

TOWN OF ARLINGTON
MASSACHUSETTS

REPORT OF THE

COMMUNITY PRESERVATION ACT COMMITTEE



TO THE
ANNUAL TOWN MEETING
April 2023

TABLE OF CONTENTS

1. Introduction..... 2
2. Recommended CPA Projects (FY2024) 3
3. CPA Budget for FY2024..... 10
4. Recommended Votes – Article 49 13

Note from the Chair

Dear Town Meeting Members,

The wisdom of the Community Preservation Act (CPA) is the creation of a dedicated funding stream for projects that are very important to preserving the character and livability of our community, but difficult to prioritize in year-to-year municipal budgets.

In adopting the CPA, the people of Arlington chose to invest in these long-term priorities and to entrust Town Meeting and the CPA Committee with a portion of their tax dollars for projects that benefit residents throughout the community in all walks of life.

The CPA Committee is ever conscious of that trust. I am deeply grateful to our members, who for the past 7 months have diligently studied the local need for CPA projects and carefully vetted each funding proposal. I am proud to say that, while most of our members represent expertise in a particular program area, each of them engages fully in every project we consider and works hard to ensure it will succeed.

Respectfully,

Clarissa Rowe

Community Preservation Act Committee

- Kin Lau - Arlington Redevelopment Board
Pamela Heidell - Arlington Conservation Commission
Clarissa Rowe, Chair - Select Board appointee
Leslie Mayer - Arlington Park and Recreation Commission
Susan Doctrow, Vice Chair - Select Board appointee
Jo Anne Preston - Arlington Housing Authority
JoAnn Robinson - Arlington Historical Commission
Alexander Franzosa - Select Board appointee
David Swanson, Vice Chair - Select Board appointee

The Committee gratefully acknowledges the indispensable assistance of Julie Wayman, Budget Director, and Jim Feeney, Deputy Town Manager/Operations, in administering the CPA program.

1. Introduction

The Arlington Community Preservation Act Committee (CPAC) is pleased to present sixteen CPA projects and a FY2024 budget to Town Meeting.

The CPA Committee provides the main motions to Town Meeting for all CPA appropriations. These recommended votes under **Article 49** are presented beginning on page 12 of this report.

The Committee is grateful to the Select Board, Finance Committee and Capital Planning Committee for their consultation and endorsement of the proposed FY2024 CPA projects and budget in their warrant review and hearing cycle.

The Community Preservation Act (CPA) allows participating cities and towns to reserve dedicated funds to preserve open space and historic sites, create affordable housing, and develop open space and recreational facilities. The acquisition, creation and preservation of these community assets is financed through the Community Preservation Fund, comprised of local revenues collected from a property tax surcharge (in Arlington, 1.5% of the net tax levy), plus annual distributions from the Massachusetts Community Preservation Trust Fund.

The Town of Arlington passed the CPA in November 2014. Annual Town Meeting in 2015 set up the structure for the CPAC. The Town began collecting local tax surcharge revenue in 2015 and received the first annual state CPA distribution in 2016. The first round of CPA grants was approved by Annual Town Meeting in 2016.

The Town of Arlington is privileged to have many important community assets. Preserved open space areas contain a scenic beauty that predates the Town itself. Historic resources provide a glimpse into Arlington's past, a way of measuring our progress throughout the years, and perhaps an insight as to where the Town is headed. Recreational land provides a safe place to enjoy community-based activities and games, thereby strengthening the health and well-being of all its residents. Community housing allows a greater range of people to benefit from all aspects of Arlington, including many who would otherwise not have the opportunity to contribute to the future of the Town.

The CPAC strives to help Arlington preserve the Town's precious assets through CPA funding. The CPA fund is a powerful resource for maintaining the character of Arlington. The CPA in Arlington is also a valuable fiscal tool for the Town, allowing qualifying capital projects to be funded with CPA revenues augmented by the state distribution, as well as matching grants from outside entities. To date, Arlington CPA grants have directly leveraged at least \$800,000 in new outside funding for open space, recreation, and historic preservation in Arlington. In addition, CPA has contributed to the required local match for millions in federal and state housing awards to date. Notably, the CPA commitment for the Downing Square Broadway Initiative project, completed in 2022, enabled Housing Corporation of Arlington (HCA) to leverage nearly \$9 million in state and regional resources and over \$12 million in federal program sources.

2. Recommended CPA Projects (FY2024)

COMMUNITY HOUSING

10 Sunnyside Avenue

Housing Corporation of Arlington (HCA)

Recommended funding: **\$500,000**

The Housing Corporation of Arlington (HCA) acquired property in October, 2022 that is the site of a former automotive business and intends to build 43 units of permanently affordable housing, adding substantially to the 150 affordable apartments throughout Arlington already owned by HCA. As the applicants explain, “With the development of 10 Sunnyside Avenue, the HCA seeks to support families who make a low-income and expand affordable housing in Arlington by providing beautiful, energy-efficient homes for a range of family sizes in a building with quality-of-life amenities...” This project will benefit the neighborhood by replacing an unattractive, underutilized former industrial property with a greatly improved streetscape, including planned rooftop garden, while also planning to provide some community meeting space. As has been true with prior HCA developments, most notably the 48-unit Downing Square Broadway initiative, CPA and other local funding awards will be leveraged to obtain the additional funding, making it possible for HCA to raise the full amount (estimated at \$23,809,156) required for this project. In its application, HCA described the status of its efforts to obtain such funding, including plans to apply for the Department of Housing and Community Development (DHCD) One Stop Funding Round; DHCD requires a substantial local funding commitment to award its subsidies. This proposed CPA award, in combination with \$250,000 in funding from the CPA-supported Arlington Affordable Housing Trust Fund (AHTF) (See “Arlington Affordable Housing Trust Fund” project), is expected to demonstrate strong local commitment for this exciting project to the DHCD and other potential funders.

