not approve funding without a recommendation from the CPC.

The CPC has nine members including four at-large members from the public who are appointed by the City Council. All committee members serve a three-year term and may serve a maximum of two terms. Per MGL c.44B, the CPC also includes a member from each of the following five entities:

- Boston Conservation Commission
- Boston Landmarks Commission
- Boston Housing Authority
- Boston Planning and Development Agency
- Parks and Recreation Commission

The role of the CPC is to:

- 1) Study the City's community preservation needs, possibilities, and resources and produce a Community Preservation Plan (CPP)<sup>1</sup>

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<sup>1</sup> This document is the Community Preservation Plan (CPP)

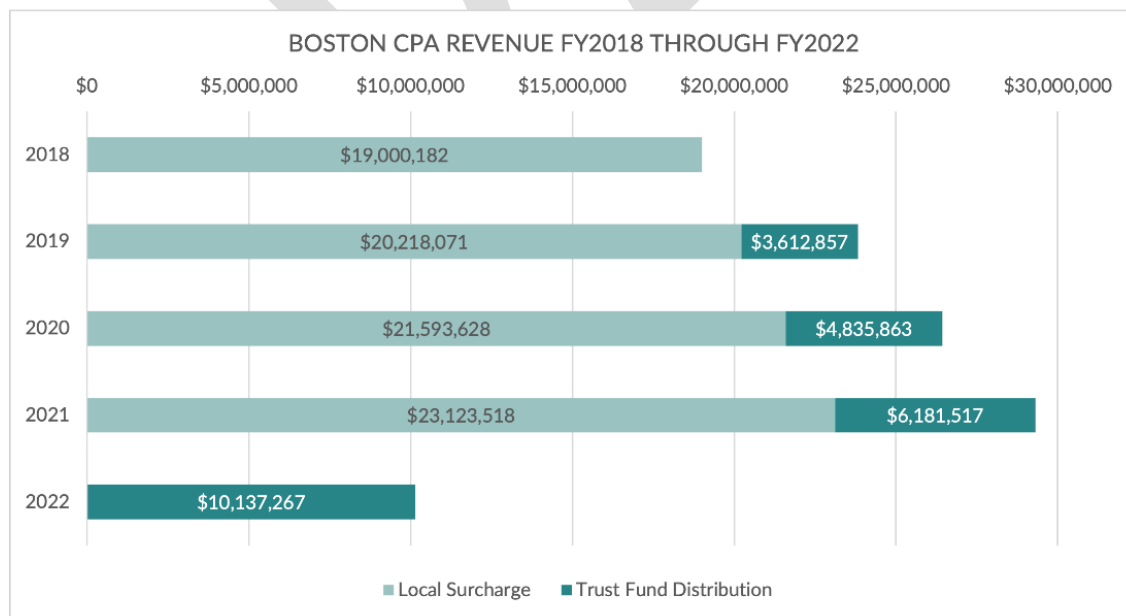
- 2) Hold a public informational hearing regarding the study before updating the Plan<sup>2</sup>
- 3) To make recommendations to the Mayor and City Council for funding projects with CPA funds

Boston's CPC meets regularly. During the CPA application period, the CPC typically meets on Thursdays from 12 PM to 2 PM, and Mondays from 5:30 PM to 7:30 PM. Additional meetings are held at the discretion of the CPC. These meetings are open public meetings and members of the public are welcome and encouraged to attend. Notices of CPC meetings and agenda (with links for virtual meetings, when needed) are posted on the City's Public Notices webpage, which can be found on the City's website: <https://www.boston.gov/public-notices>. Boston's Community Preservation staff host presentations, Q&A sessions, forums and meet-and-greets across the city.

### HOW MUCH FUNDING IS AVAILABLE?

Boston generates CPA funds through a local real property tax surcharge of one percent. There is also a variable distribution from the State Community Preservation Trust Fund (Trust Fund). Since the beginning of the program, Boston has collected more than \$100 million (as of January 2022) – this figure includes about \$83.9M raised through the local surcharge and \$24.7M through the Trust Fund distributions. In FY2021, the local property tax surcharge generated \$23,123,518 and the Trust Fund distribution was about \$6,181,517 (a 28.6 percent match). As of February 2022, the state match is 43.8 percent (\$10,137,267). The following graph shows the CPA program's revenue from 2018 to 2022.

(Note: we are awaiting information for 2022 local surcharge collection to add to the chart below.)



<sup>2</sup> Public hearings of the Committee shall be planned to maximize citizen attendance including a preference to hold hearings in the evenings or off-site from City Hall. The public hearing shall be posted publicly on the City website and published for each of two weeks preceding a hearing in a newspaper of general circulation in the City.

## APPLICATION AND FUNDING PROCESS

The Boston CPC accepts applications for CPA funding on an annual basis in the fall; applicants must submit an eligibility form. Upon review of eligibility forms, the CPA Program staff will invite eligible applicants to submit a full application. In lieu of an eligibility form, applicants for affordable housing CPA funds must submit a letter of intent and complete a Request for Qualifications by late September. Eligible candidates are invited to submit applications between early October and early November. The CPC requires application materials to be submitted online. Application materials and deadlines are updated annually. Current application forms and deadlines are available on Boston's CPC webpage, "[How to Apply for Community Preservation Funds](#)."

The CPC considers each funding application based on the merits of the project as well as the available CPA balance. The CPC reviews all applications by January and, through a majority vote, determines a list of proposals to recommend to the Mayor in February.

## CHAPTER 2: SUMMARY OF FINDINGS

The project team conducted a thorough analysis of the CPA program in Boston as a basis for updating the Community Preservation Plan. Through this process, the project team reviewed what the Boston CPA program has funded, how it coordinates with other City departments, how it conducts community outreach and communicates with residents and organizations, and what the CPA application process is like for applicants. Overall, the CPA program in Boston has been a noted success. The findings derived through this process informed the development of the goals in this document, which are intended to help the CPA program build on its success. The following are some of the key findings from this analysis process.

*"I would say that the program has been an extreme success. I'm impressed by the CPA staff, and I'm supportive of the program" – Interviewee*

The CPA program funded **193** projects from 2018 to 2021, totaling **\$91,968,922**.



The neighborhoods of **East Boston**, **Dorchester**, and the **South End** are the most vulnerable to the Urban Heat Island Effect

The neighborhoods of **Dorchester** and **Roxbury** received funding for the greatest number of projects. However, normalized for population, the funding in Dorchester is average compared to other neighborhoods



Survey respondents emphasized the need for **climate-focused initiatives** within projects in every category.

Meanwhile, the **North End** had the 7th highest spending amount overall but had the highest spending percentage when normalized by population.



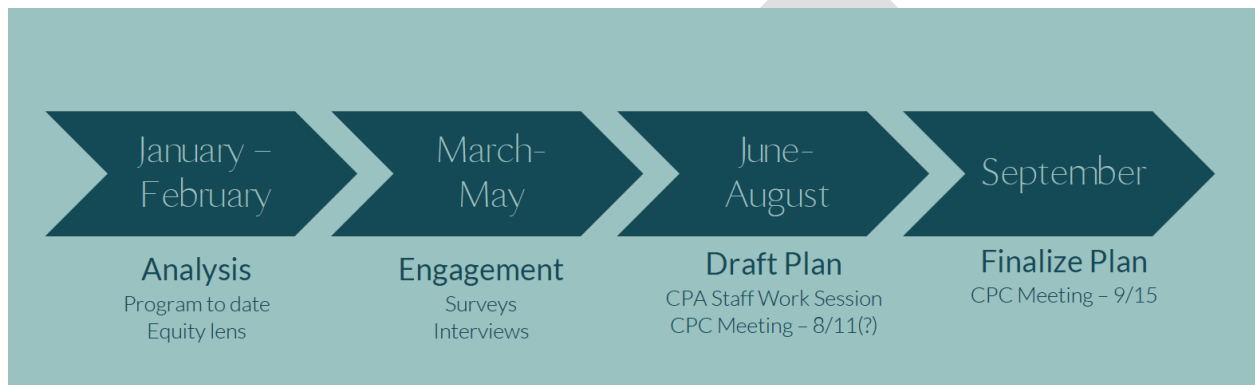
**Interviewees** emphasized the need to **streamline** the application process.

**Applicants** have praised the CPA staff for their help and willingness to support them. However, a revised application and eligibility form can help ensure that projects are **"shovel ready"** when they receive funding without needing as much support from the staff.

**109** out of **188** projects, totaling over **\$41M** of CPA funds, are in parts of Boston with **elevated poverty levels**, **language access needs**, 65 percent or more of the population **earning less than the Area Median Income**, and areas where 65 percent or more of residents **identify as BIPOC**.

## ANALYSIS APPROACH

The project team evaluated the Community Preservation Program using both qualitative and quantitative methods. The project team began the analysis process in January of 2022 by performing geographic and statistical analysis of the projects that the CPA has recommended for funding. Then, the project team conducted the engagement portion of the analysis, which consisted of interviews and a survey. This process is illustrated in the project timeline below. The following paragraphs detail the methodologies applied to each portion of the analysis and engagement phases of the project.



The team began the process by reviewing the 2018-2019 Community Preservation Plan (CP Plan), paying special attention to the goals and funding priorities defined for each project category. The project team then compared the CP Plan's goals and priorities to the goals and priorities of other relevant City plans to determine whether the CP Plan is aligned with other City departments and programs.

The team analyzed the program and funded projects at the city level. The project team mapped the projects that the City has funded and compared them to neighborhood-level indicators including poverty level, median income, percent of population that identify as BIPOC, access to open space, households with limited English language capacities, educational attainment, commuting time, citizenship, and housing vacancy. The team used web mapping in addition to advanced geospatial analytics software to perform the spatial analysis. As part of this process, the project team visited the sites of CPA projects across all categories in each of Boston's neighborhoods. This allowed the team to have a better understanding of the local context of each project as well as the different character that each neighborhood has. Please see the separate Analysis Document for a full report of the research completed.

The project team also conducted one on one interviews with City CPA staff, department heads that work directly with CPA, and members of the Community Preservation Committee. The interviews were an essential component of learning how the CPA program has operated in the past, what has gone well, and what should be changed going forward. The project team also administered a survey to past applicants and community organizations that may apply for CPA funds in the future. The survey asked past applicants about the application process and gathered insight about how the application process might be improved. The survey also asked all participants about how they would want to see the CPA program prioritize types of projects.

The analysis and engagement processes lead the project team to the creation of the goals presented in this document. Engaging with those with a special knowledge of CPA gave the team insight about how to improve the process, the survey of community leaders aided in the development of priorities that reflect the desires of the city, and the analysis ensures that the CPA can continue to meet the needs of the community in an equitable way.

Boston is a complex City made up of neighborhoods with different identities, needs, and resources. The Community Preservation program should impact all areas of Boston while also addressing equity and providing funds for projects in areas with a specific need. The following section summarizes the analysis that was completed as a part of this research process.



*The Haley House Bakery Café in Roxbury received CPA funds for the rehabilitation and restoration of its building which was originally built in 1915. Source: JM Goldson*

## ANALYSIS SUMMARY

### REVIEW OF LOCAL AND REGIONAL PLANS

It is important for the Community Preservation Plan to consider the established goals of the City. The City of Boston has several planning documents that establish community goals related to the Community Preservation Act funding categories. These include the 2018-19 Community Preservation Plan, Imagine Boston 2030, Housing Boston 2030, the 2015-2021 Boston Open Space & Recreation Plan, Resilient Boston 2017, the 2021 Boston Climate Action Report, the 2016 Economic Inclusion and Equity Agenda, and the 2020 Boston Parks & Rec Department Annual Report. Some of the key findings from this portion of the analysis are listed below. Ultimately, the 2018-19 CP Plan is closely aligned with the other relevant city plans.

The City plans focus on providing affordable housing for Bostonians through the production of new housing, preservation of existing affordable housing, and the protection of housing units from rising market rates. The City plans also emphasize the importance of climate readiness and the decarbonization of city-funded affordable housing.

## QUANTITATIVE ANALYSIS

Understanding what the CPA program has accomplished and where it has focused can help when looking forward and trying to determine what should be changed or where the focus should be adjusted. The following sections provide a summary of the quantitative analysis that was completed, including analyzing the program overall, as well as comparing the program to some indicators of equity. In total, the CPA program has funded 193 projects across the City, totaling \$91,968,922.

### PROJECT FUNDING NORMALIZED BY POPULATION

#### Equity Analysis

One of the goals of this analysis is to equate the level to which CPA funds have been distributed equitably. To explore this, the team analyzed the distribution of projects and funds compared to several indicators for equity including income level, poverty rates, language access needs, and level of BIPOC populations by neighborhood.

The following table shows these neighborhood characteristics compared with information on the number and percentage of projects funded as well as level of funding.

Neighborhood	Project Funding	Population	Percent of Funding Normalized by Population
North End	\$3,239,900	8,749	10.9%
Roxbury	\$12,593,844	54,161	6.8%
Chinatown	\$2,061,733	12,782	4.7%
Hyde Park	\$5,117,207	38,924	3.9%
Back Bay	\$2,161,700	17,783	3.6%
Mission Hill	\$1,777,500	17,386	3.0%
East Boston	\$4,611,200	47,263	2.9%
West End	\$643,552	6,619	2.9%
Beacon Hill	\$931,241	9,648	2.8%
Jamaica Plain	\$4,140,000	43,523	2.8%
Mattapan	\$2,245,000	26,659	2.5%
Dorchester	\$10,499,932	126,909	2.4%
Charlestown	\$1,446,000	19,890	2.1%
South End	\$1,678,760	25,420	1.9%
Bay Village	\$250,000	4,450	1.6%
Downtown	\$1,015,000	18,306	1.6%
Allston-Brighton	\$4,051,850	74,558	1.6%
Fenway-Kenmore	\$1,675,000	38,840	1.3%
West Roxbury	\$1,370,000	33,526	1.2%
South Boston	\$1,335,783	41,175	1.0%
Roslindale	\$685,000	30,021	0.7%

Indicator	Measurement	Projects (#)	Projects (%)	Funding (\$)	Funding (%)
Area Median Income (AMI) <sup>3</sup>	Over 65% of Households earn below the AMI	86	45.7%	\$33,356,246	36%
Poverty <sup>4</sup>	Over 40% of residents are living below the poverty line <sup>5</sup>	30	15.9%	\$11,705,369	12.7%
Language Access	Neighborhoods that have 15% or more of Boston residents with a Language Access Need (Dorchester and East Boston)	45	23.9%	\$15,111,132	16.4%
BIPOC <sup>6</sup>	Over 65% of residents identify as BIPOC	91	48.4%	\$35,067,183	38.1%

<sup>3</sup> The AMI for Boston is \$120,800

<sup>4</sup> Poverty is defined by household makeup. The Census Bureau provides an estimate of the number of people earning an income below the poverty level. The threshold for an individual is \$14,097, and the threshold for a family of four is \$27,479

<sup>5</sup> This metric highlights certain areas, like Fenway-Kenmore, with large student populations. The student population in some areas might skew the results to indicate a large population that lives in poverty than is the reality, as students are more likely to have their rents subsidized by families or tuition assistance programs that help them financially

<sup>6</sup> BIPOC stands for Black, Indigenous, People of Color, and includes Asian, Latinx, Pacific Islander, and Middle Eastern persons

Over 30 percent of project funds have been invested in both areas where more people are earning below the AMI and where there is a concentration of BIPOC residents. Less than 20 percent of project funds have been invested in areas with a high concentration of poverty or in areas with more residents with an identified language access need.

***Overall, 109 projects totaling over \$40M in CPA funds were awarded in areas with at least one of the characteristics mentioned. These projects are in the following neighborhoods: Allston-Brighton, Chinatown, Dorchester, East Boston, Fenway-Kenmore, Hyde Park, Jamaica Plain, Mattapan, Mission Hill, Roslindale, Roxbury, and the South End.***

The only neighborhoods that do not have at least one of these characteristics are the Leather District (within the Downtown Neighborhood) the Seaport (within the South Boston Neighborhood), the North End, and the West End.

#### CPA PROJECTS AND AREA MEDIAN INCOME BY CENSUS TRACT

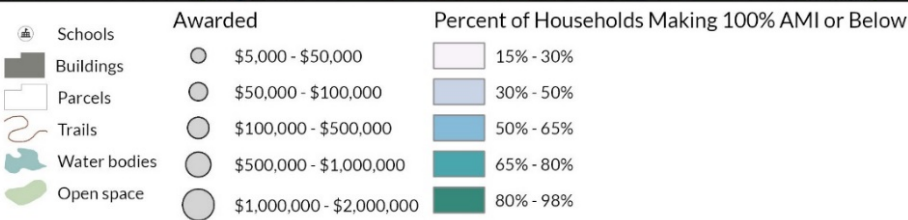
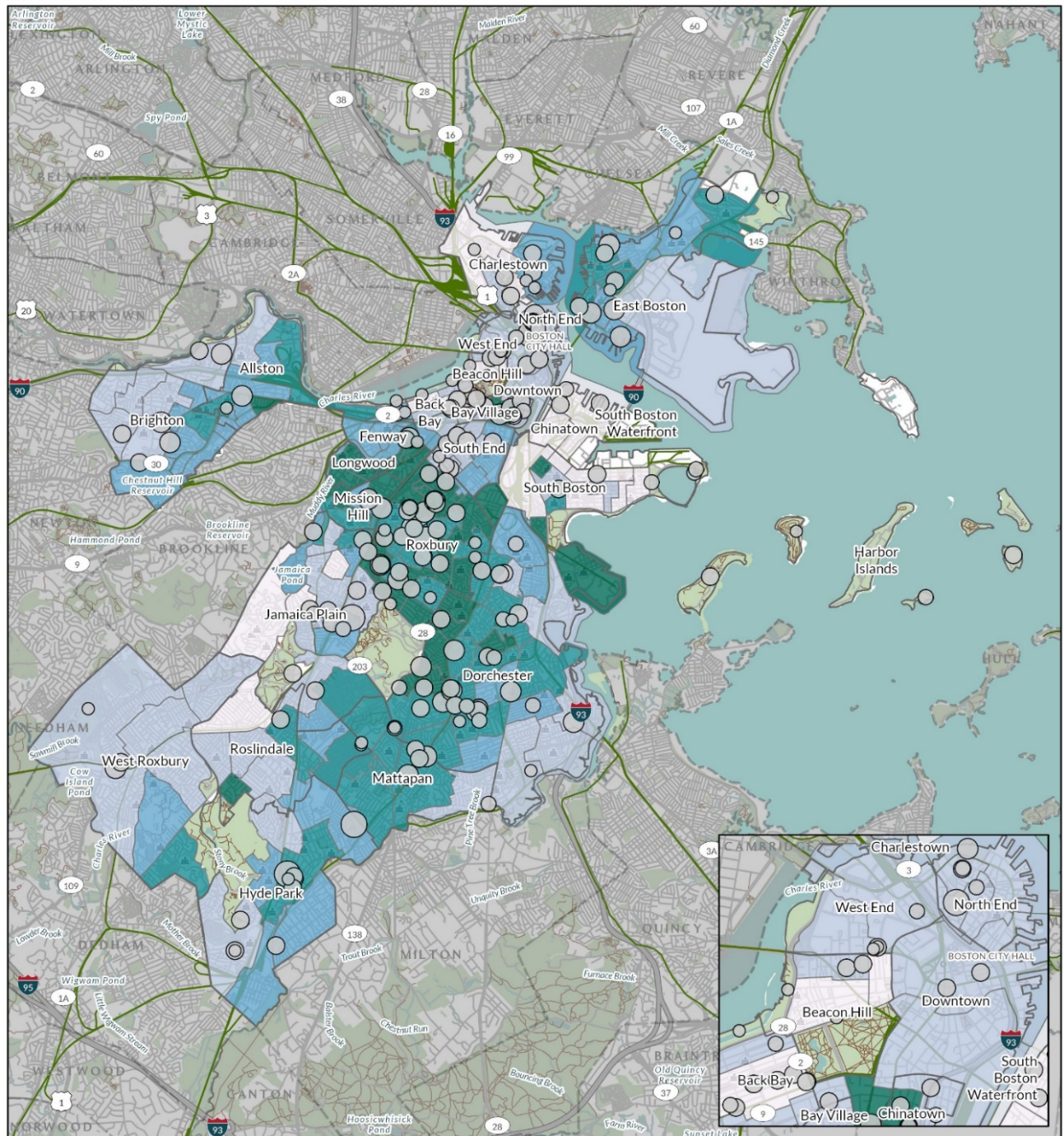
The map on the following page shows the distribution of funded CPA projects alongside data showing the concentration of households making 100 percent of the Areawide Median Income (AMI) or below. The AMI in the Boston-Cambridge-Quincy, MA-NH HUD Metro FMR Area is \$120,800. In general, the City has awarded projects in areas with more households earning less than the AMI.

Eighty-six out of 188 projects with a specified location (45.7 percent) are in census tracts where over 65 percent of households are making 100 percent of the AMI or less.

# CITY OF BOSTON - CPA PROJECTS & AREA MEDIAN INCOME

Prepared by JM Goldson LLC

J M GOLDSON



0 0.5 1 Miles

Sources: MassGIS, MassDEP, MAPC Trailmap



## CPA PROJECTS AND POVERTY RATE BY CENSUS TRACT

This map shows the project distribution alongside poverty rate data. In general, census tracts with higher poverty rates are concentrated toward the geographic center of the city, toward the Roxbury, South End, Mission Hill, Longwood, and Fenway-Kenmore neighborhoods<sup>7</sup>.

*Thirty out of 188 projects with a specified location (15.9 percent) are in census tracts with elevated poverty levels, where forty percent of residents or more are living below the poverty line.*



*The windows of Roxbury's Dr. Marie E. Zakrzewska Building underwent restoration as part of the historic building's conversion into the Dimock Center, a residential recovery facility for men. Source: JM Goldson*

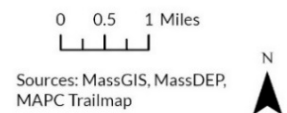
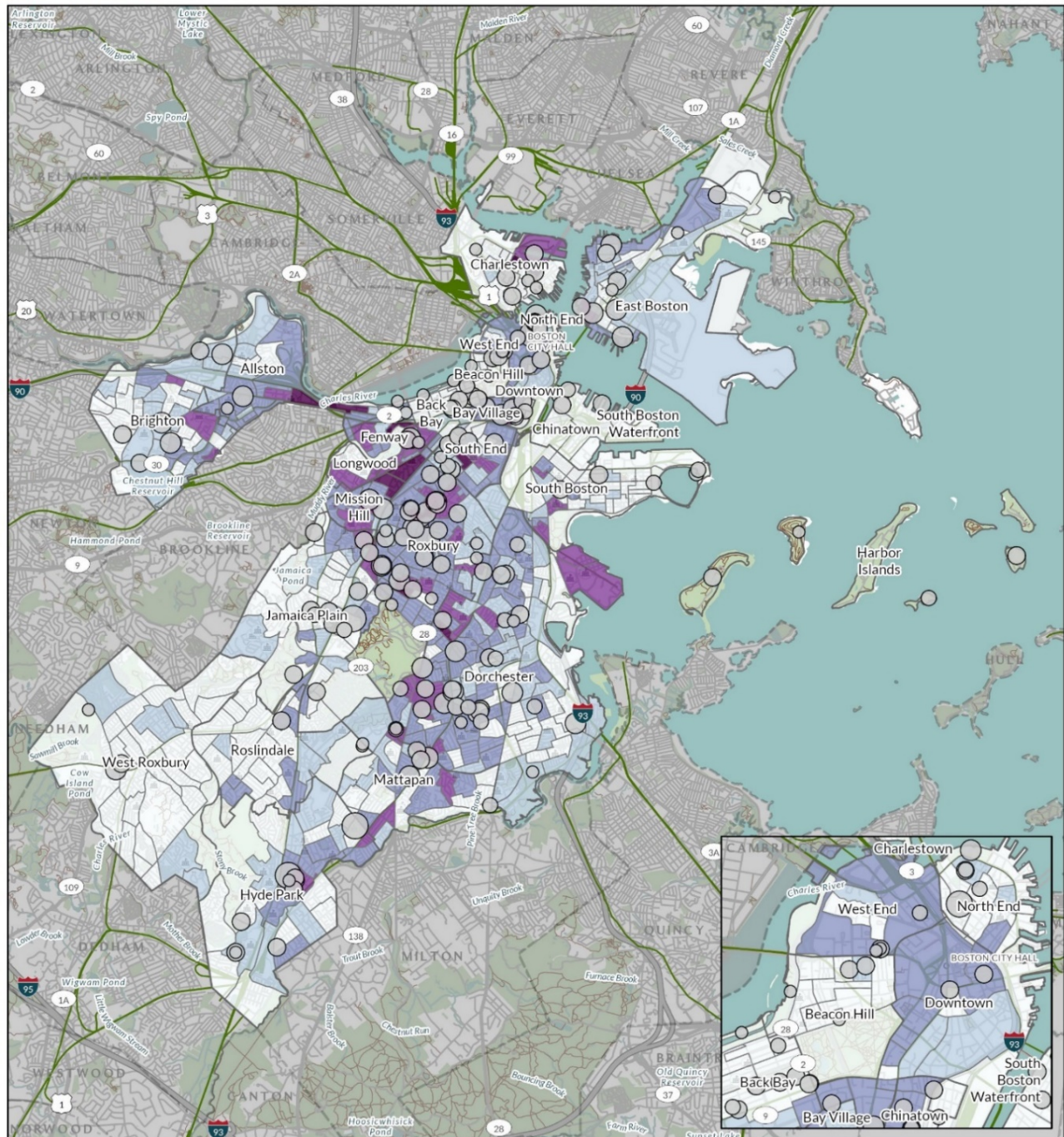
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<sup>7</sup> The project team would like to note that these neighborhoods have a large student population that might skew the results to indicate a larger population that lives in poverty than is the reality, as students are more likely to have their rents subsidized by families or tuition assistance programs that help them financially.

