

## **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, 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. Funds raised through the local surcharge are "matched" annually by monies from a Massachusetts Community Preservation Trust Fund, which is made up of revenues from Land Court and Land Registry fees. The State's payment to each CPA community is determined by a statutory formula, but in practice the State match until this year has been almost 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 matching FY08 local surcharges. The \$510,994 received by the Town in October 2008 represented a 67.6% match. At that time, the Department of Revenue advised that communities with a surcharge of less than the 3% maximum amount could expect a 35% match in the FY09 payment to be received in October 2009. Over the past several months, the economy and collections from Land Court and Land Registry fees have continued to decline, although there is some hope that mortgage refinancing driven by low interest rates may stabilize Registry receipts. It nonetheless seems likely the actual match percentage will be less than 35% and that the Town will receive less than \$275,000 in October 2009. For planning purposes below, we have estimated a \$225,000 match.

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.

Community Preservation funding proposals generally consist of capital expenditures for the purposes permitted by the CPA -- maintenance and ordinary operating expenses are not eligible and even capital spending related to recreational and open space properties not acquired with CPA funds are constrained. All expenditures from a local Community Preservation fund are subject to two basic requirements: (1) they may be made only upon appropriation adopted in the usual manner (in Wellesley's case, by vote at an Annual or Special Town Meeting), and (2) only those projects or proposals which receive the support of the local Community Preservation Committee are eligible for appropriation.

In response to the requirements of the statute, Wellesley's Bylaw provides that the Committee have representatives from five designated boards -- Natural Resources Commission, Planning Board, Recreation Commission, Wellesley Housing Authority and Historical Commission -- and the permitted maximum of four additional members appointed by the Moderator (one of which is, by common understanding, appointed from the Wellesley Housing Development Corporation).

## **II. Activities to Date**

### **Overview of Community Preservation Activities**

The Committee operates pursuant to a Community Preservation Plan for the Town, including specific Decision Guidelines and Goals which are used in reaching decisions about whether and to what extent to recommend funding for the proposals submitted to the Committee. A copy of the Community Preservation Plan can be found at the Committee's link on the Town's website at [www.wellesleyma.gov](http://www.wellesleyma.gov).

Through the 2008 ATM, the Committee has supported a total of 20 different projects (some in several stages). \$3,344,854 dollars have been appropriated for those projects. Of this total, \$1,791,740 (53.6%) has been appropriated for Recreation, \$755,500 (22.6%) has been appropriated for Affordable Housing, \$499,344 (14.9%) for Historic Resources and \$298,260 (8.9%) for Open Space. The large total for Recreation reflects the appropriation of \$1,500,000 for the Sprague Field project last spring – by far the largest single project ever considered or funded by the Committee. This one project represents 44.8% of the total project appropriations made during the first six years of Town's activities under the Community Preservation Act.

### **Open Projects**

Ten CPC funded projects were open as of June 30, 2008

### **Sprague Field (Recreation)**

As the Committee reported to the 2007 Annual Town Meeting:

“The Committee concluded that the Sprague fields are significant Town recreational resources used by hundreds of Town families; that the ability to use the fields will soon be lost unless appropriate remediation action is taken; and that the preservation of the Sprague fields is accordingly a matter of importance to the Town which merits a substantial appropriation of Community Preservation funds.”

Although the Sprague proposal, and its price tag, grew substantially during FY2008, a substantial majority of our Committee believed that the CPC portion of the new Master Plan was worthy of strong support, for a number of reasons in addition to those recited above:

-- The Master Plan as a whole provided an opportunity to reconfigure and improve all of the fields, gain two synthetic turf fields for increased play and new regulation-sized softball and baseball fields, and in general to more fully utilize this most important recreational resource. This takes on particular significance in light of the continuing demand for playing field use throughout the Town.

-- Pursuing opportunities to increase the number of playing fields in the Town is one of the Recreation goals of the Committee's own Community Preservation Plan. Given the considerable difficulties and costs associated with any acquisition of available vacant land for recreational use, the Master Plan may be the best option to add to high-quality playing field capacity in the foreseeable future.

-- Appropriating the full requested sum for the CPA-eligible costs associated with the Remediation Area, (i) tends to lower the need for general Town funds, at a time of difficult

financial constraints, and (ii) tends to increase the availability of both general Town funds and private donations to be applied toward costs of other portions of the full Master Plan.

