



# The City of **WORCESTER**

## **COMMUNITY PRESERVATION PLAN**

# 2025

*Historic Resources* ♥ *Open Space* ♥ *Recreation* ♥ *Community Housing*

*Adopted by the Community Preservation Committee*

*March 11<sup>th</sup>, 2025*



# ACKNOWLEDGEMENTS

The Community Preservation Committee (CPC) gratefully acknowledges the City employees, City Council, community organizations, and residents of the city for their contributions to the Community Preservation Plan. Additionally, gratitude goes toward the Community Preservation Coalition, whose support has been invaluable during this process.

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- Lindsay Nystrom, Conservation Commission Representative
- Diane Long, Historic Commission Representative
- Eric Stratton, Parks Commission Representative
- Bill Eddy, Housing Authority Representative, Chair



# ACRONYMS

**ADA** - The Americans with Disabilities Act

**AHTF** - Affordable Housing Trust Fund

**AMI** - Area-wide Median Income set by the federal Department of Housing and Urban Development

**CPA** - Community Preservation Act, Chapter 44B of the Massachusetts General Laws

**CPC** - Community Preservation Committee

**CPP** - Worcester Community Preservation Program

**DCR** - Massachusetts Department of Conservation and Recreation

**DPW&P** - Worcester Department of Public Works and Parks

**EOED** - The City of Worcester Executive Office of Economic Development

**FY** - Fiscal Year(s)

**HUD** - United States Department of Housing and Urban Development

**LHD** - Local Historic District

**MACRIS** - Massachusetts Cultural Resource Information System

**MGL** - Massachusetts General Laws

**MHC** - Massachusetts Historical Commission



# KEY DEFINITIONS

This list of key definitions is intended to assist the reader and is not intended to replace applicable legal definitions of these terms. The following definitions are for key terms used throughout the document, many of which are based on definitions per MGL c.44B s.2 or other statutes and regulations.

**Active Recreation** – Outdoor recreation that often involves cooperative or team activity, including playgrounds, ball fields, and paved bike paths. Development of active recreation requires intensive development to create.

**Area-wide Median Income (AMI)** – The median gross income for a person or family as calculated by the United States Department of Housing and Urban Development, based on the median income for the Metropolitan Statistical Area. In 2024, the HUD AMI for the Worcester Metro FMR Area was \$117,300 for a household of four people.

**Community Housing** – Housing for individuals and families with incomes less than 100 percent of the Area-wide Median Income, including senior housing, as defined by the Community Preservation Act.

**Community Preservation** – The acquisition, creation, and preservation of open space; the acquisition, creation, preservation, and rehabilitation/restoration of land for recreation; the acquisition, preservation, and rehabilitation/restoration of historic resources; and the acquisition, creation, preservation, and support of community housing.

**Community Preservation Act** – A State law, MGL c. 44B, enabling legislation that allows communities to create the Community Preservation Fund, specifically to support community preservation projects, including open space and natural resource conservation, outdoor recreation, historic preservation, and community housing. It is funded through a combination of a local property tax surcharge of up to 3 percent and a variable state contribution from the Community Preservation Trust Fund.

**Community Preservation Committee** – The committee established by the legislative body of a city or town to make recommendations for community preservation, as provided by Section 5 of MGL c. 44B.

**Community Preservation Fund** – A municipal fund established by Section 7 of MGL c. 44B.

**Family Household** - Two or more individuals who are related by birth, marriage, or adoption, although they also may include other unrelated people.

**Historic Resource** – A building, structure, document, or artifact that is listed on the state register of historic places and/or National Register of Historic Places or has been



determined by the local historic preservation commission to be significant in the history, archeology, architecture or culture of a city or town.

**Household** – All the people, related or unrelated, who occupy a housing unit. It can also include a person living alone in a housing unit or a group of unrelated people sharing a housing unit as partners or roommates.

**Nonfamily household** - A group of people who live alone or who share their residence with unrelated individuals.

**Local Historic District** – An area or group of historic structures that are deemed significant to the city’s history, archeology, architecture or culture and protected by public review.

