

CITY OF SALEM, MA

FISCAL YEAR 2017 COMMUNITY PRESERVATION PLAN & FY16 ANNUAL REPORT

December 6, 2016

Community Preservation Committee

***FY 17 Community Preservation Plan
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FY17 Community Preservation Plan The Community Preservation Act in Salem

Introduction

Salem's Community Preservation Plan serves a dual purpose. It provides the public with an overview of CPA in Salem and looks at Salem's community preservation needs, possibilities and resources. In addition, it serves as an annual report – summarizing the status of funded projects and including copies of required State reports.

I. The Community Preservation Act in Salem

A. Overview

The Community Preservation Act (CPA) is a [Massachusetts state law \(M.G.L. Chapter 44B\)](#) passed in 2000. It enables adopting communities to raise funds and establish a local dedicated pool of funds for the purpose of undertaking open space, historic preservation, outdoor recreation and community housing projects.

CPA is financed by a voter-approved property tax surcharge along with matching funds from the statewide CPA Trust Fund. The CPA Trust Fund provides annual matching funds, distributed according to a formula that ranges from 5% to 100% of what is raised locally. Recording fees at the State's Registries of Deeds fund the CPA Trust Fund, along with any additionally authorized funding sources, such as funds from the State's budget surplus.

CPA was adopted by Salem voters in November, 2012.

B. Understanding the Property Tax Surcharge in Salem

The CPA surcharge is paid by residential and commercial property owners annually (included in real estate tax bills). The first \$100,000 of taxable value is exempt. On the remaining value's assessed property tax, the City of Salem levies a surcharge of 1%.

The 1% surcharge is calculated as follows (using an assessed valuation of \$300,000 as an example and based on the City of Salem's FY65 tax rate):

The annual tax rate is \$15.67 per \$1000 of the property assessment ($A \div \$1000 \times \$15.67 = C$). The CPA exempts \$100,000 ($A - D = E$). The tax rate is applied to the CPA Taxable Value ($E \div \$1000 \times \$15.67 = F$). The surcharge is 1% of the CPA Tax Basis ($F \times 1\% = G$). $C + G = H$ (the total year's bill).

The surcharge is divided equally per quarterly bill (e.g. $\$33.34 = \7.84 per quarter). A Taxpayer Information Guide is available at <http://www.salem.com/sites/salemma/files/uploads/fy16cpataxguide.pdf>.

<i>Example:</i>	
<i>A. Assessment</i>	\$300,000.00
<i>B. FY 2016 Tax Rate</i>	\$15.67
<i>C. FY 2016 TAX</i>	\$4,701.00
<i>D. CPA Residential Exemption</i>	\$100,000.00
<i>E. CPA Taxable Value</i>	\$200,000.00
<i>F. CPA Tax Basis</i>	\$3,134.00
<i>G. CPA Surcharge =1%</i>	\$31.34
<i>H. TOTAL BILL</i>	\$4,732.34

1. Exemptions

Any residential property entitled to abatement or statutory exemption is automatically entitled to a proportional CPA exemption. Certain households may be eligible for a full CPA exemption. To qualify for an exemption, residential property owners must meet age, residency and income requirements. An application for exemption from the CPA surcharge (based on income) must be filed annually with the Assessor's Office by March 31st. The filing of the application does not stay the collection of the tax. Any resident who believes they are eligible for a full exemption should contact the City's Assessors Office.

C. The Community Preservation Committee

Implementation of the CPA in Salem is undertaken through the Community Preservation Committee (CPC). Salem's CPC was established in May, 2013 and is composed of nine members representing the Conservation Commission, Historical Commission, Park & Recreation Commission, Planning Board and the Salem Housing Authority, along with general public appointees (2 appointees each) of the Mayor and the City Council. Salem's current CPC members are:

John Boris
Kevin Cornacchio (Chair)
Bart Hoskins
Joanne McCrea
Ed Moriarty

Mickey Northcutt
Tim Shea
Leslie Tuttle (Vice Chair)
Matthew Veno (Planning Bd. Appointee)

The CPC's administrator is Jane Guy, Assistant Community Development Director, in the City of Salem Department of Planning & Community Development.

CPC meetings are typically held on the second Tuesday of each month at 6:00pm at 120 Washington St., 3rd Floor Conference Room (check the calendar on www.salem.com). Interested persons may also subscribe at www.salem.com for CPC meeting agendas.

The Community Preservation Commission's webpage is located on the City website at <http://www.salem.com/community-preservation-committee>. It includes meeting agendas, all meeting minutes, forms, links and helpful documents.

D. CPC Duties

The CPC is primarily a source for recommending project funding, rather than an initiator of projects. The Salem CPC's duties include:

- Assess Community Preservation needs of Salem
- Solicit input from city boards and commissions
- Hold an annual public hearing to solicit public input
- Submit a recommended annual budget to the City Council
- Prepare a *Community Preservation Plan*, which is updated annually
- Prepare application materials & set application deadlines
- Submit project funding recommendations to the City Council annually

E. The Role of the City Council

While the CPC is responsible for studying community preservation needs and reviewing applications submitted for CPA funding, it is ultimately the City Council that must approve any CPA expenditure - based on the recommendations of the Community Preservation Committee. The City Council actions are limited to the following:

- Approve recommendations of the CPC
- Reject recommendations of the CPC
- Reduce amount recommended by the CPC
- Reserve amount recommended by the CPC to applicable reserve account, rather than approving the project

F. Community Education and Outreach

A variety of educational and outreach efforts are undertaken to inform Salem residents, businesses and stakeholders about the CPA and to solicit public input.

1. Public Documents

- A [Taxpayer Information Guide](#) is updated annually by the Assessor's Office.
- The CPC issues an annual [Determination of Eligibility Application](#).
- The CPC issues a Community Preservation Plan which includes the prior year Annual Report, current Evaluation Criteria and the Funding Applications.
- The CPC issues a [Report on Funding Recommendations for the Salem City Council](#) (most recent dated May 6, 2016).
- All CPA-related public documents are available on the CPC's webpage at <http://www.salem.com/community-preservation-committee>. In addition, the webpage includes meeting agendas, minutes and other helpful information and links.

2. Notification Procedures

For its monthly meetings, agendas/notices are posted at City Hall and are uploaded to the City website. Any interested person may subscribe to receive agendas/notices through the e-mail subscriber.

For the annual public hearing, a legal notice is published in the Salem News twice, and notices are posted at City Hall, on SATV, at the Salem Public Library, at the Salem Council on Aging, and the Salem Housing Authority. Notices are sent to all City Councillors. The notice is posted on the City's website calendar and in City News. A press release is also issued.

Notification of the availability of the Draft Community Preservation Plan (including a link to the plan) and request for public comment is placed on the City website in City News, and is sent to the City Council, relevant city boards and commissions and Historic Salem, Inc.

While Determination of Eligibility Applications can be received at any time, the annual deadline to ensure consideration for the current funding round is announced in City News on www.salem.com.

3. Solicitation of Input

Once each year, the CPA is included on the agendas of the Park & Recreation, Conservation, and Historical Commissions, Bike Path Committee, the Planning Board, the Salem Redevelopment Authority and the Salem Housing Authority. CPA is also on the agenda of the Neighborhood Improvement Advisory Committee, whose members represent all of the various neighborhood associations.

An annual public hearing is held at 120 Washington Street, which includes a PowerPoint presentation and time for questions and comments. The FY17 public hearing was held on October 17, 2016. All persons in attendance received a copy of the PowerPoint Presentation and a survey. Written public comment were accepted through October 27, 2016 and were considered during the development of the Draft Community Preservation Plan.

The Draft Community Preservation Plan is made available for a two week public comment period prior to finalization. There were no comments received.

G. Fiscal Year Explanation of Tasks

During each fiscal year, the CPC will undertake several tasks and prepare several documents. During the current fiscal year – FY17 (July 1, 2016 through June 30, 2017), the CPC will:

- Prepare the FY17 Community Preservation Plan, which includes the FY16 annual report;
- Prepare the FY18 Budget Recommendation (for July 1, 2017-June 30, 2018); and
- Conduct FY17 Funding Round 3 and prepare the FY17 Funding Recommendations (Round 3) which will utilize remaining FY17 funds and approved FY18 funds.

H. Community Preservation Fund Allowable Spending Purposes

The chart on the next page summarizes how CPA funds can be spent.

***Completed Winter Island
Multi-Purpose Trail***



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

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

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

1. Definitions

"Capital improvement", reconstruction or alteration of real property that: (1) materially adds to the value of the real property, or appreciably prolongs the useful life of the real property; (2) becomes part of the real property or is permanently affixed to the real property so that removal would cause material damage to the property or article itself; and (3) is intended to become a permanent installation or is intended to remain there for an indefinite period of time.

"Maintenance", incidental repairs which neither materially add to the value of the property nor appreciably prolong the property's life, but keep the property in a condition of fitness, efficiency or readiness.

2. Studies and Reports

While studies and reports are an allowable CPA use, CPA funds cannot be used to update existing studies or prepare studies that would typically be undertaken by a city department or board/commission (i.e. Master Plan, Open Space Plan, Historic Preservation Plan, etc.).

Studies and reports can be undertaken as a phase of an approved project. The CPC can also use its reserved administrative account funds to undertake general studies that will assist them in identifying needs and possibilities for the use of CPA funds.



***15 Ward Street
Pocket Park
Before & After***



II. FY16 Annual Report

A. FY16 Funding Awards

In May, 2016, the CPC submitted its [Round 3 Report on Funding Recommendations for the Salem City Council](#). The City Council approved the CPC's funding recommendations for twelve projects:

- Housing
 - Boston Street Crossing \$59,500
- Historic Resources
 - Preserving Emmerton House \$50,650
 - Proctor's Ledge Memorial \$179,140
 - Fort Pickering Restoration Phase II \$70,000
 - Salem Willows Pavilions Preservation \$15,000
 - Salem Public Library Window Frames & Sills \$102,000
- Open Space/Recreational Land
 - Forest River Bathrooms \$85,000
 - Ryan Brennan Memorial Skate Park Renovation \$25,000
 - Forest River Pool Conditions Assessment \$20,000
 - Mack Park Bathrooms \$50,000
 - Bentley Academy Charter School Playground \$73,500
 - Collins cove Playground Renovation \$83,000

In addition to the above awards, the CPC recommended and the City Council approved the following at separate City Council meetings:

- Increase in funding for FY15 Bates School Playground for an additional \$4,000; and
- Increase in funding for FY15 Salem Common Fence for an additional \$8,000.

In addition, the CPC recommended the following, which as of the date of this plan are with the City Council:

- Bonding of \$1.4 million with a bond term of 20 years for the purpose of the acquisition of 289 Derby Street; and
- Funding of design and permitting costs for the acquisition of 289 Derby Street for \$100,000.

B. State Reporting

Community preservation communities are required to submit three reports annually. These reports are:

- A "Community Preservation Surcharge Report" (Form CP-1) that contains the information needed to distribute the state matching funds to the community. This report is submitted to the Municipal Data Management/Technical Assistance Bureau.
- A "Community Preservation Fund Report" (Form CP-2) that details fund activity of the previous fiscal year and fund balances as of 6/30. This report is submitted to the Bureau of Accounts.

- A “*Community Preservation Initiatives Report*” (Form CP-3) that details community preservation projects of the previous fiscal year. This report is submitted to the Executive Office of Energy and Environmental Affairs (EOEEA).

In the Appendix of this plan is a copy of CP-1 and CP-2 along with pertinent information from CP-3.

C. Status of Projects

Open Projects

FY15 Awards

Harbor and Lafayette Homes – NSCDC is waiting on funding decisions and is managing the property as is. Architectural plans are fully designed and they are ready to move forward when the project gets funded. Both buildings are occupied.

Greenlawn Cemetery: Dickson Memorial Chapel Restoration – The City has selected McKinley, Kalsow and Associates in partnership with Structures North Engineering. This team has completed a condition assessment, plans and draft specifications that are currently under review. The City has also received a \$50,000 MPPF grant to leverage CIP and CPA funds received. Anticipated work for this restoration phase includes stained glass window and tracery restoration of the east rose window, exterior masonry repair on a large stone over the conservatory tunnel, repairs to interior wood floor joists, gutters and other closely associated repairs. Work will start in the winter (removal of the rose window) and end June 30, 2017.

Charter St. Burial Ground Preservation/Improvement – The stone conservators have completed a conditions assessment and are working at the cemetery to continue to restore stones and tombs. Stone conservation work has been completed. Full landscape plans and a budget have been completed by Martha Lyon LLC. The landscape plans have been approved by the Cemetery Commission, Design Review Board and Salem Redevelopment Authority and are going through final City review.

Hamilton Hall Window Restoration – Agreement has been executed. The Preservation Restriction is being executed and filed with the Registry of Deeds.

Salem Common Fence Restoration – Phase 2 (FY14 CPA funded) is complete. For Phase 3 (FY15 CPA funded), the City has selected DeAngelis Iron Works, Inc. as a foundry and contractor for construction. They will be restoring 15 fence sections and 3 bollards in this phase along Washington Square East and the entrance at Washington Square South along the playground. The common fence construction will be completed in Spring, 2017.

McGlew Park Redesign – The City submitted a PARC Grant proposal to fund construction. If awarded the PARC Grant, a final bid package would be completed by June 2017 with construction between July 2017 and June 2018.

Mary Jane Lee Park improvements – The City was awarded a PARC grant for this project in the fall of 2015. Design was completed in July. Construction will begin this Fall and be completed by July 1, 2017.

Camp Naumkeag Rehabilitation Master Plan – The consultant contract was signed on 4/5/16 and meetings are underway.

FY15 Awards

Boston Street Crossing – Harborlight Community Partners continues to seek funding from various sources to put the complicated funding package in place.

Preserving Emmerton House – The Funding Agreement has been executed. The Preservation Restriction is in development.

Proctor's Ledge – The boundary and topographical survey work has been completed and the site was cleared of low and overhanging limbs, dead limbs and brush, trash and leaves. This fall, a new fence and landscape screening will be installed along the southern boundary of the parcel and along a portion of the ledge per neighbors' request and to respond to safety concerns. Street improvements to Proctor Street are underway with a new sidewalk and tree plantings. The City is also in contact with a sign designer for an interpretive sign and wayfinding signage. Concepts designs for the memorial are on the City website. The new memorial at Proctor's Ledge is scheduled to be installed by June of 2017.

Fort Pickering Phase II – The team that undertook Phase I is preparing a proposal and cost estimates. Work will commence by Spring, 2017.

Salem Willows Pavilions Restoration – In the process of obtaining vendor quotes. Work slated for Summer 2017 completion.

Salem Public Library Window Frames & Sills – The architect has completed his assessment of the damage to each window sill and is in the process of preparing up project specifications.

Forest River Park Bathrooms – Gray Architects has been engaged. Work slated for Spring, 2017.

Ryan Brennan Memorial Skate Park Renovation – Preparing Request for Proposals and developing a stakeholder group.

Forest River Pool Conditions Assessment – Preparing Request for Proposals.

Mack Park Bathrooms – Designs are complete and will be going out to bid.

Bentley Academy Charter School Playground - They are currently pursuing referrals of playground contractors including those on the MHEC Cooperative contract and plan to start seeking bids soon. They are also pursuing private funds to complete the remaining estimated budget. Major construction is expected to begin in the spring, with completion by the end of the 2016-17 academic year.