Arlington Affordable Housing Trust Fund 5-Year Action Plan Implementation

Department of Planning and Community Development

Recommended funding: **\$370,000**

The Arlington Affordable Housing Trust Fund (AHTF, the “Trust”) was established at a Special Town Meeting in 2020. These CPA funds will be used to stimulate creation and preservation of affordable housing in town. Working closely with the CPAC, the Trust will be able to use these funds to act expeditiously on emerging opportunities, while advancing the town’s Housing Production Plan and beginning to implement its 5-year Action Plan. In FY2023, the Trust received its first CPA award, \$250,000, enabling it to begin its work. After an extensive public input process, the Trust’s 5-Year Action Plan (2022–2027) was adopted on October 20, 2022 and approved by the Select Board in November of 2022. More information about the AHTF, with a link to the Action Plan, may be found here: <https://www.arlingtonma.gov/town-governance/boards-and-committees/affordable-housing-trust-fund-board>.

Among the three strategies to be pursued in the AHTF 5-Year Action Plan is to “Create More Affordable Housing”, with a goal to facilitate creation of at least 100 affordable homes. The strategy includes working in concert with other affordable housing stakeholders, such as the HCA. Consistent with this strategy, of the proposed CPA award for FY2024, the AHTF has agreed to make \$250,000 available to the HCA as a grant or loan for the 10 Sunnyside Avenue development. This will result in a total of \$750,000 in locally-committed funds that HCA can leverage in order to secure the funding needed for this project (see “10 Sunnyside Avenue” project).

Although the 2021 Town Meeting approved a Home Rule Petition for a real estate transfer fee, CPA funding is a primary funding source for housing trusts throughout the Commonwealth.

Moving forward, the CPAC will continue to liaise with the AHTF and ensure that any disbursement of funds meets the guidelines and requirements of the CPA.

Leasing Differential Program for Arlington Tenants

Somerville Homeless Coalition (SHC)

Recommended funding: **\$30,634**

The Somerville Homeless Coalition (SHC) operates a program to support formerly homeless, disabled households currently living in Arlington. The goals of the program are to ensure that members of this all-too-often disenfranchised and vulnerable population can remain safely housed in Arlington, stay close to their network of providers and daily supports, and continue to contribute to the diversity and vibrancy of the town. The project supports a wide range of households, including single mothers, independent young adults, and domestic violence victims.

SHC receives a limited amount of federal dollars to rent units on the open private market. Unfortunately, the amount of funding it receives from the federal government (*e.g.* Department of Housing and Urban Development (HUD)) is not sufficient to meet the high costs of the region's rental market, including that in Arlington. As a result, SHC, as the master lease holder of these apartments, must secure alternative funding to pay the difference in rental costs between what SHC receives from HUD and the actual asking rent of each unit (*i.e.*, "leasing differential").

This project will allow SHC to continue to keep 28 apartments in Arlington, housing a total of 44 people, and prevent these individuals from falling back into homelessness. SHC has been renting some of these apartments in Arlington for nearly 20 years and has an established track record of supporting clientele that have become contributing members of the Arlington community.

Hauser Building Roof Replacement Project

Arlington Housing Authority (AHA)

Recommended funding: **\$120,000**

The Hauser Building, at 37 Drake Road, is one of the AHA's largest state-aided senior low-income public housing developments, with 144 one-bedroom units for seniors who make a low-income and individuals under age 60 living with disabilities. Its roof was installed in 1986 with an estimated lifespan of 25 years. The replacement of the roof is needed to address the ongoing leakage of water into the building, causing damage to common areas and residents' units, and is thus consistent with the CPA mission to preserve existing community housing, as well as addressing goals of affordable housing preservation in the Town's Housing Plan. The planned installation of a white roof to increase energy efficiency and reduce the AHA's carbon footprint is consistent with the Town's Net Zero Action Plan. The AHA has secured additional funding for this project, with an estimated total cost of \$745,875.83, and, with the proposed support from the CPA, expects to proceed with the project as soon as possible.

Menotomy Manor Window Replacement Project

Arlington Housing Authority (AHA)

Recommended funding: **\$400,000**

The Housing Authority is undertaking a multi-million-dollar project to repair and restore several exterior elements of the buildings at Menotomy Manor in order to preserve the integrity of the buildings against weather infiltration and potential security issues. Menotomy Manor is a family housing property with 179 units housing more than 500 residents. The recommended CPA funding

would help pay for new windows to replace those which have exceeded their life expectancy and are subjecting units to water damage, thereby helping to preserve the buildings.