-- Consistent with our Decision Guidelines, the Master Plan proposal was developed in an unusually collaborative manner by a wide range of interested boards, groups and individuals, and appears to be directly responsive to each of the major concerns expressed at the 2007 Town Meeting concerning proposed work at Sprague Field. The Master Plan also met our guideline of offering substantial funding from sources other than the CPC.

-- Although the appropriation was substantially larger than any amount previously proposed by the Committee, we felt that the town-wide importance and broad community support of the Master Plan proposal merited this unusual level of support. We also believed that the amount recommended still leaves sufficient fund balances, coupled with future growth from revenue sources, to assist other important projects in coming years.

The Sprague Field project was substantially completed during the summer of 2008 at a cost significantly below the original budget. A reconciliation and allocation of the savings among the three sources of funding (the user groups, the CPC, and the Town General Fund) is underway.

### **Original Town Hall (Historic Resources)**

\$296,000 was appropriated at the 2008 Town Meeting for deconstruction and preservation of elements of the Original Wellesley Town Hall (contained within the old Wellesley Country Club clubhouse which was demolished at the end of last year). The Wellesley Historical Commission made a dedicated and concerted effort to investigate the possibility of preserving the "historic core" of the Clubhouse, or as many of its structural elements as possible, for an appropriate adaptive reuse at another location. The project as envisioned would have included the disassembly and storage of at least the most historically significant structural elements of the building at an appropriate interim location, followed by the ultimate reuse of those elements in a new structure at a permanent location within the Town. During the presentation, discussion and approval of this project in April at Town Meeting, there was a frank recognition that the ultimate location and use for the material had not been settled, and that even the plans for initial deconstruction were quite preliminary and would require negotiation of satisfactory arrangements with the Wellesley Country Club, development of a work plan satisfactory to a number of stakeholders, and successful solicitation of bids allowing the project to be completed within budget. However, the CPC felt and Town Meeting ultimately agreed that the unique importance of the Original Town Hall and the need to carry out any project before the building was demolished in the fall of 2008 merited the Town working hard in an attempt to overcome these uncertainties.

Unfortunately, to the deep regret of the Wellesley Historical Commission and the Community Preservation Committee, the few bids received for the project as originally envisioned substantially exceeded the amount appropriated. After intensive consultation among the WHC, CPC, the Board of Selectmen, the Department of Public Works, Town Counsel and the Wellesley Country Club, it was ultimately agreed that the demolition subcontractor for the Country Club would preserve the original flooring material from the room in which the climactic Needham Town Meeting vote was held to establish the Town of Wellesley as well as portions of the staircase, two lunette windows, and sample of other materials. These artifacts have been loaded into a trailer and stored by the DPW for future reuse in one or more buildings, including potentially the new high school or a senior center. The total cost of this project was \$16,205 and the unexpended balance of \$279,795 has been returned to the funds reserved for future Historic Resources projects.

### **Morses Pond Phosphorus Inactivation System (Open Space / Recreation)**

The second largest set of projects which have been funded through CPA funds relate to the preservation of Morses Pond for recreation and open space purposes. \$75,000 was appropriated in FY 2005 for development of the Morses Pond Comprehensive Management Plan for the preservation of the pond. In FY2007, \$250,000 was appropriated for a weed harvester and in FY2008 \$153,000 was appropriated for a phosphorous deactivation system for storm water runoff. Overall, these projects have been managed well below budget: the development of the plan and the purchase of the weed harvester were completed for \$61,000 less than the amounts appropriated, with the balance returned to the CPA Fund for future projects. However, at the time of the 2008 ATM it appeared that the phosphorous inactivation system would cost somewhat more than was originally appropriated. Consequently, the CPC recommended and Town Meeting appropriated an additional \$7,500 for this project. This project has now been substantially completed and it appears the costs will be below the budgeted amount.

### **Marriage License Record Preservation (Historic Resources)**

\$30,000 was appropriated for the preservation of marriage license records of the Town from 1881 to 2000. This project was completed during the summer and fall of 2008 at a cost of \$29,010 and the balance was returned to the funds reserved for Historical Resources.

### **Historic Resources Inventory Pre-survey (Historic Resources)**

\$10,000 was appropriated at the 2008 ATM to retain a consultant in order to carry out a pre-survey of the existing inventories of historic and cultural resources and determine what information needs to be added to them. The pre-survey will (1) assess the existing condition of properties already listed, (2) determine the accuracy and completeness of the information in the inventories, and what additional information is required, and (3) identify additional properties of historic or cultural significance that have not been surveyed. This information is essential if the Town is to proceed to the next stage of creating a strategic preservation plan. Recent events, including the loss of the Wellesley Inn and the Original Town Hall make it clear that such a strategic preservation plan is critically needed for the Town to carry out effective activities to preserve our historic resources. The Historical Commission is now in the process of hiring the consultant.

