

Report of the Community Preservation Committee

I. The Community Preservation Process in Wellesley

In 2002, Wellesley accepted the Community Preservation Act (“CPA”) and formed a Community Preservation Committee. Pursuant to the CPA, Wellesley established a surcharge of 1% on the local property tax (taxes on the first \$100,000 of a property’s value are exempt from the surcharge as are taxes on certain low income housing), and began to set aside the proceeds of the surcharge in order to pursue Community Preservation activities, encompassing four purposes -- open space, historic resources, recreational uses and community housing. 100% of this tax surcharge revenue is retained by the Wellesley CPA fund. Funds raised through the local surcharge are “matched” annually by monies from a Massachusetts Community Preservation Trust Fund, which is made up of revenues collected statewide from Land Court and Land Registry fees – there is no segregation of fees collected in particular cities or towns and indeed, the same fees are collected on local real estate transactions whether or not a locality has adopted the CPA. FY10 CPA revenue is currently estimated at

Tax surcharge revenue	\$860,000
Matching funds from State	\$277,307 (a 35% match of the FY09 surcharge)
Interest	<u>\$140,000</u>
Total	\$1,277,307

The State’s payment to each CPA community is determined by a statutory formula, but in practice the State match for the first five years was 100%. Because of sharply declining fee revenues as well as the expansion of the number of localities adopting the CPA, the match declined substantially in the payments received in FY09 and FY10. The Department of Revenue estimated last fall that the state match percentage for FY11 would be 28%. However, over the past several months, the economy has stabilized and collections from Land Court and Land Registry fees have increased so there is some hope that the match will remain in the low thirty percent range. Also, new legislation (SB90) is being considered by the legislature which would set a floor matching percentage of 75% as well as have other advantages. Both the CPC and the Board of Selectmen support SB90, which was sponsored by Senator Cynthia Creem and co-sponsored by Representatives Scott Brown and Alice Peisch.

In each year, a required minimum of 10% of all revenues collected by a CPA community from its surcharge and from the State match must be expended (or “banked” in dedicated reserves for future use) for each of the statute’s three primary purposes of open space (excluding recreation), community housing and historic resources. The remaining 70% of all Community Preservation funds raised annually by a community which are not so earmarked may be used currently or retained for future appropriation, at the municipality’s discretion, for any of those three primary statutory purposes or for the fourth purpose of recreation. Based on projected revenues, it is expected that the balance available for new projects as of June 30, 2010 will be approximately \$5.8 million. Before reserve appropriations at the 2010 ATM there will be approximately \$600,000 reserved specifically for historic resources and another \$600,000 reserved for open space. Substantial appropriations at the 2009 ATM to the Wellesley Housing Authority and Wellesley Housing Development Corporation depleted the community housing reserve

II. Proposed Appropriations at the 2010 ATM

1. Fuller Brook Park Project: Phase I

Sponsor: Fuller Brook Park Coordinating Committee

Description of the Project: Initial planning phase for the rehabilitation of Fuller Brook Park

Recommended Amount: \$250,000

Originally created in 1899, Fuller Brook Park is linear, two-and-a-half mile green space paralleling Washington Street along Caroline Brook and Fuller Brook. It is an important historic, open space, environmental and recreational resource, a vital piece of the Town's Trail system and an essential part of the storm water and drainage system. The Massachusetts Historical Commission has determined that the Park is eligible for listing on the National Register of Historic Places and thus the rehabilitation of the Park is eligible for funding with CPA funds.

The Natural Resources Commission and the NRC staff have worked tirelessly over many years to bring forward a comprehensive program to rehabilitate Fuller Brook Park, including hiring Halvorson Design Partnership to perform a Preservation Master Plan study. Based on that plan, the NRC and the Trails Committee applied to the Community Preservation Committee for \$2.9 million in funding for a complete multi-year project for the Park. After input from a public hearing and discussions among the CPC and NRC, the Fuller Brook Park Coordinating Committee was formed with a charge of assisting the Town and the NRC with the preservation, restoration and rehabilitation of Fuller Brook Park. The Committee is a task force including designees from relevant Town boards including the Natural Resources Commission (2 members and the Director), Board of Selectmen, Public Works, Historical Commission, Trails Committee, School Committee, and Community Preservation Committee and abutter(s). Members provide input on behalf of their board/committee, and contribute technical expertise and guidance in the development and implementation of the Project. An experienced part time project manager, who will be hired through a RFP process, will assist the Committee in implementation. Throughout Phase I, numerous public meetings and hearings will be held to seek input from abutters, neighbors, and other citizens.

Key elements of Phase I will include

- a boundary, topographical and utility survey
- an arborist treatment plan
- conceptual design alternatives
- cost estimates
- selection of a preferred alternative

The Phase 1 budget totals \$250,000

Conceptual Design / Initial Schematics	\$95,000
Arborist Treatment Plan	\$30,000
Maintenance Guidelines	\$10,000
Boundary, topographical & utility survey	\$75,000
Project manager	\$20,000
Contingency	<u>\$20,000</u>
	\$250,000

The Coordinating Committee plans to come back to the CPC in January 2011 and to the 2011 ATM to request funding for Phase II of the project. Final design documents will be created for selected alternative and necessary permits obtained. Due to the complexities of such a large project involving wetlands and streams, it is anticipated that Phase II will require two years and that the request for approval of Phase 3, the actual rehabilitation work, will be made to the 2013 ATM.

2. Grant to the Wellesley Housing Development Corporation

Sponsor: Wellesley Housing Development Corporation

Description of the Project: Additional capital to invest in the creation or preservation of affordable housing stock.