The AHA was also awarded \$600,000 in CPA funding in FY2023, with the understanding that the AHA would seek funding from the CPA over two consecutive years for this project. The CPA funding will supplement a significant contribution from the Town's American Rescue Plan Act (ARPA) allotment. AHA is exploring fundings options with state and federal partners, as well as its own capital budget.

OPEN SPACE AND RECREATIONAL LAND

Hill's Hill Mountain Biking Project

Town of Arlington Recreation Department

Recommended funding: **\$400,000**

The Hill's Hill property is located adjacent to the Ed Burns Arena at 422 Summer St, also abutting Washington Street, Summer Street, and the Minuteman Bikeway. The property was deeded to the Town of Arlington for a playground and recreation facility and is controlled by the Park and Recreation Commission (PRC). In 2020, a young Arlington resident presented the PRC with a proposal to build mountain biking trails and a skills area in the community. A working group subsequently examined various possible sites, and selected Hill's Hill as the most desirable location for various reasons, including its proximity to the Bikeway and the recreation center. Hill's Hill is a mostly wooded area of approximately 6 acres, of which approximately 0.65 acres is proposed for the mountain biking area. It is currently appreciated by residents as a walking site, including a place to observe wildlife; unfortunately, it has also long been known as a site for public drinking, with litter left behind, and loitering. In addition, like some other wooded properties, it has been used unofficially by local youth as a site for mountain biking and the opportunity to construct official, well-designed trails would be beneficial, including from a safety perspective.

The PRC funded a feasibility study that was presented in the CPA application. This study assessed the site and outlined several suggested components of the proposed mountain biking area, including riding trails through the woods and a pump track. *Importantly, these were only preliminary recommendations and no decisions regarding design have been made.* The proposed CPA funding will be used to develop the final design, through a process including substantial additional public input, followed by construction of the mountain biking area.

During its review of this project, the CPAC received an unusually high volume of feedback from the public, mostly Arlington residents, and this level of community engagement was most appreciated and guided the CPAC's decision. Many voiced support, including young people who enjoy mountain biking or wish to learn it and adults familiar with the sport. These included adult Arlington members of the New England Mountain Biking Association (NEMBA), offering to contribute, as community volunteers, expertise in sustainable trail building and maintenance to the stewardship of a new mountain biking area. Many others voiced serious concerns, in particular a desire that this new recreational resource be created in a manner that will preserve the natural, wooded environment of Hill's Hill, including wildlife habitat. Taking into account the substantial and wide-ranging community feedback, the CPAC voted to recommend that this project be funded *only if the following requirements are met*: That (1) a member of the Open Space Committee be incorporated into the project's Working Group; (2) a tree inventory be completed during the design process; and (3) the chosen designer be directed to advance at least two concept alternatives for the location of the pump track. If the preferred concept places the pump track in the woods, then the applicant will need to seek final authorization from the Community Preservation Act Committee prior to proceeding with construction; otherwise, no final authorization to proceed is necessary.

Though substantial public input is expected to play a crucial role in the design process, these grant conditions, included in the contract, provide additional assurance that the wooded, natural environment of Hill's Hill will be preserved.

Preserving Town Open Spaces by Addressing Invasive Vegetation

Arlington Conservation Commission

Recommended funding: **\$12,000**

Invasive plant species are among the major threats to successful management of natural resources. As described in this application, invasive species disrupt ecosystems and threaten the character and condition of Town-owned open spaces. To date, Arlington has contracted with specialized firms to manage invasive species, reacting opportunistically to their introduction and spread. This proposal is aimed at taking a more proactive approach, "a crucial first step toward getting the issue under control". This funding would enable the Conservation Commission to hire an expert firm to conduct a baseline assessment of Arlington's invasive vegetation. Previously, the CPA-funded Public Land Management Plan (PLMP) identified invasive species as a problem on nearly all town-owned open spaces, a total of 52, examined. With the proposed funding, these sites will be revisited for a more in-depth survey, adding detail on the invasive species and location information that can be integrated with the Town GIS for tracking. Other Town parcels not previously studied, including playgrounds, will also be included. The primary aim of this survey is to understand where invasive species are present, how they are being managed, and which entity is responsible. Among its additional aims is to connect volunteers in a townwide initiative to advance the Town's invasive species management.

Buffer and Beautify Mill Brook

Department of Planning and Community Development

Recommended funding: **\$120,000**

Funding for this project will enable a feasibility study for the preservation of Mill Brook between the Arlington Reservoir and Hurd Field. This preservation, affecting approximately 2,400 linear feet of the degraded, heavily-eroded banks of this section of Mill Brook, may be considered an extension of the extensive and popular improvements made, with support from the CPA, at the Reservoir and Hurd Field. The overall aim is to improve the ecological integrity and stability of Mill Brook, preserving its condition and that of the Reservoir and Hurd field. The complete preservation project will use bioengineered bank stabilization treatments, enhancement plantings, select invasive species management, and green infrastructure for stormwater management. The recommended CPA funding for FY2024 will cover the first phase of this project, working with an engineering firm to reach 75% design for review and further input by Town departments and other relevant boards and committees.