# CITY OF BOSTON - CPA PROJECTS & POVERTY RATE

Prepared by JM Goldson LLC

J M GOLDSON



## CPA PROJECTS AND LANGUAGE ACCESS NEED BY NEIGHBORHOOD

This map shows the distribution of projects alongside data indicating residents with a language access need<sup>8</sup>. By far, the most residents with language access needs across the City live in Dorchester and East Boston. In Dorchester, a minimum of five percent of residents (or one thousand people) speak Spanish, Vietnamese, Haitian Creole, and Portuguese/Cape Verdean Creole. In East Boston, at least five percent of residents (or one thousand people) speak Spanish and Arabic<sup>9</sup>.

***The City has funded 48 projects out of 188 with a specified location (25.5 percent) in neighborhoods that are home to 42.1 percent of the residents with language access needs in Boston.***



*Funds from the Community Preservation Act supported the restoration of key structural components of the Nantucket Lightship, moored in East Boston, to ensure the integrity of the ship's hull below the waterline. Source: JM Goldson*

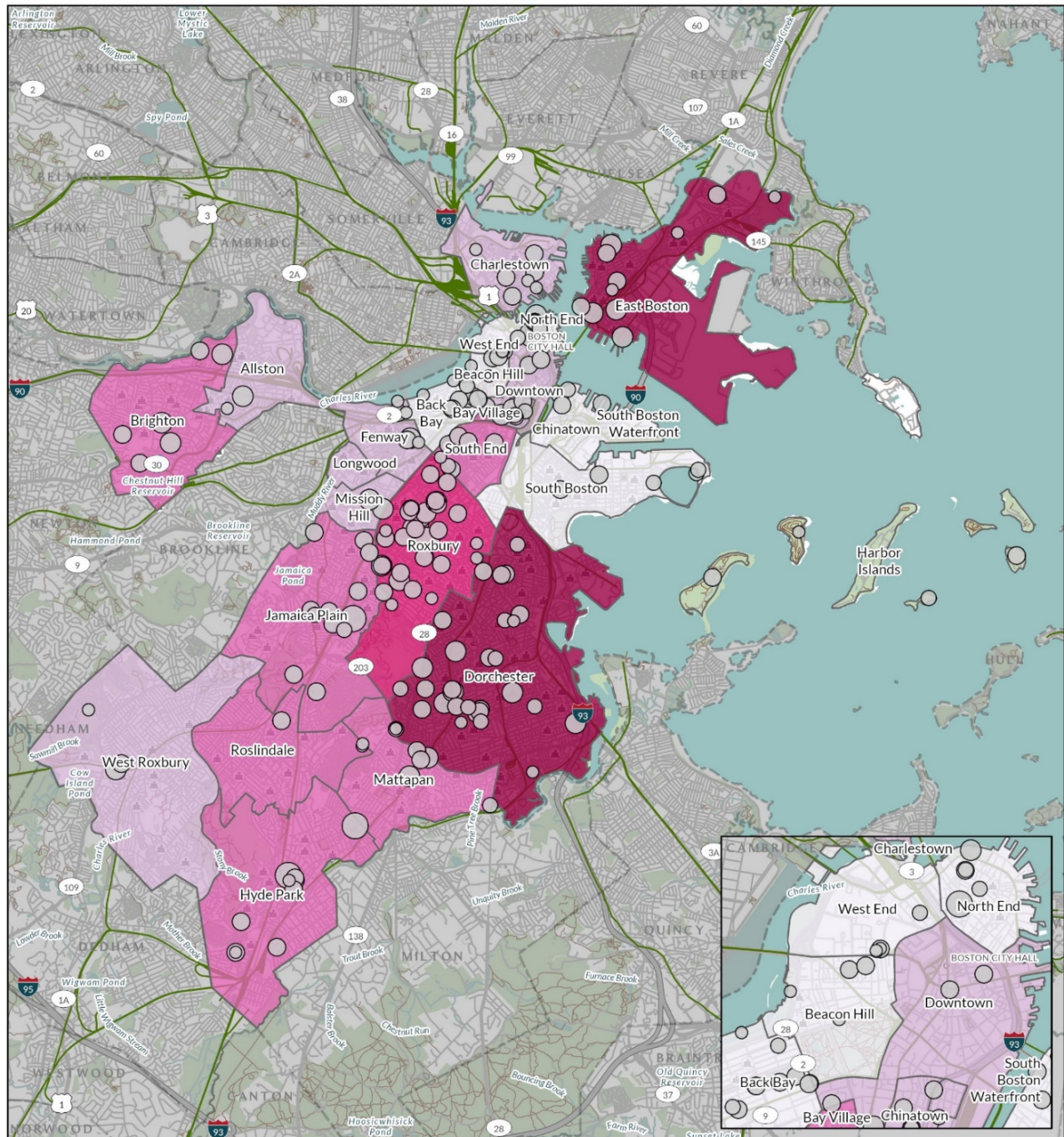
<sup>8</sup> The percentages represent the ratio of residents with language access needs in the neighborhood to residents with language access needs in the City of Boston.

<sup>9</sup> Boston Language and Communications Access Demographic Data Report – Language  
[https://www.boston.gov/sites/default/files/embed/file/2019-03/demographic\\_data\\_report\\_-\\_language.pdf](https://www.boston.gov/sites/default/files/embed/file/2019-03/demographic_data_report_-_language.pdf)

# CITY OF BOSTON - CPA PROJECTS & LANGUAGE ACCESS

Prepared by JM Goldson LLC

J M GOLDSON



0 0.5 1 Miles  
Sources: MassGIS, MassDEP, MAPC Trailmap



## CPA PROJECTS AND BIPOC POPULATIONS BY NEIGHBORHOOD

This map shows the distribution of projects that the City has funded alongside data showing the percent of BIPOC populations by neighborhood. Neighborhoods where over 65 percent of residents identify as BIPOC include East Boston, Roxbury, Dorchester, Mattapan, and Hyde Park.

***Ninety-one out of 188 projects with a specified location (48.4 percent) are in neighborhoods where over 65 percent of residents identify as BIPOC.***

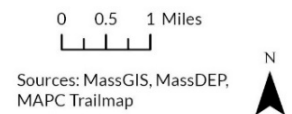
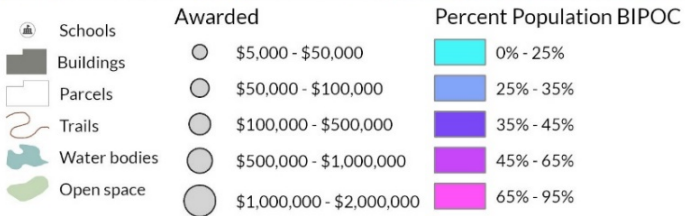
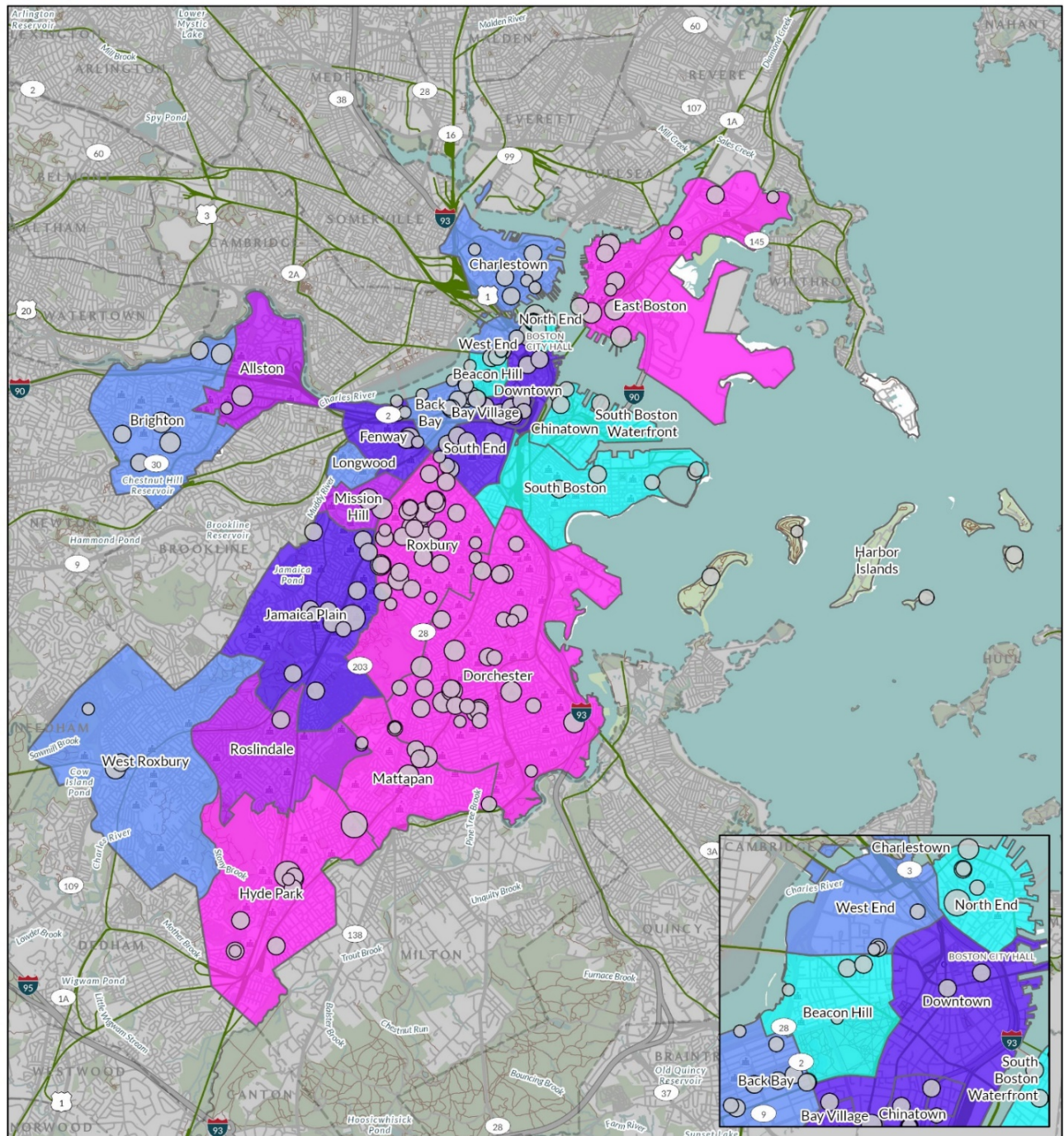


*The character-defining exterior architectural elements of the Great Hall at Codman Square (Dorchester) were rehabilitated and repaired with CPA funds. Source: JM Goldson*

# CITY OF BOSTON - CPA PROJECTS & BIPOC POPULATIONS

Prepared by JM Goldson LLC

J M GOLDSON



## CPA PROJECTS AND ACCESS TO OPEN SPACE

This map shows the areas of Boston that are within a quarter mile of open space. Nearly all parts of the city are within walking distance of a park, except for a few key gap areas, which are highlighted in red on the map. These are contiguous areas that do not have access to open space.

Nearly all these gap areas are in the southern half of the city. The gap areas in West Roxbury, Roslindale, and Jamaica Plain are also within the part of the City that has the lowest density of Community Preservation projects. However, it should be noted that many of these neighborhoods have residential properties with access to private yards.

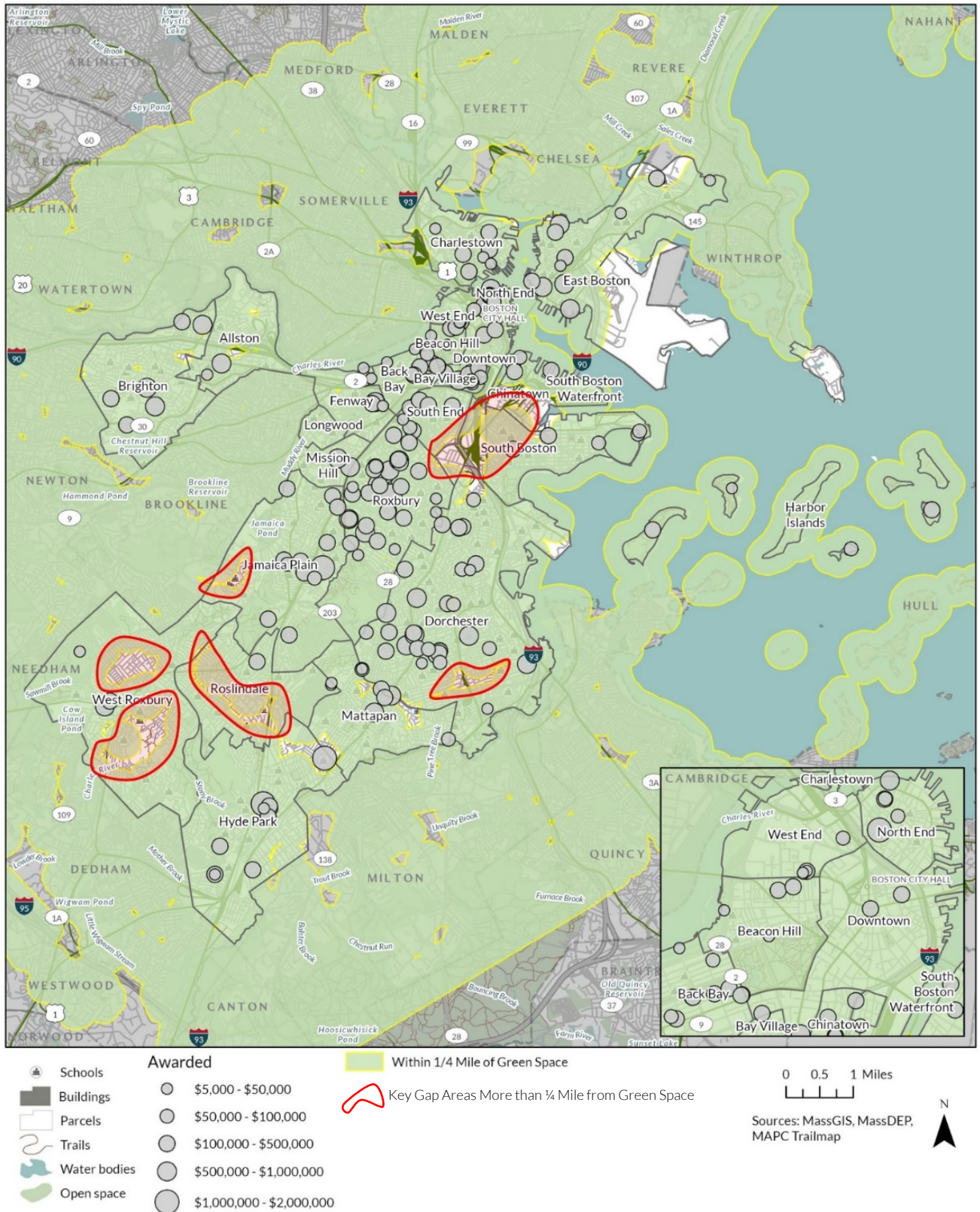


*A new community garden with a public gathering area was built in Roslindale's Healy Field through CPA funds. Source: JM Goldson*

# CITY OF BOSTON - CPA PROJECTS & OPEN SPACE ACCESS

Prepared by JM Goldson LLC

J M GOLDSON



Another important indicator for estimating areas in need of open space is heat islands. Heat islands are parts of cities that experience warmer temperatures due to the prevalence of impervious surfaces. Heat islands are often found in highly urbanized parts of cities and can be combatted by reducing the amount of impervious surface in an area or increasing the amount of green space and vegetation within warmer areas.

The map on the following page shows Boston's neighborhoods according to their vulnerability to heat islands. This map shows which neighborhoods would benefit most from having more parks with vegetation.

The neighborhoods of Hyde Park, Roxbury, and Fenway-Kenmore have the least vulnerability to heat islands, which is likely due to the large parks and open spaces within the neighborhoods. Other neighborhoods, like Dorchester, East Boston, and the South End have a much higher vulnerability because they lack large parks with vegetation.

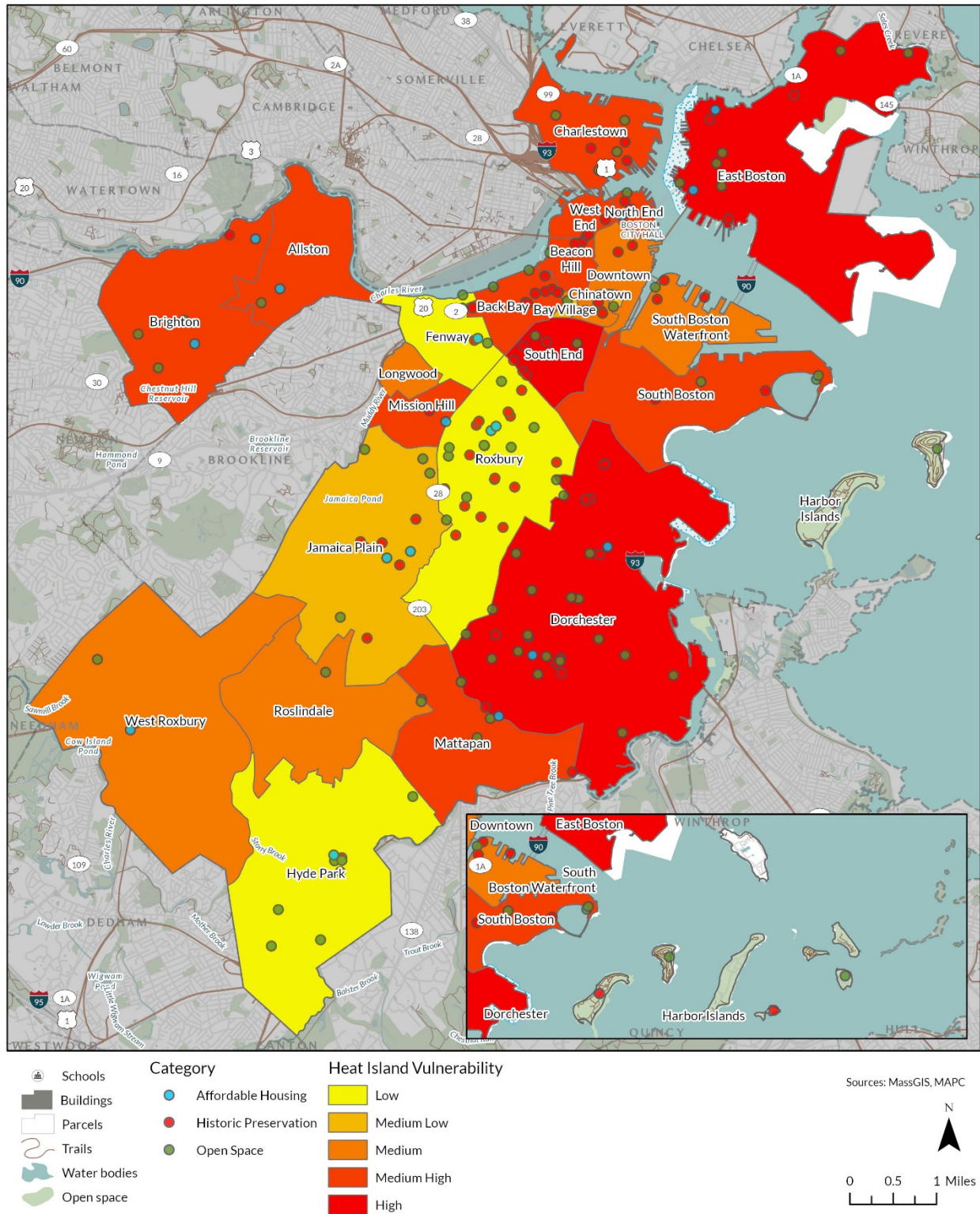


*Olmstead Park in Jamaica Plain received CPA funds to restore wood stairs and paths. Olmstead Park is part of the Emerald Necklace in Boston. Source: JM Goldson*

# CITY OF BOSTON - HEAT ISLANDS

Prepared by JM Goldson LLC

J M GOLDSON



## QUALITATIVE RESEARCH

An important part of understanding the current CPA program and determining how it can be improved in the coming years is speaking with people directly involved in the process and hearing from people that could be impacted by CPA or have a special interest in it. The project team conducted interviews with Boston CPA staff, CPC members, and department heads that work with the CPA program regularly. A survey was sent to over 300 contacts including past applicants and organizations with a special or potential interest in the CPA program. These groups included neighborhood organizations, advocacy groups, and more.

***In total, the project team connected with 294 individuals as part of the engagement process for qualitative research, through interviews and the survey.***

### Summary of Interview Findings

The purpose of the Boston Community Preservation Act Interviews was to learn about the CPA program from a variety of perspectives. Interviewees were asked about their reactions to the quantitative analysis, their opinions of the CPA program so far, their views on equity, how they measure progress, and questions about the internal processes of the CPA program, department coordination, and support from the current plan.

One key point that was raised across the interviews was that the CPA program in Boston is viewed very highly. The interviewees were quick to elaborate on the good work that the program has done and the amount of money that has been invested in Boston communities through the work of the CPA staff and CPC. While the interviewees noted ways that the program could be improved or streamlined, the program overall is seen by CPA staff, other departments, and the CPC in a positive light.

Some of the key themes that emerged through the interview process were the need for an eligibility form and application that better serves that program, staff and CPC, the need for more streamlined communication between the CPA staff, CPC, City Departments, and neighborhood groups, equity, and the goals and priorities of the program. Please see the Appendix for a full summary of the interviews.

### Summary of Survey Results

The purpose of the Boston Community Preservation Act Survey was to both learn about the project application process from past applicants and to learn about different perspectives on overall priorities for CPA funding and on specific priorities around housing, open space and recreation, and historic preservation, from past and potential future applicants. Two hundred and sixty-nine people participated in the survey. The survey was active for about a month from early April through early May 2022. Full responses to all survey questions and the full survey summary can be found in the Appendix.

The following are the key findings from the survey results.

- Most respondents (about 80 percent) live in Boston, about 15 percent work in Boston but do not live in the City, and about 5 percent have another connection to the City.
- Over 60 percent of respondents have lived, worked, or otherwise been associated with Boston for more than 20 years.

- Past applicants indicated that they find the application to be of medium difficulty, and that the application got slightly easier to complete over time.
- The biggest open space priorities among survey respondents include creating more open space projects in underserved neighborhoods and protecting natural resources to mitigate the impacts of climate change.
- In the active recreation category, most respondents indicated improving parks, playgrounds, or athletic fields in underserved areas and that creating more parks, playgrounds, or athletic fields in underserved neighborhoods was very important.
- Some of the concepts that received the most support from survey respondents for open space and recreation were making improvements and providing better accessibility in existing parks and connecting open spaces with walking and biking trails.
- The community housing project idea with the most support was ensuring that existing homes stay affordable.
- When asked about specific neighborhoods for creating affordable housing, most neighborhoods were mentioned. Among those with the most mentions were Allston, Brighton, Charlestown, Beacon Hill, Back Bay, Chinatown, Dorchester, Roxbury, and Mattapan. While most respondents indicated their own neighborhood needing affordable housing, some mentioned neighborhoods where they had no connection, and many listed multiple neighborhoods in need.
- Some of the most supported ideas for affordable housing include programs for first time homebuyers, affordable homeownership in general, and a rental assistance program.
- When asked what types of historic preservation projects are the most important, preserving historic properties that honor historically marginalized populations scored the highest.
- Survey respondents indicated that there are many historic buildings that need preservation and restoration work even though they have not been officially designated as historic.
- Most respondents agreed that the current model of allocating 50 percent of funds to affordable housing, and 20 percent each to open space and recreation, and historic preservation was a good distribution of funds.
- One of the concepts mentioned most was climate change. Survey respondents emphasized the need for climate-focused initiatives within projects in every category.

Survey respondents indicated that CPA funding should go toward creating spaces and opportunities for individuals, children, and families, and to improve conditions in underserved neighborhoods so that all people who call Boston home can feel welcomed and valued.

# CHAPTER 3: OVERALL GOALS

The CPC developed the following overall CPA goals through careful consideration of the analysis findings, the interviews, and community feedback gathered through the survey. The goals are designed to guide the CPC's deliberation of project requests for CPA funds in all three CPA funding categories and will be used to establish funding preferences. The policy and goals are not binding; The CPC will ultimately base its recommendations on individual project merits, using the overall goals as a guide.