Collins Cove Playground Renovation – Requesting proposals from various playground architects

Completed Projects:

FY14 Awards

- **52-60 Congress/105-111 Dow Streets Housing Acquisition** – The CPA funded acquisition is complete. For the rehabilitation work, the closing was completed in June, 2016 (including the filing of the Affordable Housing Restriction), with work to be complete in 2017.
- **Old Town Hall Window Restoration**
- **Salem Common Fence Phase II**
- **Winter Island: Fort Pickering Phased Rehabilitation Phase 1**
- **Choate Statue**
- **Salem Public Library Roof Replacement**
- **Winter Island Scenic Trail**
- **15 Ward St. Pocket Park** – Work completed. Restriction on land to be executed.
- **Driver & Patten Pocket Park Rehabilitation**
- **Salem Community Gardens Improvement**

FY15 Awards

- **Salem Council Chambers Historic Artwork Conservation/Restoration**
- **House of the 7 Gables: Hawthorne Birthplace Roofing Project** – The Preservation Restriction has been executed by the Gables and is in process of being recorded.
- **Forest River Conservation Area Trail Assessment**
- **Bates Elementary School Playground**
- **Salem Public Library, Brownstone & Brickwork**

***Salem Community
Garden @ Palmer
Cove Park
Before & After***



FY17 Community Preservation Plan FY17 Funding & Timing

III. FY17 Funding & Timing

A. Financial Forecast

Massachusetts CPA regulations require that 10% of annual CPA revenues be set aside or spent for housing projects, 10% for historic projects and 10% for open space & recreation projects. The remaining 70% of CPA funds received in each fiscal year is available to be appropriated to specific activities or reserved until activities are identified. Up to five percent of the CPA funds raised annually may be used for administrative activities related to the work of the CPC (administrative help, professional help, appraisals, legal assistance, general studies, newspaper ads, miscellaneous expenses, etc.). The CPC recommends how the remaining CPA revenues shall be divided among the three purposes. The budget must be approved by the City Council before the annual tax rate is set. The City Council approved the FY17 budget at its meeting of May 12, 2016 (based up an estimate of \$500,000 in surcharge revenues and \$95,000 in State match funds). Current available fund revenues and expense estimates are:

Approved CPA Budget FY17

Open Space & Recreation	
Projects Reserve	\$59,500
Housing Projects Reserve	\$59,500
Historic Projects Reserve	\$59,500
Administration Expenses	\$29,750
FY16 Budgeted Reserve	<u>\$386,750</u>
TOTAL	\$595,000

Revenues:

	Estimated Surcharge	Actual Surcharge	Estimated State Match	Actual State Match	Match %	City Appropriation	+Interest -write-offs	Projects completed under budget	TOTAL REVENUE
FY14	\$400,000	\$475,084.64				\$50,000	\$536.56		\$525,621.20
FY15	\$435,000	\$524,153.00	\$100,050	\$169,707.00	31.47%		\$1,399.85		\$695,259.85
FY16	\$450,000	\$556,348.63	\$81,000	\$155,406.00	29.70%		\$580.70		\$712,335.33
FY17	\$500,000		\$95,000					\$15,550.00	\$610,550.00
									\$2,543,766.38

Awards/Expenditures:

Awards/Admin		Total
FY14 Funding Round	\$641,553.00	\$714,974.00
FY14 Admin Actual	\$5,351.00	
Between Round Awards	\$68,070.00	
FY15 Funding Round	\$660,975.00	\$748,930.20
FY15 Admin Actual	\$7,955.20	
Between Round Awards	\$80,000.00	
FY16 Funding Round	\$812,790.00	\$833,204.21
FY16 Admin Actual	\$8,414.21	
Between Round Awards	\$12,000.00	
		\$2,297,108.41

This leaves an estimated \$246,657.97 (less \$29,750 set aside for FY17 administration costs) for total available funds of **\$216,907.97¹** to carry over into the upcoming funding round for projects. When the State match percentage projections are released in March, 2017 for FY18, the estimated State match funds and the estimated local surcharge for FY18 (to

¹ Does not include \$100,000 recommendation for costs associated with the 289 Derby Street project which is currently under City Council review.

be provided by the City Assessor) will form Salem's FY18 CPA budget. Once approved by the City Council, the FY18 budget will also be available to the CPC as it considers its funding recommendations during the FY17 funding round. It should be noted that CPA funds that are not expended in one year may be reserved (carried over to subsequent years). In addition, CPA regulations permit bonding against future local surcharge revenue.

B. Proposed Timeline

The CPC is dedicated to undertaking its responsibilities in a timely manner. Please note that the following proposed dates are tentative and may be changed as necessary by the CPC in order to ensure adequate time is provided to undertake the required tasks.

July, 2016	Updated Taxpayer Information Guide issued
October 17, 2016	Annual public hearing
November 15, 2016	State match funds released
December, 2016	Finalize FY17 Community Preservation Plan
January 9, 2017	Step 1 Determination of Eligibility Application Deadline <i>While Determination of Eligibility Applications can be received at any time, the deadline is to ensure consideration for the annual funding round.</i>
March, 2016	DOR releases State match percentage projection
March 17, 2017	Step 2 Funding Application deadline
April, 2017	CPC proposal review and development of funding recommendations
April/May, 2017	Submission of FY18 budget recommendation to City Council
May, 2017	Submission of Round 4 funding recommendations to City Council

IV. Application Process Overview

A. Step 1: Determination of Eligibility

The Determination of Eligibility Application (DOE) is the first step in a two-step application process submitting project proposals for Community Preservation Act (CPA) funds. This enables applicants to know if their project is eligible under CPA regulations prior to submitting the comprehensive Funding Application. The CPC will also determine under which category a project is deemed eligible (Community Housing, Historic Resources, Open Space or Recreation Land) and under which definition (Acquisition, Creation, Preservation, Support or Rehabilitation/Restoration). Proponents of eligible projects will be invited to submit a Funding Application and will be provided a copy of the application materials and Evaluation Criteria. Proponents of projects deemed ineligible will be notified in writing. DOEs may be submitted up to a week prior to any regular meeting. The CPC will announce an annual deadline for DOEs approximately six weeks prior to the annual funding round application deadline.

B. Step 2: Funding Round

Project proponents who are invited to submit a Funding Application will be mailed and/or emailed application materials. Project proponents may submit Funding Applications any time after they have received a Letter of Eligibility from the CPC.

To ensure project consideration for the annual round of funding, the CPC will announce an annual deadline for applications. Applications received after the deadline may also be reviewed by the CPC depending on the urgency of the project and the availability of funding.

1. *Community Preservation Committee Funding Round Review:*

During the funding round review, the CPC may request additional information. The CPC can postpone further review of the application until the next round if there is missing information, incomplete information, additional information desired, or for any matter the committee deems would delay the current funding round. The CPC may return the application for completion and resubmission. Once the CPC is satisfied with the Application's completeness, it will be accepted for funding consideration and then evaluated utilizing the Evaluation Criteria.

The CPC will vote on a rank of High, Medium or Low Priority for each project within each category (Community Housing, Historic Resources, Open Space, and Recreational Land).

After consideration of available funding, the CPC will issue one of three determinations for each project:

- **Recommended for funding** - This means the application has been selected and a funding amount will be submitted to the City Council for approval. Note: This does not necessarily mean that the total amount requested in the application will be recommended

for funding. The CPC may also include conditions as part of its funding recommendation.

- **Accepted for future consideration of funding** - Typically, this means that the project is desirable, but that other projects were deemed higher priority and that the CPC chose not to recommend funding during this round. The application will not be recommended to the City Council for funding approval *during the current round*. However, a funding recommendation will be considered at subsequent funding rounds (carried over) - or sooner, if the CPC so decides. The applicant will not need to submit a new application for the project.
- **Not recommended for funding** - The applicant will be notified in writing the reason that the project was not recommended for funding. The application as submitted will not be reconsidered at subsequent funding rounds. If the applicant desires to resubmit a project proposal, the application process must begin with a new Application for Determination of Eligibility and it is recommended that the new project proposal be a significant change over the initial proposal.

The CPC may choose not to recommend all available funds to projects. The CPC may choose to recommend awards to some projects and then carry over remaining funds. Remaining funds may be considered for any urgent projects that may arise prior to the next funding round or may be added to the following round of available funds.

C. Step 3: City Council Recommendation and Vote

The CPC's recommendations will be presented to the City Council one or more times annually. The City Council has the final authority to award funds from Salem's Community Preservation Act Fund. It may approve, approve but with a lower level of funding, or reject recommendations. The City Council takes a vote on each recommendation. It is suggested that applicants attend this meeting to answer any questions. Members of the public may speak in favor of or against specific recommendations at the public session preceding each Council meeting.

D. Step 4: Funding Awards

For projects approved by City Council, the CPC will issue award letters with information on the funding amount, funding conditions, project modification as voted by City Council (if any), and guidelines for project execution.

E. Additional Information

1. Requirements

Non-city CPA funding awardees must sign a Memorandum of Agreement (MOA) which describes the implementation and reporting requirements. The MOA will be tailored to each project and may include one or more of the following conditions or other conditions as identified by the CPC:

- **Status Reports** - Status reports will be required quarterly. If it becomes apparent that the project will not be moving forward after a reasonable time period, the CPC may recommend to the City Council that funds be reprogrammed.
- **Photographs** - Before and after photographs must be provided

- **Project Sign** (temporary and/or permanent) - A CPA project sign may be required to be posted at the project site, which must be paid out of the CPA funding award. The CPC may add the cost of the sign to the project funding award recommendation.

For projects awarded funding, all required permits and approvals must be obtained before construction commences. Please check if your project will require permitting or approvals from any City boards or Departments. Examples are the Electrical, Engineering, Fire Prevention, Health, and Building Departments, the Cemetery, Conservation, Historical or Park & Recreation Commission and/or the Planning Board, Salem Redevelopment Authority or Zoning Board of Appeals.

Projects receiving CPA funding shall credit this source of funding in all promotional materials.

2. Restrictions Required for Acquisition of Real Property

Section 12a of the Community Preservation Act requires that a permanent restriction be placed on any "real property interest" acquired using CPA funds to ensure that the property continues to be used for the applicable CPA purpose. Given this statutory requirement, a CPA project involving acquisition of any real property interest is technically not complete until the restriction is approved by the appropriate state agency and filed at the Registry of Deeds. These are the four types of restrictions that are commonly used in CPA projects:

For Open Space Conservation and Outdoor Recreation Projects: Conservation Restrictions
>> Approved by the [MA Executive Office of Energy and Environmental Affairs \(EOEEA\)](#)

For Community Housing Projects: Affordable Housing Restrictions
>> Approved by the [MA Dept. of Housing and Community Development \(DHCD\)](#)

For Open Space Agricultural Projects: Agricultural Preservation Restrictions
>> Approved by the [MA Dept. of Agricultural Resources \(DAR\)](#)

For Historic Projects: Historic Preservation Restrictions
>> Approved by the [Massachusetts Historical Commission \(MHC\)](#)

3. Procurement

The procurement laws are multiple state statutes that deal with various aspects of municipal procurement including building construction, public works construction, design services, supplies, services, and real property. In addition, prevailing wage laws apply for construction projects undertaken by public entities in the state as well as to some limited services provided to them. The procurement and prevailing wage laws are complicated – they apply in various ways depending on circumstances of the situation and sometimes exemptions may apply. The City of Salem Department of Planning and Community Development will work with CPA awardees to ensure the proper method of procurement is undertaken.

For the purposes of describing the applicability of procurement laws to CPA projects, there are three main categories that CPA projects could fall into: capital improvement projects, the purchase of real property, and contracting for professional services. Each of these three project categories must adhere to different procurement laws as explained in more detail below.

Capital Improvement Projects (MGL c.149 and c.30 s.39M)

Capital improvement projects are “brick and mortar” projects such as creation of a new playground, restoration of a building, construction of housing, wetlands restoration, etc. The matrix below very generally describes how the procurement laws may apply to the various types

of capital improvement projects, depending on who owns the property and who administers the project.

Property Owner	Project Administrator	Do Procurement & Prevailing Wage Laws Apply?
Municipality/State/Other public entity	Municipal/State/Other Public Entity	YES
Municipality/State/Other public entity	Community Group (e.g., PTO, friends group, neighborhood association, etc.)	YES*
Private entity (non-profit organization, private citizen, etc.)	Private entity	NO
Municipally owned and leased by private entity	Private leasing entity	POSSIBLY**

*Note: Even if a service is discounted or donated, prevailing wage may still apply.

**Note: For complex situations, an opinion from municipal counsel or the Attorney General's Office may be needed.

Acquisition of Real Property (MGL c.30B)

Acquisition of real property includes buying land, buildings, artifacts or a real estate interest (such as a deed restriction). The purchasing laws (c.30B) that apply to acquisition of real property using public funds deal with how to establish fair market value. This area of the law makes a special exception specifically for real property acquired with Community Preservation Act funds. The Community Preservation Act (MGL c.44B s.5(f)) states that "*Section 16 of chapter 30B shall not apply to the acquisition by a city or town of real property or an interest therein . . . no such real property, or interest therein, shall be acquired . . . for a price exceeding the value of the property as determined by such city or town through procedures customarily accepted by the appraising profession as valid.*" The bottom line is: Acquisitions of real property interests under CPA are exempt from MGL c.30B, but you must get an appraisal prior to acquiring any real property interest. And the municipality cannot appropriate more than the appraised value to acquire the real property interest.

Contracting Professional Services (MGL c.7 s.38A½ and c.30B)

Contracting professional services includes hiring a housing consultant, planner, appraiser, landscape architect, etc. MGL c.7 s.38A½ applies when procuring design services for public building projects and establishes a designer selection process for construction projects over \$100K. Prevailing wage does not apply to these types of design services. MGL c.30B applies to other professional services and establishes three monetary thresholds that trigger different selection and procurement procedures, with the most latitude established for contract amounts under \$5K. If a contract is between \$5K and 25K, then three quotes must be solicited. And, for contracts at and over \$25K, sealed bids or proposals are required.

Community Preservation Plan

Community Preservation Needs, Possibilities and Resources

V. Community Preservation Needs, Possibilities and Resources

This section includes the CPC's Evaluation Criteria for reviewing proposed projects, followed by category-specific information (Historic Preservation, Community Housing, Open Space and Recreation), followed by pertinent excerpts from various plans, studies and other public documents that make up Salem's the needs, possibilities and resources.

A. Evaluation Criteria

1. General Criteria

Primary Criteria: Projects must meet the primary criteria below:

1. Eligible for Community Preservation Act (CPA) funding according to the requirements described in the CPA legislation (Chapter 44B of Mass. General Laws).
2. Consistent with the Community Preservation Committee's *Community Preservation Plan*
3. Consistent with the recommendations of the most current relevant planning documents that have received public scrutiny and input, as applicable. A list of various planning documents is located within the *Community Preservation Plan* and at http://salem.com/Pages/SalemMA_DPCD/studies.
4. Preserve and enhance the character of the city.
5. Demonstrate practicality and feasibility, and demonstrate that they can be implemented within a reasonable, feasible schedule and budget.
6. The applicant/applicant team has successfully implemented projects of similar type and scale, or has demonstrated the ability and competency to implement the project as proposed.
7. The applicant has site control, or the written consent by the property owner to undertake the project.

NOTE: The CPC will also give due consideration to the urgency of the project, with particular consideration given to those projects whose successful implementation is constrained by scheduling factors not controlled by the applicant. In cases of emergency applications, applicants must demonstrate a compelling case (i.e. historic property at risk of irreparable loss, opportunity for immediate acquisition of open space or other compelling case).