**Low-income Housing** – Housing for persons or families whose annual income is less than 80 percent of the area-wide median income (AMI) (as defined by the CPA). The AMI is determined by the United States Department of Housing and Urban Development (HUD). As of 2024, 80 percent of the AMI is \$93,840.

**Moderate-income Housing** – Housing for persons or families whose annual income is less than 100 percent of the area-wide median income (AMI) as defined by the Community Preservation Act. The AMI is determined by the United States Department of Housing and Urban Development (HUD). In 2024, the HUD AMI for a family of four in the Worcester Metro Area was \$117,300. AMI is also referred to in the document as median family income (MFI).

**Open Space** – Land intended 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, oceans, rivers, streams, lake and pond frontage, beaches, dunes and other coastal lands, lands to protect scenic vistas, land for wildlife or nature preserve, and/or land for recreational use, as defined by the Community Preservation Act.

**Passive Recreation** – Recreational activities that emphasize the open space aspect of a park and which involves a low level of development, including picnic areas and trails.

**Preservation** – The protection of personal or real property from injury, harm, or destruction.

**Recreational use** – Recreation uses are often divided into two categories: passive and active recreation. See definitions for “Passive recreation” and “Active Recreation.” Recreation, under the CPA, does not include horse or dog racing, or the use of land for a stadium, gymnasium or similar structure.

**Rehabilitation** – Capital improvements or extraordinary repairs to historic resources, open spaces, lands for recreational use, and community housing for the purpose of making the above functional for their intended uses and compliant with the Americans with Disabilities Act (ADA) and other federal, state, or local building or access codes. With historic resources,



“rehabilitation” must comply with the Standards for Rehabilitation stated in the United States Secretary of the Interior’s Standards for the Treatment of Historic Properties (codified in 36 C.F.R. Part 68). With recreational use, “rehabilitation” includes the replacement of playground equipment and other capital improvements to the land or facilities which make the related land or facilities more functional for the intended recreational use.





# TABLE OF CONTENTS

- Acknowledgements
- Acronyms
- Key Definitions

## **EXECUTIVE SUMMARY.....11**

- I. Background of the Community Preservation Plan
- II. A Community Planning Process
- III. Community Priorities
- IV. Category Goals
- V. Criteria for Project Scoring
- VI. Application Process

## **CHAPTER 1: OVERVIEW.....15**

- I. Introduction
- II. Background
- III. General CPA Eligibility
- IV. Planning Process
- V. Community Priorities
- VI. Criteria for Project Scoring
- VII. Application & Funding Process

## **CHAPTER 2: HISTORIC RESOURCES.....34**

- I. Eligible Activities
- II. Review of Historic Resource Needs and Priorities
- III. Historic Resources Category Goals

## **CHAPTER 3: OPEN SPACE AND OUTDOOR RECREATION.....39**

- I. Eligible Activities
- II. Review of Open Space and Recreation Needs and Priorities
- III. Open Space and Recreation Category Goals

## **CHAPTER 4: COMMUNITY HOUSING.....44**

- I. Eligible Activities
- II. Review of Community Housing Needs and Priorities
- III. Community Housing Category Goals



## **APPENDICES**

- A. Application Guidelines
- B. Community Preservation Fund Allowable Spending Purposes (Eligibility)
- C. Project Scoring Rubric
- D. Public Forum and Online Survey Questions
- E. Public Forum and Online Survey Responses
- F. Draft Community Preservation Plan Public Feedback



# EXECUTIVE SUMMARY

## I. BACKGROUND OF THE COMMUNITY PRESERVATION PLAN

With the passage of the Community Preservation Act (CPA) in the Municipal Election of 2022, Worcester joined 200 other communities in the Commonwealth of Massachusetts in establishing a Community Preservation Fund. Starting in 2023, a combination of a local property tax surcharge and an annual State Trust Fund distribution will provide the city with an estimated \$4.5 million per year to support locally proposed projects in the categories of Historic Resources, Open Space and Recreation, and Community Housing. The Community Preservation Fund is allocated to applicants by the Community Preservation Committee (CPC) with support from the City of Worcester Executive Office of Economic Development (EOED). While the Commonwealth of Massachusetts has minimum eligibility requirements for projects to be funded through CPA, the City has liberty in how it prioritizes eligible projects for funding. The purpose of the Community Preservation Plan is to identify the goals and priorities of the community when it comes to how CPA funds are allocated to eligible projects. In addition to outlining the goals and priorities of the Community Preservation Program (the Community Preservation Fund administrator), this Plan aims to provide background information on CPA, describe the criteria and rationale for local project prioritization, and outline processes for the submission of an application.