## 1. Prioritize CPA funding for projects that further equity by addressing needs in the City's BIPOC residents

Generations of economic, social, and environmental equity is a pronounced challenge for the City. The CPA has an important role to play in creating a more equitable and inclusive Boston. To help attain just and fair inclusion in which all can participate, prosper, and reach their full potential in Boston, the CPC will strive to recommend CPA funds for projects and initiatives that will further equity. When a program or policy is equitable, its aim is not to treat populations equally in uniform way, rather it is responsive to differences because inequity is experienced by people in different ways.

The City of Boston is not unique in that public policies and investments historically denied opportunities and resources to areas of the City that had lower-income, immigrant, and BIPOC residents. Disinvestment left these neighborhoods and residents falling significantly behind other neighborhoods in many measures including wealth, quality of life, health, housing stability, and access to jobs, services, transportation, and social support, among other negative effects. There was a build-up of suppressed growth and investment which communities of color still feel the effects of today and continue to struggle.

The CPC recognizes that equity is about creating opportunities that were denied for many generations through direct and indirect public action and inaction. To achieve this goal, it will be critical for the CPC to weigh priorities for funding using reliable and current indicators of need as well as consistent measuring and tracking outcomes of CPA funding across Boston's neighborhoods.

Furthermore, the CPC recognizes that impacts need to go beyond absolute numbers of residents impacted by CPA funds to include the level and extent of impacts to address community-level needs and to strengthen neighborhood vitality, safety, and social cohesion, with priority to address needs in the City's historically underserved and under resourced neighborhoods including areas of Dorchester, Mattapan, Mission Hill, Roxbury, among other areas within larger neighborhoods.

## 2. Prioritize CPA funding for projects that directly advance Boston's climate resilience and sustainability

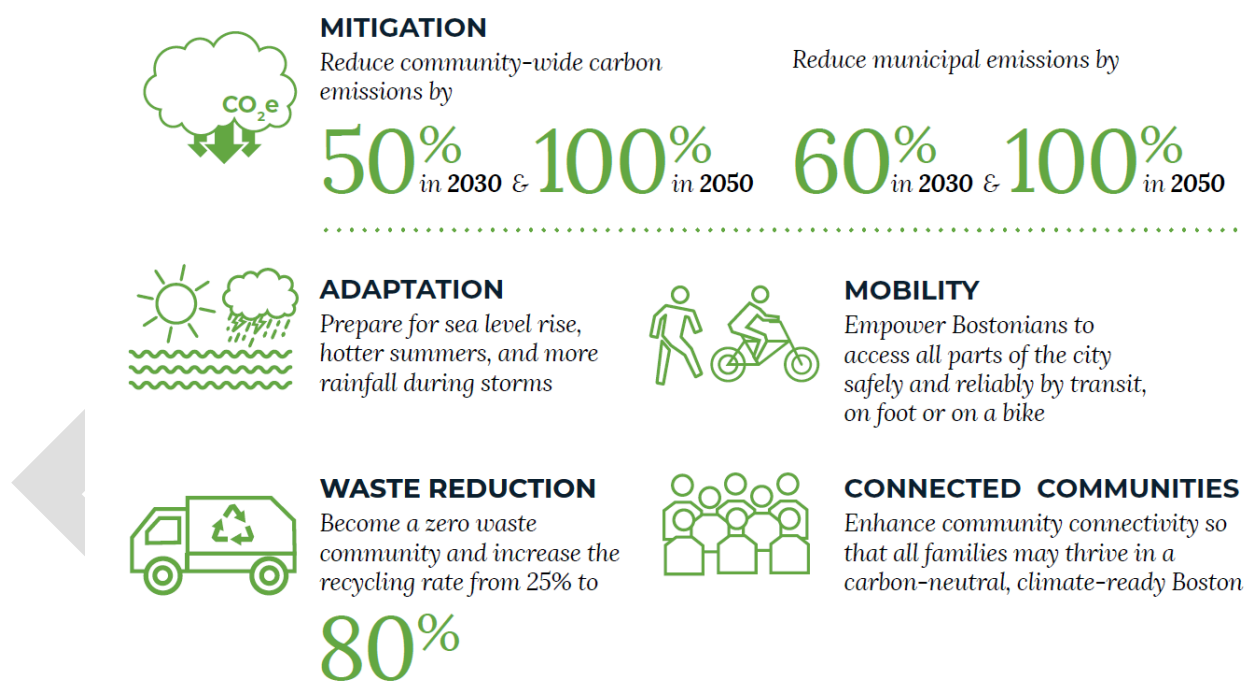
The City of Boston has a strong and unwavering commitment to environmental action and climate justice, and it is actively working toward its goal of carbon neutrality and mitigating the effects of climate change for all of Boston residents. The Department of Neighborhood Development leads a zero-emission building standard for City-funded affordable housing, the Environment Department and Boston Transportation Department released a Zero Emission Vehicle Roadmap, the City advanced its goal of becoming a zero-waste city, and the City

released Climate Ready initiatives and studies in multiple neighborhoods including Dorchester, Downtown, the North End, Charlestown, and East Boston in addition to a heat resilience study.

The CPA funds are an important funding source to help achieve these larger City-wide goals and recognized by community members and city officials throughout this engagement process. One of the main open space priorities among CPA survey respondents was protecting natural resources to mitigate the impacts of climate change (over 70%) indicated this area was very important.

As described in the Boston Climate Action, Fiscal Year 2021 Report, the City is committed to simultaneously addressing racial and social equity and environmental challenges and has two climate action guiding principles for equity:

1. People of color and low-income communities must not be disproportionately impacted by climate hazards.
2. Benefits from climate mitigation and preparedness efforts should be shared equitably among all people.



Source: Boston Climate Action, Fiscal Year 2021 Report

3. Balance the use of CPA funds to support both community-led projects and further City priorities as documented in current City plans.

The first word in the Community Preservation Act is “community.” The Boston CPA program provides a valuable opportunity for community members to take local action to improve their neighborhoods. Community gardens, pocket parks, preservation of locally important spaces, and other neighborhood-level projects can seem small when looked at on a grander scale but the impacts on a neighborhood can be immeasurably important.

The CPA program and other City departments have successfully supported these types of community-led projects and endeavored to provide the technical assistance, resources, and guidance to foster community-initiated ideas. This is and will remain an important component of the Boston CPA Program.

In addition, it will continue to be important to take a balanced approach so that CPA funding allocations can support both community-led ideas and broader City initiatives and priorities including and especially those that promote equity and climate resilience and are promoted as part of other guiding City policy documents including Imagine Boston 2030, Boston's Economic Inclusion and Equity Agenda, and other relevant City plans.

The CPC recognizes that community-led ideas and broader City initiatives are not necessarily mutually exclusive and can often work together. The CPC will encourage submission of projects at all levels and will strive to promote a balanced approach to recommending funding allocations so that both CPA-eligible community-led ideas and broader City initiatives can be appropriately supported.

**4. Continue to establish a CPA funding allocation formula annually to help guide CPC recommendations.**

Since program inception, the CPC has used an allocation formula as a guideline for funding recommendations. The current formula, which has been guiding CPA allocations since 2019, is for 50 percent of project funds to be allocated for community housing, 20 percent for open space and recreation, and 20 percent for historic preservation. The remaining 10 percent may be allocated among any category. An additional five percent is reserved for administration costs.

Survey respondents and city officials generally concurred that the existing formula is appropriate given the City's great need for affordable housing, climate resilience, quality of life improvements for Boston residents, and to promote equitable access to resources. However, the program also benefits from its ability to be a flexible and adaptive funding source that is responsive to change.

For the first year of this five-year plan, the CPC will continue to use the existing allocation formula to guide CPC funding recommendations. The CPC will reassess the formula on an annual basis to determine any adjustments needed based on anticipated needs and changing circumstances.

## CHAPTER 4: COMMUNITY HOUSING



CPA funds supported the construction of UHomes, a new 20-unit homeownership development, in Allston-Brighton. 12 of the units are deed-restricted affordable condominiums, which will be available to first-time homebuyers who earn up to 80% of the Area Median Income. Source: JM Goldson

The Community Preservation Act Legislation defines “community housing” as “low- and moderate-income housing for individuals and families, including low- or moderate-income senior housing.”

CPA Funds can be used to:

- Acquire or create land/buildings for community housing
- Preserve existing community housing
- Rehabilitate or restore community housing that has been acquired or created using CPA funds
- Support housing affordability (including for direct assistance programs)

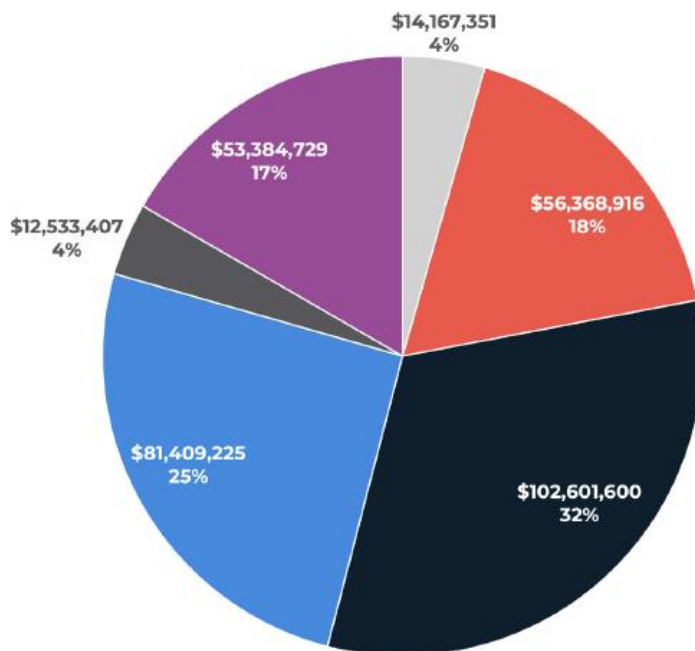
### NEEDS

Boston’s housing crisis is well documented. Real estate prices are high and only growing, pricing many people out of the city they call home. According to the Housing Boston 2030 Plan, Boston

needs more market-rate housing that is affordable to middle-income households without the need for public subsidies in addition to lower income housing.

Community Preservation Act funds are just one funding source that the City uses for housing initiatives, but it still makes a significant impact. According to Boston's Department of Neighborhood Development, as illustrated in the following chart, CPA funds make up about four percent of total housing creation and preservation funds.

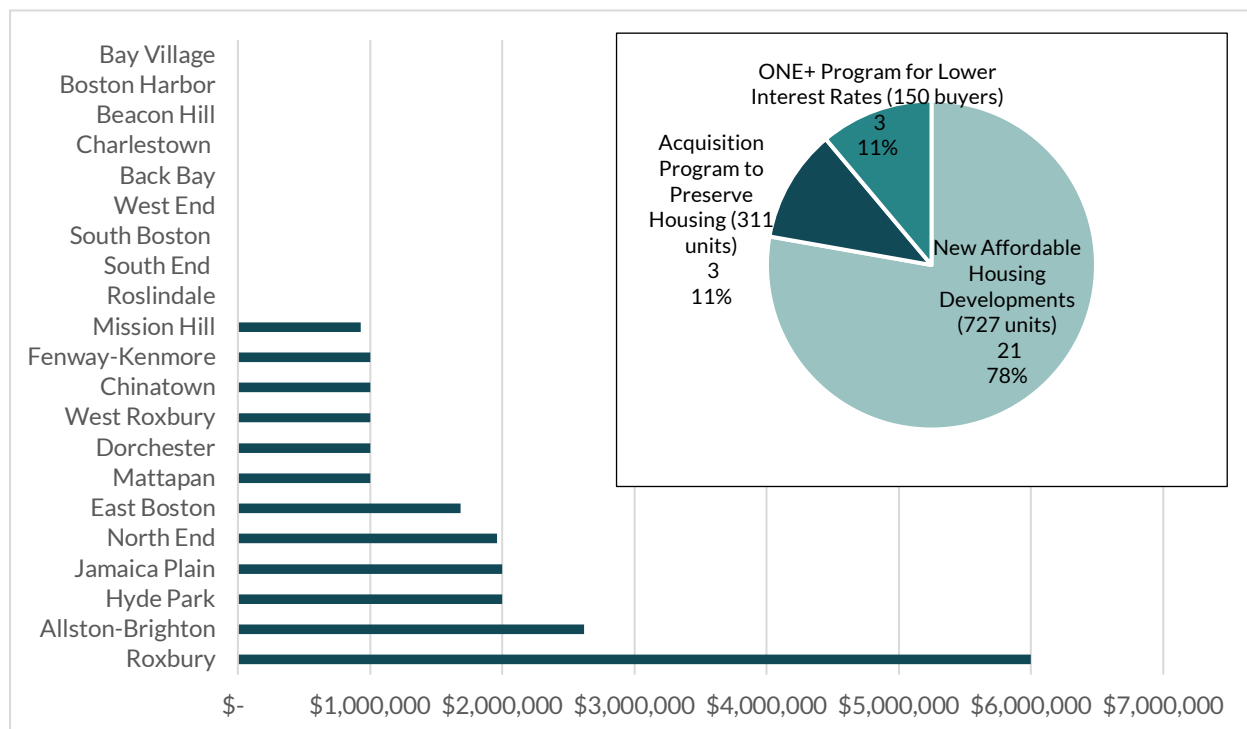
**DND FUNDING SOURCES USED FOR HOUSING CREATION AND PRESERVATION (2011 TO 2020)**



■ CDBG ■ HOME ■ IDP ■ NHT ■ CPA ■ Other City

The City has funded 27 affordable housing projects from 2018 to 2021 with CPA funds, totaling nearly \$49 million in investments.

## CPA AFFORDABLE HOUSING FUNDING BY NEIGHBORHOOD



In addition to analyzing the CPA funding by neighborhood, the team also looked at the types of projects that have been funded. The CPA has funded affordable housing projects in three categories, with 78 percent of funding used to create 727 new housing units, 11 percent for an acquisition program to preserve 311 housing units, and 11 percent for the first-time homebuyer program (ONE+), which assisted 150 buyers.

One way that the team analyzed affordable housing projects was to compare existing affordable housing to the new units that have been created with CPA funds by neighborhood, alongside data showing the percentage of households in each neighborhood that would qualify for affordable housing through CPA (households earning up to 100 percent of the AMI). Except for Jamaica Plain, the North End, and West Roxbury, CPA-funding for affordable housing was primarily allocated to neighborhoods where 56 percent (average for Boston) or more households qualified for affordable housing.

## AFFORDABLE HOUSING PROJECTS BY NEIGHBORHOOD

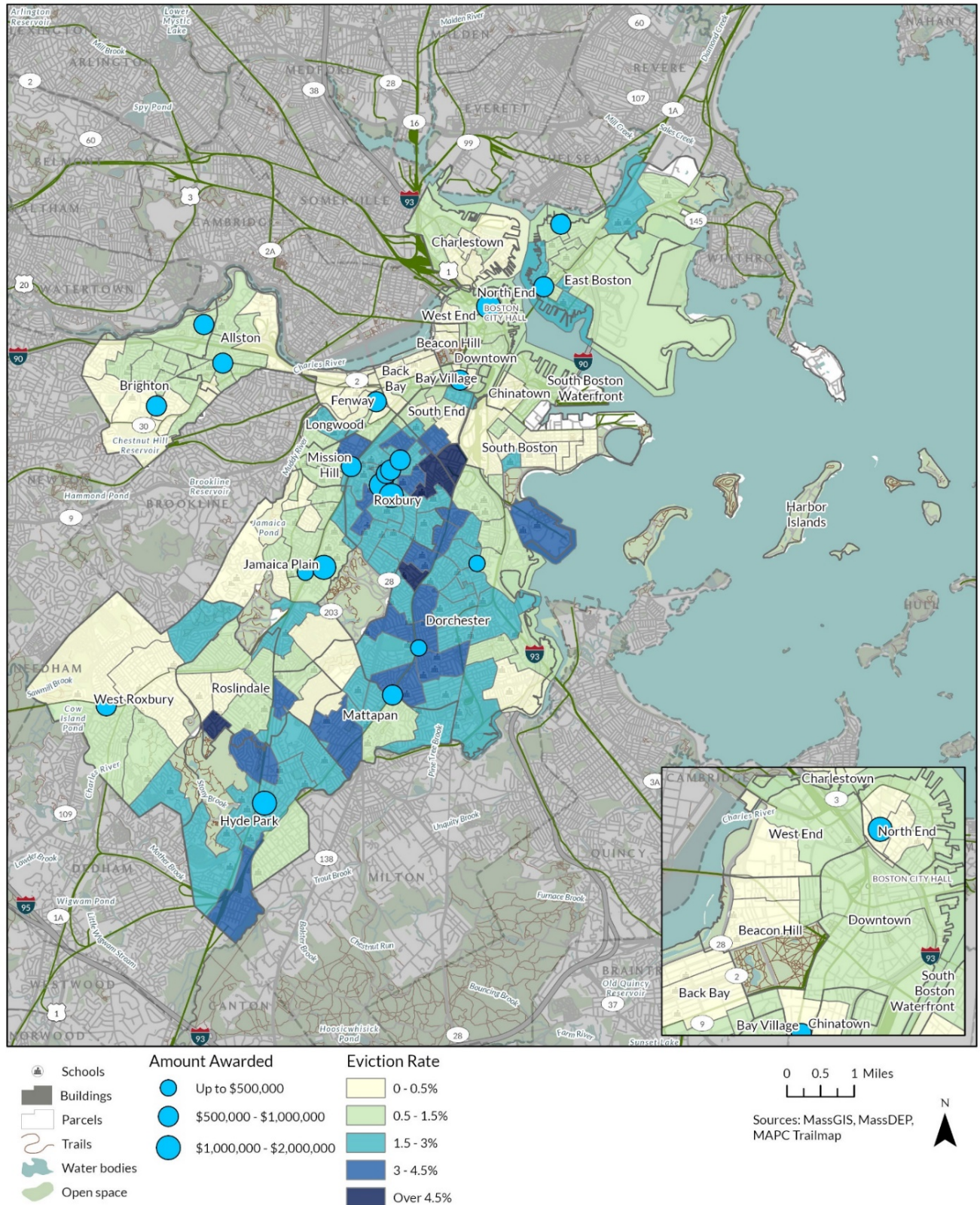
Neighborhood	Percent of Households that Would Qualify for Affordable Housing through CPA	Existing Affordable Housing Units (Subsidized Housing Inventory)	Affordable Units Created with CPA Funds
Boston	56%	53,792	727
Allston-Brighton	56%	3,555	105
Back Bay	43%	754	-
Bay Village	38%	293	-
Beacon Hill	41%	463	-
Charlestown	35%	2,240	-
Chinatown	58%	1,201	11
Dorchester	68%	9,326	70
Downtown	50%	808	-
East Boston	66%	2,792	46
Fenway-Kenmore	62%	2,182	27
Hyde Park	63%	862	75
Jamaica Plain	50%	3,361	164
Mattapan	66%	1,396	9
Mission Hill	74%	2,238	13
North End	34%	358	23
Roslindale	51%	1,320	-
Roxbury	73%	11,783	139
South Boston	44%	2,932	-
South End	49%	4,204	-
West End	36%	502	-
West Roxbury	43%	1,222	45

While the CPA is addressing a need for affordable housing in some neighborhoods, like Roxbury, there are other neighborhoods that have a need for affordable housing but have received little or no CPA funds for affordable housing. The City has not yet allocated CPA funds for affordable housing in Back Bay, Beacon Hill, Charlestown, Roslindale, South Boston, South End, and the West End. These neighborhoods, on average, have higher income, higher education levels, a higher proportion of White residents and less affordable housing.

The following map shows the distribution of affordable housing projects as well as data showing the eviction rate by census tract. This map shows that the affordable housing projects funded by the CPA are concentrated in areas with higher eviction rates. The Roxbury neighborhood has the highest eviction rate in the city. It also has the most affordable housing projects both awarded by the CPA and funded by other sources. It has a very low per capita income of just over \$22,000. Other neighborhoods like Dorchester, Hyde Park, Mattapan, and Roslindale also have census tracts with high eviction rates, but they have much fewer subsidized housing units and projects funded by the CPA for affordable housing.

# CITY OF BOSTON - AFFORDABLE HOUSING CPA PROJECTS & EVICTION RATE J M GOLDSON

Prepared by JM Goldson LLC



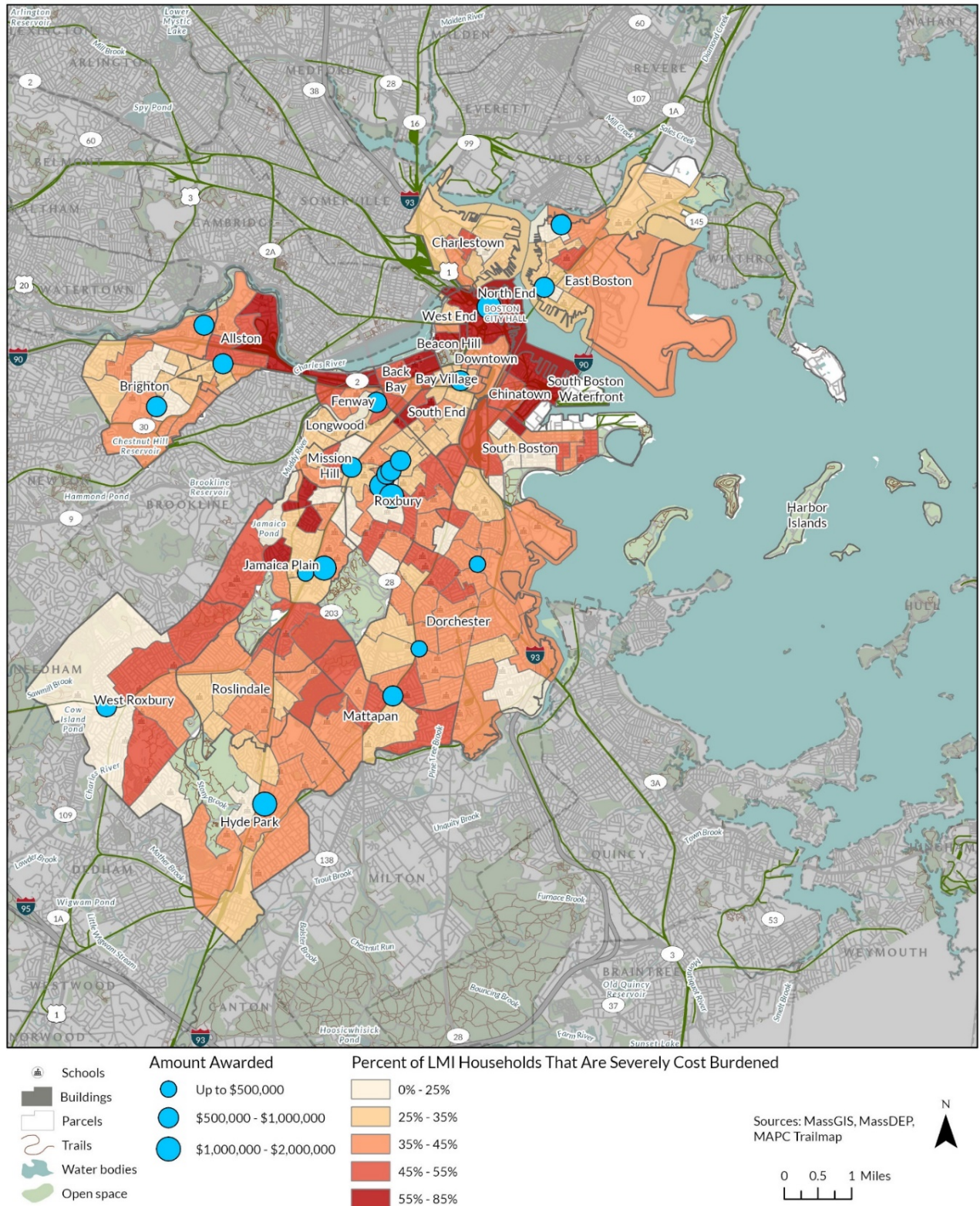
The following map shows the distribution of affordable housing projects that the City has funded through the CPA, alongside data showing the concentration of households earning less than the AMI, which is \$120,800, who are severely cost-burdened. Essentially, these are households that would qualify for CPA-funded affordable housing who are currently spending 50 percent or more of their income on housing-related costs. Households earning less than the AMI are concentrated in Roxbury and Dorchester. While there are many households in those neighborhoods that are also severely cost burdened, most of the severely cost burdened households are concentrated in other parts of the City.