Secondary criteria: Projects are encouraged to meet one or more of the following secondary criteria (listed in no particular order):

8. Serve more than one CPA purpose (historic, housing, open space, recreation).
9. Protect resources that would otherwise be threatened.
10. Demonstrate a long-term, feasible strategy for ongoing maintenance of the CPA funded project.
11. Leverage additional public and/or private funds (e.g. qualifies the project for additional grants from other sources), receives partial funding from other sources and/or voluntary contributions of goods or services or demonstrates that the proponent has unsuccessfully attempted to leverage additional funds and that CPA funds are the source of last resort.

12. Preserve currently owned city assets or improve the utilization of currently owned city assets (i.e. cemeteries, parks, historic buildings, open space, recreation areas).
13. Produce an advantageous cost/benefit value (number of persons served, encourages economic development, enhances tax base).
14. Projects that are regional (i.e. collaborative projects with other communities)
15. Clean up contaminated lands.
16. Visible to the public (visible to passersby, physically accessible to visitors).
17. Utilize green concepts/components, sustainable initiatives and low energy.
18. Projects outside of those typically funded through the city's general budget.
19. Received written endorsement by other municipal boards or departments, as applicable.
20. Received broad-based support from community members, especially project site abutters.
21. Projects that are in gateways to the city, including Bridge Street Neck, Lafayette Street, Loring Avenue, Boston Street, Highland Avenue and North Street.
22. Projects that are within the Point Neighborhood or those that benefit a currently underserved population.

2. *Category Specific Criteria*

The General Evaluation Criteria stated above apply in combination with category-specific criteria outlined below.

a. Historic Preservation - Projects which protect, preserve, enhance, restore and/or rehabilitate historic, cultural, architectural or archaeological resources of significance.

Primary Criteria: Projects must meet the primary criteria below:

- A. Listed on the State Register of Historic Places (individually, within a district, as part of a multiple property submission, multiple resource area, or thematic resource area, or under a Determination of Eligibility) or the Salem Historical Commission has made a determination that the resource is significant in the history, archaeology, architecture, or culture of Salem (in writing).
- B. Minimum of 50 years old.
- C. Comply with the Secretary of the Interiors Standards

Historic resources that the Community Preservation Commission determines to be of greater architectural and/or historical significance will be given preference.

Secondary Criteria: Projects are encouraged to meet one or more of the following secondary criteria (listed in no particular order):

- D. City-owned properties, features or resources of historical significance.
- E. Non-profit owned properties, features or resources of historical significance, especially those that are threatened
- F. Demonstrate a public benefit to residents and/or businesses.
- G. Projects are highly utilized and/or highly visible.
- H. Provide permanent protection for the historic resource.
- I. Incorporate universal design, where feasible.

b. Community Housing - Projects which provide affordable rental and affordable ownership opportunities.

Primary Criteria: Projects must meet the primary criteria below:

- A. Contribute to the goal of 10% affordability as defined by Chapter 40B of Mass. General Laws.
- B. Ensure long-term affordability (minimum of 30 years).

Secondary Criteria: Projects are encouraged to meet one or more of the following secondary criteria (listed in no particular order):

- C. Provide mixed income housing with a higher percentage of affordable units than required by state requirements pursuant to Chapter 40B.
- D. Address the needs of a range of qualified households, including extremely low, very low, and low income families and individuals (up to 60% of median income).
- E. Demonstrates a housing need of an underserved population in Salem.
- F. Promote use of existing buildings or construction on previously-developed land or city- owned sites.
- G. Provide housing that is harmonious in design and scale with the surrounding community.
- H. Incorporate universal design.
- I. Demonstrates a high degree of sustainability and low energy use (e.g. green roofs).

c. Open Space

Primary Criteria: Projects that meet one or more of the primary criteria will be given the highest priority for funding.

- A. Permanently protect important wildlife habitat, particularly areas that include:
 - a. Locally significant biodiversity;
 - b. Variety of habitats with a diversity of geologic features and types of vegetation;
 - c. Endangered habitat or species of plant or animal;
 - d. Wildlife corridors, connectivity of habitat or prevent fragmentation of habitats;
 - e. Wetlands and wetland buffers.
- B. Restore filled wetlands or otherwise degraded wetlands.
- C. Preserve and protect important surface water bodies, including streams, wetlands, vernal pools or riparian zones.
- D. Preserve, enhance and expand the city's network of undeveloped, open spaces that include and surround its natural areas (including its coastline, inland and coastal wetlands and rivers).
- E. Climate change adaptation:
 - a. Protection of open space within both the current 100-year flood zone and areas that may become part of the flood zone in the future;
 - b. Protection of open space in areas to which wetlands may migrate;
 - c. Enhancement of coastal wetlands that will absorb wave action from storms and provide flood storage; and stormwater management.

Secondary Criteria: Projects are encouraged to meet one or more of the following secondary criteria (listed in no particular order):

- F. Provide connections with existing trails, protected open space or potential trail linkages.

- G. Protect key parcels and sites for multi-purpose trails, scenic and water views.
- H. Improve and protect the waterfront for recreational use, improve access to and enhance the aesthetic experience of the waterfront.
- I. Provide flood control/storage by protecting undeveloped land within the floodplain.
- J. Enhance protection of land governed by the Conservation Commission (such as the Forest River Trail).
- K. Increase pedestrian accessibility and connectivity, and maximizes universal access, where applicable.
- L. Protect drinking water quantity and quality.
- M. Preserve active agricultural use.
- N. Provide opportunities for passive recreation and environmental education, including waterfront amenities.
- O. Includes new or improved signage directing people to the city's natural areas.

d. Recreation

Primary Criteria: Projects which meet one or more of the primary criteria will be given the highest priority for funding.

- A. Expand the quality, variety and range of passive and active recreational opportunities for all age groups and abilities.
- B. Serve a significant number of residents.
- C. Support multiple recreation uses.

Secondary Criteria: Projects are encouraged to meet one or more of the following secondary criteria (listed in no particular order):

- D. Contribute to providing a park/open space in every neighborhood - creates a new neighborhood park or upgrades an existing neighborhood park
- E. Jointly benefit Conservation Commission and Park and Recreation Commission initiatives by promoting recreation, such as hiking, biking, walking, running and boating.
- F. Maximize the utility of land already owned by the city (e.g. school property).
- G. Promote the use of railroad right-of-ways and other corridors to create safe, local and regional non-motorized alternative transportation routes
- H. Interconnect schools, open space, recreation areas and recreational facilities.
- I. Expand shoreline bicycle and pedestrian access
- J. Improve and protect the waterfront for recreational use, increase/improve access to and enhance the aesthetic experience of the waterfront
- K. Maximize universal access
- L. Include educational components
- M. Include new or improved signage directing people to parks, recreational activities and/or the waterfront, etc. or orient people within parks and recreational areas or along non-motorized routes.
- N. Increase pedestrian accessibility and connectivity, provide amenities to pedestrians.

B. Category Specific Information

1. *Historic Preservation*

As the state's second oldest city, the City of Salem's built environment reflects four centuries of history with more than 12,500 housing units constructed prior to 1960. Our inventoried assets represent the 3rd largest in the Commonwealth of Massachusetts. More than 1,700 buildings are listed on the National Register of Historic Places. Continuing maintenance of historic properties requires substantial attention and resources, and both private owners and public institutions focus considerable efforts in this direction. Many of these resources are essential to Salem residents' and the region's economy and quality of life. Salem's historic resources include:

- Fine examples of over ten historic styles of American architecture, ranging from mid-17th century through early 20th century;
- Arguably the finest collection of Federal Style and Federal Period architecture in the United States
- The finest collection of Samuel McIntire designed properties in the United States (McIntire Historic District Walking Trail).
- Some of the earliest established and best preserved urban parks in the nation;
- One of the few remaining colonial period wharves in the country;
- Many seventeenth and early eighteenth century structures from the Puritan and early maritime periods;
- Four local historic districts (Derby Street, Lafayette Street, McIntire, and Washington Square) encompassing approximately 550 17th, 18th, and early 19th century structures;
- A large early cotton textile factory, immigrant settlement houses and neighborhoods, and leather industry archeological resources;
- Historic sites associated with the late 17th century witchcraft trials; and
- Prehistoric Native American archaeological resources dating back approximately 4,000 years, ranging from the Late Archaic through Early, Middle, and Late Woodland Periods to Contact Period.

CPA funds may be spent on the acquisition, preservation, rehabilitation and restoration of historic resources. For non-City property, projects will require the filing of a permanent Preservation Restriction on the property at the Registry of Deeds that has been approved by Massachusetts Historical Commission. Communities using CPA funds on historic resources must adhere to the [United States Secretary of the Interior's Standards for the Treatment of Historic Properties](#).

Section 2 of the CPA legislation defines [historic resources](#), [preservation](#), and [rehabilitation](#). Under CPA, an historic resource is defined as a building, structure, vessel, real property, document or artifact that is either:

- listed on the State Register of Historic Places; or
- determined by the local Historic Commission to be significant in the history, archeology, architecture, or culture of the city or town.

The State Register of Historic Places is a listing of buildings, structures, objects and sites that have received local, state or national designations based on historical or archaeological significance. Included are all properties listed on the National Register of Historic Places and all local historic districts. To determine if a property is listed on the State Register, you can research one or more of the following:

- Massachusetts Cultural Resource Information System (MACRIS) - <http://mhc-macris.net/>
- National Register of Historic Places - <http://www.nps.gov/nr/research/>
- Salem National Register and Historic Districts & Landmarks Map (2003) - http://salem.com/Pages/SalemMA_Historic/historical_national.pdf
- Salem local historic districts map - http://salem.com/Pages/SalemMA_Historic/LocalHistoricDistricts.pdf

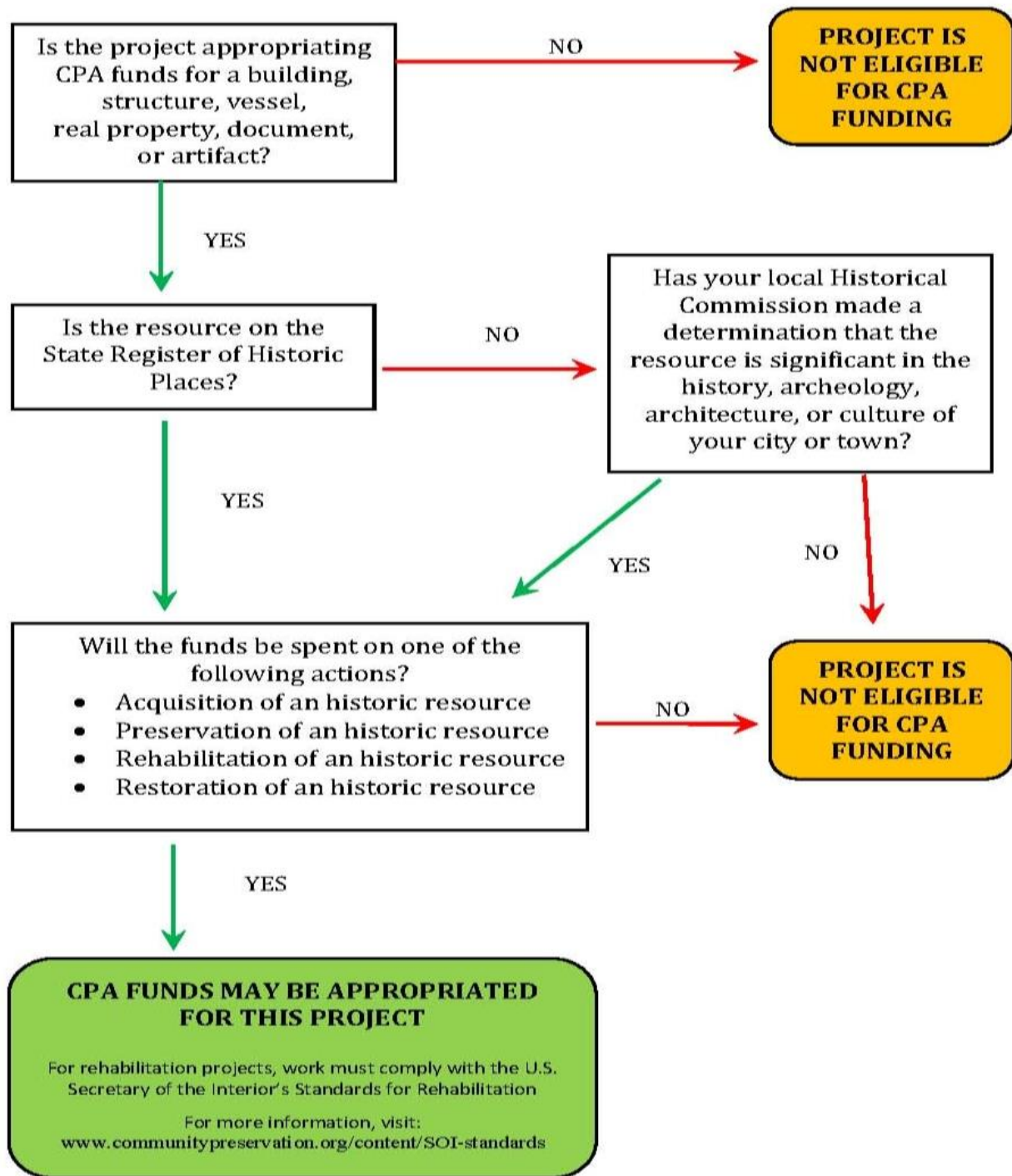
or contact the City of Salem Department of Planning & Community Development for assistance.

For more information, this flow chart details the steps to determining whether your historic preservation project qualifies for CPA funding (please also refer to the CPC's Evaluation Criteria).



Salem Common Fence Before & After





2. Community Housing

Salem is a vibrant city with a complex history. As the city continues to evolve, it undergoes changes that increase its diversity and wealth, but also present challenges. The cost of housing and the shortage of available affordable housing for low- and extremely low-income households represent one of Salem's greatest needs. Salem's population is 46.75 percent low- to moderate-income persons. In May, 2015, the MA Department of Housing & Community Development calculated Salem's Chapter 40B subsidized housing inventory at 12.98%.

According to the City of Salem's *5-Year Consolidated Plan* completed in May, 2015, Salem is home to over 41,000 residents and is one of the more diverse communities on the North Shore in terms of ethnicity and race; the proportion of minority residents being slightly higher than Essex County or Massachusetts overall. Household incomes have fluctuated over the past five years; the median household income according to the 2009-2013 ACS was \$64,214, compared with an estimated median of \$61,906 in 2006-2008. Nearly half of Salem's households have incomes below 80% of the HUD Area Median Family Income for the Greater Boston/North Shore area, which was approximately \$90,000 in the 2007-2011 ACS. One in five households earn less than 30% of the median, while an additional 14% earn between 30% and 50% of median income. Seniors fall disproportionately into these lower income brackets; for those aged 75 and over, 35% and 31% of households fall within these two income brackets, respectively. The cost of housing has a significant impact on Salem's lower income population. Renters bear the greatest burden; nearly two thousand households pay more than half of their income on rent, while a similar number spend between 30% and 50% of their income on housing costs. The study calculates that Salem's affordable housing unit need is currently 480 units.