This document can be referenced by the CPC as it makes its funding decisions, CPA fund applicants as they create proposals, and the Worcester City Council as it approves the slate of projects recommended to them by the CPC.

## II. A COMMUNITY PLANNING PROCESS

The CPC, in collaboration with EOED, prepared the Community Preservation Plan. This was a multistep process that aimed to incorporate the priorities of the Worcester community through review of existing plans, interviews with community groups, and feedback from the public. The Planning Process included:

- **Review of over ten (10) existing Worcester plans** and documents
- **Interviews with over forty (40) local organizations** that work in the three CPA funding categories
- **Three (3) Public Forums** in December of 2024, including one offered in Spanish
- **An Online Survey** that ran from December 2024 to January 2025 available in English, Spanish, Vietnamese, and Twi
- **A public hearing** on March 11<sup>th</sup>, 2025





**Figure A: Public Input.** Community members rank priorities at the December 18<sup>th</sup>, 2024, Information Session and Public Forum.

The purpose of these efforts was to understand the needs and priorities in each of the three Community Preservation Act (CPA) funding categories (Historic Resources, Open Space and Recreation, and Community Housing). In total, close to 250 people participated in the Public Forums and Online Survey. More information on how these activities were carried out can be found throughout this document.

The Planning Process allowed the CPC to understand the goals and priorities of the community regarding CPA and create criteria and an application process that scores projects that embody them more favorably. While the CPC feels confident about the Planning Process in establishing the first Community Preservation Plan, they are committed to continuing to listen to the community and consider revisions to the plan on an annual basis.

### III. COMMUNITY PRIORITIES

Throughout the Planning Process outlined above, several themes became apparent. These “Community Priorities” could be applied to any of the three funding categories and shall be addressed through the Community Preservation Program by creating a ranking criterion in the project Scoring Rubric that favors projects with these qualities. Below is a summary of these Community Priorities, but more details on each can be found in *Chapter 1* of this plan.

- **PRIORITY 1:** Increase accessibility to historic resources, open space, parks, and in community housing.
- **PRIORITY 2:** Advance the city’s sustainability and climate resilience goals.
- **PRIORITY 3:** Prioritizing investments into projects that address a demonstrated need in a geographic area.



#### IV. CATEGORY GOALS

Throughout the Planning Process outlined above, several themes emerged that were specific to each of the three funding categories. These “Category Goals” represent priorities of the community related to Historic Resources, Open Space and Recreation, and Community Housing that shall be used as ranking criterion for the CPC to score eligible projects in each category. Below is the list of Funding Category Goals. More on each of these goals can be found in *Chapters 2, 3, and 4* of this plan.

##### *Historic Resources Category Goals*

- **GOAL 1:** Acquire and restore historic buildings in danger of demolition.
- **GOAL 2:** Promote adaptive reuse or deconstruction for historical preservation.
- **GOAL 3:** Preserve, digitize, and archive historic records.
- **GOAL 4:** Preserve underrepresented stories.

##### *Open Space and Recreation Category Goals*

- **GOAL 1:** Maintain high quality drinking water resources and protect wetlands and floodplains.
- **GOAL 2:** Refurbish existing park amenities to meet the city’s changing needs.
- **GOAL 3:** Provide access to fresh, locally grown foods.
- **GOAL 4:** Increase native species populations and grow the urban forest.
- **GOAL 5:** Expand green networks to create corridors for wildlife and alternative mobility options.