*In the North End, CPA funds supported the adaptive reuse of the existing Knights of Columbus headquarters to create 23 affordable apartments for seniors, including three units reserved for seniors experiencing homelessness. This CPA project also developed meeting space for the North End community and acquired a new space for the Knights of Columbus. Source: JM Goldson*

# CITY OF BOSTON - AFFORDABLE HOUSING CPA PROJECTS & COST BURDEN J M GOLDSON

Prepared by JM Goldson LLC



This map shows the distribution of affordable housing projects alongside data showing the concentration of existing subsidized housing in the City (subsidized units are listed on the Subsidized Housing Inventory, or the SHI). Roxbury and Dorchester are the neighborhoods with the most existing subsidized housing. The City has awarded the most affordable housing funds in the Roxbury neighborhood but has not awarded nearly as much in the Dorchester neighborhood.

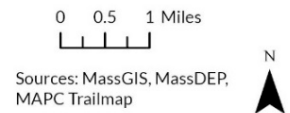
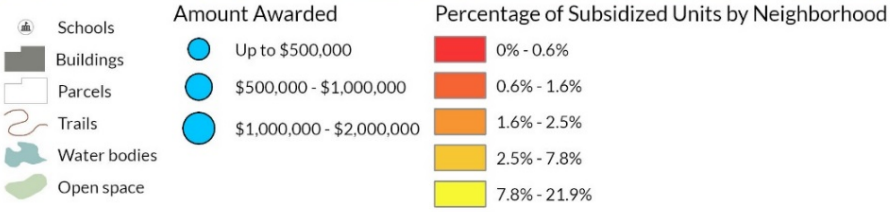
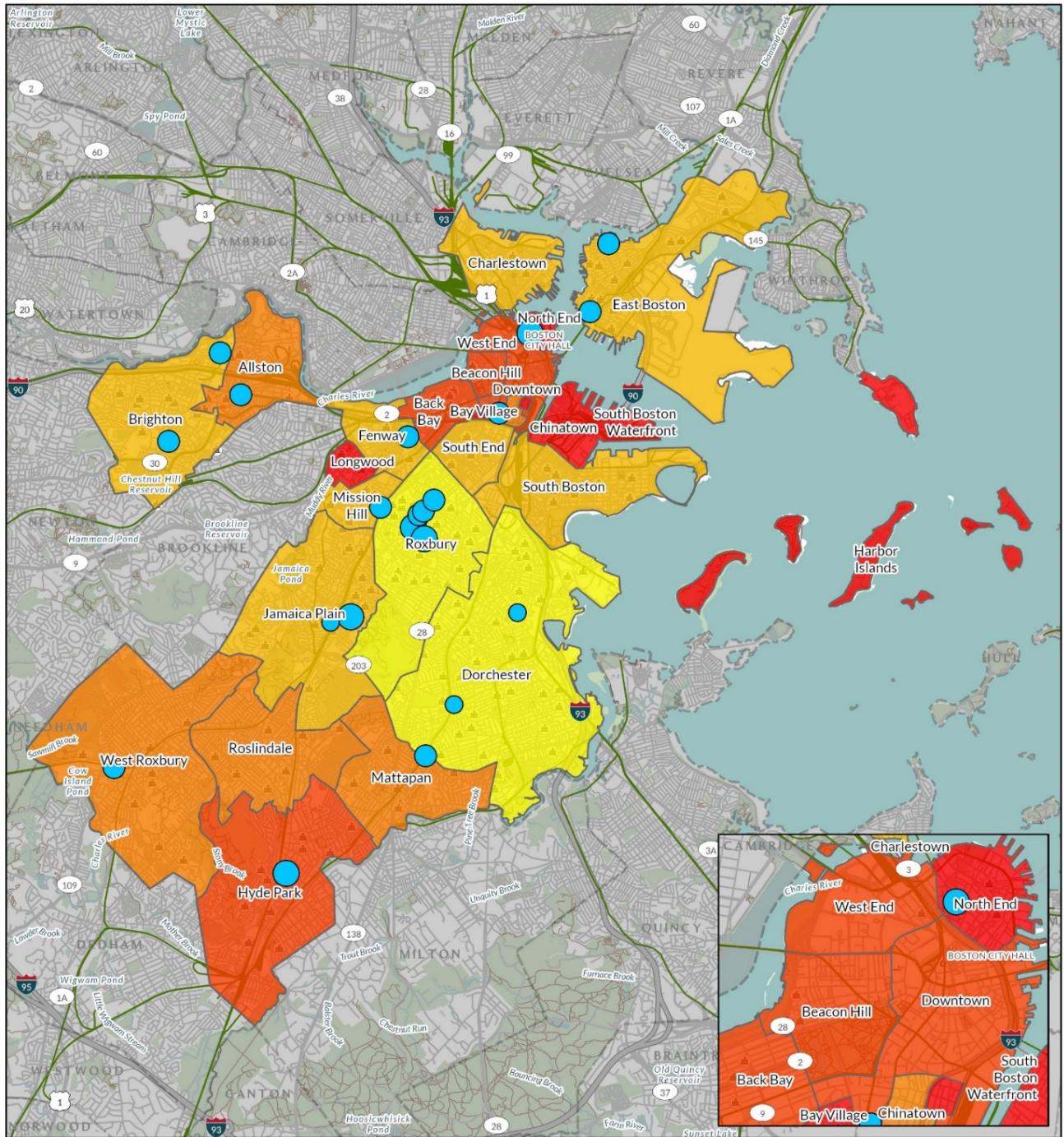


*Hyde Park's vacant William Barton Rogers School will be converted into a vibrant, mixed-income, LGBTQ-friendly senior 75-unit housing development through CPA funding. Source: JM Goldson*

# CITY OF BOSTON - AFFORDABLE HOUSING CPA PROJECTS & SHI

Prepared by JM Goldson LLC

J M GOLDSON



Throughout the course of the CPA program, seven citywide projects have been awarded. Six of these projects have been in the affordable housing category. The goals of the citywide affordable housing projects were to:

- Provide funding for a program that will assist first-time homebuyers
- Provide funding to combat displacement through the purchase of existing rental units to income-restrict them as permanently affordable housing
- Provide funding for the city's ONE Plus Boston program which assists first-time homebuyers in receiving lower interest rates

The City has funded a wide range of affordable housing projects with CPA funds, including a wide range of affordable housing projects and programs with grants ranging from \$500,000 to \$5 million. The following sample of grant awards provides some perspective as to how CPA funds have been awarded to address the full spectrum of Boston's affordable housing needs.



CPA funds are supporting the construction of Grace Apartments in East Boston. When finished, this multi-family development will have 42 units of low-income senior housing, including five units reserved for individuals experiencing homelessness. Source: JM Goldson.

Allston-Brighton	\$617,856 \$1 million	16 new SRO units for residents at 30 percent of AMI 79 new senior units with 15 homeless units
Citywide	\$14 million \$12.8 million	Fund anti-displacement program through the purchase of existing rental units to preserve affordability Fund to assist first time home buyers
Dorchester	\$500,000 \$500,000	36 new mixed income rental units with ground floor retail 19 new rental units for tenants at 60 percent of AMI
East Boston	\$400,000	4 new affordable home ownership units
Hyde Park	\$2 million	LGBTQ adaptive reuse senior units that commemorate former school
Mission Hill	\$927,500	13 new artist rental units for tenants at 80 percent of AMI

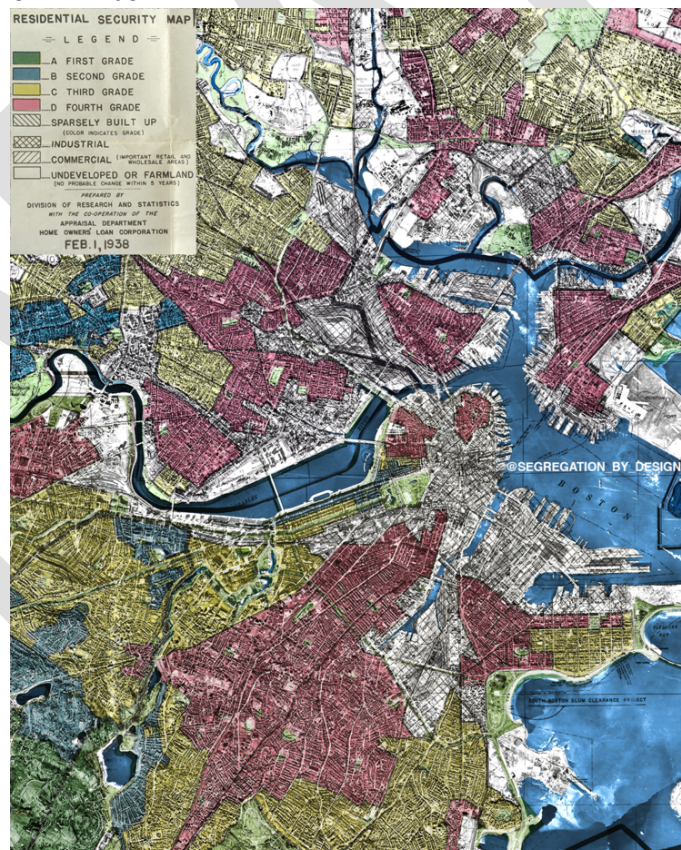
## GOALS

1. Create new units of affordable housing in all Boston neighborhoods including areas with higher median household income to help provide greater opportunities, mobility, and choice while also preventing people from being priced out of their current neighborhoods.

As highlighted in the Boston Economic Equity and Inclusion Agenda (2016), economic equity is a pervasive issue that will continue to take concerted effort to address, including through City support of economic mobility and stabilization on the individual, family, and community levels. Housing is a critical component of equity, foundational in many senses.

Through the effects of racially discriminatory public policy combined with local private actions, Boston has been a racially and ethnically segregated City for many generations and remains so today. In 2020, Mayor Walsh declared systemic racism an emergency and public health crisis. The City is committed to addressing the needs of Boston's BIPOC residents including by promoting fair and equitable housing access. One of the most significant actions taken in recent years to promote fair housing and equitable housing access was to incorporate mechanisms to affirmatively further fair housing within Boston's zoning code.

The CPA funds have an important role to play to fulfill the City's commitment to affirmatively further fair housing including how funds are allocated to address racial inclusiveness and historic patterns of exclusion.



Residential Security Map of Boston (AKA "Redline Map") from 1938. Source: Segregation by Design: <https://www.segregationbydesign.com/boston/redlining>

Roxbury currently has the most subsidized housing units out of all neighborhoods in the City at 11,783. The City has awarded about \$6 million CPA funds in Roxbury for affordable housing projects. This is the highest amount of CPA funds for affordable housing in a single neighborhood to date, while the neighborhoods of Back Bay, Beacon Hill, Charlestown, Roslindale, South Boston, South End, and the West End, which on average have higher income, higher education levels, and higher proportion of White residents and less affordable housing, have received less CPA funds to create affordable housing.

The CPA recognizes that there are limitations and many complexities that affect the location of sites to create new affordable housing opportunities. The CPC also recognizes the importance of creating housing that has good access to public transit and is eager to continue funding innovative housing models including artists housing, community land trusts, senior housing, and supportive housing.

The CPC will strive to continue to fund the creation of affordable housing in all Boston neighborhoods including areas with higher poverty levels and larger stock of existing affordable housing as well as areas with higher median incomes and lower stock of existing affordable housing. The CPC will also strive to fund new affordable housing that provide local priority to help income eligible residents stay in their neighborhoods.

## **2. Preserve naturally occurring affordable housing, such as through acquisition and preservation programs.**

Rapid and/or sudden increases in rent can be severely destabilizing for households and lead to displacement or even homelessness. There is dignity in having an affordable, decent home in a safe neighborhood. Housing stability helps not just individuals and families live quality lives but helps neighborhoods in countless ways. Housing is more than an investment vehicle. The City has several housing stability and anti-displacement initiatives and is considering additional measures to help prevent displacement of Boston residents.

The CPC will continue to support the City's anti-displacement initiatives, particularly Boston's Acquisition Opportunity Program. In 2018, the City established a new goal to assist its housing partners to acquire 1,000 units of unrestricted but affordable market-rate housing and convert them to long term income-restricted units, providing a cost-effective method of increasing affordability while preventing displacement. Between 2019 and 2021, the City allocated \$14,000,000 of CPA funds to support this program.

The CPC would consider supporting other CPA-eligible programs or initiatives that help to prevent displacement such as through a preservation program for low-income homeowners.<sup>10</sup>

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<sup>10</sup> For example, a preservation program to help existing low-income homeowners could be modelled from the City of Cambridge's Affordable Housing Preservation Grants Program: <https://www.cambridgema.gov/historic/permitsApplications/preservationgrants#:~:text=ELIGIBILITY%20REQUIREMENTS%3A,more%20than%20four%20rental%20units>.

3. **Continue to fund CPA funds to promote homeownership to enable household equity growth and help address the racial wealth gap.**

As explained in the 2020 Annual Report for Housing Boston 2030:

*“There are significant racial disparities in Boston’s homeownership rates: only 30 percent of Black households and 16 percent of Latinx households own their own home, compared to 44 percent of white households. It is crucial that more Bostonians become able to own their own homes not only because homeownership provides long term housing stability, but also because homeownership is a significant means of wealth-creation. Addressing disparities in homeownership will also serve to address the wealth gap and help make Boston a more equitable city.”*

The CPC is committed to assisting more households in becoming homeowners and will continue to do this by funding projects that create income-restricted homeownership units as well as down payment assistance and mortgage programs especially with resale provisions that enable homeowners to build equity

4. **Consider support for local rental assistance and relief programs to expand the limited reach of existing federal and state housing vouchers.**

In addition to state and federal rental housing assistance programs, the City of Boston launched a Rental Relief Fund in 2020 in response to a sharp rise in housing instability during the COVID pandemic. The City secured \$3 million in seed funding from federal Coronavirus, Aid, Relief, and Economic Security (CARES) Act funds and later obtained additional \$5 million. The average amount of rental arrearages paid was \$4,200, which covered an average of 2.8 months of rent. Although there are various other funding sources for such rental relief and assistance, the CPC would consider supporting organizations the provide direct financial support at an appropriate level in the coming years to help expand the important support rental relief and assistance can provide for Boston residents.

## ELIGIBLE ACTIVITIES

Chapter 44B of the Massachusetts General Laws (CPA Statute) defines “community housing” as “low- and moderate-income housing for individuals and families, including low- or moderate-income senior housing.” Low-income housing is affordable to households with annual incomes of less than 80 percent of the areawide median income (AMI) and moderate-income housing is affordable to households earning less than 100 percent AMI. Furthermore, the CPA Statute defines “senior housing” as housing for persons 60 years old or over, who also meet the qualifications for low or moderate income.

The CPA Statute allows expenditures for the acquisition, creation, preservation, and support of community housing and for the rehabilitation of community housing that is acquired or created through CPA. Preservation, which is a permitted activity for community housing, is defined as the “protection of personal or real property from injury, harm or destruction, but not including maintenance.”

Rehabilitation, which is only permitted for housing created using CPA funds, is defined as “the remodeling, reconstruction and making of extraordinary repairs, to...community housing for the purpose of making such...community housing functional for their intended use, including, but not

limited to, improvements to comply with the Americans with Disabilities Act and other federal, state or local building or access codes.”

The CPA Statute defines the term “support” as programs that provide grants, loans, rental assistance, security deposits, interest-rate write downs or other forms of assistance directly to individuals and families who are eligible for community housing . . .” The CPA Statute also allows CPA funds to be appropriated to a Municipal Affordable Housing Trust (MGL c.44 s.55C). Any CPA funds allocated to a Housing Trust must be used for CPA-eligible purposes, as clarified through the 2016 amendments.

## CHAPTER 5: OPEN SPACE AND RECREATION



*With CPA funding, the Hyde Park Branch of the Boston Public Library transformed an unused area of open public space into a passive park featuring artifacts of historical significance to the community. Source: JM Goldson*

The Community Preservation Act Legislation defines “open space” as including but not limited to “land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh and saltwater marshes and other wetlands, ocean, river, stream, lake and pond frontage, beaches, dunes and other coastal lands, lands to protect scenic vistas, land for wildlife or nature preserve and land for recreational use.” It also defines “recreational use” as including but not limited to “the use of land for community gardens, trails, and noncommercial youth and adult sports, and the use of land as a park, playground or athletic field.”

CPA Funds can be used to:

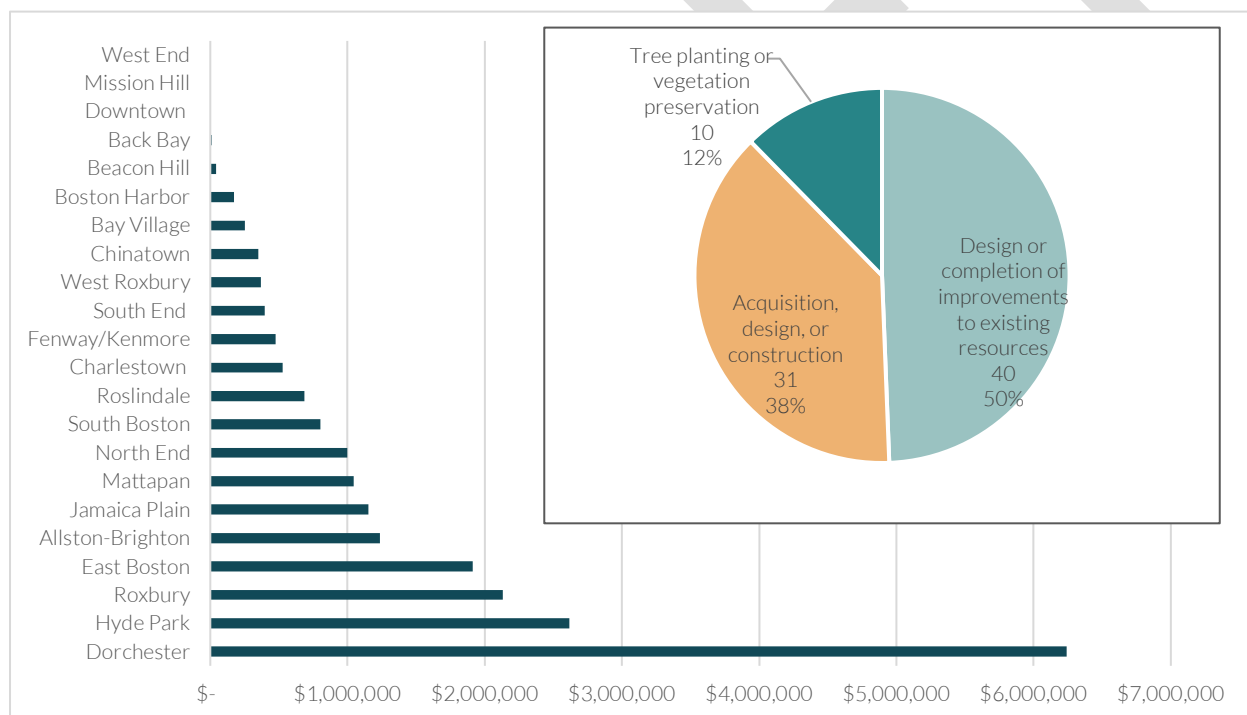
- Acquire or create open space or land for recreation
- Preserve open space lands
- Rehabilitate or restore open spaces that have been acquired or created using CPA funds
- Preserve, rehabilitate, and restore existing recreational lands
- CPA funds cannot be used for indoor facilities or artificial turf

## NEEDS

Open space and outdoor recreation have many benefits for both people and the environment. Research has shown that increased access to open space can help improve both mental and physical health and increased green space and tree canopy can help the city's natural resources by reducing the urban heat island effect and helping manage stormwater runoff. Boston has a long history of prioritizing open space, with the Boston Common being the country's oldest public park. In addition to the Emerald Necklace, Charles River Esplanade, Malcolm X Park, and Rose Kennedy Greenway, Boston residents enjoy hundreds of neighborhood parks, playgrounds, squares, courts, and fields that provide open space and recreation opportunities.

In total, the CPA program has funded 81 open space and recreation projects totaling \$22,412,458. In addition to analyzing the funding by neighborhood, the team also looked at the types of projects that have been funded. The CPA has funded open space and recreation projects in three categories, shown in the chart below.

### OPEN SPACE AND RECREATION FUNDING BY NEIGHBORHOOD



To further analyze the CPA open space and recreation projects in Boston, the team looked at access to open space and amount of open space across the neighborhoods. When analyzing access to open space, the team determined the percentage of the neighborhood area that was within a quarter mile (walking distance) of open space. When analyzing the amount of open space, the team determined the square feet of open space per capita in each neighborhood. It is important to note that these metrics do not take the quality or condition of the open space into account, just the amount of open space and where it is located. The table below summarizes these statistics.

## OPEN SPACE AND RECREATION PROJECTS BY NEIGHBORHOOD

Neighborhood	Percent of Neighborhood with Access to Open Space	Square Feet of Open Space per Capita	Total CPA Open Space Projects
Boston	95.74%	392.8	81 (incl. 1 city-wide acquisition program)
Allston-Brighton	97.74%	105.6	4
Back Bay	100.00%	60.7	1
Bay Village	100.00%	2.8	1
Beacon Hill	100.00%	363.5	2
Charlestown	97.66%	125.5	3
Chinatown	99.38%	17.0	2
Dorchester	95.32%	184.1	19
Downtown	99.68%	45.0	0
East Boston	56.37%	239.6	6
Fenway-Kenmore	99.14%	40.9	3
Hyde Park	95.21%	1139.9	7
Jamaica Plain	98.07%	525.7	3
Mattapan	92.13%	1031.5	5
Mission Hill	99.68%	82.4	0
North End	100.00%	67.7	1
Roslindale	91.55%	56.7	4
Roxbury	99.83%	476.7	9
South Boston	75.11%	255.5	4
South End	96.26%	49.7	2
West End	99.22%	134.9	0
West Roxbury	89.3%	1116.2	2

In addition to analyzing these statistics at the neighborhood level, the team analyzed the geographic distribution of projects and existing open space within neighborhoods to identify trends. The team also assessed the types of projects that have been funded in each neighborhood to determine those with more projects involving acquisition of new park land, those that have been focused on improving existing amenities, and those with a mix of both.

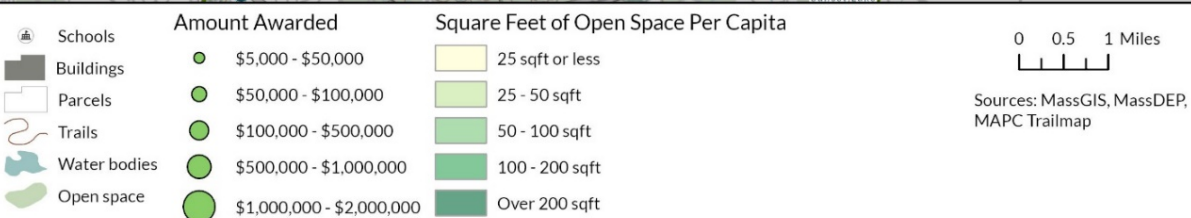
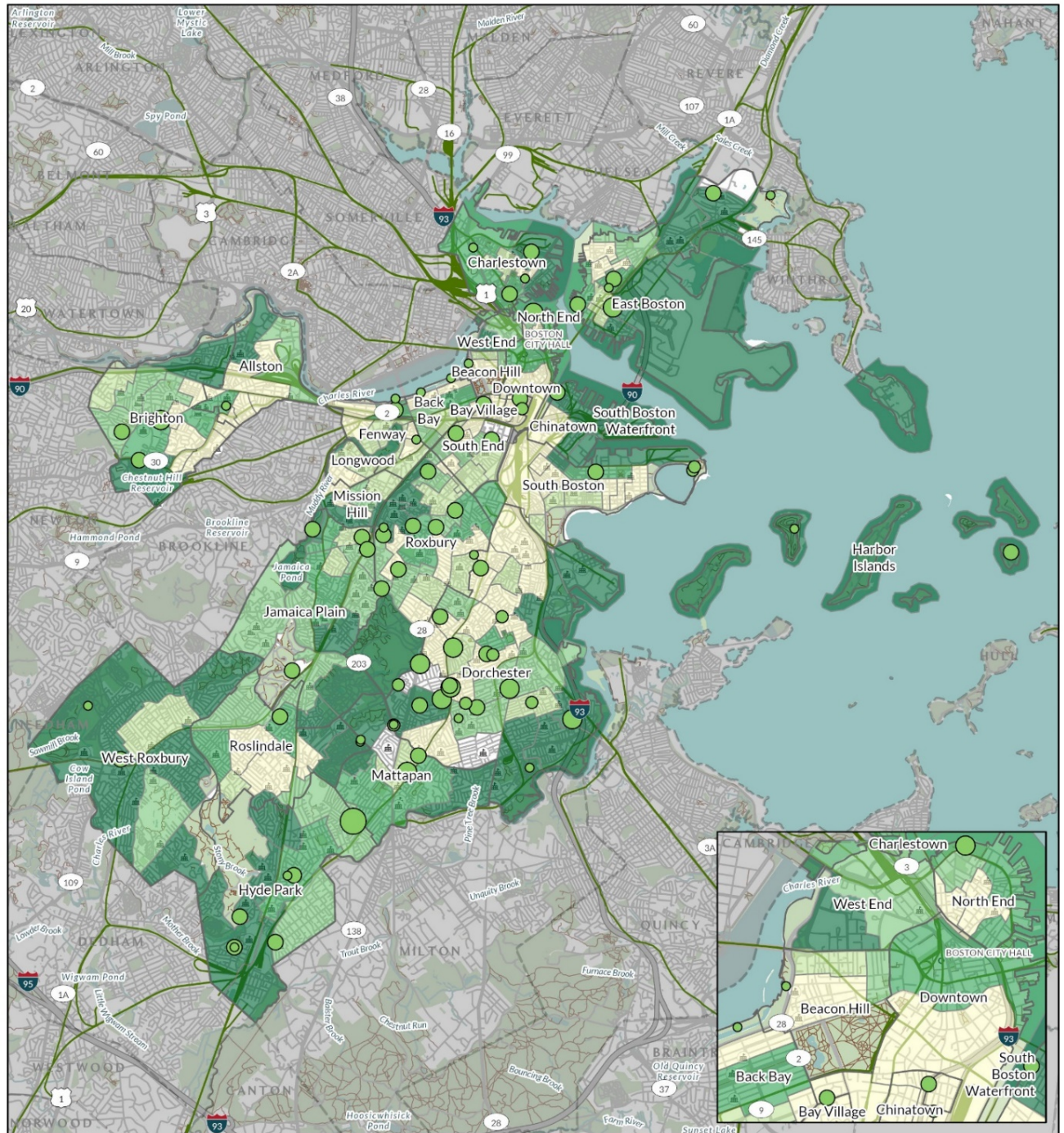
The map below shows the distribution of open space and recreation projects that the CPA has funded alongside data showing the green space per capita in each census tract. Boston has many parks within the city limits, so there is a good distribution of green space. In most neighborhoods, over 90 percent of the area has access (is within a quarter mile) to open space.