### **National Register Plaques for Sprague Clock Tower and Hills Branch Library (Historic Resources)**

\$1,200 was appropriated at the 2008 ATM for plaques designating the Sprague Clock Tower and the Hills Branch Library as listed on the National Register of Historic Places. CPA funds had previously been used to apply for these listings. The plaques are currently being designed.

### **Affordable Housing Survey (Community Housing)**

\$10,500 was appropriated to the WHDC at the 2006 ATM to engage a consultant to develop a comprehensive database of all affordable housing units in Town, to develop a simple reporting system to be used to monitor compliance with applicable affordability restrictions, and to recommend enforcement procedures the Town could follow if a development is found not to be complying. The work is now being performed and the project should be completed within the next several months.

### **Affordable Housing Purposes (Community Housing)**

\$125,000 was appropriated to the WHDC at the 2006 ATM for affordable housing purposes. At that time, it was anticipated that these funds would be used in conjunction with the installation of a two-family modular house at 10 Boulevard Road as part of the Town's agreement with the developer of new condominiums at the site of the former Wellesley Inn. The project has not been commenced but remains active.

### **Listing of Hills Branch Library and Fuller Brook Path on National Registry of Historic Places (Historic Resources)**

At the 2005 Annual Town Meeting, \$7,450 was approved to apply for registration of the Hills Branch Library and the Fuller Brook Path on the State and National Registers of Historic Places. The Hills Branch Library application has been approved and the Fuller Brook Path registration is in process. \$1,400 remains to fund further consulting services for this application.

### **Preservation of Wellesley Farms Train Station (Historic Resources)**

\$107,500 was appropriated at the 2004 ATM for the preservation of the Wellesley Farms Train Station. \$95,401 was expended in several stages. The Wellesley Historical Commission and the CPC are now evaluating whether further work should be carried out at this time or whether this project should be closed.

## **III. Resources Available for Community Preservation Activity**

Based on the current projections of the costs to complete the ten existing projects as well as projections of local tax surcharges, State matching funds, and interest, the Town CPA funds will have a balance of approximately \$5.6 million on hand as of June 30, 2009 to fund new projects. In addition, approximately \$1.1 million in revenue will be received during FY10 (including a projection of \$225,000 in State matching funds), so that the total available funds for FY10 projects will approximate \$6.7 million. Should a project arise which exceeds the Town CPA funds available balance, the Town may, with the approval of a two thirds vote at Town meeting, borrow against future CPA revenue. The Town's local CPA tax revenue would support borrowing in excess of \$5 million while still leaving available monies for a reasonable level of new modest to moderate projects in subsequent years.

## **IV. Appropriations at the 2009 ATM**

### **1. Renovation of Waldo Court Complex (Community Housing)**

**Sponsor:** Wellesley Housing Authority

**Description of the Project:** Renovation of the 12 units at Waldo Court to restore them to use.

**Recommended Amount:** \$700,000

This request supplements State grants totaling \$1.65 million and will allow the WHA to renovate all three buildings at the Waldo Court complex at 50 Linden Street. Currently nine of the units are vacant and uninhabitable. These vacancies have existed since 2001.

The scope of work includes:

- building envelope repairs and improvements;
- kitchen and bathroom modernization;

- interior refurbishment of walls, ceilings, floors, and finishes ;
- reconfiguring of interior for greater livability;
- heating, plumbing, electrical and life and safety upgrades;
- site drainage, site and parking improvements;
- lead and asbestos abatement, and
- accessibility upgrades if required by code.

The WHA had previously received a grant of \$782,805 from the Department of Housing and Community Development (DHCD) to modernize the kitchens/baths and improve the site work at Waldo Court/Linden Street. After an extensive survey was completed by DHCD, the report noted that this property required a comprehensive modernization. The WHA approached DHCD to increase the grant to do a comprehensive work plan on the site and all building components and systems. The State agreed and increased the prior construction grant to \$1,500,000 and \$150,000 for Architect/Engineering services, which is double the amount previously awarded for work at this site but would be sufficient to renovate only two of the three buildings.