Recommended Amount: \$375,000

The CPC believes that providing affordable housing is important to strengthening and preserving the culture of the Town. The Wellesley Housing Development Corporation was created by the Board of Selectmen and Town Meeting for that purpose. Recent studies have validated the growing unmet need for affordable housing for both families and seniors. The weak economy has reduced the number of new affordable units expected from inclusionary zoning regulations. These economic forces, however, are creating opportunities for the Town by reducing the gap between market and affordable for-sale housing prices. There is also a need for resources to move within 90 days of an existing affordability-restricted unit coming on the market to preserve its affordable status. With this appropriation of an additional \$375,000 the WHDC will have \$850,000 available, enough to purchase approximately 2 to 4 units. The CPC believes this is an appropriate balance. The Board of Selectmen has unanimously supported this appropriation

3. Historic Resources Inventory

Sponsor: Wellesley Historical Commission

Description of the Project: Part 2 of a long range project to create a historic resources inventory for the Town

Recommended Amount: \$30,000

The CPC previously funded a first phase project to assess overall status of existing documentation and assist in the development of the long range plan. The current phase will focus on specific areas (expected to village / commercial centers)

- Square
- Hills
- Lower Falls
- Fells

The inventory will provide readily accessible data to assist both Town and private parties in shaping potential future preservation and development projects as well as educational and public awareness efforts

4. Wellesley Historical Society Building Study

Sponsor: Wellesley Historical Society

Description of the Project: Feasibility study for the possible rehabilitation and expansion of the Wellesley Historical Society Dadmun-McNamara House

Recommended Amount: \$24,500

This project provides funds for preliminary study to determine the feasibility of rehabilitating and expanding the headquarters of the Wellesley Historical Society in the Dadmun-McNamara House by adding approximately 5,000 square feet. The WHS owns the 1824 Dadmun-McNamara House (formerly a toll taker's residence located on the Worcester Turnpike – now known as Route 9) which is located on land leased until 2074 from the Wellesley Friendly Aid Association. The CPC in previous years declined to fund applications from the WHS due in part to the lack of display space, staffing, and questions about curatorial policies around accession and de-accession of material. The WHS has put in place curatorial policies and is moving to address staffing. This study is responsive to the needs for display and work space

5. Cluster Zoning Bylaw study

Sponsor: Planning Board

Description of the Project: Study for drafting potential Open Space Residential Design or Cluster Zoning by law provisions

Recommended Amount: \$10,000

Many Massachusetts communities have Open Space Residential Design or Cluster Zoning provisions, including Wellesley comparable communities Andover, Belmont, Brookline, Lexington and Winchester. The study will: analyze both Cluster and OSRD design options, assess what elements of each approach or a hybrid of both approaches would be successful in Wellesley, and investigate appropriate incentives to encourage subdivision design which promotes open space as well as affordable housing. The Planning Board believes that Cluster Development or OSRD lends itself directly to Wellesley's efforts for sustainable design and affordable housing.

6. Restoration of the historic Belvedere / Abbott Road sign

Sponsor: Salvatore De Fazio

Description of Project: Restore and install historic street sign

Recommended Amount: \$3,000

On July 10, 2009 the historic Abbott Road / Belvedere sign toppled due to age and rot. The sign was quickly recovered by alert Wellesley police and highway department employees. This sign was erected in the 1920's at the beginning of Abbott Road at Washington Street. The wrought iron sign bracket was forged in one of the leading Boston Art & Crafts studios. The sign announced the entrance to Abbott Road and identified the direction to the Belvedere Estates. The Estates were the first major large house development in Wellesley begun in the 1890's. The Wellesley Historical Commission has determined that the sign is a historic resource and supports this project. The estimated total project cost is approximately \$6,000. The CPC requested Mr. De Fazio gather additional support in the form of petitions and contributions. \$3,200 in private contributions have been pledged and over 150 Town residents have signed petitions supporting this project

7. Administrative Funds

Recommended Amount: \$60,000

The Town may appropriate up to 5 % of estimated annual revenues for administrative purposes. In each of the past fiscal years, \$50,000 has been appropriated. Increasingly, the CPC is utilizing these funds for consultants and other support to better define, shape, and analyze potential projects. Based on the estimated annual revenues, we request an appropriation of \$60,000 for FY11.

8. Appropriations to Designated Reserves

Recommended Amount: \$128,000 for Historic Resources
 \$128,000 for Open Space
 \$128,000 for Community Housing

The Community Preservation Act requires each fiscal year the Town to appropriate or reserve for future appropriations a minimum of 10% of the estimated annual revenues for three designated purposes. Based on the estimated FY09 annual revenues, we request the appropriation of \$128,000 for each of Historic Resources, Open Space and Community Housing

V. Looking Forward

A number of neighboring communities, including Needham, Weston, Sudbury and Lexington have funded substantially larger projects with CPA funds than has Wellesley. Except for Needham, most of these projects have involved the acquisition of new land for active and passive recreation. Those towns have supported these programs with combinations of higher surcharge rates and significant borrowing against CPA revenues. While the Phase 1 costs for the Fuller Brook Park rehabilitation will be relatively small, over time the full project may be the largest funded to date by the Town. Early planning work is underway concerning possible Town uses for the St. James property. A large commitment of CPA resources would be required were such a project were to go forward with a focus on recreation or affordable housing uses. If SB90 passes in its current form, this would substantially increase the matching funds incentive as well as open up the potential use of CPA funds to rehabilitate the Town's existing active and passive recreation properties. Over the next year, the CPC will work proactively with other Town Boards and citizens to develop a vision for the future scope, program, and fund approach for Community Preservation in Wellesley.

Respectfully Submitted,

Jack Morgan, Chair
Theodore Parker, Vice-Chair
Kara Cicchetti

James Conlin
Rose Mary Donahue
Joan Gaughan

Robert Goldkamp
Stephen Murphy
Allan Port

February 22, 2010