***The neighborhoods with less access to open space include East Boston, Roslindale, South Boston, and West Roxbury, where more than ten percent is not within walking distance (a quarter mile) of open space. The City awarded CPA open space and recreation funding to each of these neighborhoods.***

***Over 85 percent of the open space projects funded in these neighborhoods were for new recreational spaces rather than improvements to existing parks, which helps increase access to open space for more people. In all neighborhoods besides East Boston, Roslindale, South Boston, and West Roxbury, more than ninety percent of the population is within a quarter mile of open space.***

# CITY OF BOSTON - OPEN SPACE CPA PROJECTS & OPEN SPACE PER CAPITA J M GOLDSON

Prepared by JM Goldson LLC



In addition to the open space projects tied to specific locations and neighborhoods, the City has also funded the Boston Open Space Acquisition Fund, which will pay the costs involved in open space land acquisition citywide. This fund will work to implement the City's Open Space and Recreation Plan goal of providing additional open space throughout Boston. The open space that will be acquired through the fund will be permanently protected and publicly accessible.

A wide range of projects and programs received grants from \$6,000 to \$ 1.5 million. The following sample of grant awards provides some perspective as to how CPA funds have been awarded to address Boston's open space, parks, and recreation needs.

Citywide	\$1 million	Open Space Acquisition
Allston-Brighton	\$300,000	Shore and woods restoration
Back Bay	\$250,000	Capital improvements to Statler park (private funding will be used to create a memorial to Coconut Grove fire victims)
Charlestown	\$500,000	Community open space to commemorate victims of community violence
Hyde Park	\$1.5 million	Restore elementary school yard
Roxbury	\$400,000	New public space inspired by Olmsted and African American garden traditions
South End	\$250,000	Create Allan Rohan Crite Park dedicated to renowned African American artist



*A vacant parcel in Mattapan was converted into an urban farm—known as Astoria Farm—for education and the cultivation of fresh, local produce. Source: JM Goldson*

## GOALS

1. **Promote climate equity and resilience by supporting open space and recreation initiatives that help to mitigate the effects of climate change for Boston residents, especially BIPOC populations and neighborhoods that lack access to quality open space and recreation.**

The City of Boston's commitment to environmental action and climate justice is strong as the City works to overcome many challenges on its way to carbon neutrality and mitigating the effects of climate change for all Boston residents, as described in the FY21 Boston Climate Action Report, the Urban Forest Plan, the Open Space and Recreation Plan, and the Boston Heat Resilience Solutions Report. As a coastal city, the city is already experiencing the effects of rising sea levels, flooding, and extreme heat, with elevated risk for residents in historically underserved and redlined neighborhoods. Heat vulnerable focus areas in Boston are Chinatown-Leather District, Dorchester, East Boston, Mattapan, and Roxbury.

As described in the Boston Heat Resilience Plan: "Parks, trees, and outdoor spaces are critical to the City's network of cooling resources. In fact, trees and outdoor green spaces are among the most effective nature-based heat mitigation strategies."

CPA-eligible initiatives to promote climate equity could include expanding Boston's urban tree canopy including in public parks, preparing outdoor public recreation facilities for climate changes, acquiring private property to protect the City's urban wilds, wetlands, and in coastal areas and flood zones and in accordance with the Parcel Priority Plan to support the City's Open Space and Recreation Plan's vision of a comprehensive park system and for protective infrastructure.

2. **Create more public open space in historically underserved Boston neighborhoods to promote health equity for BIPOC and other marginalized populations.**

As described in the Boston Heat Resilience Plan: "Parks play critical roles in resident health and wellbeing, social connections, ecological health, and resilience, including cooler communities." The City's goal is to enhance and enlarge Boston's network of resilient community parks and is in the process of transforming the Parcel Priority Plan to a long-term program called Planning for Future Parks which will emphasize permanent protection and public access and expansion of park access in densely populated neighborhoods of the city. This effort aims to acquire and protect new parklands and natural areas that fill in gaps where there are no such spaces.

BPRD's Open Space Acquisition Program, which the CPA funds supported with \$1 million in 2021, enables the City to negotiate the purchase of land for future open spaces. The CPC will consider continued support for this important initiative as appropriate based on effective implementation of initial support.

3. **Rehabilitate existing parks, playgrounds, athletic fields, greenways, and schoolyards in historically underserved Boston neighborhoods to promote health equity for BIPOC and other marginalized populations.**

The City's Open Space and Recreation Plan (OSRP) outlines several CPA-eligible priorities for improving existing parks based on public input, analysis of existing resources, and neighborhood demographic characteristics. Among the OSRP's objectives is to revitalize and renovate parks according to facility life cycles and maintain Boston parks at the highest level feasible. CPA-eligible projects to implement these objectives include rehabilitation of basic

infrastructure including paths, drainage systems, site furnishings, and soil to keep parks in consistently good to excellent condition and improve universal access to parks.

Having access to high quality parks, schoolyards, and open spaces are important to promote health equity for all Boston residents. The CPC will strive to support eligible projects that improve the quality of Boston's parks, schoolyards, and open space in Boston's historically underserved neighborhoods and in accordance with the City's open space and recreation goals.

4. **Promote healthy local food access in historically underserved Boston neighborhoods such as through funding for community gardens, urban agriculture properties, and community farms.** Through CPA eligible open space and recreation projects, the CPC will strive to recommend CPA funds to promote healthy food access, particularly in historically underserved neighborhoods.

As described in the Open Space & Recreation Plan: *"Boston has 175 community gardens located in 11 Boston neighborhoods. . . Community gardens are vital focal points in many Boston neighborhoods and unique among the city's open space types. Most began and continue as food-producing plots used by people of limited means but have also grown to serve as important social and educational centers for gardeners, their families, and neighbors."*

The City allocated \$1,201,000 to fund not for profit community gardens between 2018 and 2021 in Charlestown, Dorchester, East Boston, Mattapan, Roslindale, and Roxbury. These projects are largely driven by community members and groups and create valuable assets for neighborhoods.

5. **Promote creation of greenways that connect neighborhoods, provide park and recreation amenities, and support multimodal recreational infrastructure including biking and walking.** This goal connects the City's mobility and open space and recreation priorities across several existing citywide plans. The City's mobility plan, *Go Boston 2030*, seeks to create more "accessible, safe, and reliable ways to get around Boston," while the City's Comprehensive Plan, *Imagine Boston 2030*, identifies the need to create an extended network of green spaces across the City, particularly in underserved neighborhoods.

These priorities coalesce in the Boston Department of Transportation's *Boston Green Links*, a citywide initiative to connect Boston residents in every neighborhood to the city's greenway network. Green links are "missing bike and pedestrian connections," which "when completed, [...] will create a seamless network of greenway paths connected to every neighborhood." In addition to increasing access to green, open spaces, Green Links envisions improved mobility, accessibility, and safety for all active transportation modes.

In 2019, the City allocated \$900,000 of CPA funds for two of these types of projects, which funded the design in one case and the creation in the other, of connections between key green spaces. One project was in Roslindale, and one in the Fenway-Kenmore neighborhood. CPA funds could support the implementation and completion of other greenways, such as the Neponset and Fairmount Greenways, and green links, such as the proposed Columbia Road Green Link.

## ELIGIBLE ACTIVITIES

The CPA defines the term “open space” as including, but not limited to, land deemed necessary to protect existing and future well fields, aquifers and recharge areas, marshes, wetlands, watershed land, agricultural land, lake and pond frontage, beaches, and scenic vistas. The CPA statute allows the use of CPA funds for the acquisition, creation, and preservation of open space. Additionally, the CPA statute allows for the rehabilitation/restoration of open space that was acquired or created with CPA funds. Per MGL c.44B s.5(f), CPA funds may not be used to acquire real property, or property interest, for a price exceeding the value of the property (as determined by methods customarily accepted by the appraisal profession).

In accordance with the CPA statute (MGL c.44B s.12(a) and (b)), an acquisition of real property is required to be owned by the municipality and to be bound by a permanent restriction. Any open space acquisitions by the Town using CPA funds will require execution of a permanent restriction that runs to the benefit of a nonprofit organization, charitable corporation, or foundation and that is in accordance with the requirements of MGL c.184. In addition, CPA funds may be appropriated to pay a nonprofit organization to hold, monitor, and enforce the deed restriction on the property (sometimes called a “stewardship fee”).

The CPA defines recreational use as including, but not limited to, the use of land for community gardens, noncommercial youth and adult sports, and the use of land as a park, playground, or athletic field. The definition goes on to prohibit “... horse or dog racing or the use of land for a stadium, gymnasium, or similar structure.”

Per the July 2012 amendments, the CPA statute allows use of CPA funds for the acquisition, creation, preservation, rehabilitation, and restoration of land for recreational use. Note that the 2012 amendments allow “rehabilitation” where previously it only allowed for recreational land created through the CPA. This amendment would allow existing parks and playgrounds to be rehabilitated with upgraded and new facilities and amenities. Maintenance costs are not eligible for CPA funds. In addition, acquisition of artificial turf for athletic fields is expressly prohibited in Section 5(b)(2).

## CHAPTER 6: HISTORIC PRESERVATION



*CPA funds enabled the repaving of pathways, and the repair of the perimeter gate and fencing in Allston-Brighton's Evergreen Cemetery. Source: JM Goldson*

The Community Preservation Act Legislation defines “historic resources” as “a building, structure, vessel, real property, document or artifact that is listed 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.” CPA Funds can be used to acquire, preserve, rehabilitate, or restore historic resources

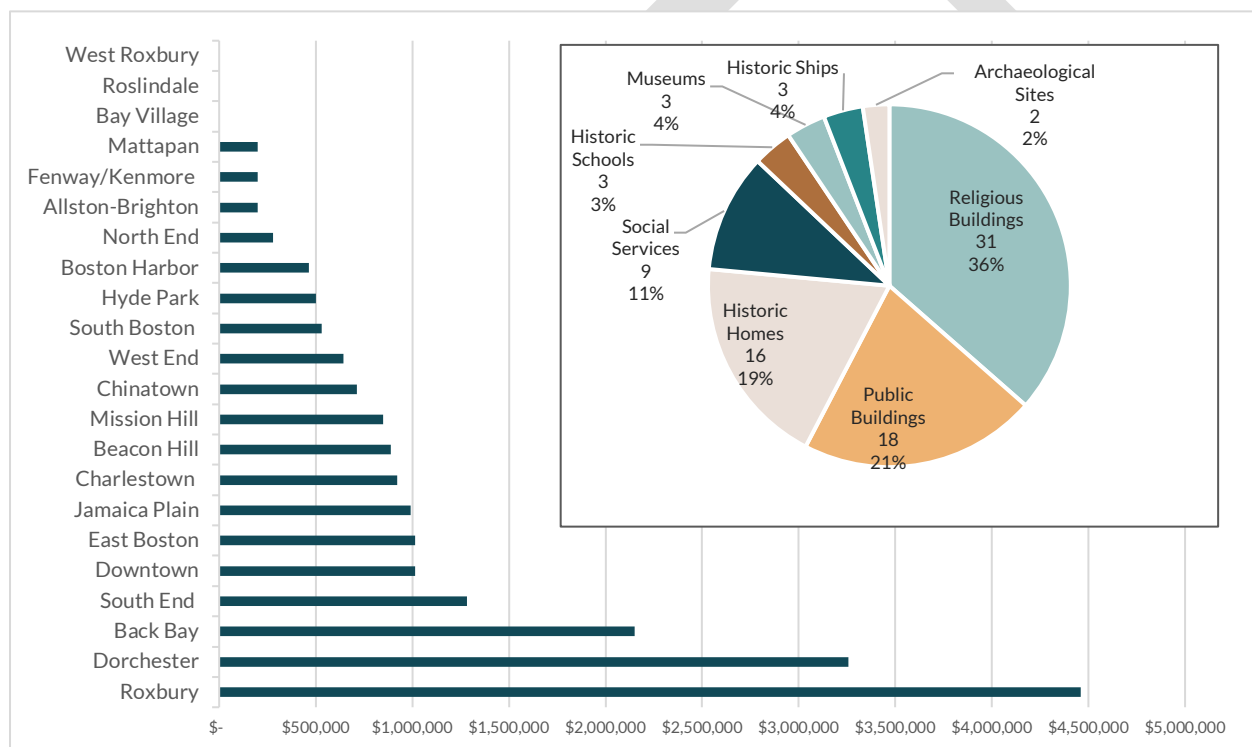
### NEEDS

Boston is nationally recognized as the place where several important events and movements took place that shaped the future of the United States. Among these are the Abolition movement, Boston Massacre, the Boston Tea Party, and the Battle of Bunker Hill. Aside from these places of national historic importance, Boston is also filled with historic architecture and landmarks. Boston has a rich native history, was a key player in women’s history, especially advancing women in medicine, and was an important place for the civil rights movement. Today, the City is greatly influenced by immigrant populations that have made Boston home for generations. The preservation of historic sites, buildings, museums, monuments, and more is extremely important for the culture and significance of

Boston. The Community Preservation Plan goals allow the program to fund historic preservation projects that preserve and activate historic sites and buildings in new ways that bring the community together while celebrating and protecting history.

In total, the CPA program has funded 85 historic preservation projects totaling \$20,565,414. In addition to analyzing the funding by neighborhood, the team also looked at the types of resources that have been funded, as shown in the pie chart. Please note that the buildings that were once historic homes and schools are now owned by non-profits, community organizations, and museums, or are now affordable community housing. The CPA program has not provided funding for private residences. However, this is something that could be done legally, under the statute.

## HISTORIC PRESERVATION FUNDING BY NEIGHBORHOOD



In each neighborhood, the project team also reviewed the historic preservation projects to understand the history and significance of the buildings as well as the work that is being done to them. Particularly, the team looked for any projects that were related to historically marginalized populations.

To understand the distribution of historic preservation projects, the team analyzed how many CPA historic preservation projects were in historic districts, landmarks, or places designated at national, state, and local levels. In total, 47 out of 85 projects were in these areas. The remaining 38 projects occurred in locations that have been deemed locally historically significant by the Boston Landmarks Commission<sup>11</sup>.

<sup>11</sup> The CPA allows funding for projects that are not in locations designated by the Massachusetts Historical Commission if the local Historic Commission determines that there is local historic significance.

This table summarizes the distribution of this overlap across the neighborhoods of Boston compared to the total number of CPA historic preservation projects.

## HISTORIC PRESERVATION PROJECTS BY NEIGHBORHOOD

Neighborhood	CPA Historic Preservation Projects in Landmarks, Districts, and Places	CPA Historic Preservation Projects in Places with Local Historic Significance	Total CPA Historic Preservation Projects
Boston	47	38	85
Allston-Brighton	1	0	1
Back Bay	9	0	9
Bay Village	0	0	0
Beacon Hill	3	0	3
Boston Harbor	0	2	2
Charlestown	1	2	3
Chinatown	0	4	4
Dorchester	4	9	13
Downtown	3	1	4
East Boston	1	2	3
Fenway-Kenmore	1	0	1
Hyde Park	0	2	2
Jamaica Plain	3	3	6
Mattapan	1	0	1
Mission Hill	0	1	1
North End	0	3	3
Roslindale	0	0	0
Roxbury	9	6	15
South Boston	1	2	3
South End	5	1	6
West End	5	0	5
West Roxbury	0	0	0

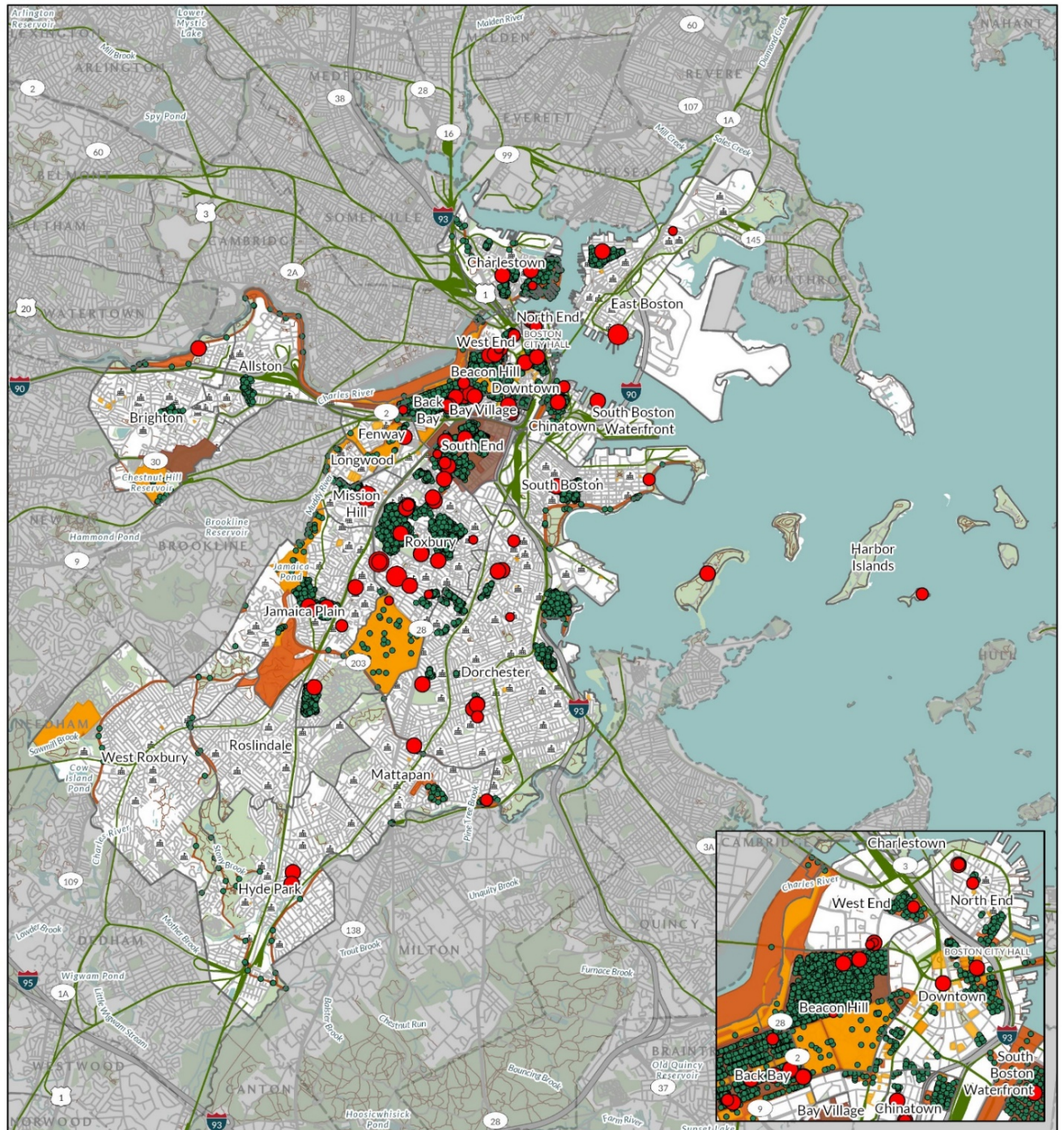
The following map shows the distribution of historic preservation projects funded by the CPA alongside data layers displaying Local Historic Districts, Local Landmarks<sup>12</sup>, Massachusetts Historic Landmarks, National Historic Landmarks, and National Register Historic Districts<sup>13</sup>. These are areas identified as priority areas for historic preservation on local, state, and national levels. The goals set out by the CP Plan for historic preservation focus on historic resources. While the City does not need to fund projects that are designated landmarks or in historic districts, this data helps identify parts of the city with more historic resources than others. The historic preservation projects already funded by the CPA align well with these identified historic districts.

<sup>12</sup> Local Historic Districts and Local Landmarks data comes from Boston Landmarks Commission

<sup>13</sup> Massachusetts Historic Landmarks, National Historic Landmarks, and National Register Historic Districts data come from the Massachusetts Historic Commission

# CITY OF BOSTON - HISTORIC PRESERVATION CPA PROJECTS & RESOURCES J M GOLDSON

Prepared by JM Goldson LLC



- |              |                         |   |
|--------------|-------------------------|---|
| Schools      | <b>Amount Awarded</b>   | MHC Local, State, and National Historic Places                |
| Buildings    | \$5,000 - \$50,000      | MHC Local, State, and National Historic Districts & Landmarks |
| Parcels      | \$50,000 - \$100,000    | BLC Landmarks   |
| Trails       | \$100,000 - \$500,000   | BLC Historic Districts  |
| Water bodies | \$500,000 - \$1,000,000 |   |
| Open space   |                         |   |

0 0.5 1 Miles

Sources: MassGIS, MassDEP, MAPC Trailmap

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Five neighborhoods (Dorchester, East Boston, Hyde Park, Mattapan, and Roxbury) have populations that are over 75 percent BIPOC. These neighborhoods make up about 43 percent of the total population in Boston. Historic preservation projects in these neighborhoods make up about 46 percent of the funding for this category.

***In these neighborhoods with a higher proportion of BIPOC residents than other neighborhoods, there were several projects that were related to the history and culture of these populations. These projects included preservation projects on several Black churches, the National Center of Afro-American Artists, and a Latino social services organization have been funded in these neighborhoods.***

The City has funded other projects for historic preservation in Boston that are directly related to historically marginalized populations, in neighborhoods that have a smaller proportion of BIPOC residents as well. Some examples of this include grant funding for masonry repair at the League of Women for Community Service (The League) in the South End. The League is exceptionally significant due to its participation in the Underground Railroad, as well as being the home of Coretta Scott King. In 1920, it became the headquarters for the League, a pioneering Black women's organization known for promoting Black cultural values and engaging with social issues. Another example is the Union United Methodist Church, which the City awarded funds to complete the accessibility features to their community food pantry and meeting space. Union United Methodist Church is the oldest African American United Methodist Church in New England, whose congregation first formed in 1796.



*Union United Methodist Church (South End) received CPA funds to finish building a handicap accessibility entrance for the church's well-used community space. Source: JM Goldson*

The following sample of Historic Preservation grant awards provides some perspective as to how CPA funds have been awarded to address neighborhood equity and multiple CPA Plan goals.

Charlestown	\$26,000	Restoration work at Constitution Museum to address sea level rise.
Allston-Brighton	\$200,000	Adaptive restoration of Charles River Speedway buildings for dining, retail, and other facilities. (Built 1899)
Beacon Hill	\$340,000	Restoration of former school building for 42 affordable housing units for individuals and families. (Built 1910)
Boston Harbor	\$365,000	Masonry repair for Salah Hall on Thompson Island to continue STEM education. (Built 1909)
Charlestown	\$400,000	Roof restoration of an historic school that provides child and senior care. (Built 1894)
Dorchester	\$500,000	Pierce Building restoration as a cornerstone for Arts and Innovation District (Built 1804)
Jamaica Plain	\$200,000	Roof restoration for Prosperity Center which provides small business services, job training, ESC classes and other programs.
	\$200,000	Restore foundation of Footlight Club, country's oldest community theater. (Built 1831)
Roxbury	\$850,000	Window restoration for Dimock Community Health Center which provides residential recovery program and has had a significant role in the history of women in medicine, serving as both a teaching and practicing hospital.
South End	\$400,000	Masonry repair for the League of Women for Community Service, a building of major importance to the underground railroad, home of Coretta Scott King, a pioneering Black women's organization. (Built 1857)



*The USS Constitution Museum in Charlestown received CPA funds to relocate the museum's sprinkler system equipment. Source: JM Goldson*

## GOALS

### 1. Support historic preservation projects that help address affordable housing needs.

Despite historic preservation's reputation as an avenue for gentrification, historic preservation can also be instrumental for community building and to support socioeconomically and ethnically diverse neighborhoods. Historic preservation can be a beneficial policy intervention to help slow down neighborhood change, particularly when paired with affordable housing initiatives.