##### *Community Housing Category Goals*

- **GOAL 1:** Produce more housing, especially owner-occupied housing.
- **GOAL 2:** Support deeper housing affordability (households at or below 60% AMI).
- **GOAL 3:** Increase infill and adaptive reuse development.
- **GOAL 4:** Increase the number of perpetual affordability deed restrictions.
- **GOAL 5:** Support unhoused individuals, especially youth and families.

#### V. CRITERIA FOR PROJECT SCORING

With input collected throughout the Planning Process, criteria for project scoring were developed for a Project Ranking Rubric. The purpose of this Rubric is so that the CPC can fairly and transparently review and rank project applications, as well as provide guidance to applicants in project development. The following are the criteria for the 2025 Worcester Community Preservation Plan. More information on these criteria can be found in *Chapter 1: Overview*.



- A. Project Preparedness:** To ensure that public funds are committed to projects have the greatest chance of being completed in a timely manner, and with a lower chance for delay due to problems with securing permissions, permits, or outside funding when applicable.
- B. Match Funding:** To encourage projects which utilize both CPA funds and other public and private funding, including donations and bargain sales.
- C. Applicant Experience:** To ensure that public funds are committed to projects have the greatest chance of being completed in a timely manner by project managers that have experience related to the proposed project.
- D. Long-Term Sustainability:** To ensure that the project is a sustainable investment into the community.
- E. Community Benefit:** To ensure that the project has a positive impact on Worcester residents.
- F. Community Priorities:** To ensure that projects align with CPA Community Priorities.
- G. Community Preservation Plan Category Goals:** To ensure that projects align with CPA Category Goals.
- H. Community Planning and Buy In:** To prioritize projects that demonstrate compatibility with other community initiatives, goals, or plans; and/or have demonstrated community buy-in.
- I. Compatibility Between CPA Funding Categories:** To encourage projects that include eligible activities in multiple CPA areas, such as affordable housing and recreation.

## **VI. APPLICATION PROCESS**

Beginning in the Fall of 2025, the CPC shall accept applications for funding on an annual basis. Determination of Eligibility forms and applications shall be due in the Fall, and funding decisions being announced in the Winter. Based on the project, an applicant may pursue one of three Application Tracks: The Standard Application, The Special Application, or the Affordable Housing Trust Fund Application (AHTF Application). Details on each of these tracks can be found in *Chapter 1* on this plan. For any questions regarding eligibility or the application process, applicants can reach out to EOED Community Preservation Program staff.

Prior to the first round of funding in the Fall of 2025, there shall be a Pilot Funding Round in the Spring of 2025. More information on the Pilot Funding Round can be found later in this document.



# CHAPTER 1: OVERVIEW

## I. INTRODUCTION

The Community Preservation Act (CPA) allows for the creation of a local fund that supports projects and programs related to Historic Resources, Open Space and Recreation, and Community Housing, thereby creating an exciting opportunity for long term community investment. While the Commonwealth of Massachusetts has minimum eligibility requirements for the use of CPA funds, the City of Worcester can prioritize eligible projects based on local needs and priorities. The Worcester Community Preservation Committee (CPC), the local resident committee charged with implementing CPA in Worcester, developed this Community Preservation Plan in collaboration with the city administration, local organizations, and residents, to guide the allocation of the Community Preservation Fund in alignment with community needs and priorities. In addition to outlining the goals and priorities of the Community Preservation Program for use of CPA funds, this Plan aims to provide background information on CPA, describe the criteria and rationale for local project prioritization, and outline processes for the submission of an application.

CPA projects can be proposed by the city administration, local organizations, and residents alike. The CPC will consult the priorities and goals outlined in this plan to inform its project recommendations to the City Council on appropriating CPA funds. The CPC encourages applicants seeking CPA funds to use this plan to guide their CPA requests.

This plan is not a static document. It shall be reviewed annually and revised as necessary to ensure that project investments continue to align with community needs.

## II. BACKGROUND

The Community Preservation Act (CPA) is a state law, MGL c.44B, which was enacted in 2000. It enables communities to raise and set aside monies for a Community Preservation Fund that can only be used for certain categories of local projects. These project funding categories include Historic Resources, Open Space and Recreation, and Community Housing.