As this development is located in an area of town that has convenient access to transportation, shopping, churches, library, schools, etc. it qualifies as one of the State's "smart growth" developments. DHCD has committed this additional money because this site needed a more comprehensive work program to get the units back on-line. These same factors have lead the CPC to recommend appropriation of \$700,000 to allow all three buildings to be renovated at the same time as part of one, cost efficient project.

## **2. Grant to the Wellesley Housing Development Corporation (Community Housing)**

**Sponsor:** Wellesley Housing Development Corporation

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

**Recommended Amount:** \$350,000

The 2006 ATM approved an appropriation of \$450,000 for the WHDC to invest in housing which could be used as affordable housing. The WHDC used \$361,697.83 of the CPC grant to purchase a house and make minor renovations to it. The house has since been sold as an affordable unit to an income qualified family. The balance along with the \$350,000 requested at this 2009 ATM will provide the WHDC with over \$433,000 in funds available to respond quickly to opportunities as they arise, subject to the approval of the Board of Selectmen. 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.

## **3. Lower Falls Railroad Bridge (Recreation, Historic Resources, Open Space)**

**Sponsor:** Natural Resource Commission and Trails Committee

**Description of the Project:** Funds for Lower Falls DCR Railroad Bridge Partnership Matching Grant Phase 2 application with the City of Newton and the Massachusetts Department of Conservation and Recreation (DCR)

**Recommended Amount:** \$100,000

The project would convert the old, abandoned and deteriorating railroad trestle, which crosses the Charles River in the Lower Falls Area (downstream of the Route 16 bridge), to a pedestrian bridge and approaches providing open access to it that will connect with many trails and walkways that exist or can be developed on both sides of the river. This will be the key first step

in the creation of an overall safe and scenic, pedestrian friendly, passive recreation trail system to benefits residents living in the Wellesley/Newton Lower Falls area and adjacent neighborhoods. The DCR owns the bridge/ trestle and approaches and will oversee and manage the project as well as maintain the bridge in the future with Wellesley Trails Committee and Newton Bicycle / Pedestrian Task Force support. The design phase (Phase I) of this project has been funded with \$24,000 from the DCR with matching grants totaling \$12,000 from the Wellesley Trails Committee, NRC gift funds and the Newton Conservators. The Phase II construction activities would be funded by the DCR, City of Newton CPC and the Wellesley CPC. The estimated cost of construction (Phase II) is \$400,000.

The Wellesley Historical Commission has determined that the bridge is a Historic Resource and they support this project. The project is consistent with plans to develop the 27 Washington Street property although it is not contingent on that project, and is also consistent with the comprehensive plan for Wellesley Lower Falls development. This project supports three of the objectives of the CPA by creating a new recreational asset, adaptively reusing and rehabilitating an historic structure, and enhancing open space (although since this is already existing open space not acquired with CPA funds it probably cannot be funded as open space *per se*) An appropriation of \$100,000 from undesignated CPA funds to the Community Preservation Committee is requested, contingent on: a) Wellesley's portion of the Phase II project costs not exceeding 25% of the total project cost, b) at least equal grant funds from the City of Newton, and c) the concurrence of relevant Wellesley Boards and Committees on the Phase II construction plan and the integration of this project into overall plans for the Lower Falls area on the Wellesley side of the Charles River. At the completion of the design phase (assuming the City of Newton has committed its funding), the CPC will oversee the process of finalizing the Phase II matching grant application and gaining the concurrence of the other Wellesley Boards and Committees. If Wellesley's share of the project is less than \$100,000 the remainder will be returned to the undesignated fund balance.

#### **4. Sprague Clock Tower Preservation (Historic Resources)**

**Sponsor:** Department of Public Works

**Description of the Project:** Work to preserve the structural and aesthetic integrity of the Tower

**Recommended Amount:** \$65,000

The Department of Public Works originally requested \$63,500 for this work on the Isaac Sprague Memorial Clock Tower located in Elm Park. The tower was built in 1928 and was placed on the National Register of Historic Places in 2007. It does not appear that any major structural work has been performed in the past 80 years. The tower has been carefully inspected by both a Town engineer and a consultant retained using \$2,000 of Administrative funds of the CPC. There is general agreement on the overall scope of the work required, although certain details remain to be defined (for instance whether to repair or replace the wood door and stone surrounds at the ground level). Consequently, we request an appropriation of \$65,000 to the DPW contingent on the concurrence of the CPC and the Wellesley Historical Commission on the final Request for Proposal and work plan of the selected bidder.