Recognizing the critical need for more affordable housing to help address Boston's housing crisis, the CPC will favor historic preservation projects that help address the City's affordable housing needs. CPA-eligible opportunities to combine these purposes into projects could include preservation of naturally occurring affordable housing to help the City's anti-displacement initiatives, adaptive reuse projects that convert historic buildings to affordable housing such as former school buildings or religious structures, and a program such as the City of Cambridge established to provide preservation grants to low-income homeowners.

### 2. Favor projects that honor the history and historical contributions of Boston's BIPOC and other historically marginalized populations.

For decades, the stories and histories of Boston's BIPOC communities have been overlooked. Historic preservation can be a tool to help Boston build a more inclusive city. The historic preservation movement, as with so many other aspects of American life, is in a period of profound changes in response to recognition of its role to confront issues of race and equity.

By refocusing CPA-funded preservation efforts to protect Black and other spaces historically significant to people of color, the City can help promote and honor more inclusive stories of historically marginalized Boston voices and support community services and resources in historically underserved neighborhoods.

To encourage eligible projects that would promote this goal, it will be important to access (or create) comprehensive documentation that identifies these resources, such as historic resource inventories. CPA Program staff and CPC members look forward to actively work with the City's new historic preservation director to promote these types of studies and surveys to advance the City's understanding of the history and historical contributions of Boston's BIPOC and other historically marginalized populations.

Historic resources are not just museums or buildings stuck in time. They are living resources that contribute to their neighborhoods and help us understand who we are and where we came from. Preserved historic resources are living records that tell stories and help communities nurture pride of place and authentic identity.

***When asked what types of historic preservation projects are the most important, preserving historic properties that honor historically marginalized populations scored the highest (67.9 percent selected "very important")***

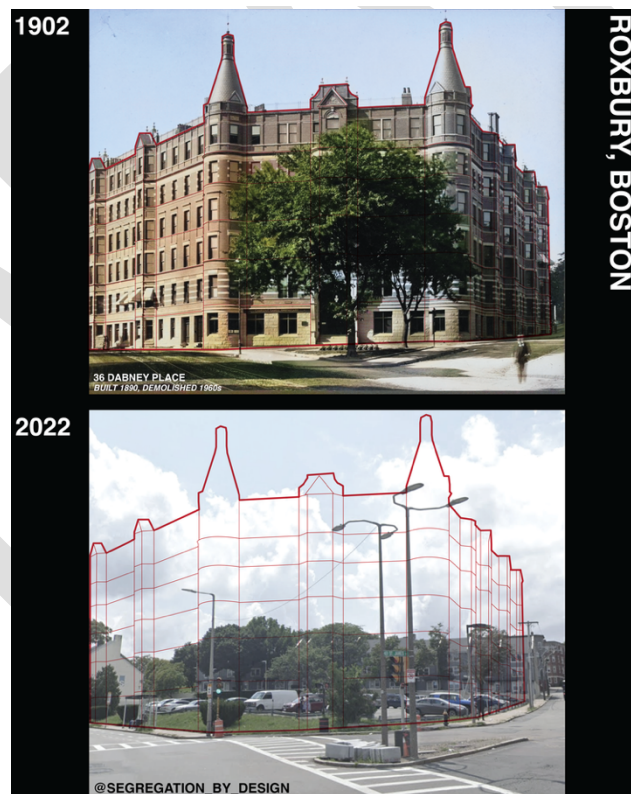
3. Further preservation and rehabilitation of properties that provide public access or that provide environmental and/or social benefits.

The CPC will continue to prioritize historic preservation projects that provide public access or other demonstrably impactful and direct public benefits (including affordable housing, social services, and other community benefits). Providing public benefits is not just important for legal reasons (i.e., to comply with the Anti-Aid Amendment of the Massachusetts Constitution) but also as a policy to target the use of CPA funds to promote the greatest level of public good through direct and positive community impacts.

4. Protect privately-owned properties that are threatened by demolition or demolition by neglect and will provide a demonstrated public purpose.

When historic resources are demolished, they are permanently lost, leaving a void, and missed opportunities to continue to contribute to the good of the community. Privately-owned historic resources can be protected through acquisition of fee interest or through Preservation Restrictions to permanently protect the resource.

While protecting threatened resources can provide many public benefits, the practicality of this type of initiative can be challenging given the speed at which the real estate market works compared with the CPA program's annual funding cycle. The CPC would consider supporting such initiatives, however, if opportunities arise that can appropriately demonstrate public benefits resulting from preservation.



Nubian Square – the historic Dabney Place, which was demolished in the 1960s, is now home to a parking lot. Source: Segregation by Design: <https://www.segregationbydesign.com/boston/roxbury>

## ELIGIBLE ACTIVITIES

The CPA Act, as amended July 2012, defines a historic resource as “a building, structure, vessel, real property, document, or artifact that is listed on the State Register of Historic Places or has been determined by the Boston Landmarks Commission to be significant in the history, archeology, architecture, or culture of a city or town.” CPA funds can be used for the “acquisition, preservation, rehabilitation, and restoration of historic resources.”

In addition, CPA funds may be appropriated to pay a nonprofit organization to hold, monitor, and/or enforce a deed restriction as described in Section 12 of the CPA Act (amended Summer 2012). Furthermore, within the definition of “rehabilitation,” CPA is allowed to fund improvements to make historic resources functional for their intended use, including improvements to comply with the Americans with Disabilities Act (ADA) and other building or access codes.

All rehabilitation work, with respect to historic resources, is required to comply with the Standards for Rehabilitation stated in the US Secretary of the Interior’s Standards for the Treatment of Historic Properties (codified in 36 C.F.R. Part 68).

# CHAPTER 7: RECOMMENDATIONS FOR PROGRAM OPERATIONS

The City has run the Boston CPA program successfully since 2017, with close to \$92M allocated to projects for affordable housing, historic preservation, and open space and recreation. The program has grown in number of applications, funded projects, as well as the amount of funding appropriated. In 2018, the program awarded 34 projects (3 affordable housing, 16 historic preservation, and 15 open space and recreation) totaling over \$8M in CPA funds. In 2021, the program awarded 65 projects (5 affordable housing, 33 historic preservation, and 27 open space and recreation) totaling over \$25M in CPA funds.

*Within three years, the CPA program nearly doubled the number of projects it funded in each funding round and more than tripled the amount of funding given in a funding round.*

Along with the program's growth, the oversight and management of needs for existing projects have grown. At the time of this writing, the CPA program staff are managing 60 active projects, with 75 additional projects that have been awarded but have not yet started.

The program staff have significant responsibilities for all aspects of the CPA program: inspiring ideas in all neighborhoods in an inclusive way; encouraging great applications that promote the program's goals; supporting the CPC's evaluation and recommendation process; and executing and managing the grants. The program is currently running with two full-time employees and three full-time consultants.

To ensure the Boston CPA program is as effective as possible to promote this plan's goals and create the best outcomes for the people of Boston, this chapter provides recommendations for program operations, including:

1. Increasing staffing capacity and a strategic plan for department organization
2. Adopting a standard set of metrics to measure the program's performance
3. Broadening inclusive community engagement
4. Refining the application evaluation process

## INCREASING STAFFING CAPACITY AND A STRATEGIC PLAN FOR DEPARTMENT ORGANIZATION

Substantially increasing the program's staff capacity is essential to the program's success. A program of this size and complexity requires strategic expansion of talent in three key areas of responsibility: 1) community engagement and communications; 2) grant compliance; and 3) project management.

The CPA Director is acutely aware of and working to implement a strategic staffing plan that includes the following.

**FY2023 (July 1, 2022 – June 30, 2023)**

1. **Manager of Engagement and Operations** (Full-Time Employee): help manage community engagement, digital and physical operations, and internal and external communications initiatives.

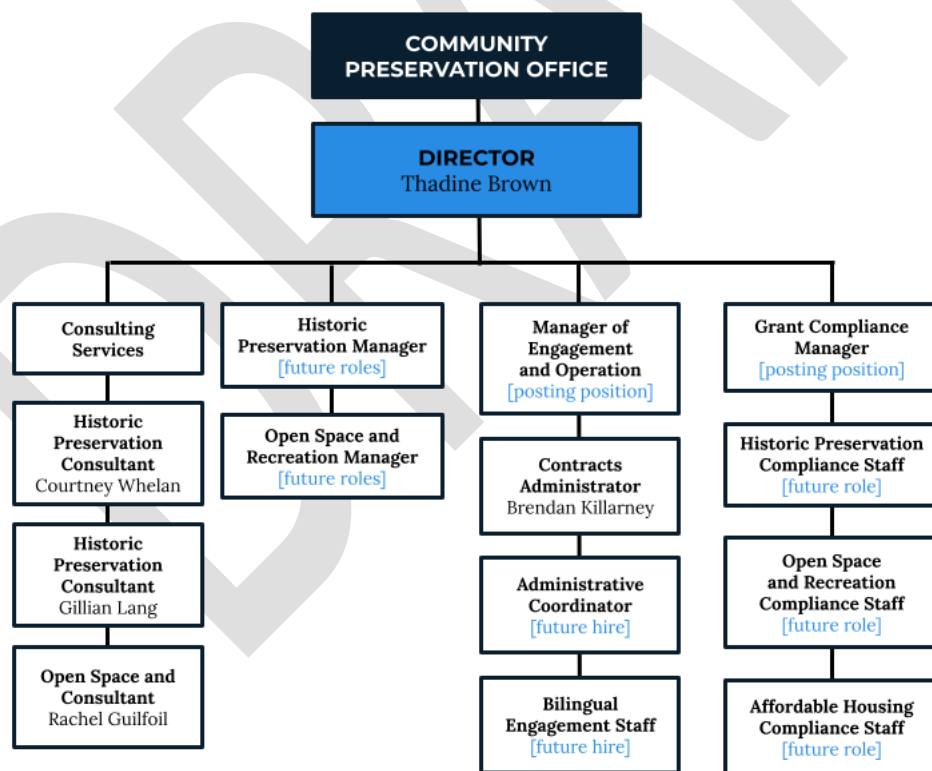
2. **Grant Compliance Manager** (Full-Time Employee): responsible for overseeing the compliance of all Community Preservation Act grant agreements and memorandum of agreements (MOA) with the City of Boston. The CPA GCM will ensure grant agreement and MOA requirements are met annually and monitor agreement terms.

#### FY2024-2027 (July 1, 2023 – June 30, 2027)

Expand the program further with additional staff members as the program continues to grow between FY2024 and 2027. Consider the following positions, as CPA administrative funding would allow:

1. Administrative Coordinator
2. Bilingual Engagement Staff
3. Historic Preservation Manager
4. Open Space and Recreation Manager
5. Historic Preservation Grant Compliance Staff
6. Open Space and Recreation Grant Compliance Staff
7. Affordable Housing Grant Compliance Staff

Depending on the future organizational structure, working in close collaboration with the Mayor's Office of Housing, determine if the program would benefit from an additional consulting position to assist with evaluation, project management, or other aspects of affordable housing applications.



## ADOPTING A STANDARD SET OF METRICS TO MEASURE THE PROGRAM'S PERFORMANCE

This plan lays out important goals for the CPA program. Goals are conditions to aim for that to help the CPA program provide the greatest benefit to Bostonians. Goals are often measurable. Where possible, track metrics to help the CPC, City officials, and the broader Boston community understand and assess the CPA program's performance to achieve the goals adopted as part of this plan.

For all applications, consider adding requirements that applicants provide specific metric information within applications and to verify with a project completion report. Here are a few requirements to consider requesting:

- universal metrics (number of people served)
- identifying and defining neighborhood need
- identify the specific populations served by the project

### Track Performance Toward Overall CPA Goals

#### *Measurable Overall Goals:*

1. Prioritize CPA funding for projects that further equity by addressing needs in the City's historically underserved neighborhoods and marginalized populations
  - **Potential Metric to Measure Level of Goal Attainment:** a percent of total projects or total funding to be allocated to neighborhoods or sub neighborhoods with at least one of the following characteristics:
    - i. over 65% of Households earn below the AMI
    - ii. over 40% of residents are living below the poverty line
    - iii. 15% or more of Boston residents with a Language Access Need
    - iv. over 65% of residents identify as BIPOC
2. Prioritize CPA funding for projects that directly advance Boston's climate resilience and sustainability
  - **Potential Metrics to Measure Level of Goal Attainment:**
    - i. Plant a certain number of trees annually (or a certain number over 5 years)
    - ii. Convert a certain number of acres of impervious surfaces to vegetated open space annually (or a certain number over 5 years)
    - iii. A certain percent of total affordable housing and historic preservation projects result in net zero carbon properties
    - iv. A certain number of miles of new bike/pedestrian paths annually (or a certain number of miles over 5 years)
    - v. A certain percent of projects promotes diversity of flora and fauna
    - vi. A certain percent of projects or a certain percent of total funding promotes improved coastal resilience

### Track Performance Toward Affordable Housing

#### *Measurable Affordable Housing Goals*

1. Prioritize CPA funds to promote homeownership to enable household equity growth and help address the racial wealth gap.
  - **Potential Metrics to Measure Level of Goal Attainment:**
    - i. A certain number of first-time homebuyer households assisted annually or a certain number of affordable homeownership units created (or a certain number over 5 years)

2. Create new units of affordable housing in all Boston neighborhoods including areas with higher median household income to help provide greater opportunities, mobility, and choice while also preventing people from being priced out of their current neighborhoods.
  - **Potential Metrics to Measure Level of Goal Attainment:**
    - i. A certain number of new affordable units in each Boston neighborhood over 5 years – perhaps create a target for each neighborhood based on % of total housing units that are affordable.
3. Preserve naturally occurring affordable housing, such as through acquisition and preservation programs.
  - **Potential Metrics to Measure Level of Goal Attainment:**
    - i. A certain number of preserved units annual (or a certain number over 5 years)

#### Track Performance Toward Open Space and Recreation

##### *Measurable Open Space and Recreation Goals:*

None recommended specifically for these goals because the metrics suggested for the Overall Goals would apply to these goals as well.

#### Track Performance Toward Historic Preservation

##### *Measurable Historic Preservation Goals*

1. Support historic preservation projects that help address affordable housing needs.
  - **Potential Metrics to Measure Level of Goal Attainment:**
    - i. A certain percent of historic preservation projects funded create or preserve affordable housing
2. Favor projects that honor the history and historical contributions of Boston's BIPOC and other historically marginalized populations.
  - **Potential Metrics to Measure Level of Goal Attainment:**
    - i. A certain percent of historic preservation projects funded honor the history and historical contributions of Boston's BIPOC and other historically marginalized populations

To support the CPC's deliberation and evaluation of funding applications, provide baseline documentation for each metric and an updated report tracking progress toward these measurable goals as part of the CPA staff recommendation materials each funding round. Provide these materials to the Mayor and City Council to support the CPC's recommendations.

## **BROADENING INCLUSIVE COMMUNITY ENGAGEMENT**

### **Develop an Annual Outreach Plan**

A written outreach plan, updated annually, can help the CPA Program staff prioritize its limited capacity and collaborate effectively and efficiently with civic/neighborhood associates and the Ambassadors (described below). The outreach plan should layout a schedule for events and milestones, describe the tools and methods that will be used for engagement, describe the information that will be provided, and identify responsible entity. With this outreach plan in place each year, the CPA Program staff can work to implement some aspects themselves and work with community and neighborhood partners, including the Ambassadors, to implement the plan. As the plan is implemented, the CPA Program staff should maintain metrics to track how many, and the characteristics of community members reached through these efforts and report this to the CPC.

### **Reinstitute the CPA Community Ambassador Initiative**

In the early years of the CPA program in Boston, the program staff worked to create a CPA Community Ambassador Initiative that would solicit volunteers in every neighborhood to help residents with general CPA questions, plan and participate in neighborhood workshops and events, promote CPA initiatives, and keep neighborhoods connected to the CPA Program. These Ambassadors could be neighborhood residents, community leaders, experienced individuals in housing, historic preservation, parks, or open space, and other professional or business leaders.

Reinstituting the Ambassador Initiative could help boost engagement and outreach for the program in all Boston neighborhoods. It is important to create space for local, especially historically under-heard, voices to have a more prominent role in the CPA program to help strengthen relationships and engagement. Recruiting Ambassadors who already have relationships and knowledge of key challenges for voices that are the hardest to reach in Boston neighborhoods can directly enhance the inclusivity of the program's engagement efforts.

This recommendation will require expanding CPA Program staff capacity first hiring a Manager of Engagement and Operations to oversee the Ambassador Initiative.

### **Explore Partnerships with Non-Profit Organizations to Support Community-Initiated Projects**

To support the CPC's goal of continuing to encourage and fund community-led projects, it will be helpful to ensure an effective approach for longer-term maintenance of the CPA investment. For example, if community-led projects involve creating community gardens, pocket parks, or other similar neighborhood improvements, the owner or custodian of the property may not be able to commit to or be adequately resourced to adequately fulfill the required maintenance. The CPA grant agreements have required a minimum 15-year responsibility to maintain the improvement for such projects, and housing projects have a permanent responsibility. However, many community-based project proponents, who may be concerned neighborhood residents, may not be able to take on this requirement realistically or feasibly.

Exploring CPA Program partnerships with non-profit organizations who could undertake the required maintenance may be a helpful approach. With the appropriate organization (which could be an existing community or civic organization or other non-profit organization) taking the lead on maintenance, the responsibility can be shifted from community-based project proponents to an organization that has capacity to be an effective and attentive steward of the property. Initiating these discussions early on with potential applicants during the eligibility determination or even before if possible and working to actively match applicants with potential community partners could help to implement this idea.

### **Create a System to Provide Efficient and Increased 1:1 Technical Assistance**

The CPA staff provides information and technical support to community members, City officials, organizations, and the like, through several information sessions as well as one-on-one conversations and meetings on an as needed basis. With expanded capacity through the hire of a Community Engagement and Communications Manager, and ultimately additional staff to support this role, the City staff will be able to expand these outreach initiatives. However, even with expanded capacity, it is important to streamline efforts to ensure the greatest reach with the least inefficiencies by creating systems that help focus staff time on helping people.

For example, the Staff could consider opening regular times that people can self-book short 1:1 video meetings or phone calls with the appropriate staff member through a calendar booking system such as Calendly or Doodle. This type of system can provide both boundaries to open only certain days/times for booking, syncs with staff's schedules in real time to avoid conflicts and can include the opportunity (or even a

requirement) to describe the specific question/ topic the person booking would like to discuss so that the staff member can prepare.

In addition, this type of meeting system can automatically create a zoom link or require a phone number be provided by the person booking the call. It can save many minutes, even hours, each week in back-and-forth scheduling emails and communications and can help to make the time together as productive as possible. With this type of system, staff members ultimately can help more people.

Staff could focus time for technical support availability during the months leading up to the November application deadline to provide as much support as possible during this critical time when project ideas and applications are shaped.

## REFINING THE APPLICATION EVALUATION PROCESS

### Systematize Evaluation Process and Tools

#### *Consider Adjustments to the Evaluation Process*

In prior years, the CPA Staff distributed all eligible and complete applications to CPC members to review prior to public deliberations. The CPA Staff conducts site visits as well as a thorough evaluation of all applications and writes funding recommendations for consideration by the CPC. The Staff presents these recommendations to the CPC for discussion and consideration.

To deepen the CPC's deliberations, consider adjusting this process by categorizing applications into three groups:

1. High: applications that address this plan's goals at a high level and that both the CPA Staff and CPC members (through their individual evaluation tool, discussed below) identify as high priorities for funding
2. Low: applications that do not address this plan's goals adequately and the both the CPA Staff and CPC members identify as low priorities for funding
3. Middle: applications that are somewhere in the middle of high priority and low priority or have mixed evaluations.

These groupings can help the CPC focus its deliberations where they are most useful - on the applications in the middle group. The high priority applications, if there is enough funding, can be approved without much discussion. The low priority applications can be disapproved without much discussion.

The middle group of applications, however, will require thoughtful discussion. The CPA Staff's role would be to identify issues including pros and cons of the applications in the middle group and to facilitate CPC discussion over one or more public meetings, but the Staff would not make recommendations for this group. The CPC, after discussion and consideration, would vote on the individual applications in this middle group to determine which applications to recommend for funding in addition to the high priority group of applications.

#### *Consider Adjustments to the Evaluation Tool*

The CPA Staff have provided the CPC with evaluation criteria worksheets to assist in their evaluation of applications. The worksheets provide space to indicate to what extent each application addresses each CPC goal for the applicable funding area. The worksheets are Excel files. There is one for each CPA funding category. These have been offered as an optional tool for CPC members to fill out individually and submit to CPA Staff prior to public deliberations.

Consider renewed efforts to encourage CPC members to utilize the worksheets and to submit their completed worksheets with adequate time for CPA Staff to review and incorporate into the evaluation and recommendation process prior to presenting low, middle, and high categories of applications, as described above.

2022 CPA Application General Evaluation Criteria - Affordable Housing						
Community Housing : Projects which provide affordable rental and affordable ownership opportunities.						
Neighborhood	Project Name	Multiple Benefit i.e., project serves more than one CPA purpose	Critical Need and/or Fills Gap i.e., project leverages additional public and/or private funds and/or establishes a significant opportunity	Equity & Need i.e., project supports the housing need of an underserved, vulnerable and/or at-risk population in Boston.	Equity & Recognition i.e., project advances a public benefit to residents and/or businesses and/or supports under-represented communities	Climate Resiliency i.e., project utilizes green concepts/components, achieves sustainable results, and/or conserves natural resources
Chinatown	288 Harrison Residence					
Dorchester	DMH Housing Harvard Commons					
Dorchester	4-18 Cheney Street Apartments					
Dorchester	Hamilton at Mt. Everett					
Dorchester	Talbot Commons II					
Jamaica Plain	Stonley - Brookley					
Jamaica Plain	127 Armory Street					
Roxbury	2085 Washington Street (aka Parcel 10)					
Roxbury	Barlett Station Drive - F5					

# APPENDICES

## KEY DEFINITIONS

This list of key definitions is intended to assist the reader and is not intended to replace applicable legal definitions of these terms. The following definitions are for key terms used throughout the document, many of which are based on definitions per MGL c.44B s.2 or other statutes and regulations.

**Active Recreation** – Requires intensive development to create outdoor recreation and often involves cooperative or team activity, including playgrounds, ball fields, and paved bike paths.

**Areawide Median Income** – The median gross income for a person or family as calculated by the United States Department of Housing and Urban Development, based on the median income for the Metropolitan Statistical Area.

**Chapter 40B** – A state statute which enables local Zoning Boards of Appeals (ZBAs) to approve affordable housing developments under flexible rules if at least 20-25 percent of units have long-term affordability restrictions.

**Chapter Lands** - Chapter Lands refer to Chapter 61, 61A, and 61B of Massachusetts General Law. Lands are classified as forestry, agricultural/horticultural, or recreational. Landowners can apply for their property to be considered “Chapter Land”, in which case the tax will be assessed on the value of the land for forestry, agricultural/horticultural, or recreational uses, rather than the fair market value based on the land’s highest and best use as would be the case if the land were not classified.

**Community Housing** – As defined by the Community Preservation Act is housing for individuals and families with incomes less than 100 percent of the Areawide Median Income, including senior housing. In general, the occupant(s) should pay no greater than 30 percent of his or her income for gross housing costs, including utilities.

**Community Preservation** – The acquisition, creation, and preservation of open space; the acquisition, creation, preservation, and rehabilitation/restoration of land for recreation; the acquisition, preservation, and rehabilitation/restoration of historic resources; and the acquisition, creation, preservation, and support of community housing.

**Community Preservation Act** – A state law, MGL c. 44B, is enabling legislation that allows communities to raise and set aside funds for community preservation projects, including open space and natural resource conservation, outdoor recreation, historic preservation, and community housing. It is funded through a combination of a local property tax surcharge of up to 3 percent and a variable state contribution from the Community Preservation Trust Fund.

**Community Preservation Committee** – The committee established by the legislative body of a city or town to make recommendations for community preservation, as provided by Section 5 of MGL c. 44B.

**Community Preservation Fund** – The municipal fund established by Section 7 of MGL c. 44B.

**Historic Resource** – A building, structure, document, or artifact that is listed on the state register of historic places or National 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.

**Household** – All the people, related or unrelated, who occupy a housing unit. It can also include a person living alone in a housing unit or a group of unrelated people sharing a housing unit as partners or roommates.

**Housing Production Plan** – A community's proactive strategy for planning and developing affordable housing. In an HPP, a community creates a strategy to produce housing units and meet the 10 percent goal under Chapter 40B.

**Local Historic District** – An area or group of historic structures that are deemed significant to the town's history, archeology, architecture, or culture and protected by public review.