21 Pond Lane Feasibility Study and Preliminary Design Concept

Department of Planning and Community Development

Recommended funding: **\$15,000**

Funding for this project will develop plans to transform a weedy patch of land, owned by the Town of Arlington, into a vibrant hub of activity and botanic garden park. This proposal was brought forward to the Department of Planning and Community Development by longtime Arlington resident Ben Barkan, owner of HomeHarvest. This vacant parcel is owned by the Arlington Select Board (Parcel ID 10-3-8) and is a rare example of underutilized open space in the town. The feasibility study will analyze existing conditions and design a proposal for use of the site as a park

with amenities similar to the Arlington Orchard. One important benefit of the proposed park would be its proximity to the Minuteman Bikeway and Spy Pond Park. Another is that 21 Pond Lane is at the end of a Community Development Block Grant (CDBG)-eligible neighborhood, so improving the site would add an open space amenity within an environmental justice tract.

NoName Brook Preservation Feasibility Study

Department of Planning and Community Development

Recommended funding: **\$20,000**

NoName Brook is a ~1,600 linear foot water body running parallel to the Minuteman Bikeway in Arlington Heights. The brook is severely degraded and prone to further damage due to bank destabilization, invasive species, blockage, stormwater pollution, and infrastructure failure. Funding for this project will advance plans reflected in the recently completed Minuteman Bikeway Plan to preserve the condition of the Bikeway along NoName Brook and enhance the integrity of the waterway. The Open Space Committee is seeking funding for a preservation feasibility study of NoName Brook. The goals of the feasibility study will include gaining an understanding of its current conditions and its role in stormwater management and creating a conceptual plan for its improvement. The feasibility will be complemented by a public engagement campaign to rename the brook. Because NoName Brook is located in the Minuteman Bikeway, owned by the MBTA and licensed to the Town, the feasibility study will include determining whether and how the MBTA will need to be involved in subsequent changes.

Find Your Way to the Orchard!

Department of Planning and Community Development

Recommended funding: **\$2,500**

Funding for this project will provide wayfinding signage directing Minuteman Bikeway users and Brattle Street visitors to the Arlington Orchard. Girl Scout Troop 62592 identified the need for this signage while the Open Space Committee was also discussing the same. After identifying the best placement, up to five signs will be designed, through a participatory process, and fabricated. DPW will supply in-kind labor for installation.

HISTORIC PRESERVATION

Arlington Friends of the Drama Building Upgrades and Repairs

Arlington Friends of the Drama (AFD)

Recommended funding: **\$187,750**

This project will preserve and restore the Arlington Friends of the Drama (AFD) building, which is listed in the Town's historic inventory and is located in the Pleasant Street Historic District. It was purchased by the AFD in 1923; now in its centennial year, it is one of the oldest continuously operating theaters in the country. The AFD partners with many organizations in the arts community, for example, participating in the successful campaign to designate a Cultural District in the Town. In addition, AFD reaches out to the broader community in numerous ways, such as providing an annual scholarship to a local graduating senior to further their education in the performing arts. Thus, this project will rehabilitate and restore an historic building while also supporting an important cultural resource in the Town. Specifically, the funding will be used to repair and restore elements of the building façade and crumbling stairs and to replace an aged, partially functional HVAC system with a heat-pump system. Both improvements are necessary to preserve the building (e.g. a burst pipe caused by the outdated HVAC system resulted in a significant leak causing interior

damage). The energy improvements are consistent with the Town’s energy efficiency goals and are expected to be eligible for MassSave rebates, for which AFD will be applying; any such rebates would be returned to the CPA.

Digitizing and Rehousing of the Cyrus Dallin Papers

Cyrus E. Dallin Art Museum, Inc.

Recommended funding: **\$71,880**

This funding will support the digitization and rehousing of the Cyrus Dallin papers owned by the Robbins Library. In September of 2022, the Robbins Library Board of Trustees executed a 30-year renewable loan agreement with the Cyrus E. Dallin Art Museum, Inc. (the Museum), granting long-term stewardship of this historical resource to the Museum. CPA funding to the Cyrus Dallin Museum in FY2023 was used to improve its own archival, art, and artifact collections. This work involved the re-housing of its collections in archival enclosures and cabinetry and reorganization of its storage areas for long-term preservation. The Dallin Museum also received a grant from the Commonwealth of Massachusetts to digitize their archives. Together, this work is intended to improve the Dallin Museum’s ability to preserve the collections and make them accessible – both physically and remotely – to community members, local historians, scholars, and genealogists seeking to better understand the legacy of Cyrus E. Dallin (1861–1944), a celebrated sculptor, educator, and Indigenous rights activist who lived and worked in Arlington for over 40 years. The former Robbins Library Director, Andrea Nicolay, noted this work and concluded that the Dallin Papers at the library would be better served under care of the Museum, thus leading to the long-term loan of the papers and the current proposal to preserve them, building upon the previous grants to the Dallin Museum from the CPA and the Commonwealth of Massachusetts.