#### **5. Barton Road Master Plan (Community Housing)**

**Sponsor:** Wellesley Housing Development Corporation

**Description of the Project:** Initial phase of development of a Barton Road Master Plan through a neighborhood and community wide planning process

**Recommended Amount:** \$50,000

The Barton Road complex was built post World War II as barracks-style veterans' housing in an area then served by some public transportation, grocery stores and other services. In the intervening decades these supporting services have fallen away. Despite expenditure of substantial funds in the beginning of this decade to renovate the existing buildings and their 88 units of low income family housing, there is general recognition that design deficiencies remain. This, along with recurring problems of a socio-economic nature such as vandalism, lack of jobs, insufficient retail services and lack of accessible public transportation, needs to be addressed to have a favorable impact on the neighborhood. If ways can be found to mitigate these problems and change the socio-economic mix of residents, there will be benefits to the residents of the neighborhood and to the broader community. There is a substantial amount of space available for new and fill-in construction at the complex if that would help address some of the changes needed. Further study is needed to assess the needs and determine the affordability level of any proposed housing, types of housing, and financing sources.

Objectives of this initial phase of study will be:

1. Existing Residents' Survey / Existing Conditions Survey: The needs of existing residents and the impact of any new development need to be identified and assessed. Also, the existing buildings and site will be evaluated and plans for improvements identified.
2. Supportive Services: The existing residents need improved services – help with employment opportunities, education, training, accessible public transportation and other needs. The master plan will identify plans of tangible improvements for existing and new residents.
3. Design Scope: Assess opportunities and constraints for development within the site of the existing buildings and on WHA-owned open land at the boundaries and generate to the extent budgeted funds allow, program alternatives with different housing types, open space treatments, community facilities and recreational areas.

This Master Plan Study will produce an initial vision for the future of the existing Barton Road development as well as any expansion. It will identify a program which seeks to

- support and enhance the current development
- integrate any potential expansion of housing into the community and upgrade the overall design and use of the area
- connect the development to the broader Wellesley community by looking to improve services for shopping, transportation, trails, recreation, educational and other programs

The WHA will seek to supplement the \$50,000 appropriated from CPA funds with State grant monies to more fully flush out program alternatives and potential financing options. However, expenditure of the \$50,000 to carry out of the initial phase of the project is not contingent upon the receipt of any such grants.

The CPC (along with the WHA) has struggled with this project: the complexities are daunting and ultimately this will be a long, multi-staged process. Under M.G. Ch. 44B Sec 5.b (2) one of the core roles of the CPC is to make recommendations “for the acquisition, creation, preservation and support of community housing”. The Barton Road complex represent a major portion of the existing community housing stock in Wellesley and the clearest location where construction of additional units is feasible. The CPC concluded that we have an obligation to the Town and the residents of Barton Road to begin acting – even if that action is only to put in motion the initial phase of a long process to find solutions to the daunting complexities.

## **6. Administrative Funds**

**Recommended Amount:** \$50,000

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 from local and state matching funds of somewhat over \$1 million, we again request an appropriation of \$50,000.

## **7. Appropriations to Designated Reserves**

The Community Preservation Act requires each fiscal year the Town to appropriate or reserve for future appropriations 10% of the estimated annual revenues for three designated purposes. Based on the estimated FY09 annual revenues, we request the appropriation of \$152,800 for each of Open Space (Excluding Recreation), Historic Resources, and Community Housing.

## **V. Looking Forward**

The Community Preservation Committee continues to work diligently with other Town Boards and community organization to successfully implement already approved projects, consider new projects, and in particular to advance the process of generating long term strategic plans for historic resources, open space, recreation and affordable housing to guide a pro-active program to best utilize the substantial resources generated by the CPA surcharge and State matching funds. We place a particular emphasis on working proactively to define and ultimately bring forward projects where the CPC can provide a significant level of funding, including for the acquisition of land for open space, recreation, and affordable housing. Based on the available fund balance, even after funding the projects to be considered at the 2009 ATM as well as the CPA borrowing capacity, we see an opportunity to provide up to approximately \$10 million to support such projects.

Respectfully Submitted,

Jack Morgan, Chair  
Kathryn Bowry, Vice-Chair  
Bradley Boyd

James Conlin  
Rose Mary Donahue  
Joan Gaughan

Dona Kemp  
Theodore Parker  
Helen Robertson

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