**Low-income Housing** – Housing for persons or families whose annual income is less than 80 percent of the areawide median income (AMI). The AMI is determined by the United States Department of Housing and Urban Development (HUD).

**Moderate-income Housing** – Housing for persons or families whose annual income is less than 100 percent of the areawide median income (AMI). The AMI is determined by the United States Department of Housing and Urban Development (HUD).

**Open Space** – Land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh and saltwater marshes and other wetlands, oceans, rivers, streams, lake and pond frontage, beaches, dunes and other coastal lands, lands to protect scenic vistas, land for wildlife or nature preserve, and/or land for recreational use.

**Passive Recreation** – That which emphasizes the natural aspects of open space, and which involves a low level of development, such as hiking trails.

**Preservation** – The protection of personal or real property from injury, harm, or destruction.

**Recreational use** – Recreation uses are often divided into two categories: passive and active recreation. See definitions for "Passive recreation" and "Active Recreation." Recreation, under the CPA, does not include horse or dog racing, or the use of land for a stadium, gymnasium, or similar structure.

**Rehabilitation** – Capital improvements or extraordinary repairs to historic resources, open spaces, lands for recreational use, and community housing for the purpose of making the above functional for their intended uses and compliant with the Americans with Disabilities Act (ADA) and other federal, state, or local building or access codes. With historic resources, "rehabilitation" must comply with the Standards for Rehabilitation stated in the United States Secretary of the Interior's Standards for the Treatment of Historic Properties (codified in 36 C.F.R. Part 68). With recreational use, "rehabilitation" includes the replacement of playground equipment and other capital improvements to the land or facilities which make the related land or facilities more functional for the intended recreational use.

**Subsidized Housing Inventory (SHI)** - The official list of units, by municipality, maintained by the Massachusetts Department of Housing and Community Development (DHCD) that is used to measure a community's stock of low- and moderate-income housing for the purposes of M.G.L. Chapter 40B's 10 percent goal.

# ELIGIBILITY CHART

## COMMUNITY PRESERVATION FUND ALLOWABLE SPENDING PURPOSES (G.L. c. 44B, § 5)

	OPEN SPACE	HISTORIC RESOURCES	RECREATIONAL LAND	COMMUNITY HOUSING
<b>DEFINITIONS</b> (G.L. c. 44B, § 2)	Land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh and salt water marshes and other wetlands, ocean, river, stream, lake and pond frontage, beaches, dunes and other coastal lands, lands to protect scenic vistas, land for wildlife or nature preserve and land for recreational use	Building, structure, vessel, real property, document or artifact listed on the state register of historic places or determined by the local historic preservation commission to be significant in the history, archeology, architecture or culture of the city or town	Land for active or passive recreational use including, but not limited to, the use of land for community gardens, trails, and noncommercial youth and adult sports, and the use of land as a park, playground or athletic field  Does <u>not</u> include horse or dog racing or the use of land for a stadium, gymnasium or similar structure.	Housing for low and moderate income individuals and families, including low or moderate income seniors  Moderate income is less than 100%, and low income is less than 80%, of US HUD Area Wide Median Income
<b>ACQUISITION</b> Obtain property interest by gift, purchase, devise, grant, rental, rental purchase, lease or otherwise. Only includes eminent domain taking as provided by G.L. c. 44B	Yes	Yes	Yes	Yes
<b>CREATION</b> To bring into being or cause to exist. <i>Seideman v. City of Newton</i> , 452 Mass. 472 (2008)	Yes		Yes	Yes
<b>PRESERVATION</b> Protect personal or real property from injury, harm or destruction	Yes	Yes	Yes	Yes
<b>SUPPORT</b> Provide grants, loans, rental assistance, security deposits, interest-rate write downs or other forms of assistance directly to individuals and families who are eligible for community housing, or to entity that owns, operates or manages such housing, for the purpose of making housing affordable				Yes, includes funding for community's affordable housing trust
<b>REHABILITATION AND RESTORATION</b> Make capital improvements, or extraordinary repairs to make assets functional for intended use, including improvements to comply with federal, state or local building or access codes or federal standards for rehabilitation of historic properties	Yes if acquired or created with CP funds	Yes	Yes	Yes if acquired or created with CP funds

Source: Department of Revenue (DOR) 10-5-2012 conference, "Recent Developments in Municipal Law," Workshop B - Local Finances

# ANALYSIS SUMMARY

Draft Prepared by JM Goldson 3/16/2022

## PROJECT SCOPE

1. Evaluating the current Community Preservation Program (CPP) with thorough review of applications from FY2018 through FY2021 to determine to what extent funds have been distributed equitably
2. Interviewing various officials of key city departments and surveying applicants, grantees, neighborhood associations, and other organizations for perspectives on the existing program and suggestions for improving/updating the program
3. Assessing the current Community Preservation Plan and provide an updated 5-year Plan

Our team has completed a preliminary evaluation of CPA projects and applications (FY2018-2021) that include information on where projects have been funded, who received funding, and how much funding was allocated. The analysis presents preliminary findings at a city-wide level and the neighborhood level.

This summary is intended to provide information about our preliminary evaluation to city officials to prepare for their upcoming interview with a member of the consultant team.

## PROGRAM STATISTICS: OVERALL

In total, the CPA program has funded 193 projects across the City, totaling \$91,968,922.

## NUMBER OF PROJECTS BY NEIGHBORHOOD

The neighborhoods of Dorchester and Roxbury received more projects than the other neighborhoods.

However, these neighborhoods also have a higher population than others, as the following tables demonstrate.

Neighborhood	Affordable Housing	Historic Preservation	Open Space & Recreation	Total
Citywide	6	0	1	7
Dorchester	2	13	19	34
Roxbury	5	15	9	29
East Boston	2	3	6	11
Jamaica Plain	2	6	3	11
Back Bay	0	9	1	10
Hyde Park	1	2	7	10
Allston-Brighton	3	1	4	8
South End	0	6	2	8
Chinatown	1	4	2	7
Mattapan	1	1	5	7
South Boston	0	3	4	7
Charlestown	0	3	3	6
Beacon Hill	0	3	2	5
Fenway-Kenmore	1	1	3	5
North End	1	3	1	5
West End	0	5	0	5
Boston Harbor Islands	0	2	2	4
Downtown	0	4	0	4
Roslindale	0	0	4	4
West Roxbury	1	0	2	3
Mission Hill	1	1	0	2
Bay Village	0	0	1	1
<b>Total</b>	<b>27</b>	<b>85</b>	<b>81</b>	<b>193</b>

## PROJECT FUNDING NORMALIZED BY POPULATION

Once normalized for population the funding in Dorchester is average compared to other neighborhoods. Meanwhile, the North End had the 7<sup>th</sup> highest spending amount overall but had the highest spending percentage when normalized by population.

## EQUITY ANALYSIS

One of the goals of the analysis is to equate the level to which CPA funds have been distributed equitably. To explore this, the team analyzed the distribution of projects and funds compared to several indicators for equity including income level, poverty rates, language access needs, and

level of BIPOC populations by neighborhood. The following table shows these neighborhood characteristics compared with information on the number and percentage of projects funded as well as level of funding.

Neighborhood	Project Funding	Population	Percent of Funding Normalized by Population
North End	\$3,239,900	8,749	10.9%
Roxbury	\$12,593,844	54,161	6.8%
Chinatown	\$2,061,733	12,782	4.7%
Hyde Park	\$5,117,207	38,924	3.9%
Back Bay	\$2,161,700	17,783	3.6%
Mission Hill	\$1,777,500	17,386	3.0%
East Boston	\$4,611,200	47,263	2.9%
West End	\$643,552	6,619	2.9%
Beacon Hill	\$931,241	9,648	2.8%
Jamaica Plain	\$4,140,000	43,523	2.8%
Mattapan	\$2,245,000	26,659	2.5%
Dorchester	\$10,499,932	126,909	2.4%
Charlestown	\$1,446,000	19,890	2.1%
South End	\$1,678,760	25,420	1.9%
Bay Village	\$250,000	4,450	1.6%
Downtown	\$1,015,000	18,306	1.6%
Allston-Brighton	\$4,051,850	74,558	1.6%
Fenway-Kenmore	\$1,675,000	38,840	1.3%
West Roxbury	\$1,370,000	33,526	1.2%
South Boston	\$1,335,783	41,175	1.0%
Roslindale	\$685,000	30,021	0.7%

Indicator	Measurement	Projects (#)	Projects (%)	Funding (\$)	Funding (%)
Area Median Income (AMI) <sup>14</sup>	Over 65% of Households earn below the AMI	86	45.7%	\$33,356,246	36%
Poverty <sup>15</sup>	Over 40% of residents are living below the poverty line <sup>16</sup>	30	15.9%	\$11,705,369	12.7%
Language Access	Neighborhoods that have 15% or more of Boston residents with a Language Access Need (Dorchester and East Boston)	45	23.9%	\$15,111,132	16.4%
BIPOC <sup>17</sup>	Over 65% of residents identify as BIPOC	91	48.4%	\$35,067,183	38.1%

Over 30% of project funds have been invested in both areas where more people are earning below the AMI and where there is a concentration of BIPOC residents. Less than 20% of project funds have been invested in areas with high concentration of poverty or in areas with more residents with an identified language access need. The following map shows the distribution of CPA projects alongside the data summarized in the table above.

<sup>14</sup> The AMI for Boston is \$120,800

<sup>15</sup> Poverty is defined by household makeup. The Census Bureau provides an estimate of the number of people earning an income below the poverty level. The threshold for an individual is \$14,097, and the threshold for a family of four is \$27,479

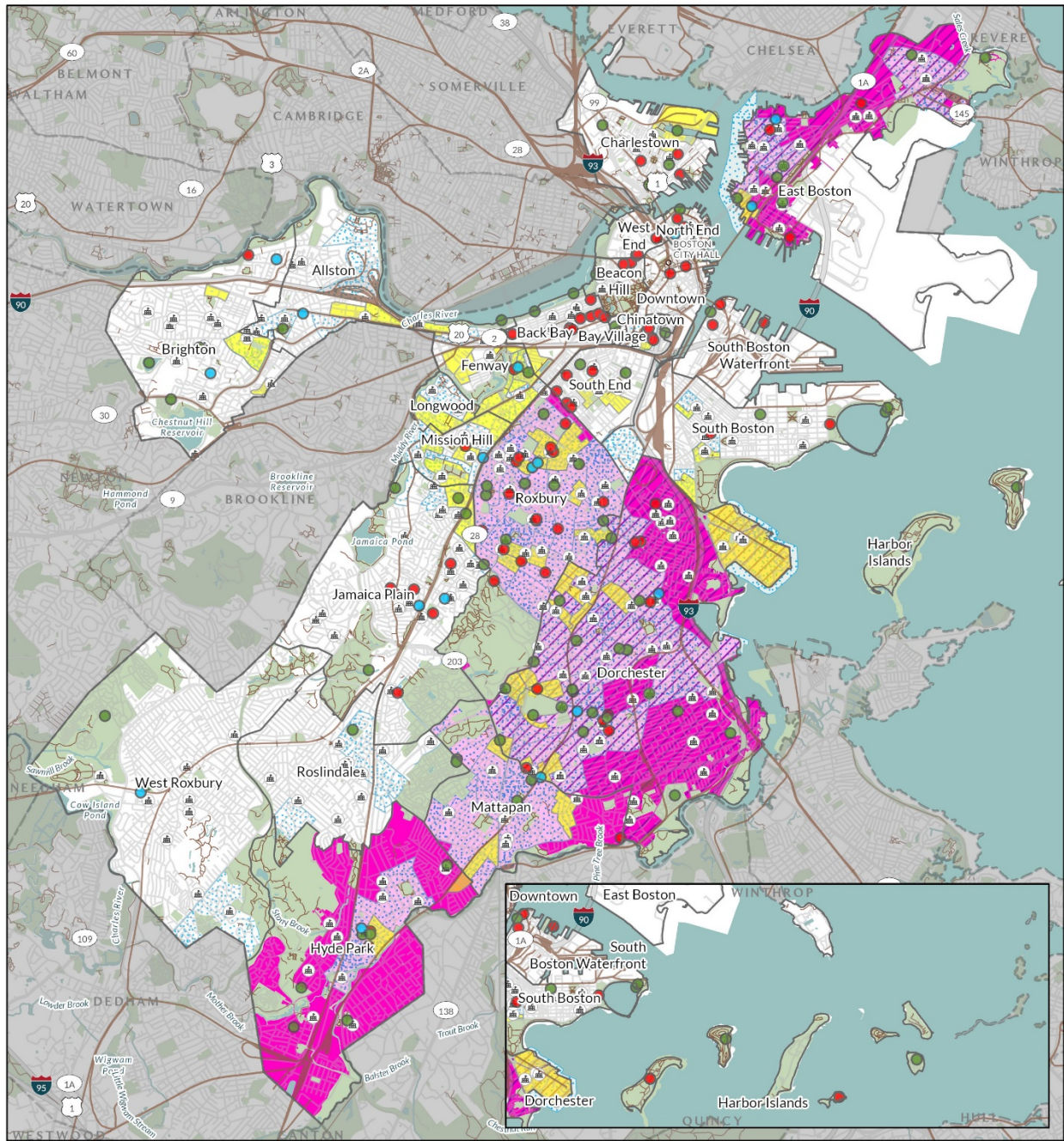
<sup>16</sup> This metric highlights certain areas, like Fenway-Kenmore, with large student populations. The student population in some areas might skew the results to indicate a large population that lives in poverty than is the reality, as students are more likely to have their rents subsidized by families or tuition assistance programs that help them financially

<sup>17</sup> BIPOC stands for Black, Indigenous, People of Color, and includes Asian, Latinx, Pacific Islander, and Middle Eastern persons

# CITY OF BOSTON - EQUITY ANALYSIS

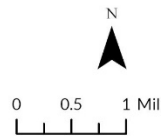
Prepared by JM Goldson LLC

J M GOLDSON



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|---|--|---|
| <ul style="list-style-type: none"> <li> Schools</li> <li> Buildings</li> <li> Parcels</li> <li> Trails</li> <li> Water bodies</li> <li> Open space</li> </ul> | <b>Category</b> <ul style="list-style-type: none"> <li> Affordable Housing</li> <li> Historic Preservation</li> <li> Open Space</li> </ul> | <ul style="list-style-type: none"> <li> Poverty Rate Over 40%</li> <li> Neighborhoods with a Language Access Need</li> <li> Over 65% of Households Earn Below the AMI</li> <li> Over 50% of Population Are BIPOC</li> </ul> |
|---|--|---|

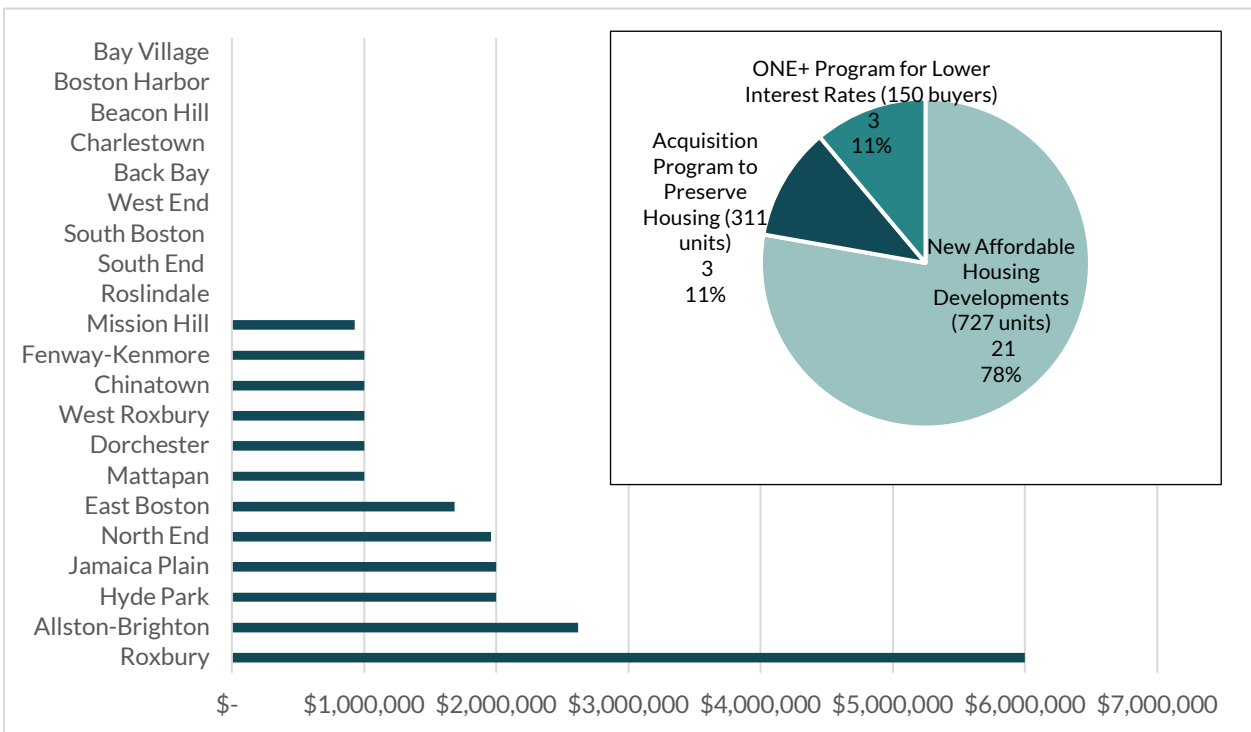
Sources: MassGIS, MassDEP, MAPC Trailmap



# AFFORDABLE HOUSING

In total, the CPA program has funded 27 affordable housing projects totaling \$48,991,050.

## CPA AFFORDABLE HOUSING FUNDING BY NEIGHBORHOOD



In addition to analyzing the CPA funding by neighborhood, the team also looked at the types of projects that have been funded. The CPA has funded affordable housing projects in three categories, with 78 percent of funding used to create 727 new housing units, 11 percent for an acquisition program to preserve 311 housing units, and 11 percent for the first-time homebuyer program (ONE+), which assisted 150 buyers.

One way that the team analyzed affordable housing projects was to compare existing affordable housing to the new units that have been created with CPA funds by neighborhood, alongside data showing the percentage of households in each neighborhood that would qualify for affordable housing through CPA (households earning up to 100% of the AMI). With the exception of Jamaica Plain, the North End, and West Roxbury, CPA-funded affordable housing was only constructed in neighborhoods where 56 percent (average for Boston) or more households qualified for affordable housing.

## AFFORDABLE HOUSING PROJECTS BY NEIGHBORHOOD

Neighborhood	Percent of Households that Would Qualify for Affordable Housing through CPA	Existing Affordable Housing Units (Subsidized Housing Inventory)	Affordable Units Created with CPA Funds
Boston	56%	53,792	727
Allston-Brighton	56%	3,555	105
Back Bay	43%	754	-
Bay Village	38%	293	-
Beacon Hill	41%	463	-
Charlestown	35%	2,240	-
Chinatown	58%	1,201	11
Dorchester	68%	9,326	70
Downtown	50%	808	-
East Boston	66%	2,792	46
Fenway-Kenmore	62%	2,182	27
Hyde Park	63%	862	75
Jamaica Plain	50%	3,361	164
Mattapan	66%	1,396	9
Mission Hill	74%	2,238	13
North End	34%	358	23
Roslindale	51%	1,320	-
Roxbury	73%	11,783	139
South Boston	44%	2,932	-
South End	49%	4,204	-
West End	36%	502	-
West Roxbury	43%	1,222	45

In addition to the metrics that have been summarized, the team also looked at the CPA affordable housing projects in comparison to:

- Eviction Rate
- Income
- Cost Burden (households spending more than 30 percent of their income on housing)

## CURRENT CPA PLAN HOUSING GOALS AND PRIORITIES

### Goals

- ☐ Create and expand permanently affordable rental housing for various household sizes, income levels, and special needs populations, including accessible units for households with physical or cognitive challenges.
- ☐ Address the home ownership gaps that exist in the Boston market.
- ☐ Complement the built environment of the surrounding neighborhood and restore existing buildings as permanently affordable housing.
- ☐ Maximize energy efficiency and other green building practices, utilize sustainable materials, and integrate climate change ready features that will result in low maintenance, reduced utilities cost, and healthier living environments for occupants.

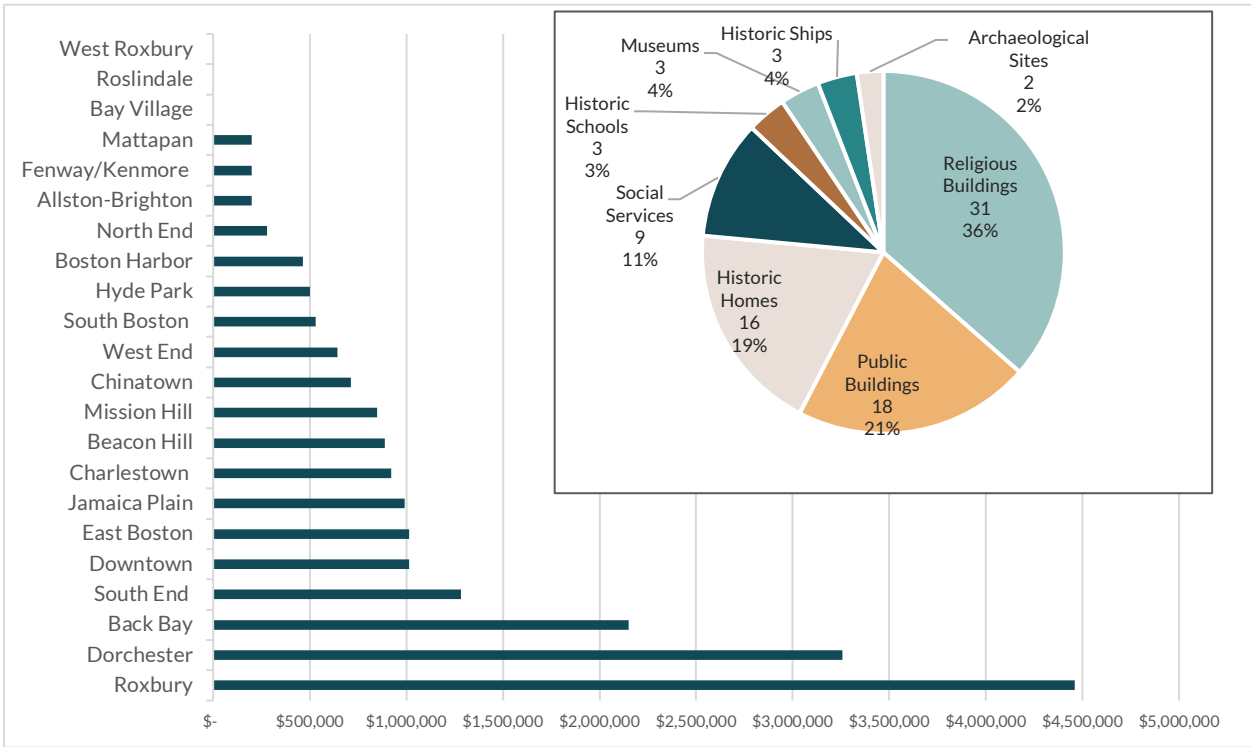
### Funding Priorities

- ☐ Construction of more deeply affordable rental housing - 50% AMI or below.
- ☐ Affordable homeownership opportunities for moderate income buyers who are under 100% AMI
- ☐ Displacement prevention through acquisition by purchasing at-risk properties to maintain tenancies and add to Boston's affordable housing stock.

# HISTORIC PRESERVATION

In total, the CPA program has funded 85 historic preservation projects totaling \$20,565,414.

## HISTORIC PRESERVATION FUNDING BY NEIGHBORHOOD



In addition to analyzing the funding by neighborhood, the team also looked at the types of resources that have been funded, as shown in the pie chart. Please note that the buildings that were once historic homes and schools are now owned by non-profits, community organizations, and museums, or are now affordable community housing. The CPA program has not provided funding for private residences.

In each neighborhood, the team also took a more detailed look at the historic preservation projects to understand the history and significance of the buildings as well as the work that is being done to them. Particularly, the team looked for any projects that were related to historically marginalized populations.

To understand the distribution of historic preservation projects, the team analyzed how many CPA historic preservation projects were in historic districts, landmarks, or places designated at national, state, and local levels. In total, 47 out of 85 projects were in these areas. The remaining 38 projects occurred in locations that have been deemed locally historically significant by the Boston Landmarks Commission<sup>18</sup>.

This table summarizes the distribution of this overlap across the neighborhoods of Boston compared to the total number of CPA historic preservation projects.

<sup>18</sup> The CPA allows funding for projects that are not in locations designated by the Massachusetts Historical Commission as long as the local Historic Commission determines that there is local historic significance.