“Foot of the Rocks” Battlefield Memorial

Allan Tosti and the Town Manager’s Office

Recommended funding: **\$112,000**

The “Foot of the Rocks”, at the intersection of Lowell St and Mass Ave, is the site of a battle on April 19, 1775 where the British soldiers, retreating from Concord through Lexington and into present day Arlington (Menotomy), were confronted by over 1,700 colonial militia. The overall goal of the applicants is to increase public awareness of this battle site and, more broadly, Arlington’s role in the Revolutionary War. With a previous CPA grant in FY2022, the applicants began a plan to develop this memorial, and envision an inclusive design providing various opportunities for interpretive experiences that engage diverse audiences. To support a comprehensive and inclusive narrative of the local history, the goal will be to amplify the stories of those under-represented in the traditional storytelling, including the participation of women, people of color and indigenous peoples in the fateful events of the battle and the conflict more generally.

With the FY2022 CPA grant, a working group was formed that, with public input, explored the feasibility of developing this site, as described in a report that was presented to the CPAC. The report is available on the Town’s website. The present grant for FY2024 would take this project into the design phase and through the development of construction documents. With a shovel-ready design, the Applicants will be better positioned to seek future construction funding from state, federal, and private sources. The goal is to raise a significant portion of the estimated one million dollars that will be required to build the public gathering space, including the battlefield memorial, in advance of the 250th anniversary of the historic battle of the Foot of the Rocks in April 2025, and the Declaration of Independence in 2026. The Applicants intend to pursue funding from the

National Parks Service earmarked for preserving cultural resources that commemorate the nation's independence.

Historic Preservation of the Jason Russell House (Continued)

Arlington Historical Society

Recommended funding: **\$73,573**

The goal of this project is the continued preservation of the historic Jason Russell House (JRH). This house was built in 1745 by an ordinary farmer, Jason Russell, and was a witness house in the first battle of the American revolution. The JRH is an important Revolutionary War site, visited by nearly every third grader in Arlington Public Schools, and is open for regular public tours. Most recently, it began a tradition of hosting a summer beer garden for the community on its grounds. It is identified in the Arlington Master Plan as an important historical resource and is listed in the recent inventory of cultural assets in the Town. This application is the latest iteration to five previous CPA grants. The first, in FY2017, enabled the Arlington Historical Society to commission a Condition Assessment and Preservation Plan (CA&PP) that laid out a blueprint for restoration of the JRH with critical items identified in yearly plans through the year 2024. The second grant, in FY2019, enabled sill and foundation work on the west side of the JRH, as well as window restoration and additional gutter work. The third grant, in FY2021, funded sill and foundation work on the south and east sides, as well as continued window and door restoration. The fourth grant, in FY2022, enabled installation of an energy-efficient geothermal HVAC system that has since been under successful operation through both extreme heat and cold conditions. While performing this work, the applicants have gained additional grant funding from other sources and have successfully completed the carefully planned and executed restoration work. Funding for FY2024 will complete the work envisioned in the original CA&PP and address a few issues identified in subsequent annual inspections by the project architect. This includes work to address dry rot discovered in the gutters and resetting the granite main entrance stoop on a new base to address subsidence and drainage.

Town Hall Envelope Preservation, Phase 1 (Town Hall Clock Tower)

Town of Arlington

Recommended funding: **\$385,000**

The Robbins Memorial Town Hall was built in 1912 and serves as Arlington's center of civic activity. This prominent and architecturally-significant building was donated in the will of Winfield Robbins and contains many ornate features. It is owned and operated by the Town of Arlington and protected by a preservation restriction. The building needs reinvestment following over a century of service and decades of deferred maintenance. The entire building envelope, including the limestone façade, terra cotta Clock Tower, wooden windows and doors, and various roofing membranes need repair or replacement. The Town of Arlington retained a consultant to conduct a preliminary assessment and prepare a preservation plan for the envelope of Town Hall. Principal Patrick Guthrie (who prepared a similar report for the Jason Russell House) led a team of specialized consultants and a final report is available on the Town's website.

The most pressing findings relate to the dire conditions of the Clock Tower, which is losing structural integrity and causing water penetration affecting the building interior, specifically the Lyons Hearing Room. The Clock Tower is a somewhat independent structure, built in terra cotta instead of the Indiana limestone used elsewhere in the building. The proposed CPA grant would fund Phase 1. The first goal would be to complete a comprehensive 3D laser scan of the Clock Tower that will capture shape and dimensional information for the structure and its various ornate elements (the Town has already begun initial laser scanning, but more will be needed). The existing Clock Tower would also be safely removed and the opening into the attic would be roofed over to

protect the interior from further damage. The laser scans would then be used during later phases to design and fabricate new elements off-site for reconstruction of the Clock Tower at a later date. The proposed FY2024 CPA funding would facilitate execution of this crucial preservation work. Because of the severity of the current condition, the Town has tarped the structure to stem the rapidly-worsening conditions inside the building. Beyond the Phase 1 work to be funded by the proposed CPA award, the consultants estimate that the entire exterior renovation project will be approximately \$8–10M. Phase 1 intends to stabilize the structure, allowing the Town to develop a plan and timeline to fund the remaining work, likely via a borrowing supported over time by CPA funding and the Town’s Capital Plan.

3. CPA Budget for FY2024

The table on page 12 shows the recommended CPA budget, with available funds and proposed expenditures for FY2024, beginning July 1.