According to the *Salem Housing Needs and Demand Analysis* completed by the Metropolitan Area Planning Council in July, 2015, Salem offers a range of housing opportunities from large, multi-family communities to historic, single-family homes. Although significant gains have been made to improve the affordability of housing, Salem still faces several challenges. Creating homes for the next generation of workers while also addressing the complex needs of an aging and increasingly diverse population is one of those challenges. Though Salem saw only modest population gains over the past decade, the community is growing more diverse. Salem's affordable and historic homes, combined with its access to commuter rail and the region's job centers have attracted young, diverse workers and families in the region, which is evidenced by its high rate of non-family households and low average age. Should Salem continue to retain and attract young workers, the city's population is projected to increase by 4%-9% from 2010 to 2030 and the number of households is projected to increase by 10-14% during that same period. Salem is expected to see significant increases in housing demand over the coming decade. To continue to retain and attract more workers to fill labor gaps left by retiring baby boomers, Salem should continue to maintain its high stock of multifamily housing. Although Salem ranks high in rates of poverty and cost-burden status, its proximity to transit and lower median gross rent prices help to defray costs. Salem's relatively count of subsidized housing inventory surpasses the Commonwealth's 10% affordable housing target, however, many units have expiring deed restrictions which will situate Salem below 10% affordability.

[Section 2 of CPA legislation defines community housing.](#) The United States Department of Housing and Urban Development (HUD) income guidelines are used to determine who is eligible to live in the affordable housing units developed by communities with their CPA funds. Housing developed with CPA funds may be offered to those persons and families whose annual income is less than 100 percent of the area wide median income, as determined by HUD. Please note, though, that communities may choose to limit certain housing units created with CPA funds to those persons and families earning less than 80 percent of the area wide median income annually, as determined by HUD. This allows communities to include these units on their Subsidized Housing Inventory (SHI) with the state. Projects will require the filing of a permanent Affordable Housing Restriction on the property at the Registry of Deeds that has been approved by the MA Department of Housing and Community Development.

CPA funds may be spent on the acquisition, creation, preservation and support of community housing, and for the rehabilitation or restoration of community housing that has been acquired or

created using CPA funds. The CPA requires that whenever possible, preference be given to the adaptive reuse of existing buildings or construction of new buildings on previously developed sites.

3. Open Space

[Section 2 of the CPA legislation defines open space.](#) It includes, but is not limited to, the following:

- Land to protect existing and future well fields
- Aquifers, recharge areas, and watershed land
- Agricultural land
- Grasslands, fields and forest land
- Fresh and salt water marshes and other wetlands
- Ocean, river, stream, lake and pond frontage
- Beaches, dunes, and other coastal lands
- Lands to protect scenic vistas
- Land for wildlife or nature preserve
- Land for recreational use (see separate category information, below)

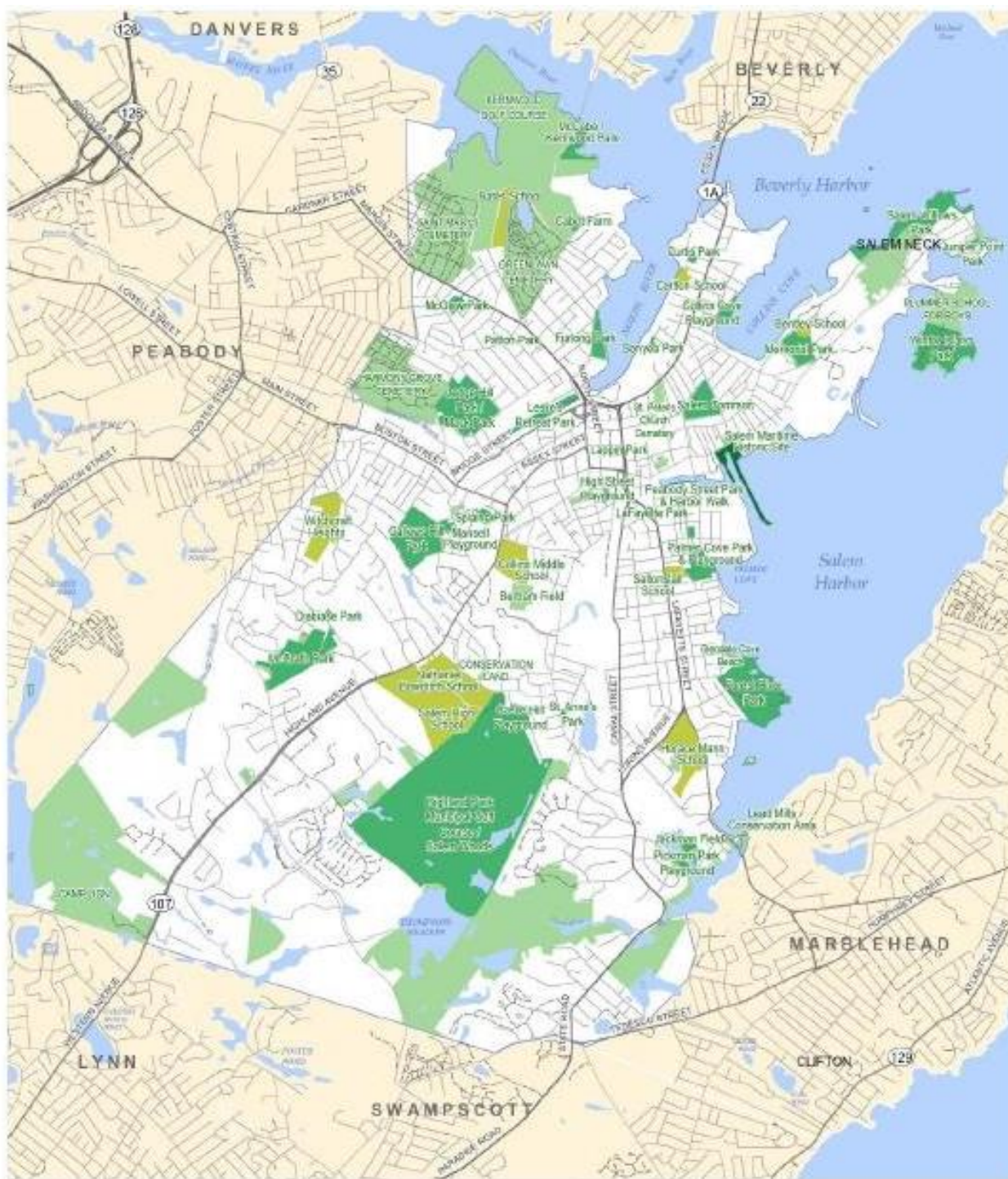
CPA funds may be spent on the acquisition, creation, and preservation of open space, and for the rehabilitation or restoration of any open space that has been acquired or created using CPA funds. It is important to note that a permanent deed restriction is required for all real property interests acquired under CPA. This restriction must be filed as a separate instrument, such as a Conservation Restriction (CR) or Agricultural Preservation Restriction (APR), and until this step has been completed, the terms of the CPA acquisition have not been technically fulfilled.

Below are maps of the City of Salem's:

- Open Space Inventory; and
- Scenic Resources and Unique Environments.

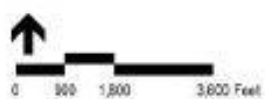


Choate Statue Restoration



Legend

- City Parks
- National Parks
- Protected and Recreational Open Space
- Schools



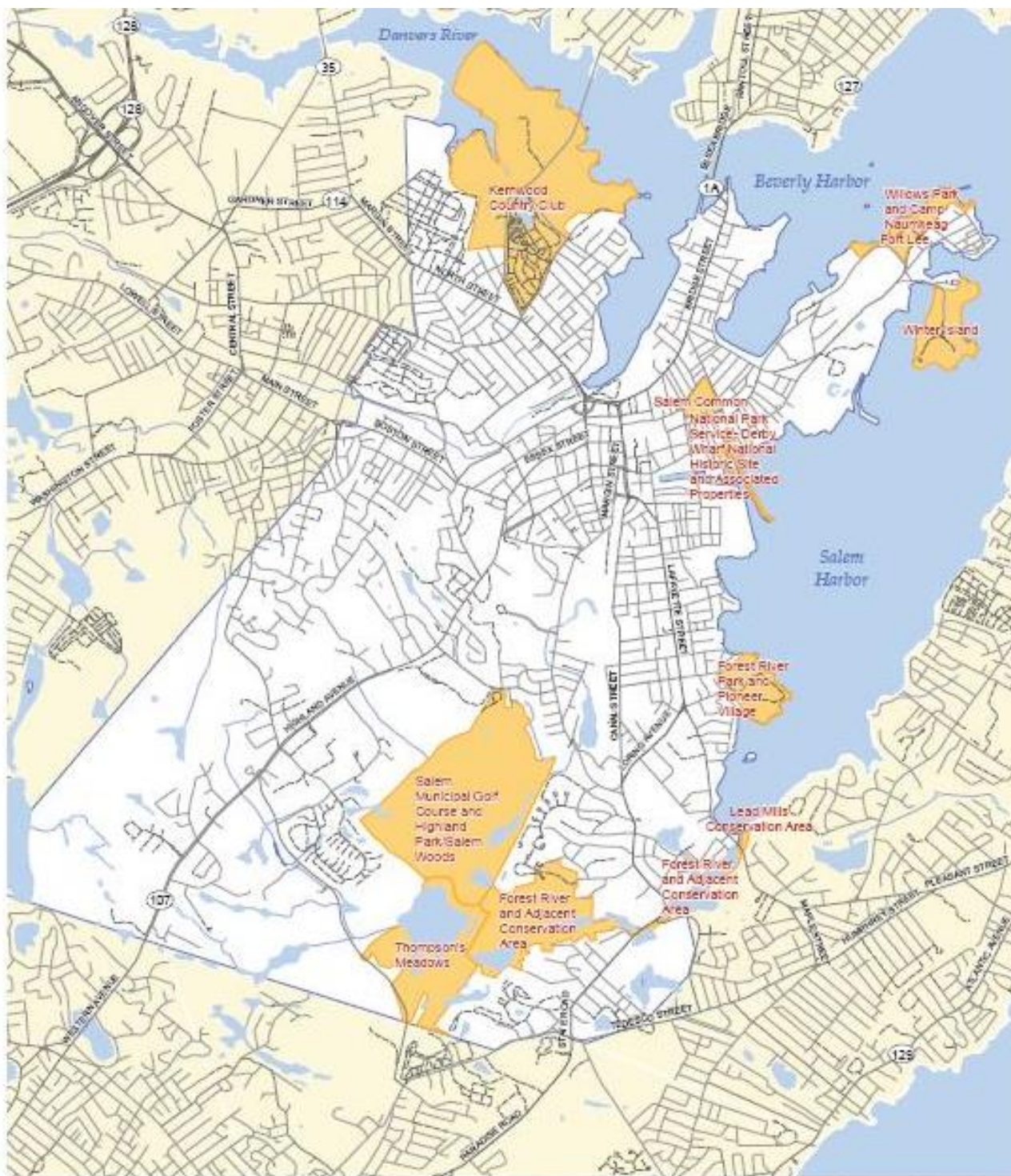
City of Salem Open Space and Recreation Plan Update 2015

Salem Open Space and Recreation Plan

Map 6

Open Space Inventory

Data Sources:
 City Parks - City of Salem
 Protected and Recreational Open Space - MassGIS



Legend

Scenic Resources and Unique Environments



0 900 1,800 3,600 Feet

City of Salem Open Space and Recreation Plan Update 2015

Salem Open Space and Recreation Plan

Map 5

Scenic Resources and Unique Environments

Data Sources:
City Parks - City of Salem
Protected and Recreational Open Space - MassGIS

4. Recreation

[Section 2 of the CPA legislation also defines recreational use.](#) The focus for CPA recreational projects is on **outdoor** passive or active recreation, such as (but not limited to) the use of land for:

- Community gardens
- Trails
- Noncommercial youth and adult sports
- Parks, playgrounds or athletic fields

CPA funds may not be spent on ordinary maintenance or annual operating expenses; only capital improvements are allowed. In addition, CPA funds may not be used for horse or dog racing facilities, or for a stadium, gymnasium, or similar structure. This prohibition has generally been interpreted to mean that CPA funds may be used only for outdoor, land-based recreational uses and facilities.

CPA funds may be used for the acquisition of land to be used for recreation, or for the creation of new recreational facilities on land a community already owns. A 2012 amendment to CPA broadened the law to also allow for the rehabilitation of existing, outdoor recreational facilities. The amendment made it clear that with respect to land for recreational use, "rehabilitation" could include the replacement of playground equipment and other capital improvements to the land or the facilities thereon to make them more functional for their intended recreational use.

Another change ushered in by the 2012 amendment was a prohibition on the use of CPA funds for the acquisition of artificial turf for athletic fields. Communities may still use their CPA funds for other aspects of a field project, but must appropriate non-CPA funds to acquire the artificial turf surface.

Non-city projects will require the filing of a permanent restriction on the property at the Registry of Deeds.

Fort Pickering Phase 1 Completion



C. Plans, Studies and Other Public Documents

As applicable, project proponents submitting funding applications should provide evidence that the project proposed for CPA funding is consistent with the recommendations of the most current and relevant planning documents that have received public scrutiny and input. The CPC encourages regional proposals.

Located at <http://www.salem.com/planning-and-community-development/pages/studies-and-reports> are numerous studies and reports that have been developed and vetted through public processes. Such plans are incorporated in this Community Preservation Plan by reference. Some of the recommendations are potentially eligible to be funded through CPA. It is useful to summarize the relevant needs, goals and recommendations of some of these plans (see excerpts below - most with plan links).

1. Preservation Master Plan Update (2015)

This Historic Preservation Plan Update serves as both an educational tool for fostering greater awareness and appreciation for Salem's historic resources and the role these buildings, structures, objects, landscapes, and burial sites play in visually defining the City's character and unique sense of place and a guidance document to prioritize local preservation efforts. The Plan summarizes opportunities and issues affecting Salem's historic resources and community character and includes recommendations to address the City's preservation needs. The Plan's major topics, as provided below, each include several recommended actions.

- Promoting Salem's History and Historic Resources
 - Educational Programming and Activities
 - Collaboration with Salem's Preservation Partners
- Promoting the Economic Benefits of Historic Preservation
- Integrating the Arts and Historic Preservation
- Protecting Salem's Historic Resources
 - Identification and Evaluation of Historic Resources
 - Salem's Historic Resources Inventory
 - Archaeological Resources
 - National Register of Historic Places
- Protecting Salem's Historic Resources and Historic Character
 - Preservation Restrictions
 - Salem's Municipal Preservation Efforts
 - Salem Historical Commission
 - Strengthening Salem's Historic Preservation Ordinances
- Other Preservation Tools Available to Protect Historic Resources
 - Protecting Individual Resources
 - Protecting Historic Neighborhoods
- Integrating Historic Preservation Objectives into City's Zoning Development Review Process
 - Communication between City's Boards, Commissions and Departments
 - One Stop Meetings
 - Site Plan Review
 - Special Permits and Variances
 - Urban Renewal Area

- Entrance Corridor Overlay Districts
- North River Canal Corridor Neighborhood Mixed Use District
- Environmental Review
- Preservation and Management of City-owned Historic Resources
 - City-Owned Historic Buildings
 - City-Owned Cemeteries and Burial Grounds
 - City-Owned Historic Parks
 - Public Sidewalks and Infrastructure in Historic Areas
- Planning for Natural Disasters and Climate Change Impacts

2. [*City of Salem Open Space and Recreation Plan Update: 2015-2022 \(2015\)*](#)

Goal: Maintain & Improve Existing Public Spaces and Recreational Facilities.

