Welcome to CPA Bootcamp!
The Community Preservation Coalition

Representatives from 8 member communities and 6 at-large members
Coalition Services

• Technical assistance
• Website
• Email newsletter & bulletins
• CPA advocacy and legislation
• Ballot measures (adoption, changes)
• Training for CPC members

Supported by membership dues from CPA communities
The Coalition Website
www.communitypreservation.org

Community Preservation Coalition
Preserving our past. Building our future.

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

“Eighteen years is a long time. It’s obvious that there needs to be an adjustment made [to CPA].

We would support that mechanism being increased... We would support it and we would sign it.”

- Governor Charlie Baker,
10/20/2018

Governor Baker Supports CPA Trust Fund Legislation
Technical Assistance Resources

The Coalition offers technical assistance to communities adopting the Community Preservation Act. This includes resources and articles on various topics such as parks, historic preservation, and housing. The website also features a news feed with updates on CPA-related events and legislation.
The State of CPA Today

Total of 187 Cities and Towns

53% of municipalities
65% of Massachusetts residents
0 communities have revoked
187 CPA Communities

CPA Adoption
- Green: Towns that have adopted CPA
- Orange: Cities that have adopted CPA
CPA by the Numbers
(through end of FY2020)

- Over 12,800 projects approved & $2.5 billion raised -

**HISTORIC PRESERVATION:** 5,800 appropriations made

**OPEN SPACE:** 31,861 acres preserved

**OUTDOOR RECREATION:** 2,700 projects funded

**AFFORDABLE HOUSING:** 20,000 units created or supported
The Community Preservation Committee
Committee Composition

Created by Bylaw/Ordinance

• 5 Statutory Members
  – Conservation Commission
  – Planning Board
  – Housing Authority
  – Parks and Recreation
  – Historic Commission

• Up to 4 At-Large Members
CPC Ongoing Requirements

- Hold at least one public hearing per year
- Update *Community Preservation Plan*
- Review CPA account balances & spending to ensure compliance with the Act
- Prepare CPA budget
- Make project recommendations
CPA Revenue and Expenses
CPA Revenue Sources

- Local Surcharge Revenue (up to 3% property tax surcharge)
- Annual Trust Fund Distribution
- Interest
The Statewide CPA Trust Fund

- Guaranteed annual disbursement each November
- Administered by the Department of Revenue (DOR)
- Funds come from fees charged on documents filed at the Registries of Deeds ($50 and $25 as of December 31st, 2019)
- November 2020 base match was 28.6% of what communities raised at the local level
- Future looks bright – DOR has estimated a 32.3% match for November 2021
CPA Trust Fund Revenue

11/18-10/19
$23,292,000
12 Months with Old Fee Structure

11/20-Now
$76,137,000
11 Months with New Fee Structure
CPA Annual Budget Overview

- Usually done at the same time as municipal budget
- Requires CPC recommendation
- Total budget is based on:
  - Estimated local surcharge revenue
  - Estimated Trust Fund Distribution (November)
Creating the CPA Budget

- Housing: 10%
- Open Space & Recreation: 10%
- Historic: 10%
- Flexible: 65%
- Optional Administrative: 5%
CPA Annual Budget

Required minimum spending (or reserve):

- 10% of total revenue for housing projects
- 10% for historic projects
- 10% for open space & recreation projects

Optional:

- Up to 5% for administrative expenses
- Appropriations for new CPA projects
- Balance goes in a “budgeted reserve”
CPC Administrative Account

- CPC can request up to 5% of estimated revenues for expenses to run CPC

- Unspent balance returned to undesignated fund at end of each Fiscal Year

- For CPC expenses only, **not** reimbursements to other municipal departments or to pay other municipal staff
Administrative Account
Common Uses

• Hire new staff to support CPC

• Professional help: Appraisals, consultants, legal assistance, general studies

• Due diligence on project recommendations

• Newspaper ads for public hearing

• Misc. expenses
Municipal Budget 100%

CPA Funds up to 3%
Spending CPA Funds
# What is Eligible for CPA Funds?

## CPA Allowable Uses Chart

<table>
<thead>
<tr>
<th></th>
<th>Open Space</th>
<th>Historic</th>
<th>Recreation</th>
<th>Housing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acquire</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Create</td>
<td>YES</td>
<td>NO</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Preserve</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Support</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>Rehabilitate and/or Restore</td>
<td>NO (unless acquired or created with CPA $$)</td>
<td>YES</td>
<td>YES</td>
<td>NO (unless acquired or created with CPA $$)</td>
</tr>
</tbody>
</table>
Who is Eligible for CPA Funds?

**Yes**

- Government entity
- 501c3 nonprofit

**Caution**

- Non-incorporated entities
- Individual homeowners
How do CPA Projects Happen?

Project proponents submit applications to Community Preservation Committee (CPC)

CPC reviews projects, gets input

CPC recommends list of projects to Legislative Body

Majority vote of Legislative Body required for each project to get CPA $$$
Legislative Body’s Role is Limited

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

• No supplanting general municipal revenue
• No maintenance or operating expenses
• Recreation – Outdoor projects only
• Land Purchases – Must file permanent restriction with the state, held by 3rd party
• You can pay for CPA projects with bonds issued against future CPA Revenue
Most Popular Uses of CPA Funds
CPA and Historic Preservation

Restoration of historic municipal buildings
CPA and Historic Preservation

Adaptive Reuse of Historic Buildings
Grants to non-profit community groups (typically with a preservation easement)
CPA and Historic Preservation

Historic Municipal Document Preservation
CPA and Open Space/Recreation

Athletic Fields
CPA and Open Space/Recreation

Off Road Biking Trails
CPA and Open Space/Recreation

Parks
Community Gardens
CPA and Affordable Housing

For families & individuals earning up to 100% of areawide median income
Housing for Veterans

CPA and Affordable Housing
Adaptive Reuse of Existing Buildings

CPA and Affordable Housing
CPA and Affordable Housing

Meeting
Specialized Community Needs
Community Involvement and Non-profit Partnerships

CPA and Affordable Housing
The Coalition is here to help you!

Technical Assistance Hotline
617-367-8998

Stuart Saginor
Executive Director

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Communications Director