CPA Revenues and Other Available Funds

Town Meeting appropriates CPA expenditures from the Community Preservation Fund, which consists of revenues from the CPA property tax surcharge, plus annual distributions from the state CPA trust fund. The estimated local CPA revenues for the coming fiscal year are \$1,901,200 and the estimated state distribution is \$380,240, totaling \$2,281,440.

In addition to appropriating from anticipated FY2024 revenues, Town Meeting may also access an existing Fund balance for CPA expenditures. The available balance, \$607,750, is principally composed of any funds not yet appropriated for any CPA purpose (the “unrestricted Community Preservation Fund balance”) and any funds previously appropriated to a dedicated reserve account for future projects in a specific CPA program area. It also includes surplus local or state revenues in excess of projections, and any unused or returned funds from prior appropriations.

The FY2024 CPA budget draws from these available funds to fully fund the slate of FY2024 projects. After all recommended FY2024 appropriations are committed it is estimated that the remaining CPA fund balance, would be approximately \$6,113. That amount would remain available for appropriation to future CPA projects.

CPA Expenditures

The CPAC is recommending a FY2024 CPA budget of **\$2,883,077**, comprising \$2,820,337 for sixteen CPA projects and \$62,740 for the CPA administrative expenses account.

State law requires that, every year, Town Meeting either spends or reserves a minimum of 10% of anticipated CPA revenues for each of the three CPA areas of interest (open space/recreation, community housing, and historic preservation). We ensure annual compliance with this statutory requirement by executing temporary accounting transfers for each CPA project area in the first of the three Town Meeting votes on the CPA budget.

The recommended CPA projects are detailed in the prior section. All CPA awards to non-Town entities require a grant agreement between the Town and the awardee specifying terms and conditions required by the CPAC or otherwise required by the Town. Funds for CPA projects are progressively disbursed upon documentation of actual expenses incurred. Undisbursed funds remaining after the completion of a project return to the local CPA fund balance for future CPA project appropriation by Town Meeting.

The CPAC is budgeting 2.18% of expected CPA revenues for program administrative expenses, a substantially smaller portion than the 5% permitted by state CPA law. The administrative expenses account protects the Town's operating budget from CPA operating costs wherever allowed by law. Such expenses could include signage and plaques, legal consultation, environmental or land surveys, or other necessary due diligence. The CPAC also requires staff support for administering the CPA program; using CPA administrative funds for this purpose avoids unnecessary use of the operating budget for Town employee time. By law, the unspent balance is returned at the end of each fiscal year to Arlington's CPA fund for future projects.

Expenditures by CPA Program Area



FY2024 CPA Budget

AVAILABLE FUNDS

Estimated FY2024 CPA Revenues		
Local CPA tax surcharge receipts (projected)		\$ 1,901,200
State CPA Trust Fund distribution (projected)		\$ 380,240
total revenues		\$ 2,281,440
Other available funds		
Anticipated Unrestricted Community Preservation Fund balance, close of FY23		\$ 607,750
TOTAL AVAILABLE FUNDS		\$ 2,889,190

EXPENDITURES

CPA Projects	Applicants	Community Housing	Open Space & Recreation	Historic Preservation	TOTALS
10 Sunnyside Ave	Housing Corporation of Arlington	\$ 500,000			\$ 500,000
Arlington Affordable Housing Trust Fund	Board of Trustees of the Arlington Affordable Housing Trust Fund	\$ 370,000			\$ 370,000
Leasing Differential Program for Arlington Tenants	Somerville Homeless Coalition	\$ 30,634			\$ 30,634
Hauser Building Roof Replacement Project	Arlington Housing Authority	\$ 120,000			\$ 120,000
Menotomy Manor Window Replacement Project, Ph.2	Arlington Housing Authority	\$ 400,000			\$ 400,000
Hill's Hill Mountain Biking Trails	Arlington Rec Dept.		\$ 400,000		\$ 400,000
Invasive Vegetation Removal	Arlington Conservation Commission		\$ 12,000		\$ 12,000
Buffer and Beautify Mill Brook	Arlington Conservation Commission		\$ 120,000		\$ 120,000
21 Pond Lane Feasibility Study and Preliminary Design Concept	Dept of Planning and Community Development		\$ 15,000		\$ 15,000
No Name Brook Preservation Feasibility Study	Open Space Committee		\$ 20,000		\$ 20,000
Orchard Signage (Find Your Way to the Orchard!)	Open Space Committee		\$ 2,500		\$ 2,500
AFOD Building and Energy Upgrades and Repairs	Arlington Friends of the Drama			\$ 187,750	\$ 187,750
Document Digitization of Cyrus Dallin Papers	Cyrus E. Dallin Art Museum, Inc.			\$ 71,880	\$ 71,880
Foot of the Rocks Battlefield Memorial	Working Group Foot of the Rocks Project			\$ 112,000	\$ 112,000
Jason Russell House, Preservation Continued	Arlington Historical Society			\$ 73,573	\$ 73,573
Town Hall Envelope Preservation, Ph. 1 (Town Hall Clock Tower)	Town of Arlington			\$ 385,000	\$ 385,000
TOTAL PROJECTS		\$ 1,420,634	\$ 569,500	\$ 830,203	\$ 2,820,337
Expenses					
CPAC administrative expenses					\$ 62,740
TOTAL FY2024 CPA EXPENDITURES					\$ 2,883,077

4. Recommended Votes – Article 49

ARTICLE 49

APPROPRIATION/ COMMUNITY PRESERVATION FUND

To see if the Town will vote to make appropriations from the Community Preservation Fund for eligible community preservation projects; for community preservation reserve accounts for historic preservation, open space and recreation, and affordable housing; for Community Preservation Act Committee administrative expenses or other eligible expenses; or take any action related thereto.