A local Community Preservation Fund is made up of three sources of money. The largest portion comes from a local property surcharge of up to three percent. Second, CPA communities receive an annual distribution from the State Community Preservation Trust Fund, which is funded by fees on property transactions at the Registry of Deeds, as well as occasional state budget appropriations. A community's allocation of the Trust Fund is based directly on local surcharge collection rates and the percent surcharge selected by the community. Finally, interest earned on the balance of the Community Preservation Fund shall be applied to the account to be used for CPA eligible expenses.





### *The Local Surcharge*

In the 2022 November 5th Municipal Election, a majority of Worcester voters elected to enact the Community Preservation Act in Worcester with a 1.5% surcharge on property taxes, set to begin in Fiscal Year 2024 (FY24). The surcharge applies after the first \$100,000 in value of all residential, commercial, and industrial properties. However, exemptions are available for low-income homeowners, as well as low- and moderate-income senior homeowners. Abatement applications can be found on the City of Worcester webpage.

**Table 1: Estimated surcharge according to property type.** Below are average values of different property types in Worcester and the surcharge an owner could expect to see, based on averages and rates in FY24.

Property Type	Average Value	Annual CPA Surcharge
Single Family – Residential	\$371,094	\$56
Condominium – Residential	\$245,975	\$30
Three-Family – Residential	\$524,309	\$88
Apartment- Residential	\$1,246,431	\$236
Commercial	\$1,200,621	\$496

### *The Community Preservation Committee (CPC)*

Upon passage of the CPA in Worcester, a nine (9) member Community Preservation Committee (CPC) of volunteer Worcester residents, was created to administer the Community Preservation Program. Of these nine members, four (4) are at-large members, and five (5) must come from specified boards and commissions throughout the city, including a member from the Conservation Commission, one from the Planning Board, one from the Parks and Recreation Commission, one from the Historical Commission, and one from the Board of Directors of the local Housing authority. These members bring their expertise from these boards and commissions to the CPC.

The CPC is tasked with studying the needs, possibilities, and resources of the city regarding the three funding categories, creating the Community Preservation Plan and Funding Application, evaluating submitted applications and recommending a budget and appropriations to the City Council for final approval. The Worcester CPC will also hold an annual public hearing to solicit feedback on the Community Preservation Plan to ensure it remains current with the city's evolving needs.





The funding recommendations from the CPC are sent to the City Council where the recommended appropriations can be affirmed, rejected, or lowered. Funding recommendations may not be increased. City Council is bound to act only upon an affirmative recommendation of the CPC and cannot consider requests that do not receive a CPC recommendation.

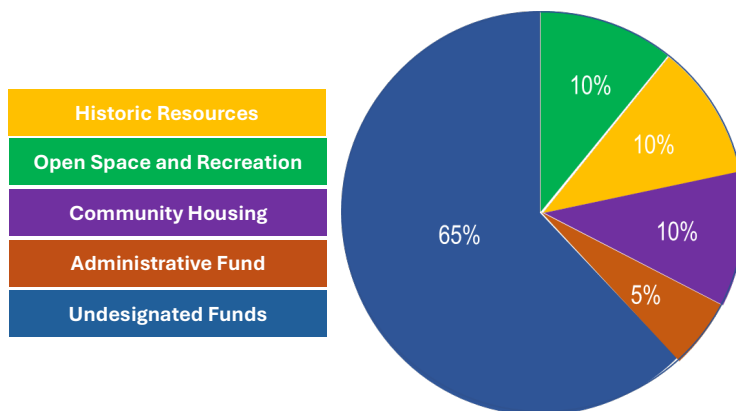
**Table 2: 2025 Community Preservation Committee (CPC) Membership.**

*The CPC is made up of nine Worcester residents, 5 of which are required to be serving on other specific Worcester boards and commissions. Members are appointed by the City Manager and have staggering three-year terms.*