## HISTORIC PRESERVATION PROJECTS BY NEIGHBORHOOD

Neighborhood	CPA Historic Preservation Projects in Landmarks, Districts, and Places	CPA Historic Preservation Projects in Places with Local Historic Significance	Total CPA Historic Preservation Projects
Boston	47	38	85
Allston-Brighton	1	0	1
Back Bay	9	0	9
Bay Village	0	0	0
Beacon Hill	3	0	3
Boston Harbor	0	2	2
Charlestown	1	2	3
Chinatown	0	4	4
Dorchester	4	9	13
Downtown	3	1	4
East Boston	1	2	3
Fenway-Kenmore	1	0	1
Hyde Park	0	2	2
Jamaica Plain	3	3	6
Mattapan	1	0	1
Mission Hill	0	1	1
North End	0	3	3
Roslindale	0	0	0
Roxbury	9	6	15
South Boston	1	2	3
South End	5	1	6
West End	5	0	5
West Roxbury	0	0	0

## CURRENT CPA PLAN HISTORIC PRESERVATION GOALS AND PRIORITIES

### Goals

- ☐ Protect threatened or vulnerable historic resources through preservation, rehabilitation, and restoration. Support strategies to make historic structures energy efficient and protect them against climate change impacts.
- ☐ Activate underutilized, historic resources in our neighborhoods that add to community vibrancy and celebrate local history and culture. Encourage creative new uses for spaces that retain historic features.
- ☐ Ensure equitable access to historic resources in the community that provide a public benefit. Support historic resources that recognize Boston's cultural communities and enhance our understanding of the full breadth and depth of Boston's history.
- ☐ Respect the historic and architectural character of threatened resources and their local context. Promote positive preservation practices and work to correct and prevent adverse modifications, including demolition. Include a preservation easement to protect resources in perpetuity.

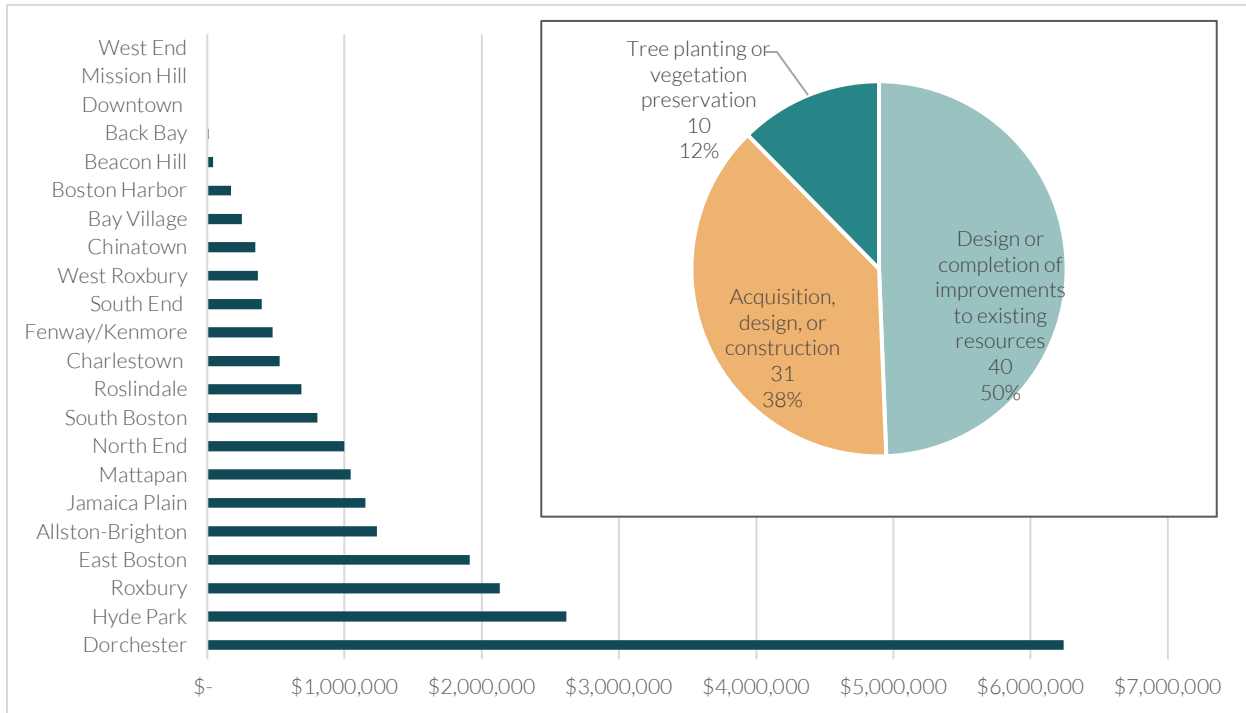
### Funding Priorities

- ☐ Updated historic surveys of Boston's neighborhoods with a single database.
- ☐ Repair and restoration of projects that are visible from the public realm at sites that are accessible to the public.
- ☐ Final funding support for historic projects.

## OPEN SPACE AND RECREATION

In total, the CPA program has funded 81 open space and recreation projects totaling \$22,412,458.

### OPEN SPACE AND RECREATION FUNDING BY NEIGHBORHOOD



In addition to analyzing the funding by neighborhood, the team also looked at the types of projects that have been funded. The CPA has funded open space and recreation projects in three categories, shown in the chart below.

To further analyze the CPA open space and recreation projects in Boston, the team looked at access to open space and amount of open space across the neighborhoods. When analyzing access to open space, the team determined the percentage of the neighborhood area that was within a quarter mile (walking distance) of open space. When analyzing the amount of open space, the team determined the square feet of open space per capita in each neighborhood. It is important to note that these metrics do not take the quality or condition of the open space into account, just the amount of open space and where it is located. The table below summarizes these statistics.

## OPEN SPACE AND RECREATION PROJECTS BY NEIGHBORHOOD

Neighborhood	Percent of Neighborhood with Access to Open Space	Square Feet of Open Space per Capita	Total CPA Open Space Projects
Boston	95.74%	392.8	81 (incl. 1 city-wide acquisition program)
Allston-Brighton	97.74%	105.6	4
Back Bay	100.00%	60.7	1
Bay Village	100.00%	2.8	1
Beacon Hill	100.00%	363.5	2
Charlestown	97.66%	125.5	3
Chinatown	99.38%	17.0	2
Dorchester	95.32%	184.1	19
Downtown	99.68%	45.0	0
East Boston	56.37%	239.6	6
Fenway-Kenmore	99.14%	40.9	3
Hyde Park	95.21%	1139.9	7
Jamaica Plain	98.07%	525.7	3
Mattapan	92.13%	1031.5	5
Mission Hill	99.68%	82.4	0
North End	100.00%	67.7	1
Roslindale	91.55%	56.7	4
Roxbury	99.83%	476.7	9
South Boston	75.11%	255.5	4
South End	96.26%	49.7	2
West End	99.22%	134.9	0
West Roxbury	89.3%	1116.2	2

In addition to analyzing these statistics at the neighborhood level, the team analyzed the geographic distribution of projects and existing open space within neighborhoods to identify trends. The team also assessed the types of projects that have been funded in each neighborhood to determine those with more projects involving acquisition of new park land, those that have been focused on improving existing amenities, and those with a mix of both.

## CURRENT CPA PLAN OPEN SPACE & RECREATION GOALS AND PRIORITIES

### Goals

- ☐ Promote the active and passive use of open space and parks by improving access for all abilities; creating new outdoor recreation facilities to fill neighborhood gaps; and providing opportunities for play, exercise, sports, socializing, education, cultural enjoyment, and quiet contemplation of nature for all.
- ☐ Work to address disparities in the quantity and quality of open spaces across Boston's neighborhoods and ensure that the availability of open space keeps pace with a growing and changing population, identifying opportunities for acquisition of open space.
- ☐ Design resilient landscapes to promote ecosystem health, deploy strategies to protect and expand Boston's tree canopy, support native species, protect wetlands and water bodies, manage stormwater, and mitigate the impacts of climate change, including higher temperatures, more intense precipitation, and sea level rise.

### Funding Priorities

- ☐ Acquisition and development of new open space to address access gaps in the city as identified in the Open Space and Recreation Plan 2015-2021.
- ☐ Restoration and improvements that serve high need populations as identified in the Open Space and Recreation Plan 2015-2021.
- ☐ Enhanced active recreation use and play value in parks with a specific focus on inclusion.

- 2 Expanded capital projects to add value to design and construction elements above and beyond original plans.

## COMMUNITY SURVEY SUMMARY

*Prepared by JM Goldson 5/18/2022*

### OVERVIEW

The purpose of the Boston Community Preservation Act Survey was to both learn about the project application process from past applicants and to learn about different perspectives on overall priorities for CPA funding and on specific priorities around housing, open space and recreation, and historic preservation, from past and potential future applicants. Two hundred and sixty-nine people participated in the survey. The survey was active for about a month from early April through early May. Full responses to all survey questions can be found in the Appendix.

### KEY FINDINGS

- Most respondents (about 80 percent) live in Boston, about 15 percent work in Boston but do not live in the City, and about 5 percent have another connection to the City.
- Over 60 percent of respondents have lived, worked, or otherwise been associated with Boston for more than 20 years.
- Past applicants indicated that they find the application to be of medium difficulty, and that the application got slightly easier to complete over time.
- The biggest open space priorities among survey respondents include creating more open space projects in underserved neighborhoods and protecting natural resources to mitigate the impacts of climate change.
- In the active recreation category, most respondents indicated improving parks, playgrounds, or athletic fields in underserved areas and that creating more parks, playgrounds, or athletic fields in underserved neighborhoods was very important.
- Some of the concepts that received the most support from survey respondents for open space and recreation were making improvements and providing better accessibility in existing parks and connecting open spaces with walking and biking trails.
- The community housing project idea with the most support was ensuring that existing homes stay affordable.
- When asked about specific neighborhoods for creating affordable housing, most neighborhoods were mentioned. Among those with the most mentions were Allston, Brighton, Charlestown, Beacon Hill, Back Bay, Chinatown, Dorchester, Roxbury, and Mattapan. While most respondents indicated their own neighborhood needing affordable housing, some mentioned neighborhoods where they had no connection, and many listed multiple neighborhoods in need.
- Some of the most supported ideas for affordable housing include programs for first time homebuyers, affordable homeownership in general, and a rental assistance program.
- When asked what types of historic preservation projects are the most important, preserving historic properties that honor historically marginalized populations scored the highest.
- Survey respondents indicated that there are many historic buildings that need preservation and restoration work even though they have not been officially designated as historic.

- Most respondents agreed that the current model of allocating 50 percent of funds to affordable housing, and 25 percent each to open space and recreation, and historic preservation was a good distribution of funds.
- One of the concepts mentioned most was climate change. Survey respondents emphasized the need for climate-focused initiatives within projects in every category.
- Survey respondents indicated that CPA funding should go toward creating spaces and opportunities for individuals, children, and families, and to improve conditions in underserved neighborhoods so that all people who call Boston home can feel welcomed and valued.

## DEMOGRAPHICS OF SURVEY RESPONDENTS

The following section summarizes the demographic characteristics of survey respondents. The survey was sent to past CPA applicants and community organizations who could potentially be future CPA applicants. The respondents are representing the organizations that applied or could apply for funds and were expected to be familiar with the CPA program in Boston.

The survey was translated into Chinese, French, Haitian Creole, Portuguese, Cape Verdean Creole, Russian, Somali, Spanish, and Vietnamese from English, as these are the top languages spoken in Boston. Most respondents took the survey in English, while 31 took the survey in Chinese. When asked about their primary language, 25 indicated that English was not their primary language. Of these 25, two respondents spoke Spanish, one spoke French, and the remaining 22 respondents spoke either Mandarin, Cantonese, or another Chinese dialect.

***Most respondents (about 80 percent) live in Boston, about 15 percent work in Boston but do not live in the City, and about five percent have another connection to the City. Over 60 percent of respondents have lived, worked, or otherwise been associated with Boston for more than 20 years.***

## SURVEY TOPICS

About 32 percent of respondents indicated that they had applied for CPA funds in the past. Respondents who had applied in the past were asked a series of questions about the application and funding process. The remaining 68 percent of respondents were directed to questions about the CPA categories.

### Past Applicants

Among the 68 respondents that applied for CPA funding at some point, there was a fairly equal distribution of applicants and awarded projects per year. Between 25 and 28 respondents indicated they applied for CPA funds in each year. Between 22 and 26 respondents indicated that their application was recommended for funding each year.

About 89 percent of respondents indicated that it would not be helpful for their organization to have CPA information and application to be available in languages other than English. Of the 11 percent that said having materials in other languages would be helpful, the languages indicated were Chinese, Spanish, Haitian Creole, and Cape Verdean Creole.

Of the organizations that applied for funding, nearly all (97 percent) were non-profits or another type of organization like a community group or church. The other applicants were City departments or City officials.

***Past applicants indicated that they find the application to be of medium difficulty, and that the application got slightly easier to complete over time (according to those that applied for funds in more than one year).***

About 50 percent of applicants received technical assistance on their application, with assistance ranging from clarification of requirements to site visits and support throughout the application process for those unfamiliar with the application process.

Fifty percent of applicants were contacted about clarifications on their application. Most of the clarifications had to do with the budget and scope of the project.

## Open Space and Recreation

***The biggest open space priorities among survey respondents include creating more open space projects in underserved neighborhoods and protecting natural resources to mitigate the impacts of climate change, with over 70 percent of respondents indicating that these project areas were very important.***

None of the categories received more than 3.5 percent of respondents saying they were not at all important, indicating an overall priority for open space projects.

***A majority of respondents (65.5 percent) indicated that creating more parks, playgrounds, or athletic fields in underserved neighborhoods was very important. Even more respondents (73 percent) indicated improving parks, playgrounds, or athletic fields in underserved neighborhoods was very important.***

Fewer than 20 percent of respondents indicated that creating dog parks or skateboard parks was very important.

When asked about open space and recreation priorities for the upcoming years, survey respondents provided ideas for overall concepts and priorities to focus on as well as specific project ideas. A full list of responses can be found in the appendix document.

***Some of the concepts that received the most support from survey respondents were making improvements and providing better accessibility in existing parks and connecting open spaces with walking and biking trails.***

Another important concept was that of climate mitigation and resilience throughout all open space and recreation projects. This included ideas like sustainable landscaping and planting more trees.

Some of the specific project ideas with the most mentions include Town Field at Fields Corner, Crane Ledge Woods in Hyde Park, Pier 5 in Charlestown, the formalization of desire paths that connect streets in Mission Hill, and a general desire for more community gardening (space with plots for individuals to grow what they like) and urban farming (spaces focused on growing for food production for the community or for sale) opportunities.

## Community Housing

***The community housing project idea with the most support was ensuring that existing homes stay affordable, which received about 68 percent of respondents indicating it was very important.***

Respondents were less concerned about assisting eligible people with renting a home, as about 53.7 percent of respondents indicated that the initiative was very important, and the category had the most respondents indicate it was not at all important. This indicates that the survey respondents were more focused on projects related to supporting homeownership, possibly as a wealth building tool for communities.

***When asked about specific neighborhoods for creating affordable housing, most neighborhoods were mentioned. Among those with the most mentions were Allston, Brighton, Charlestown, Beacon Hill, Back Bay, Chinatown, Dorchester, Roxbury, and Mattapan. While most respondents indicated their own neighborhood being in need of affordable housing, some mentioned neighborhoods where they had no connection, and many listed multiple neighborhoods in need.***

When asked about community housing priorities for the upcoming years, survey respondents mentioned general concepts as well as specific project ideas. Specific ideas can be found in the appendix document.

***Some of the most supported ideas include programs for first time homebuyers and affordable homeownership in general. There were also many responses supporting affordable housing for specific groups like older adults, whether for homeownership or rental.***

Other ideas include elderly housing and housing for families with children. Lastly, survey respondents indicated that the CPA program should support the acquisition and preservation of existing housing in Boston in addition to new housing development. Many respondents also indicated that new housing development should be required to be energy efficient to support climate initiatives.

## Historic Preservation

***When asked what types of historic preservation projects are the most important, preserving historic properties that honor historically marginalized populations scored the highest (67.9 percent selected "very important")***

Respondents also indicated that protecting historic resources from demolition and improving historic properties that provide a public benefit as priorities. Both categories received over 60 percent of respondents indicating they were "very important". Respondents felt the most neutral about improving accessibility to historic resources.

When asked about specific historic preservation projects that they would like to see funded in the upcoming years, there were many specific projects listed as well as general ideas. Specific project ideas can be found in the appendix document. One concept that was significant was the lack of priorities of the Landmarks Commission. Without an updated survey of historic resources eligible for CPA funding in Boston, it is hard to prioritize the project applications, according to survey respondents.

***Survey respondents indicated that there are many historic buildings in Boston that need preservation and restoration work even though they have not been officially designated as historic.***

Other priorities mentioned by survey respondents include projects that honor marginalized populations. Respondents indicated a need for historic designations and projects in Charlestown and Chinatown specifically. There were also responses about preserving and providing more public access in historic cemeteries.

### Funding Priorities

When asked about funding priorities, respondents agreed that all categories were important.

***Most respondents agreed that the current model of allocating 50 percent of funds to affordable housing, and 25 percent each to open space and historic preservation was a good distribution of funds.***

Some respondents mentioned that affordable housing shouldn't receive as large of a proportion of funds because there are other funding sources available while there are fewer other sources available for the other categories. Still some others argued that affordable housing should receive even more than 50 percent of the funds due to the current housing crisis that Boston is facing.

Other priorities within the project categories include projects that fit into multiple categories, like an affordable housing project in a historic building. Many respondents also indicated a need to connect open spaces within the city, especially in marginalized neighborhoods or areas with less access to open space. Survey respondents also proposed many ideas that apply to all three CPA categories.

***One of the concepts mentioned most was climate change, resilience, and mitigation. Survey respondents emphasized the need for climate-focused initiatives within projects in every category. This could include climate change mitigation measures at parks or adding energy efficiency measures in affordable housing and historic preservation projects.***

Some specific ideas within this concept were coastline management, sustainable landscaping with native plants, planting more trees, and overall environmental protection.

Another concept that applies to all CPA categories that was mentioned in several survey responses is that of supporting historically marginalized communities and neighborhoods. Inclusivity and access for all should be considered in each project, no matter the CPA category.

***Survey respondents indicated that CPA funding should go toward creating spaces and opportunities for individuals, children, and families, and to improve conditions in underserved neighborhoods so that all people who call Boston home can feel welcomed and valued.***

Finally, survey respondents had suggestions for ways that project applications should be decided. Many respondents suggested that community-led planning should be encouraged, through smaller local neighborhood organizations. One suggestion was for there to be several small grants available, where the application does not need to be as professional as applications for larger projects. The comment mentioned that this could open opportunities for smaller organizations who normally wouldn't receive CPA funding due to the small amount they are requesting. Another suggestion from respondents was to find a way to help applicants find other funding sources to support their projects in addition to CPA. Each of these suggestions needs to be considered through the lens of the CPA program goals, priorities, and general feasibility.

# SUMMARY OF INTERVIEWS

*Prepared by JM Goldson LLC 5/18/2022*

## OVERVIEW

The purpose of the Boston Community Preservation Act Interviews was to learn about the CPA program from a variety of perspectives. In total, the project team conducted 25 interviews with the CPA staff, relevant City departments, and Community Preservation Committee members from March 28th to May 12th, 2022. Each interviewee was given a summary document of key findings from the analysis conducted thus far, as well as a copy of the interview questions that they were asked. Each interview was one-on-one with a member of the JM Goldson team and was 30 minutes long. Interviewees were asked about their reactions to the analysis, their opinions of the CPA program so far, their views on equity, how they measure progress, and questions about the internal processes of the CPA program, department coordination, and support from the current plan. The results of the interviews are organized into several key themes listed below.

One key point that was raised across the interviews was that the CPA program in Boston is viewed very highly. The interviewees were quick to elaborate on the good work that the program has done and the amount of money that has been invested in Boston communities through the work of the CPA staff and CPC. While the interviewees noted ways that the program could be improved or streamlined, the program overall is seen by CPA staff, other departments, and the CPC in a positive light.

## Key Themes

### *Eligibility and Application*

There is a need to develop an eligibility form and application process that ensures that projects are “shovel ready” when they receive funding. When funds are awarded but not spent because the organization wasn’t ready, the money usually cannot be spent in that same funding round.

Other recommendations for the application include adding a section to predict the impact and equity of a project. Suggestions include estimating the number of people and diversity of the team that will work on the job. The application can also require specific and detailed answers about how the project will increase equity.

### *Clearer Process*

There is a need for clarification around the CPA process in Boston. The goals and priorities need to be clearly stated in the plan and followed. If changes to these goals and priorities change, then the change needs to be reflected in the plan and communicated to past and potential applicants. For example, the CPA program offered partial funding for the first few years, then decided against this. The idea was that applicants could submit a smaller application for a portion of their overall project that could be completely funded with CPA. However, this change was not communicated, and applicants submitted applications as usual, expecting to at least receive partial funding.

Upgrades to the usability and navigability of the CPA website can also be helpful, so that potential applicants can easily find information about the process online.

### *Goals*

The goals that are currently listed in the plan were taken from other plans and departments, rather than developed specifically for CPA. The CPA plan needs its own goals and priorities that are aligned with other departments but not copied from them to allow synergies between the elements. The plan should also clearly state the target funding allocations per category that the CPC is operating under.

### **Priorities**

The CPA plan needs to clearly state its priorities for funding beyond the types of projects, including the types of organizations that they will fund. On the one hand, funding larger organizations is easier from a management and monitoring perspective because they need less hand holding and can do more on their own. On the other hand, smaller grassroots organizations and neighborhood groups give more community ownership over the projects, though they need much more support, often for a smaller grant amount. The CPA plan needs to also define the types of projects clearly, they will prioritize in terms of size. Currently, due to staffing issues, the CPC is more likely to fund fewer large projects rather than many small projects because there is less monitoring and staff capacity required, however this needs to be clearly stated.

### **Staff Capacity**

The CPA staff currently does not have enough support for monitoring all the projects that they oversee, and there are only more coming. Some of the potential staff needs identified include more staff for monitoring existing projects, a staff person dedicated to community outreach, an intern or fellowship position that can help manage smaller grants. There is a consensus that smaller organizations and grants usually result in projects that are good for the community and create a sense of ownership, but that there are capacity issues that come with funding these projects and organizations. Currently, the CPC does not allocate all the money available because they know that the staff can't handle the monitoring of more projects.

### **Coordination**

There is a need for better and more streamlined communication between the CPA staff, CPC, City Departments, and Boston Neighborhood groups.

There is a need for a coordinated effort across the whole City to achieve the goals that have been set out.

Everyone needs to work together to be in synchronization with the decisions being made. City departments need to know how much money they are getting from CPA so that they can use it efficiently. Departments also need to know if any CPA projects will impact them or need their input. This is where CPC members need to communicate with each other and their respective departments better.

There is also a need for better communication between the CPA staff and CPC. There are different perceptions about priorities, like whether it is best to fund long term projects year after year or not, and how much reliance the CPC should have on the staff.

Finally, there is a need for more communication, support, and outreach in the neighborhoods. The amount of outreach that the CPA staff have done to date was widely praised throughout the interviews, though there is still a need for more communication and support. The CPA staff should provide more outreach in neighborhoods with greater needs and fewer applications and connect with neighborhood groups to let them know about CPA as a funding source, support their application, and help them find other funding to leverage. More communications with neighborhood groups can also help the CPA staff stay up to date with neighborhood priorities and projects that they want to accomplish.

### **CPC**

There is a need to clearly define the CPC's role. There is a feeling that the CPC members don't prepare for meetings or read project applications. There is also a feeling that CPC members act politically rather than doing what is best for the communities, and that perhaps the lack of definition and criteria allows them to act politically. Currently, there is a perception that the CPC relies heavily on the staff for guidance rather than the plan. They also rely on the staff to narrow down project applications. The CPC does not eliminate projects, they just rank the ones that the staff gives them. Some ideas for improving the way the CPC

operates were to have them form subcommittees so that there is a higher chance that applications get properly vetted, and that members could sit in on other department meetings (like at the Mayor's Office of Housing) to learn about how they make decisions and how the CPA program fits in. CPC members could also perform a quantitative evaluation of all applications so that they can participate in the elimination and ranking process of applications rather than relying on CPA staff.

## *Equity*

When asked about equity, the most common topic that came up was language access. There are neighborhoods with limited English proficiency that could be missing out on CPA funds because of language access needs. As part of the outreach, the CPA staff should target parts of the city with known language access needs and target underserved and underrepresented communities.

Another important equity factor that was brought up was engagement. The beneficiaries of the project, the community members, should be engaged and aware of what is going on, perhaps through social media. This will not only help the community take ownership of their projects but will also let them know about CPA as a funding source for future projects in their community.

One suggestion for ensuring that projects are equitable was to have a quantitative evaluation of each project in terms of equity. Measurements can include things like whether there is a need for the project in the community or if it helps with climate change. There should be many factors so that one measurement doesn't skew the results. For example, you can't measure equity by the number of people served, because sometimes underserved and underrepresented populations are small.

Ultimately, during the conversations about equity, it was clear that many believe that equity should be at the forefront of the CPA program. The CPA staff and CPC need to be vigilant about ensuring that projects they fund are equitable. Equity cannot be an afterthought, but an intentional and fundamental part of the program.