Recommended votes on this article are divided into three sections: (a) votes to transfer funds to temporary dedicated reserves, as explained in the vote comment; (b) votes on the fourteen CPA projects, and (c) a vote on administrative expenses. The moderator generally elects to address all of the sections in a single vote.

VOTED:

(1) That the Town take the following actions regarding dedicated CPA project area reserves:

(a) Transfer the sum of \$228,144 from FY2024 Community Preservation Fund revenues to a CPA Open Space and Recreation Reserve account, for later Town Meeting appropriation for open space and recreational land purposes;

(b) Transfer the sum of \$228,144 from FY2024 Community Preservation Fund revenues to a CPA Historic Preservation Reserve account for later Town Meeting appropriation for historic preservation purposes; and

(c) Transfer the sum of \$228,144 from FY2024 Community Preservation Fund revenues to a CPA Community Housing Reserve account for later Town Meeting appropriation for community housing purposes.

COMMENT:

These transfers, taken immediately prior to the CPA project appropriation votes that follow, ensure that the Town complies with the state legal requirement to either appropriate or reserve at least 10% of estimated annual CPA revenues (est. \$2,281,440) in each of the three CPA project areas.

Although these transferred funds are immediately recommended for appropriation in their entirety in the next vote, this action ensures that the Town maintains compliance should Town Meeting reduce or reject the recommended appropriations, or does not become retroactively out of compliance with state law should any approved project not proceed as planned. (In such an event, the reserved funds would remain in or be returned to the dedicated account for future appropriation in that CPA project area.)

(2) That the Town take the following actions to appropriate funds for FY2024 CPA projects, with each project considered a separate appropriation:

(a) Appropriate the sum of \$500,000 from the Community Preservation Fund revenues for the 10 Sunnyside Avenue project for the support of community housing, subject to the condition that a grant agreement between the Housing Corporation of Arlington and the

Town be executed, said funds to be expended under the direction of the Housing Corporation of Arlington and the Community Preservation Act Committee;

(b) Appropriate the sum of \$370,000 from the Community Preservation Fund revenues for the Arlington Affordable Housing Trust Fund project for the support of community housing, subject to the condition that a grant agreement between the Arlington Affordable Housing Trust Board and the Town be executed, said funds to be expended under the direction of the Arlington Affordable Housing Trust Board and the Community Preservation Act Committee;

(c) Appropriate the sum of \$30,634 from the Community Preservation Fund revenues for the Leasing Differential for Arlington Tenants project for the support of community housing, subject to the condition that a grant agreement between the Somerville Homeless Coalition and the Town be executed, said funds to be expended under the direction of the Somerville Homeless Coalition and the Community Preservation Act Committee;

(d) Appropriate the sum of \$120,000 from the Community Preservation Fund revenues for the Hauser Building Roof Replacement project for the preservation of community housing, subject to the condition that a grant agreement between the Arlington Housing Authority and the Town be executed, said funds to be expended under the direction of the Arlington Housing Authority and the Community Preservation Act Committee;

(e) Appropriate the sum of \$400,000 for the Menotomy Manor Window Replacement Project for the preservation of community housing, with \$228,144 being appropriated from the Community Housing Reserve Account and \$171,856 being appropriated from Community Preservation Fund revenues, subject to the condition that a grant agreement between the Arlington Housing Authority and the Town be executed, said funds to be expended under the direction of the Arlington Housing Authority and the Community Preservation Act Committee;

(f) Appropriate the sum of \$400,000 for the Hill's Hill Mountain Biking project for the rehabilitation of recreational land, with \$228,144 being appropriated from the Open Space and Recreation Reserve Account and \$171,856 being appropriated from the Community Preservation Fund revenues, said funds to be expended under the direction of the Park and Recreation Commission and the Community Preservation Act Committee;

(g) Appropriate the sum of \$12,000 from Community Preservation Fund revenues for the Preserving Town Open Spaces by Addressing Invasive Vegetation project for the preservation of open space, said funds to be expended under the direction of the Arlington Conservation Commission and the Community Preservation Act Committee;

(h) Appropriate the sum of \$120,000 from Community Preservation Fund revenues for the Buffer and Beautify Mill Brook project for the preservation of open space, said funds to be expended under the direction of the Department of Planning and Community Development and the Community Preservation Act Committee;