Objective: Increase park and open space maintenance to sustainable levels, prioritize and focus on neglected areas

Actions:

- Implement Winter Island master plan:
 - Barracks bldg. rehab
 - Hanger rehab.
 - Ft. Pickering restoration
 - USCG hanger plaza
 - Improve paths and walkways
 - New park furnishings and amenities
 - Infrastructure improvements
- Repair/improve picnic areas at McCabe Park.
- Improve tennis and basketball courts at parks throughout the city.
- Replace & repair park benches & tables on a regular basis.

Objective: Expand Recreational facilities and programming at existing sites and identify new opportunities.

Actions:

- Improve & maintain hiking trails in Forest River conservation area and Highland Park/Salem Woods.
- Evaluate need and feasibility of drinking fountains at parks, using current technology. Consider Mary Jane Lee park as trial installation.
- Find locations, pursue funding and construct additional playing fields and playgrounds.
- Identify opportunities for creating open space and playground facilities in dense neighborhoods that lack such opportunities.
- Look for opportunities for new park/playground in West Salem
- Consider creation of a new dog park to address overuse of the current dog park at Leslie's Retreat Park.

Objective: Establish stewardship programs to encourage community engagement and participation in park and open space improvements and maintenance activities.

Actions:

- Work with Salem community gardens to site gardens within walking distance of each neighborhood.
- Support and cooperate with parks "friends of" organizations.

- Establish a program for enhancing protection of land owned by the Conservation Commission, such as the Forest River trail.

Objective: Increase public street tree and landscape maintenance (street trees)

Actions:

- Provide funding for DPS and tree warden to inventory, restore & add street tree planting pits and trees
- Remove invasive species and poison ivy
- Maintain, replace and add trees in parks

Objective: Provide mixed uses in parks for all age groups and abilities.

Actions: Inventory park needs as part of 2015 Recreation Facility Needs Assessment and act on recommendations

Objective: Create more walking / biking /running trails and linkages throughout city

Actions: Update bicycling master plan to analyze city streetscapes and park linkages to identify the best linkages and locations

Objective: Install & maintain automatic irrigation systems at select parks & athletic field facilities

Actions: Include funds for irrigation systems in conjunction with any field renovations where appropriate

Objective: Include public art as part of any park or facility renovation or expansion

Actions: Coordinate parks and open space projects with public art commission to identify projects and funding sources.

Goal: Develop and Implement a Capital Improvement Program

Objective: Identify key maintenance and improvement needs in City recreational facilities.

Actions: Repair and improve items as necessary.

Objective: Explore alternative means for funding park maintenance and improvements.

Actions:

- Pursue grant opportunities to enhance City parks and playgrounds.
- Seek to establish public/private partnerships

Goal: Protect Open Spaces and Acquire More Open Space When Possible

Objective: Acquire key parcels and sites for multi-purpose trails, scenic views, and visual access to the water.

Actions: Acquire old railroad rights of way for multi-purpose trails.

Objective: Assess historic resources and prioritize improvements to protect those resources that are most endangered.

Actions:

- Support Salem Historical Commission and Historic Salem Inc. efforts to identify and protect their designated “endangered” historic sites.

- Maintain, Restore and enhance Salem’s Historic Cemeteries, and their unique features including fences, headstones, etc.

Objective: Provide consistently high standards for “symbolic landscapes.”.

Actions:

- Plant new trees in parks
- Continue the program for regular tree replacement and planting with a goal on increasing tree canopy at Salem’s parks and open spaces.

Objective: Protect examples of Salem’s ecological diversity.

Actions: Proactively eradicate invasive species at City parks, open space and wetlands.

Objective: Identify and plan for acquisition of key properties for parks and open space..

Actions:

- Identify desirable parcels not owned by the City that are located in key locations and identify the current owner. If purchase and sale is not possible speak to the current owner about developing a conservation restriction on the property.
- Identify desirable parcels for acquisition that would improve existing park usage or access

Goal: Improve Public Access, Security and Awareness

Objective: Improve signage to direct people to the parks and to help orient them within the parks.

Actions: Apply City wide signage program to install, repair and update entrance signs installed at Salem’s park facilities.

Objective: Update equipment and park surfaces/ access to comply with current safety and ADA standards.

Actions: Implement and update improvements identified in the ADA self- assessment as park improvements are undertaken, and provide accessible playground facilities.

Objective: Expand bike paths and designated routes to connect to downtown and surrounding communities.

Actions:

- Create interconnecting trail system linking schools and parks on roadways and by off road routes (bike paths).
- Purchase and install bike racks throughout downtown, schools, and parks.

Objective: Increase and improve access to the water improve signage directing people to the waterfront.

Actions:

- Identify and improve access points such as public boat launches and provide required parking, signage, and other amenities.
- Continue to work toward implementation of a continuous Harborwalk.

Objective: Increase security at Salem Parks

Actions: Install lighting in parks to increase night visibility

Objective: Improve access to Parks

Actions:

- Update parks to be accessible to all age groups and abilities
- Maintain & upgrade walks, linkages and amenities for accessibility

Objective: Consider Climate Change when planning for parks and open space improvement and acquisition

Actions:

- Salem Climate Change Vulnerability & Assessment Plan should be consulted when considering development in low lying or flood prone areas.
- Consider projected future expansion of flood areas when locating parks, recreation areas and open space

3. Salem Housing Needs and Demand Analysis – July, 2015

This report provides an overview of the current demographics of Salem, the existing housing stock, projected changes in housing demand over the coming decades, and the types of new housing that are needed to meet that need. Many portions of this analysis make reference to or include MAPC projections data. These projections include two scenarios for regional growth. Each scenario reflects different assumptions about key trends. The “Status Quo” scenario is based on the continuation of existing rates of births, deaths, migration, and housing occupancy. Alternatively, the “Stronger Region” scenario explores how changing trends could result in higher population growth, greater housing demand, and a substantially larger workforce.

Projected Development Demand:

MAPC projects that the current population of Salem, 41,320 people, could grow by 2,348 to 5,559 by 2030. At the same time, household size has been on the decline, from an average of 2.24 persons per household in 2000 to 2.22 persons per household in 2010. Under the Status Quo scenario, MAPC projects that the number of households will increase by 1,800 (10%) by 2030. Under the Stronger Region scenario, it is projected that the number of households will increase by 2,600 or 15%.

By 2020, Salem will need from 720 – 1,200 multi-family units and 210 – 260 single family units to keep pace with population growth and smaller households.

In total, by 2030, assuming the Status Quo scenario, Salem will need to produce a total of 1,900 units of housing to meet demand. However, according to the Stronger Region scenario 2,725 units (approximately 140 units annually) will be needed to meet demand.

Housing Affordability:

The intersection of demand (people) and supply (housing), as well as policy and planning priorities, helps determine housing affordability in a given community. One measure of affordable housing need is the number of households eligible for public housing assistance or housing subsidies. Under M.G.L. Chapter 40B, affordable housing units are defined as housing that is developed or operated by a public or private entity and reserved by deed restriction for income-eligible households earning at or below 80% of the area median income, which is \$98,500 for the Boston-Cambridge-Quincy, MA-NH HUD Metro Fair Market Rent Area. Additionally, all marketing and placement efforts for income-eligible households follow Affirmative Fair Housing and Marketing Plan guidelines per the Massachusetts Department of Housing and Community Development (DHCD). Housing that

meets these requirements, as well as some market rate units that are in developments that include affordable housing, qualify for the Subsidized Housing Inventory (SHI). Chapter 40B allows developers of low-and moderate-income housing to obtain a comprehensive permit to override local zoning and other restrictions if less than 10% of a community's year-round housing inventory is included on the SHI. A municipality's SHI fluctuates with new development of both affordable and market-rate housing. The percentage is determined by dividing the number of affordable units by the total number of year-round housing units according to the most recent decennial Census. As the denominator increases, or if affordable units are lost, more affordable units must be produced to reach, maintain, or exceed the 10% threshold. Salem has reached that threshold. As of June 2015, 2,466 out of 18,998 units, or 13.0%, were included on the SHI. However, over the next five years, the city stands to lose up to 904 of these affordable units due to expiring deed-restrictions. If 904 units on the SHI were to expire, Salem would have a total of 1,562 units remaining on the inventory. The city's current 10% goal is 1,899 based upon the 2010 Total Year-Round Housing Units number. If the city achieves the projected 2020 housing unit total of 20,400 units (described earlier in this analysis), then a total of 2,042 SHI-qualifying units would be needed to meet the 10% target. If the 904 expiring units were lost from the current inventory, then the city would need to replace them with 480 additional SHI units by 2020. MAPC recognizes that this does not take into consideration potential forthcoming developments which may include affordable housing units nor does it include any potential efforts to preserve those units which are projected to expire by 2020

4. *City of Salem Five-Year Consolidated Plan – May 2015*

This plan is created as part of the requirements to receive federal funds for housing and community development activities, through the U.S. Department of Housing and Urban Development (HUD). It includes a housing market analysis (including existing public and subsidized housing), as well as a housing and community development needs assessment.

Need: Preserve, expand and improve the City's supply of affordable housing and increase availability of decent housing that meets the needs of lower income seniors, families, individuals, and people with disabilities, as well as transitional and supportive housing for homeless and non-homeless with special needs.

Goals:

- Offer financial and technical assistance to eligible homeowners and investor-owners to improve housing units, including improvements for accessibility, for low-to moderate-income renters through the Housing Rehabilitation Loan Program
- Support local non-profit housing organizations and CHDOs seeking to acquire, create, preserve, and/or renovate affordable units

Need: Increase homeownership opportunities for low-to moderate-income households.

Goal: Offer financial assistance to eligible households in the form of loans for downpayments and closing costs through the First-Time Homebuyer Downpayment Assistance Program.

Need: Provide financial and technical assistance, design assistance, training, and location assistance to potential or existing local businesses, including microenterprises, that create or retain jobs for low-and moderate-income residents of Salem and contribute to the vitality and diversity of Salem's economy

Goals:

- Provide a Business Loan Program and a Storefront Improvement Program for new, emerging or expanding small businesses that create or retain jobs for low-and moderate-income workers, address building code violations, handicapped access, and/or leverage private investment.
- Offer technical assistance, training, design guidance, location service, and referrals for owners of microenterprises or businesses that create or retain jobs for low-and moderate-income workers. Provide program delivery for the business loan program, oversight of the Salem Redevelopment Authority, and funding for the Salem Main Streets and other economic development programs

Need: Support community development needs by targeting resources to support the social service needs of low-to moderate-income households and special needs populations through anti-poverty, self-sufficiency, quality of life, enrichment and instruction programs, including programs for immigrants, non-English speaking residents, youth and seniors, homeless individuals and families, as well as specialized education programs for adults.

Goal: Provide grants to nonprofit agencies for social services programs such as homelessness and foreclosure prevention, housing education, food distribution, homeless services, job training, senior transportation, childcare, crime prevention, immigrant services (cultural orientation and acclimation), ESL and citizenship education, youth activities, senior services, adult education (financial literacy, computer training, etc.), and substance abuse prevention, and other programs that advance self-sufficiency, reduce household financial burdens, or improve the quality of life, as well as other special services (legal assistance, program navigation). Also support programs that provide supplemental education and/or engagement programs to increase public school students' academic achievement.

Need: Focus neighborhood improvements on activities that are located in low-to moderate-income areas and/or benefit people with disabilities

Goal: Undertake public facility and infrastructure improvements that enhance the quality of life in eligible neighborhoods, such as, parks/playgrounds, tree planting, lighting, signage, bike paths, streets, sidewalks, crosswalks, pedestrian safety, trash receptacles, traffic calming, accessibility, senior center, fire stations, schools, etc.

Need: Focus public improvements on activities that are located in Salem's Urban Renewal area and/or benefit people with disabilities

Goal: Undertake infrastructure improvements to support Salem's Urban Renewal Area (downtown) and complement ongoing Economic Development activities. Projects may include street & sidewalk improvements, tree planting, trash receptacles, traffic improvements, lighting, signage and open space improvements, as well as improvements to public facilities and public infrastructure.

5. [Salem Public Art Master Plan](#) - September, 2013

The Public Art Master Plan outlines a wealth of exciting, innovative and community-building public art projects. Some of these opportunities are related to proposed construction projects in the Capital Improvement Plan. Many others address existing places. Public art can bring

vibrancy to key civic places throughout Salem, including gateways, squares and historic walks that help to tie different areas together.

6. [Vision and Action Plan for the Point Neighborhood in Salem 2013-2020](#) – August 2013

The Salem Point Neighborhood Vision contains some actions that would potentially qualify for CPA funding.

Environment, Open Space, and Recreation

One goal is to make improvements that enhance the quality of public spaces, parks, and playgrounds in the Point – enhancing the resources that already exist so people who live and play in the Point can fully enjoy these resources, and supporting the creation of more opportunities for people of all ages to engage in athletic, educational, and creative activities in the neighborhood. Another goal is to explore opportunities for small and large-scale open space, natural resource, and recreation improvements. Examples that meet this goal include:

- Improve parks, open spaces, natural resources by making small and large improvements
- Continue to implement the Open Space and Recreation Plan actions in the Point
- Undertake improvements identified through the vision and action planning process
- Develop a revitalization plan for Mary Jane Lee Park
- Develop a revitalization plan for Palmer Cove Park
- Undertake improvements to Lafayette Park
- Revitalize 38 Palmer Street lot
- Improve neighborhood access to the waterfront behind Shetland Park
- Fix benches, replace sand in parks and plant trees in strategic areas

Housing and Economic Development

Goals include enforcing regulations pertaining to housing quality and public health, connecting residents with existing housing resources, and helping secure new resources that will improve the diversity and quality of housing available for rent and for ownership in the Point. Examples that meet this goal include:

- Support development that includes a mix of housing, business, and offices uses in the Point and housing that is affordable to different incomes.
- Work with public and private developers to promote property reuse and redevelopment that is consistent with goals to provide affordable housing to people of different incomes and with respect to historic assets.
- Identify, purchase, and rehabilitate critical, blighted properties.
- Improve historic building facades.
- Encourage and advocate that new developments in other parts of the City of Salem include on-site affordable housing units to off-set the disproportionate presence of affordable housing in the Point neighborhood while still meeting the housing needs of the community.