2025 Community Preservation Committee Roster			
Name	District	Representation	Expiration
Barry Fradkin	3	At-large	9/1/2025
Frank Callahan	4	At-large	9/1/2025
Monica Adwani	1	At-large	9/1/2026
Odeta Longobardo	5	At-large	9/1/2027
Vacant		Planning Board	
Lindsay Nystrom	1	Con Comm	9/1/2027
Diane Long	5	Historic Comm	9/1/2025
Eric Stratton	1	Parks Comm	9/1/2027
William Eddy	1	Housing Authority	9/1/2025

### Legal Requirements

There are several legal requirements on how Community Preservation Funds must be allocated in the community. At least 10 percent of total revenue must be spent or set aside annually in each of the three funding categories: Historic Resources, Open Space and Recreation, and Community Housing. However, the community may opt to increase this allocation to up to 80% during the annual budgeting period. Up to 5% of revenues may be used for administrative costs, including due diligence on property transactions, food and rental space for public meetings,



**Figure B: Minimum Category Allocations.** CPA requires that at least 10% of revenues be allocated to each funding category annually, though it does not need to be spent that year. Undesignated funds can be spent on any of the three funding categories.



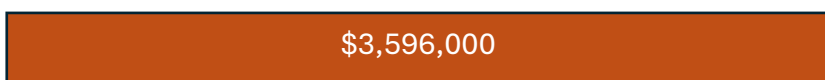
consultants, and administrative staff. Unspent Administrative funds must be returned to the Fund Balance each year.

Prior to accepting any applications and awarding any funds, the CPC must solicit input from the community and create a Community Preservation Plan that reflects the community's priorities.

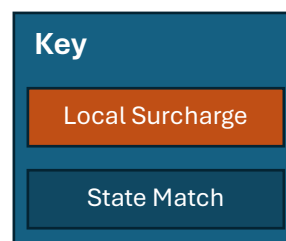
### *Available Funding*

Funding available for project proposals is based on revenues from the previous year and prior years uncommitted account balances. In FY24, the first year of collections, the city collected approximately \$3,596,000. The first State Trust Fund Distribution became available to Worcester in November of 2024. Funds available for FY25 are therefore higher at an estimated \$4,759,000. At this point, the CPC intends to award as much of the Fund Balance as possible each year.

*FY 24 Fund Balance: \$3,596,000*



*FY 25 Revenue Estimate: \$4,759,000*



**Figure C: Available Funding.** In FY24, the City of Worcester has a Fund Balance of \$3,596,000. Estimated revenue for FY25 is \$4,759,000. Note that Worcester was not eligible for a Trust Fund distribution until after its first year of collections.

Due to state procurement laws, CPA funding is provided on a reimbursement basis to awardees. For larger projects with more extended timelines, grant agreements may include terms for up to monthly invoicing of the city to reimburse expenses on an ongoing basis.

### **III. GENERAL CPA ELIGIBILITY**

CPA provides funding for local projects in three funding categories: Historic Resources, Open Space and Recreation, and Community Housing. Below are the state's general eligibility requirements for projects in each category. While these are the minimum requirements for a project to receive funding, the city can prioritize funding for eligible projects. More on how Worcester selected its funding priorities can be found later in this chapter.

*Historic Preservation:* CPA funds can be used to *acquire, preserve, rehabilitate, and restore* historic resources that are listed on the State Register or determined to be locally significant by the Worcester Historical Commission.



**Open Space and Recreation:** CPA funds can be used to *acquire, create, and preserve* open space and natural resources. They can be used to *rehabilitate or restore* open space that was initially acquired with CPA funds. They can also be used to *acquire, create, preserve, rehabilitate, or restore* property for recreational use.

**Community Housing:** CPA funds can be used to *acquire, create, preserve, and support* community housing for households with incomes at or below 100 percent of the area median income (AMI). They can also be used to *rehabilitate or restore* community housing that was initially acquired or created with CPA funds.

**Table 3: Community Housing household income eligibility limits for Worcester.** CPA Funds can be used to support housing for individuals and families at or below 100% area median income (AMI).