- (i) Appropriate the sum of \$15,000 from Community Preservation Fund revenues for the 21 Pond Lane Feasibility Study and Preliminary Design Concept project for the creation of open space, said funds to be expended under the direction of the Department of Planning and Community Development and the Community Preservation Act Committee;
- (j) Appropriate the sum of \$20,000 from Community Preservation Fund revenues for the NoName Brook Preservation Feasibility Study project for the preservation of open space, said funds to be expended under the direction of the Department of Planning and Community Development and the Community Preservation Act Committee;
- (k) Appropriate the sum of \$2,500 from Community Preservation Fund revenues for the Find Your Way to the Orchard project for the preservation of open space, said funds to be expended under the direction of the Department of Planning and Community Development and the Community Preservation Act Committee;
- (l) Appropriate the sum of \$187,750 from the Community Preservation Fund revenues for the Arlington Friends of the Drama Building Upgrades and Repairs project for the rehabilitation and restoration of historic resources, subject to the condition that a grant agreement between the Arlington Friends of the Drama and the Town be executed, said funds to be expended under the direction of the Arlington Friends of the Drama and the Community Preservation Act Committee;
- (m) Appropriate the sum of \$71,880 from the Community Preservation Fund revenues for the Digitizing and Rehousing of the Cyrus Dallin Papers project for the preservation of historic resources, subject to the condition that a grant agreement between the Cyrus E. Dallin Museum and the Town be executed, said funds to be expended under the direction of the Cyrus E. Dallin Museum and the Community Preservation Act Committee;
- (n) Appropriate the sum of \$112,000 from the Community Preservation Fund revenues for the “Foot of the Rocks” Battlefield Memorial project for the rehabilitation and restoration of historic resources, said funds to be expended under the direction of the Town and the Community Preservation Act Committee;
- (o) Appropriate the sum of \$73,573 from the Community Preservation Fund revenues for the Preservation of the Jason Russell House (Continued) project for the rehabilitation and restoration of historic resources, subject to the condition that a grant agreement between the Arlington Historical Society and the Town be executed, said funds to be expended under the direction of the Arlington Historical Society and the Community Preservation Act Committee;
- (p) Appropriate the sum of \$385,000 for the Town Hall Envelope Preservation, Phase 1 (Town Hall Clock Tower) project for the preservation of historic resources, with \$228,144 from the Historic Preservation Reserve Account and \$156,856 being appropriated from the Community Preservation Fund revenues, said funds to be expended under the direction of the Town of Arlington and the Community Preservation Act Committee;

COMMENT:

The CPAC recommends the above CPA projects to Town Meeting for FY2024 funding, having carefully vetted each application for compliance with the CPA law, feasibility, importance, cost justification, sustainability and other criteria.

(3) That the Town take the following action regarding administrative expenses:

Appropriate \$62,740 from FY2024 Community Preservation Fund revenues to the CPA Administrative Expenses account for eligible FY2024 administrative expenses, such funds to be expended under the direction of the Community Preservation Act Committee.

COMMENT: These expenses are explained on page 9.

The CPAC’s vote on all recommendations was unanimous.

APPENDIX

This table summarizes the funding sources for each of the preceding transfer and appropriations votes.

Budget sourcing for Article 49 vote language	Community Preservation Fund	10% CPA Category Reserve Transfers	Historic Preservation Reserve Account	Community Housing Reserve Account	EXPENDITURE TOTALS
RESERVE ACCOUNT TRANSFERS					
CPA Community Housing Reserve account (10%)	\$ 228,144				\$ -
CPA Open Space and Recreation Reserve account (10%)	\$ 228,144				\$ -
CPA Historic Preservation Reserve account (10%)	\$ 228,144				\$ -
PROJECTS					
10 Sunnyside Ave	\$ 500,000				\$ 500,000
Arlington Affordable Housing Trust Fund	\$ 370,000				\$ 370,000
Leasing Differential Program for Arlington Tenants	\$ 30,634				\$ 30,634
Hauser Building Roof Replacement	\$ 120,000				\$ 120,000
Menotomy Manor Window Replacement Project, Ph.2	\$ 171,856	\$ 228,144			\$ 400,000
Hills Hill Mountain Biking Trails	\$ 171,856	\$ 228,144			\$ 400,000
Invasive Vegetation Removal	\$ 12,000				\$ 12,000
Mill Brook Preservation (Buffer and Beautify)	\$ 120,000				\$ 120,000
21 Pond Lane Feasibility Study	\$ 15,000				\$ 15,000
No Name Brook Preservation Feasibility Study	\$ 20,000				\$ 20,000
Orchard Signage (Find Your Way to the Orchard!)	\$ 2,500				\$ 2,500
AFOD Building and Energy Upgrades and Repairs	\$ 187,750				\$ 187,750
Document Digitization of Cyrus Dallin Papers	\$ 71,880				\$ 71,880
Foot of the Rocks Battlefield Memorial	\$ 112,000				\$ 112,000
Jason Russell House, Preservation Continued	\$ 73,573				\$ 73,573
Town Hall Envelope Preservation, Phase 1 (Town Hall Clock Tower)	\$ 228,144	\$ 156,856			\$ 385,000
EXPENSES					
CPAC administrative expenses	\$ 62,740				\$ 62,740
TOTAL CPA EXPENDITURES					\$ 2,883,077
<i>The first three reserve transfers are not included in the expenditure totals as they are immediately appropriated in their entirety</i>					