7. [Salem Winter Island Park Master Plan and Summary](#) – September 2011

Priorities identified in this Master Plan include the following:

Proposed Early Action

- | | |
|--|---|
| • Barracks and USCG Building (shell and structural improvements) | • Gateway enhancements (sign, gatehouse, paving, lighting, plantings) |
| • Early infrastructure improvements | • Bathhouse relocate/renovate |

- Playground Relocation
- Parking & Circulation Improvements
- Grasspave Overflow Parking
- Bio cells, Moat/Rain Garden restoration
- Community Gardens
- Consolidation of RV sites
- Consolidation of tent sites
- Hangar Garage parking
- Extended dock for kayak rentals
- Amphitheatre

Proposed Long Term Action

- The Barracks Building renovation
- The USCG Hangar Renovation
- Fort Pickering restoration
- Hangar Garage Improvements
- USCG Hangar pedestrian plaza
- Paths and walkways (including bike paths and scenic walking paths)
- Park furnishings and amenities
- Infrastructure (sewer, water, electric)

8. [Salem Downtown Renewal Plan - 2011](#)

The specific objectives are:

- To eliminate and prevent the reoccurrence of blighting factors in order to restore conditions of health, safety, amenity and economic viability.
- To preserve and enhance historic architecture and resources which are valued contributors to the civic, cultural and economic environment of the Project Area.
- To accomplish a coordinated development of the Project Area which will promote the health, safety, general welfare and amenity of the City and its people, by preserving and enhancing the following:
 - a range of compatible uses, each well suited to its location;
 - a diverse and consistently high quality architectural character expressing a range of periods and respecting the integrity of both historic and contemporary styles while avoiding derivative design;
 - urban forms that respect the patterns of blocks, sidewalks, streets and open spaces that distinguish the compact, historic character of the area including the orientation of building frontages toward streets and public open spaces, varied scales among closely-spaced buildings, and the integration of off-street parking, if required, and vehicle access to substantially limit their visual impact from public vantage points;
 - a complete network of active and vital sidewalks and pedestrian-oriented spaces activated by the entrances and uses along the ground floors of the buildings and through the interaction among the compatible designs of sites, buildings, landscapes and streetscapes.
- To develop and apply urban design criteria, standards and guidelines to the Project Area that will create a central city urban environment. The design criteria are sympathetic to and conducive of the preservation and enhancement of historic and architectural values and to the construction of new buildings and facilities compatible with the preservation and enhancement of such values. The design criteria shall be consistent with the needs of the City and its people for new and expanded residential and non-residential opportunities, services, facilities and amenities.
- To undertake activities and initiatives to accomplish public or private redevelopment of vacant or underutilized land and buildings, public open space and the infrastructure of streets, sidewalks and utilities consistent with the other purposes within this *Salem Downtown Renewal Plan*.
- To sponsor or participate in planning for areas adjacent to the Downtown Renewal Project Area and for the principal transportation and land use corridors that lead to and from the Downtown. The purpose of these activities is to encourage public actions that will reinforce

the edges, approaches and gateways to the Downtown and promote the other purposes of this Plan.

9. ***Bike Circulation Master Planning Study - January, 2010***

The Salem Bike Path Committee members drawing upon years of work and through an iterative process with the City Planning Department, identified individual and group visions of citywide cycling enhancements. The December 2009 status of the Salem Bike Path Committee's vision for citywide bike routes and facilities includes initial emphasis on implementation of:

- The 4.85-mile Pilot Route connecting Salem's waterfront parks, historic sites, open spaces, and several schools, beaches, etc.;
- Construction of a missing connection between Palmer Cove and the Bridge Street Bypass Road Multiuse Path; and
- The Phase II multiuse Salem Bike Path connecting the northerly end of the Lafayette-Canal Phase I Bike Path to Downtown Salem. Besides providing a direct route between downtown Marblehead and downtown Salem, the Phase II multiuse path will provide tranquil views of Rosie's Pond and the surrounding wetlands.

Key elements of the Salem Bike Path Committee's citywide bike circulation vision include:

- *Designation of bike routes* along all of Salem's major roads that have adequate right of way for supporting bike use.
- *Installation of road crossing safety measures at critical bicycle crossings* where existing or projected bicycle/vehicle conflicts will be highest and where necessary crossings have constricted sight lines.
- *Creation of a new pedestrian at-grade railroad connection* between the bike path serving the Jefferson at Salem Station and Salem Station to provide walkers and bicyclists with a far shorter and more convenient connection to the northeast Salem neighborhoods that avoids the use of the Route 114 overpass with its steep grades and high traffic volumes.
- *Creation of at least two bike share stations at the MBTA Salem Commuter Rail Station and the City of Salem Ferry Terminal.*
- *Identification of Mountain Bike Trails at Salem Woods* for off-road cyclists who enjoy challenging terrains for bicycle travel.
- *Identification of Salem components of the East Coast Greenway (ECG)*, a proposed 2,900 mile long corridor between communities along the eastern seaboard from Florida to Maine.

10. ***Salem Bridge Street Neck Neighborhood Revitalization Plan – August 2009***

Objectives:

- Act to support neighborhood development and village style housing.
- Support and enhance commercial retention and development opportunities.
- Maintain and improve the area's pedestrian environment.

One key goal of the Plan is to recommend physical improvements that will enhance the overall quality of living in the neighborhood. One of the neighborhood's unique selling points is the opportunity to find reasonably priced historic homes in need of renovation, thus contributing to preserve and enhance the neighborhood's historic character. This is particularly noticeable in the southern portion of the neighborhood, which is closer to the MBTA station and Downtown Salem.

Strategies in the plan include:

- Enhance amenities to attract visitors to the Bridge Street Neck area, such as enhancing waterfront access and activities, including provisions for transient boat access.
- Expand and improve open space connections and amenities along the water and through new development.
- Extend pedestrian and bicycle access along the waterfront and through new development

Example Actions:

- Undertake feasibility study for enhanced waterfront access and recreational programming
- Undertake feasibility study for boat access
- Seek opportunities to generate a network of interconnected bike paths/shared paths, building upon the planned extension of the bike path along Route 1A Initiate feasibility studies to provide for public use and access where there are opportunities associated with zoning, Chapter 91 regulations or other methods
- Study feasibility to extend the existing bicycle path from Webb Street north to Collins Cove Park, and to the planned park and open space at the end of Bridge Street
- Improve signage and markings for the dedicated pedestrian and bicycle paths

11. [***Neighborhood Preservation District Study - September, 2008***](#)

The major purpose of the current study was to research the concept of Neighborhood Preservation Districts (NPD) and ways that it might best fit Salem's situation, prepare a draft ordinance and draft design guidelines for two neighborhoods, and create educational materials for the public. The study and its final products and recommendations relied heavily on public input, gained through a series of neighborhood meetings, stakeholder interviews, dedicated page on the City's website, and other means. The study provides recommendations that will help the City of Salem and individual neighborhoods determine if a NPD program is right for the city's neighborhoods and can function alongside the Local Historic District (LHD) program already in place. The final products included criteria for district designation, recommendations on areas for NPDs, sample design guidelines and boundaries for Bridge Street and Point neighborhoods and a draft NPD ordinance.

12. [***Salem Harbor Plan – January, 2008***](#)

Priorities identified include:

- New public open spaces in the South Commercial Waterfront area
- Additions to the Harbor Walk all along the harbor's edge
- New/improved pedestrian connections, walkways, and open spaces in the North Commercial Waterfront area
- Separate walkway/bike path out to Winter Island
- Facility improvements throughout Winter Island Park
- Re-use of the former Coast Guard hangar and barracks at Winter Island
- Fort Pickering and lighthouse improvements

13. [***Old Town Hall Building Condition Assessment - May, 2007***](#)

Old Town Hall is the earliest surviving municipal structure in Salem, Massachusetts (dating from 1816) and an outstanding Federal Style building. The second floor of the building, the Great Hall, has always been used as a public space and contained Town offices until 1837. The first floor was originally designed as a public market. An existing conditions analysis

and structure conditions analysis were done in 2007 identifying critical needs of this historic structure. Since 2008, Gordon College has managed Old Town Hall on behalf of the City of Salem, and in doing so has maintained the building as a public venue that hosts a variety of events. Gordon College in cooperation with the City has addressed several maintenance and repair issues at Old Town Hall over the years as part of the goal to preserve this historic building and keep it operational. Numerous needs have not yet been addressed given the cost and scope of work to be done.

14. [North River Canal Corridor Master Plan](#) – February 2003

Northwest

- Promote long-term waterfront access along the Canal from Boston Street through the rear of the Goodhue parcels to Harmony Grove
 - Coordinate with the redevelopment of Goodhue parcels
- Improve image of canal edges
 - Replace chain-link along Bridge Street – between Flint and Grove - with quality fencing—include trees, widen sidewalks, etc.

North

- Extend access from Mason Street to canal edge— at key locations
- Consider redeveloping the Salem Suede site for housing and commercial
 - Seek maintaining portions of the historic industrial structures
- Improve and maintain views from the Mason Street neighborhood to canal
- Enhance the residential character and streetscape along Mason from North Street to Grove to strengthen Mason Street as a quality residential road.
 - Work with neighborhood to promote reinvestment including; new lawns, fences, façade improvements, and landscaping (**probably only applicable to CPA if historic)
- Enhance Canal edge
 - Develop public private partnership to provide enhanced maintenance trees, sidewalks, benches, etc.

Northeast

- Improve pedestrian access along riverfront adjacent to Franklin Street—independent of redevelopment efforts
- Connect Franklin Street to the downtown area (via the MBTA station) with a quality pedestrian pathway
- Improve streetscape and sidewalks along both sides of Franklin Street and Furlong Park
- Seek opportunities to incorporate water-dependent uses—pursue efforts to clean up North River
- Expand play fields of Furlong Park

Southwest

- Improve the edges of Bridge Street and the canal
 - Seek public-private partnerships for maintenance
 - Replace chain-link with visually attractive fence
 - Explore long-term expansion of Leslie's Retreat Park on north side of canal from Flint to Grove

Leslie's Retreat Park

Strengthen character and identity of the park and surrounding streets—connect the park to the surrounding neighborhoods to the north and south

- Build programming into the park:
 - Work with City and other organizations to develop events, program, etc. to activate the park and its edges, to potentially include:
 - Children's playscape areas
 - Historic interpretive features
 - Improve access and safety to the Park by creating two new pedestrian access points at Bridge St.
 - One new access point between Flint and North Streets to connect the Federal Street neighborhood to the park via a pedestrian bridge
 - The second access point through the extension of Commercial Street to Bridge and the associated relocation of the existing entrance to the MBTA parking lot
 - Include safety measures at the edge of the canal to prevent people from falling in
 - Seek additional pedestrian bridge further east of the existing bridge, to directly link Downtown and Mason Street
- Improve Park Image
 - Solve park drainage problems
 - There is the potential for the Bridge Street reconstruction project to re-align Bridge Street so that it extends two-meters into the park. The Working Group and residents should continue to be involved with Mass Highway and the City to ensure that the design of Bridge St. complements the park edge and provides adequate pedestrian connections and landscaping

South

- Improve pedestrian connections and access to Leslie's Retreat Park
 - Pedestrian Bridge at the end of Lynn Street
 - An at-grade grade crossing near new eastern entrance
- Remove rail storage
- Enhance views and image of park

Southeast

- Improve the waters' edge and forge connections to Downtown, Franklin Street and Leslie's Retreat park—Trees, sidewalks, lighting, benches, plazas, etc.
- Restore Leslie's Retreat Plaque.
- Work with local historian and stakeholders to identify appropriate new location for plaque.

Franklin Street Parcels

- Seek expansion of water-dependent uses
 - The Working Group and City should continue to discuss what acceptable water-dependent uses are. While most acknowledged the desire to promote water-dependent uses, consensus was not reached as to which specific uses should be permitted.
- Access to the waterfront should be provided at several locations and along the length of the waterfront, from Furlong Park to North Street
- The City should review the status of the City owned parcels at North Street and adjacent to the river—to provide a new pedestrian walkway from Franklin to the MBTA Station
- Potential uses include
 - Improving and maintaining the existing uses
 - A potential mix of low density housing/commercial and retail
 - Additional open space along the waterfront
- Expansion of Furlong Park

15. ***Fort Lee and Fort Pickering Conditions Assessment, Cultural Resources Survey, and Maintenance and Restoration Plan - 2003: [Pages 1-88](#), [Pages 89-130](#)***

The study was intended to identify and document prehistoric and historic sites, to determine the boundaries and integrity of those sites, to determine their significance in terms of National Register criteria, and to establish methods of historic preservation, community interest, budgetary issues, long-term maintenance, conservation and management. There is also an archaeological companion document to this report.

16. ***[Burial Ground Planning Project Report](#) - August, 2002***

Salem's burying grounds represent some of the most historic cemeteries in the Commonwealth. This plan represents the long-term process to preserve and protect the Charter Street Cemetery, Broad Street Cemetery, Friends Cemetery and Howard Street Cemetery. The overall goal is to retain the burying grounds' historical integrity, while at the same time maintaining accessibility.

17. ***City of Salem Historic Preservation Maintenance Plan – August 1998***

This plan consists of a series of individual reports on selected historically significant properties owned and maintained by the City of Salem. Each report is written as a stand-alone document intended to describe, at a survey level, the subject structure's physical condition in the context of its historic quality, followed by specific prioritized recommendations for appropriate treatment of defects. Each report also indicates historic components of each structure that are essential to preserve, recommends optional restoration treatments for important features that have been lost or severely compromised and provides photographs to illustrate the significant features and conditions of deterioration. This two binder plan includes:

- Salem City Hall, 93 Washington Street
- North Salem Fire Station, 142 North Street
- Essex Street Fire Station, 415 Essex Street
- South Salem Fire Station, 40 Loring Avenue
- Salem Public Library, 372 Essex Street
- Endicott School (original building only), 110 Boston Street
- Palmer Cover Playground – Palmer Cove Community Center, 52 Leavitt Street
- Salem Willows, 200 Fort Avenue
- Winter Island Park, 50-120 Winter Island Road
- Dr. William Mack House – Ledge Hill Park, 59 Grove Street
- Gallows Hill Park, 53 Hanson Street
- Forest River Park – Col. Timothy Pickering House, 32 Clifton Avenue
- Witch House, 310 Essex Street
- Greenlawn Cemetery, 57 Orne Street
- Monuments:
 - John Hodges Choate Monument: Essex and Broad Street (bronze statue)
 - Roger Conant, Washington Sq. West (bronze statue)
 - Civil War Monument, 37 Washington Sq. North (boulder with bronze tablet and separate cannon)
 - Theobald Matthew Monument, 28 Hawthorne Boulevard (marble statue)
 - Nathaniel Hawthorne monument, 20 Hawthorne Boulevard (bronze statue)
 - Immaculate Conception Monument, 20 Hawthorne Boulevard (bronze bas relief)

18. [City of Salem Master Plan Update and Action Plan - 1996](#)

“The Planning Board Imperative” includes the following “critical elements”:

- “Development of the commercial and industrial properties which have become contaminated from prior activities, and thus are difficult for the generation of new uses”
- “Continued emphasis on the livability of the City for its inhabitants and visitors in terms of neighborhoods, parks and cultural institutions.”
- “Promote culturally-based tourism emphasizing the City’s non-profit museums, historical houses and neighborhoods, relationship to the sea, and general historical attractions.”
- “Continued emphasis on the reorientation of the “kernel of the City” – the downtown area...”
- “The harbor is the City’s front door and a focus on that is needed.”

The Plan presents goals & strategies in six categories:

The Waterfront

Goal: Expanded public waterfront access

Strategies:

- Increase public landings in downtown
- Create public waterfront walkway at new South Harbor Marina, Shetland Office Park, and downtown to Hawthorne Cove Marina and connect to regional trail system
- Develop multi-purpose trail system along waterfront as much as possible
- Convert old Salem-Beverly Bridge to a public recreational pier
- Downtown Maritime District: Create waterfront walk to the new port
- South Harbor: Pursue waterfront park development proposals
- Collins Cove: Reinforce waterfront public access; Connect to bicycle/pedestrian trail system
- North River: Create recreational pier at old bridge
- Relocate junkyard and marine contractor to create more open space
- Winter Island: Expand recreational boating & fishing; restore fort and historic buildings.

Goal: Enhanced access to harbor and islands

Strategy: Determine appropriate public access to islands, if any

Goal: Expanded and improved waterfront facilities

Strategies:

- Expand/promote use of marinas at Kernwood, Collins Cove, Winter Island, and Salem Willows
- Seek funding for South Harbor Marina
- Winter Island: increase dockage and improve launch ramp

Transportation

Goal: Development and improvement of alternate modes of transportation

Strategies: Implement a system of bicycle/pedestrian trails: extend Webb St. trail beyond Cross St.; design and build a trail along the Bypass Road and on Bridge Street; design and build a trail on the Marblehead Branch

Economic, Institutional, and Downtown Development

Goal: Increased marine tourism

Strategies:

- Promote additional docking and mooring space
- Support development cruise ship port/wharf

Neighborhoods and Housing

Goal: 50% owner-occupancy of housing units overall in 10 years

Strategy: Support nonprofit production of affordable ownership housing

Goal: The Point: 25% owner-occupancy in 10 years

Strategy: Target problem properties for Buy/Rehab/Sell projects to encourage investment

Goal: Improve appearance of public property

Strategies:

- Continue upgrading of streets, public properties, parks, lighting
- Seek aesthetic improvements to power station land; investigate acquiring this parcel

Goal: Bridge Street Neighborhood – Revitalize neighborhood in conjunction with road improvements

Strategy: Improve open spaces and connections to the water

Goal/Strategy: Boston Street Corridor – Playground in Beaver/Silver Street area

Goal/Strategy: South Salem between Lafayette and Canal Streets – Vest pocket park/playground in central Cabot Street area

Recreation, Open Space, and the Environment

Goal: Develop recreational facilities to meet specific City needs

Strategies:

- Acquire and construct bicycle trails as funds and land become available
- Find a location and construct a new soccer field
- Pursue feasibility of Salem/Peabody golf course at Spring Pond
- Improve hiking trails at the Forest River Conservation Area and Highland Park
- If a site becomes available, purchase and develop a playground between Lafayette and Canal Streets
- Construct a recreational park at the South River

Goal: Continue to implement specific improvements to parks and neighborhood playgrounds

Strategies:

- Update equipment and surfacing to comply with current safety standards
- Improve handicap accessibility in accordance with the ADA

Goal: Target Winter Island for major improvements

Strategies:

- Secure funds to increase float space at pier
- Secure funds to reconstruct boat ramp
- Restore and develop interpretive signage for historic resources on Winter Island

Goal: Protect inland water resources

Strategies:

- Acquire and protect Thompson's Meadow
- Acquire Leggs Hill property on the Salem Marblehead boundary

Goal: Protect and improve areas of historical significance

Strategies:

- Develop trails at Fort Lee
- Expand Salem 1630 Pioneer Village

Goal: Protect and improve areas of scenic importance

Strategies:

- Acquire the Leggs Hill property, develop trails on the site
- Acquire and protect the Lead Mills property
- Improve waterfront areas through the construction of bicycle trails, along Collins Cove, the North River, and Salem Harbor in the Lead Mills area
- Relocate junk yard on the North River and expand Furlong Park into the site

Recreation, Open Space & the Environment – mapped priorities:

- Develop future reclamation program and development plans in coordination with owner of the Quarry and the Town of Swampscott
- Acquire Spring Pond/Highlands
- Waterfront Access/Acquisition/Recreation at McCabe Park

19. *Relevant Programs*

Additional programs that may be useful to CPA funding evaluation include:

- [Historic Salem, Inc. Most Endangered Program](#)

Historic Salem, Inc. established the Most Endangered Historic Resources Program in 2000 with the purpose of focusing public attention and Historic Salem, Inc.'s efforts on specific endangered resources that are threatened by neglect, lack of funding or inappropriate development. It is the cornerstone of Historic Salem's advocacy efforts in pursuit of its mission to ensure that the historic resources of Salem are preserved for future generations and that new development complements the historic character of the city.

- [Capital Improvement Program \(from FY17 proposed budget\)](#)

The Capital Improvement Program (CIP) is a blueprint for planning a community's capital expenditures. A CIP is typically a multi-year plan identifying capital projects and equipment to be funded during the planning period. The plan includes a particular focus on asset preservation, replacement of apparatus and equipment, and continued improvements to the City's infrastructure.

- CP-1, CP-2 and relevant information from CP-3 annual reports
- City of Salem Code of Ordinances Section I. Chapter 2, Article IV. Division 15. Community Preservation Committee
- Secretary of the Interior's Standards for Rehabilitation
- Determination of Eligibility Application
- Funding Application



Bates School Playground Before & After



CP1

Community Preservation Surcharge Report - Fiscal Year 2016

Return by September 15 to:
Municipal Data Management/Technical Assistance Bureau
Division of Local Services
P.O. Box 9569
Boston MA 02114-9569

Surcharge %	1.00%
Total Surcharge Committed to Collector for FY	561,480.46
Current Yr Surcharge Abatements/Exemptions	5,122.35
Prior Yr Surcharge Abatements/Exemptions	9.48
Net Surcharge Raised for FY	556,348.63
Additional Revenue Appropriated to CPF (Ch. 44, Sec. 3b1/2)	0.00
Total Net Surcharged Raised and Other Appropriated Revenue	556,348.63

Signatures

Board of Assessors

Completed by:

Deborah Jackson, Chief Assessor , Salem , djackson@salem.com 978-619-5608 | 8/24/2016 2:31 PM

Comment:

Accounting Officer

Sarah Stanton, Finance Director / Auditor , Salem , sstanton@salem.com 978-745-9595 | 9/1/2016 8:54 PM

Comment:

CP2

Community Preservation Fund Report - Fiscal Year 2016

Surcharge % 1.00

1. Total fund balance from prior year (PY) report (Form CP-2): 865,434.09

NEW REVENUES/OFS

2. Proceeds from bonds and OFS	0.00	
3. Collections from community preservation surcharge	553,651.73	
4. Distributions from State trust fund	155,406.00	
5. Earnings on investments	0.00	
6. Gifts, Grants, Donations	0.00	
7. Other	0.00	
Total New Revenue/OFS	709,057.73	

EXPENDITURES/OFU

8. Expenditures:

a. Open Space	115,719.08	
b. Historic Resources	423,856.15	
c. Community Housing	0.00	
d. Other (Community Recreation)	0.00	539,575.23

9. Expenditures for Debt Service:

a. Open Space	0.00	
b. Historic Resources	0.00	
c. Community Housing	0.00	
d. Other (Community Recreation)	0.00	0.00

10. Administrative Expenses	8,414.21	
11. Other	0.00	
Total Expenditures/OFU	547,989.44	
Total Fund Balance June 30, 2016 (Detail Following)	1,026,502.38	

CP2

Community Preservation Fund Report - Fiscal Year 2016

CITY/TOWN of Salem
Detail of Community Preservation Fund Total Fund Equity
Fiscal year ended June 30, 2016

1. Fund Balance Reserved for Encumbrances (3211)	28,770.00
2. Fund Balance Reserved for Expenditures (3240)	0.00
3. Fund Balance Reserved for Open Space (3241)	41,370.00
4. Fund Balance Reserved for Historic Resources (3242)	9,780.00
5. Fund Balance Reserved for Community Housing (3243)	53,100.00
6. Fund Balance Reserved for Special Purposes (3280)	0.00
7. Fund Balance Reserved for Community Preservation Act (3320)/Undesignated (3590)	893,482.38
8. Total Community Preservation Fund Balance June 30, 2016	1,026,502.38

(Total must equal total fund balance page 1)
Has the community met the requirement to either appropriate
or reserve for future appropriation at least 10% of the
estimated annual fund revenue for open space, historic
resources and community housing? Y
If no, explain how the town plans to meet the requirement?

Signatures

Accountant/Auditor

Completed by:

Nina Bridgman, Asst Finance Director , Salem , nbridgman@salem.com 978-619-5628 | 9/27/2016 1:15 PM

Comment:

Comments

No comments to display.

City of Salem Code of Ordinances

Section I. Chapter 2 is hereby amended by adding a new division within Article IV Boards, Commissions, Committees and Authorities as follows:

“ARTICLE IV. BOARDS, COMMISSIONS, COMMITTEES AND AUTHORITIES DIVISION 15. COMMUNITY PRESERVATION COMMITTEE

Sec. 2-1010. Established

There is hereby established a Community Preservation Committee, in accordance with the *Massachusetts Community Preservation Act*, M.G.L. Chapter 44B, consisting of nine (9) voting members.

Sec. 2-1011. Membership and Terms

The composition of the committee, the appointment authority and the term of office for the committee members shall be as follows:

- (1) One member of the Conservation Commission as designated by the Commission for a term of three years.
- (2) One member of the Historical Commission as designated by the Commission for an initial term of two years, and thereafter for a term of three years.
- (3) One member of the Planning Board as designated by the Board for an initial term of one year, and thereafter for a term of three years.
- (4) One member of the Park and Recreation Commission as designated by the Commission for an initial term of one year and thereafter for a term of three years.
- (5) One member of the Housing Authority Board as designated by the Board for an initial term of two years and thereafter for a term of three years.
- (6) Two members appointed by the City Council, two of the general public or in the alternative one member of the City Council recommended by the Council President and one member of the general public, to be appointed for a term of one year and thereafter for a term of two years for appoints from the general public.
- (7) Two members of the general public to be appointed by the Mayor, confirmed by majority vote of the City Council, one member to be appointed for a term of one year and thereafter for a term of two years and one member to be appointed for a term of two years and thereafter for a term of three years.
- (8) All members of the Committee must be Salem residents.

The Commissions, Boards, Council and Mayor who have appointment authority under this Division shall appoint such representatives within 45 days of the effective date of this ordinance. Should there be a vacancy or resignation in any of the Community Preservation Committee positions, the Commissions, Boards, Council or Mayor who have appointment authority under this Division shall appoint a new representative within 45 days of the first date of a known vacancy or resignation.

As a prerequisite to appointment to the Community Preservation Committee, a Commission or Board appointee must be in good standing, meaning that the member's term of appointment from the Board or Commission shall not have lapsed. In the event that a Committee member who is appointed by a Board or Commission has term of appointment to the underlying Board or Commission that lapses while he or she is a member of the Committee, that appointee shall be ineligible to vote on any matter before the Committee until the member is back in good standing or replaced.

Should any of the Commissions or Boards who have appointment authority under this Division be no longer in existence for whatever reason, the appointment authority for that Commission or Board shall become the responsibility of the City Council.

Should the Mayor fail to appoint a committee member into his/her two allotted spots within 45 days following adoption of this Division or a known vacancy, the appointment authority for that position shall be the City Council.

Should the City Council fail to appoint a committee member into their two allotted spots within 45 days following adoption of this Division or a known vacancy, the appointment authority for that position shall be the Mayor.

Should any of the Commissions or Boards who have appointment authority under this Division fail to appoint a representative within 45 days following adoption of this Division or a known vacancy, the appointment authority for that position shall be the Mayor. In the event the Mayor appoints following a Commission or Board's failure to do so, the individual chosen must be a current member in good standing of the Commission or Board and whose appointment shall be subject to approval of the City Council. In the event 45 additional days have lapsed since the Mayor was to appoint a member to the Committee from a Board or Commission and the Mayor fails to make such appointment, the City Council shall then become the appointing authority for that position.

Sec. 2-2012. Powers and Duties

(1) The community preservation committee shall study the needs, possibilities and resources of the city regarding community preservation. The committee shall consult with existing municipal boards, including the City Council, the conservation commission, the historical commission, the planning board, the park and recreation commissioners and the housing authority, or persons acting in those capacities or performing like duties, in conducting such studies. As part of its study, the committee shall hold one or more public informational hearings on the needs, possibilities and resources of the city regarding community preservation possibilities and resources, notice of which shall be posted publicly and published for each of two weeks preceding a hearing in a newspaper of general circulation in the city. The committee may, after proper appropriation, incur expenses as permitted by state law using funds from the community preservation fund to pay such expenses.

(2) The community preservation committee shall make recommendations to the City Council for the acquisition, creation and preservation of open space; for the acquisition, preservation, rehabilitation and restoration of historic resources; for the acquisition, creation, preservation, rehabilitation and restoration of land for recreational use; for the acquisition, creation, preservation and support of community housing; and for the rehabilitation or restoration of open space and community housing that is acquired or created with Community Preservation Funds. With respect to community housing, the community preservation committee shall recommend, wherever possible, the reuse of existing buildings or construction of new buildings on previously developed sites. With respect to recreational use, the acquisition of artificial turf for athletic fields shall be prohibited.

(3) The community preservation committee may include in its recommendation to the City Council a recommendation to set aside for later spending funds for specific purposes that are consistent with community preservation but for which sufficient revenues are not then available in the Community Preservation Fund to accomplish that specific purpose or to set aside for later spending funds for general purposes that are consistent with community preservation.

Upon approval of any rule or regulation by the committee, a copy of the same shall be filed with the City Clerk and become effective as of the date of filing thereof unless the specific vote of the committee establishes a later effective date.

Sec. 2-2013. Amendments

This Division may be amended from time to time by a majority vote of the City Council, provided that the amendments would not cause a conflict to occur with M.G.L., Chapter 44B.

Sec. 2-2014. Severability

In case any section, paragraph or part of this division is for any reason declared invalid or unconstitutional by any court of last resort, every other section, paragraph or part shall continue in full force and effect.

Section II. This ordinance shall take effect as provided by city charter.

Secretary's Standards for Rehabilitation

The Standards (Department of Interior regulations, 36 CFR 67) pertain to historic buildings of all materials, construction types, sizes, and occupancy and encompass the exterior and the interior, related landscape features and the building's site and environment as well as attached, adjacent, or related new construction. The Standards are to be applied to specific rehabilitation projects in a reasonable manner, taking into consideration economic and technical feasibility.

1. A property shall be used for its historic purpose or be placed in a new use that requires minimal change to the defining characteristics of the building and its site and environment.
2. The historic character of a property shall be retained and preserved. The removal of historic materials or alteration of features and spaces that characterize a property shall be avoided.
3. Each property shall be recognized as a physical record of its time, place, and use. Changes that create a false sense of historical development, such as adding conjectural features or architectural elements from other buildings, shall not be undertaken.
4. Most properties change over time; those changes that have acquired historic significance in their own right shall be retained and preserved.
5. Distinctive features, finishes, and construction techniques or examples of craftsmanship that characterize a historic property shall be preserved.
6. Deteriorated historic features shall be repaired rather than replaced. Where the severity of deterioration requires replacement of a distinctive feature, the new feature shall match the old in design, color, texture, and other visual qualities and, where possible, materials. Replacement of missing features shall be substantiated by documentary, physical, or pictorial evidence.
7. Chemical or physical treatments, such as sandblasting, that cause damage to historic materials shall not be used. The surface cleaning of structures, if appropriate, shall be undertaken using the gentlest means possible.
8. Significant archeological resources affected by a project shall be protected and preserved. If such resources must be disturbed, mitigation measures shall be undertaken.
9. New additions, exterior alterations, or related new construction shall not destroy historic materials that characterize the property. The new work shall be differentiated from the old and shall be compatible with the massing, size, scale, and architectural features to protect the historic integrity of the property and its environment.
10. New additions and adjacent or related new construction shall be undertaken in such a manner that if removed in the future, the essential form and integrity of the historic property and its environment would be unimpaired.



CITY OF SALEM, MASSACHUSETTS
Kimberley L. Driscoll, Mayor
Community Preservation Committee

120 WASHINGTON STREET ♦ SALEM, MASSACHUSETTS 01970
TELE: 978-619-5685 ♦ FAX: 978-740-0404

FY17 Determination of Eligibility Application

Submit 1 original and 10 copies to: Jane A. Guy, City of Salem, Dept. of Planning & Community Development, 120 Washington St., Salem, MA 01970 or jguy@salem.com. To ensure consideration for FY17 Community Preservation Act funding, please submit this no later than **Monday, January 9, 2017**. Early applications are encouraged. Projects determined eligible will be invited to submit a Funding Application.

PROJECT NAME: _____

PROJECT LOCATION: _____

APPLICANT NAME / ORGANIZATION: _____

MAILING ADDRESS: _____

CONTACT PERSON: _____ PHONE: _____

Applicant is (check one):

☐ City board or department

☐ Non-profit - 501(c)(3)

☐ Private group or individual

EMAIL: _____

In the chart at right, please indicate (X) all categories that apply to this project (minimum of one). For information on CPA funding categories, please refer to the "Allowable Spending Purposes" chart on the reverse page.

INDICATE THE LEGAL PROPERTY OWNER OF RECORD:

	Open Space	Historic Resources	Recreational Land	Community Housing
Acquisition				
Creation				
Preservation				
Support				
Rehabilitation/ Restoration				

IF THE OWNER IS NOT THE APPLICANT, DOES THE APPLICANT HAVE SITE CONTROL OR WRITTEN CONSENT OF THE PROPERTY OWNER TO SUBMIT AN APPLICATION? YES ☐ (Attach documentation)

NO ☐ (Project will be deemed ineligible for a funding application by this applicant, but will be forwarded to the property owner to consider submitting a funding application)

~ FOR NON-CITY PROPERTY, PROJECTS WILL REQUIRE THE FILING OF A RESTRICTION ON THE PROPERTY AT THE REGISTRY OF DEEDS. ~

FOR HISTORIC RESOURCES PROJECTS:

- Is the resource listed on the State Register of Historic Places or has the Salem Historical Commission made a determination that the resource is significant? YES ☐ NO ☐
- Date of original construction _____

FOR COMMUNITY HOUSING PROJECTS:

- Total number of units proposed _____
- Of the total, number that will meet the State definition of "affordable" _____

PLEASE ATTACH A NARRATIVE WHICH PROVIDES A DESCRIPTION OF THE PROJECT AND HOW IT RELATES TO THE CATEGORIES THAT ARE SELECTED IN THE CHART ABOVE – NO MORE THAN 1 PAGE & NO LESS THAN 12 PT FONT, PLEASE.

FOR CPC USE: DATE RECEIVED _____ DATE REVIEWED _____ DATE APPLICANT NOTIFIED _____
☐ ELIGIBLE ☐ NOT ELIGIBLE ☐ MORE INFORMATION NEEDED

COMMENTS _____

Chart 1
COMMUNITY PRESERVATION FUND ALLOWABLE SPENDING PURPOSES (G.L. c. 44B, § 5)

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

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



CITY OF SALEM, MA
Community Preservation Committee
FY17 Funding Application

Please date stamp here upon receipt.

Application Cover Page

Must be on top of entire application packet. No cover letters, please!

To ensure consideration for FY17 Community Preservation Act funding, please submit this no later than **Thursday, March 17, 2017**.
Prior to submitting this funding application, applicants should first submit a Determination of Eligibility application and receive a Letter of Eligibility from the Community Preservation Committee. Please read all materials carefully. Omitted information may result in delays or application rejection.

PROJECT NAME: _____

PROJECT LOCATION _____

INDICATE THE LEGAL PROPERTY OWNER OF RECORD: _____

Applicant is (check one):

- ☐ City board or department
☐ Non-profit - 501(c)(3)
☐ Private group or individual

APPLICANT NAME/ORGANIZATION: _____

CO-APPLICANT NAME/ORGANIZATION: _____

APPLICANT MAILING ADDRESS: _____

APPLICANT CONTACT: _____ DAYTIME PHONE: _____

EMAIL: _____

*In the chart below, please indicate (X) the **approved** category(s) from your Letter of Eligibility.*

Indicate Total CPA Funds Requested (must match total CPA request in attached Budget Summary)
\$ _____

	Open Space	Historic Resources	Recreational Land	Community Housing
Acquisition*				
Creation				
Preservation				
Support				
Rehabilitation/ Restoration				

If acquisition, please provide the number of acres to be acquired: _____

**Provide a one sentence
description of the project:**

I/we attest that all information provided in this entire submission is true and correct to the best of my/our knowledge and that no information has been excluded, which might reasonably affect funding. I/we authorize the Community Preservation Committee and/or the City of Salem to obtain verification from any source provided. I acknowledge and agree that a permanent restriction may be placed on the property as a condition of funding.

Name (printed) _____ Signature _____ Date: _____

Name (printed) _____ Signature _____ Date: _____

Submission:

- ☐ **Eleven (11) copies (double sided acceptable) – to preserve file space, NO 3-ring binders please; and**
☐ **One (1) electronic copy of all submitted materials (Word for narratives, jpeg for pictures, no PDFs except application) on CD or flash drive to: Jane A. Guy, Assistant Community Development Director, City of Salem, Dept. of Planning & Community Development, 120 Washington St., Salem, MA 01970**

Submission Requirements

Please check ✓ each item included in your submission. Your submission should include the applicable items in the order listed below.

General

- ☐ *Application Cover Page (form provided)*
- ☐ *Submission Requirements Checklist (this form)*
- ☐ Narratives
- ☐ Category Specific Narratives
- ☐ Project Timeline - Provide a project schedule showing all major milestones (i.e. study, design, environmental, permitting, construction, estimated completion date, etc.), including receipt of other funding sources.

Financial

- ☐ *Budget Summary (form provided)*
- ☐ Cost estimates and/or written quotes, if applicable
- ☐ Proof of secured funding (commitment letters, bank statements), if applicable

Visual

- ☐ Map - Please include a map showing the property location (if applicable, show wetlands and wetland buffers, flood plain, water bodies, parks, open spaces, rails, and other features pertinent to the project). Applicants may use the City's interactive mapping website at <http://host.appgeo.com/salemma/>
- ☐ Catalog cuts (i.e. recreation equipment), if applicable
- ☐ Photos of the project site (not more than four views per site). Digital copies for use in a presentation must be provided.

Ownership/Operation (non-City)

- ☐ If the owner is not the applicant, attach documentation of site control or written consent of the property owner to undertake the project.
- ☐ Certificate of Good Standing (if operating as a corporation)
- ☐ 501(c)(3) certification (if operating as a non-profit)
- ☐ Purchase and Sale agreement or Copy of Current Recorded Deed (if applicable)

Community Support (Recommended)

- ☐ Letters of Support (i.e. city departments, residents, neighborhood groups, civic organizations, businesses, etc.)

Historic Resource Projects

- ☐ Documentation that the project is listed on the State Register of Historic Places or a written determination from the Salem Historical Commission that the resource is significant in the history, archaeology, architecture or culture of Salem. Note: If located within a local or National Register district, it must be a contributing property to the district.
- ☐ Photos documenting the condition of the property
- ☐ Report or condition assessment by a qualified professional describing the current condition of the property, if available.

Community Housing Projects

- ☐ Development proforma

Plans and Reports (if available) - If available in 8 ½ x 11, include in the application. If not, provide separately, not bound to the application.

- ☐ Renderings, site plans, engineering plans, design and bidding plans and specifications
- ☐ Applicable Reports: 21E, Historic Structure Reports, appraisals, survey plans, feasibility studies - for reports of more than 10 pages, applicants may provide 2 copies, rather than 11.

Budget Summary

Indicate the total project costs, including CPA funding request, from all proposed sources.
Application package must include a complete itemized budget of all project costs.
Note: CPA funds cannot be used for maintenance.

	STUDY	SOFT COSTS*	ACQUISITION	CONSTRUCTION**	TOTAL
SOURCE 1: SALEM CPA <i>(total must match amount requested on cover sheet)</i>	\$	\$	\$	\$	\$
SOURCE 2:	\$	\$	\$	\$	\$
SOURCE 3:	\$	\$	\$	\$	\$
SOURCE 4:	\$	\$	\$	\$	\$
SOURCE 5:	\$	\$	\$	\$	\$
SOURCE 6:	\$	\$	\$	\$	\$
TOTAL PROJECT COST	\$	\$	\$	\$	\$

*Soft costs include design, professional services, permitting fees, closing costs, legal, etc.

**For this application "construction" refers to new construction, rehabilitation, preservation and/or restoration work.

In the column to the right, please explain the status of each funding source (i.e. submitting application 7/1/14, applied on 1/1/14, received award notification 3/1/14, funds on-hand in organization bank account, etc.). For sources where funding has been awarded or funds are on hand, please attach documentation proof from the funding source (commitment letter, bank statement, etc.).

SOURCE 2:	STATUS:	
SOURCE 3:	STATUS:	
SOURCE 4:	STATUS:	
SOURCE 5:	STATUS:	
SOURCE 6:	STATUS:	

Do you anticipate that your project may require bonding (City projects only)? If yes, please elaborate.

Application Narratives

 **Please attach concise narratives that respond to all questions in the order they are described below.** 

General Narratives (All Applicants)

A. Project Description

1. What is the project description, scope of work and goals?
2. Where is the project located? Describe the visibility.
3. Why is this project needed? How does it preserve and enhance the character of the City?
4. What is the public benefit? Describe the population the project will serve. Does the project encourage economic development and/or enhance the tax base?
5. How is the project consistent with recommendations of current relevant planning documents? For information on available planning documents, refer to the Community Preservation Plan and/or http://saalem.com/pages/salema_dpced/studies . Be specific, citing document and page of each goal/object quoted.
6. Is the project of an urgent nature?
 - a. Is there a critical deadline? Please specify if the project is constrained by scheduling factors not controlled by the applicant (i.e. opportunity for immediate acquisition, opportunity to leverage available non-CPA grant or other financial opportunity).
 - b. For historic resource applications, is the property at risk for irreparable loss? If so, please include a condition assessment from a qualified professional.
7. What is the nature of community support for this project?
8. How does the project meet any additional General Evaluation Criteria?

B. Financial

1. Will there be in-kind contributions, donations or volunteer labor? Are there fundraising plans? Describe other attempts to secure funding (including unsuccessful).
2. What is the basis for the total CPA funding request?
3. Provide any additional pertinent information relative to the proposed budget.

C. Project Management

1. Please describe how the project is practical and feasible and can be implemented within a reasonable, feasible schedule and budget.
2. Will the project need any permits? Please describe the nature of permits and inspections required. Applicants are encouraged to concurrently begin to seek applicable permits. Are there any other known or potential barriers to project implementation and completion?
3. Who will be responsible for undertaking the project? Is the project regional? Identify and describe the roles of all known participants (applicants, architects, contractors, etc.).
 - a. For City of Salem (and regional) projects, what City of Salem department will manage the project?
 - b. For non-City of Salem projects, what are the qualifications/experience of the project's sponsoring organization? Demonstrate that the applicant/applicant team has successfully implemented projects of similar type and scale, or has the ability and competency to implement the project as proposed.
4. Who will be responsible for ongoing maintenance?

Category Specific Narratives

Prepare narratives that respond to all questions below for each category checked on the Application Cover Page.

Community Housing Projects

- A. How does the project meet the CPC's Evaluation Criteria for Community Housing Projects? Please describe how the project meets the category specific primary criteria and any secondary criteria for Community Housing.
- B. How does the property contribute to the goal of 10% affordability as defined by M.G. L. Chapter 40B? What are the total number of units proposed? How many will meet the State definition of "affordable"? What will be the long term affordability? Note: Property owner must enter into an affordable housing restriction for a minimum of 30 years (if CPA funds are used for acquisition, a permanent restriction).
- C. If the project incorporates sustainable design features, explain how they will reduce impacts on the environment including, but not limited to, reducing energy consumption, enhancing energy and water conservation, and the use of recyclable materials.
- D. Explain how the project incorporates universal design, if applicable.

Historic Resource Projects

- A. How does the project meet the CPC's Evaluation Criteria for Historic Resource Projects? Please describe how the project meets the category specific primary criteria and any secondary criteria for Historic Resources.
- B. What is the date of the original construction/creation of the resource? The resource must be a minimum of 50 years old.
- C. Is the resource listed on the State Register of Historic Places or has the Salem Historical Commission made a determination that the resource is significant? Written documentation is required.
- D. If the project incorporates sustainable design features, explain how they will reduce impacts on the environment including, but not limited to, reducing energy consumption, enhancing energy and water conservation, and the use of recyclable materials.
- E. Explain how the project incorporates universal design, if applicable.

Open Space Projects

- A. How does the project meet the CPC's Evaluation Criteria for Open Space Projects? Please describe how the project meets the category specific primary criteria and any secondary criteria for Open Space.

Recreational Land Projects

- A. How does the project meet the CPC's Evaluation Criteria for Recreational Land Projects? Please describe how the project meets the category specific primary criteria and any secondary criteria for Recreational Land.
- B. Does the project support multiple recreation uses? Describe each use.
- C. Explain how the project incorporates universal design, if applicable.

Application Information

General:

- If the proposal involves City-owned land or structures, either the applicant or the co-applicant must be a City agency/department.
- Applicants must review the Community Preservation Plan, including the Evaluation Criteria and all materials in this Funding Application packet. Review of the CPA legislation is recommended.
- All proposals must be submitted using the application forms contained herein (Application Cover Page, Application Checklist, Budget Summary) along with the required narratives and attachments.
- Applications may be accepted at any time. However, the CPC will announce one annual cutoff date to ensure funding consideration for that funding round. Applications received after the deadline may be held until the next funding round.
- If submitting multiple applications, the applicant may indicate if one application is preferred over another.
- During the funding round review, the CPC may request additional information from the applicant.
- Supplanting is not permitted. CPA funds cannot be used to reimburse funds paid from other sources.
- Implementing cost-saving measures and leveraging other funding or in-kind donations is encouraged.
- Other permitting: Projects must conform to the zoning regulations of the City of Salem, as applicable. Projects must have Board of Appeals, Conservation Commission, Salem Historical Commission, Planning Board, Salem Redevelopment Authority and/or Park & Recreation Committee approval, as applicable. Projects must have a building permit before proceeding, as applicable.
- Non-city applicants must be in good standing with all real estate taxes and water/sewer fees.
- For acquisition of an interest in real estate, property value will need to be established through procedures “customarily accepted by the appraising profession as valid”. Applicants for acquisition projects are encouraged to include an appraisal from a qualified profession. CPA funds may be requested to pay for an appraisal, but this may delay a CPA funding award. Please include an estimate of the number of acres to be acquired.
- Non-city property will require the filing of a permanent restriction at the Registry of Deeds to ensure that the property continues to be used for the applicable CPA purpose. Restrictions are legal documents that place limitations on the use of a property. These restrictions apply to all future owners of the property, and can’t easily be changed or removed by subsequent owners. The restriction will be held by the City of Salem in order to facilitate enforcement of the conditions. These are the four types of restrictions that are commonly used in CPA projects:
 - For Open Space Conservation and Outdoor Recreation Projects, the Conservation restriction will be approved by the MA Executive Office of Energy and Environmental Affairs (EOEEA)
 - For Community Housing Projects the Affordable Housing Restrictions will be approved by the MA Dept. of Housing and Community Development (DHCD)
 - For Open Space Agricultural Projects, the Agricultural Preservation Restrictions will be approved by the MA Dept. of Agricultural Resources (DAR)
 - For Historic Projects the Preservation Restrictions will be approved by the Massachusetts Historical Commission

Please direct any questions on completion of this application to Jane Guy, jguy@salem.com or 978-619-5685.

Rev. 9/1/16