FY 24 Income Limits Worcester CPA Community Housing								
	Household Size							
	1 Person	2 People	3 People	4 People	5 People	6 People	7 People	8 People
<b>Low Income (80% AMI)</b>	\$ 65,688	\$ 75,072	\$ 84,456	\$ 93,840	\$ 101,347	\$ 108,854	\$ 116,362	\$ 123,869
<b>Moderate Income (100% AMI)</b>	\$ 82,110	\$ 93,840	\$ 105,570	\$ 117,300	\$ 126,684	\$ 136,068	\$ 145,452	\$ 154,836

Section 12(a) 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. This may include a Conservation Restriction (CR), a Preservation Restriction, or a Deed Restriction for housing affordability. For more information on the various restrictions, see the following chapters on each Funding Category.

The CPC may also require a restriction to protect the nature of their investment for some improvements, such as a new roof, windows, accessibility improvements, and other code-compliant improvements. For private properties, applicants must demonstrate a public benefit which may be accomplished through a public access easement or deed restriction.

#### IV. PLANNING PROCESS

The creation of the Community Preservation Plan was a joint effort between the City of Worcester Executive Office of Economic Development (EOED) Community Preservation Program staff (CPP staff) and the CPC. To ensure the goals of this plan are most aligned with the priorities of Worcester residents, great care was taken to review existing documents created with community input, interview community organizations that work in the three



funding priorities and get feedback directly from the public. The CPC’s commitment to a community-oriented and democratic Community Preservation Program will continue even after the publication of this report by providing annual listening sessions, public hearings, and updates to adapt the Plan with the city’s changing needs.

**Table 4: The CPA Project Eligibility Matrix.** The below tool was developed by the Community Preservation Coalition to assist applicants in determining if a project is eligible for CPA funding.

	Open Space	Recreation	Historic	Housing
Acquire	YES	YES	YES	YES
Create	YES	YES	NO	YES
Preserve	YES	YES	YES	YES
Support	NO	NO	NO	YES
Rehabilitate/ Restore	NO*	YES	YES	NO*

**\*Unless acquired with CPA funds**

#### *Review of Existing Documents*

To better understand the city’s existing priorities, city plans related to the three funding categories that were published in the last decade and plans currently being drafted were reviewed. These plans include the Now | Next Long-Range Plan, the Open Space and Recreation Plan, the Historic Preservation Study, and many more. A complete list of reviewed plans can be found in the proceeding funding category chapters. Most of these plans were made with significant community input and highlight the perspectives and priorities of residents. In addition to these plans, other city documents were reviewed, including local ordinances and other reports to supplement understanding of the issues, including, for example, the Demolition Delay Ordinance, the Inclusionary Zoning Ordinance, and the Lakes and Ponds Program Water Quality Reports. The content of these documents was helpful in establishing a baseline of understanding for what some potential priorities and goals of the Community Preservation Plan could be.

#### *Interviews with Local Community Groups*

Concurrent to the review of documents, interviews were conducted with local organizations that work in each of the three funding categories. Interviews started with an overview of CPA



and project eligibility requirements, followed by an opportunity for the organization to talk about its mission and operations, including the projects it is working on, and the projects it would like to work on. The last part of the interview focused on community needs observed by the organization in relation to the funding category, as well as a request for other

organizations to contact for interviews. Over the course of four months, between August and December of 2024, over 40 interviews were conducted with organizations that worked across each of the three funding categories. Notes were summarized and themes from the interviewees were extracted. These “Priority Themes” (themes) represented the collective and overlapping priorities of these organizations that could be addressed using CPA funds.

### *Public Input*

Public input on what the priorities and goals of the Community Preservation Program should be was collected via Public Forums and an Online Survey. In December of 2024, three CPA Public Forums were held. Two were in-person meetings, and one was a recorded virtual meeting. One of the in-person sessions was offered in Spanish. At each Public Forum, CPA eligibility information was shared with the public, as well as the Priority Themes that came out of the interviews with community groups. Attendees were then able to participate in exercises in which they ranked the themes based on how important they thought they were, as well as add some of their own priorities to be considered.

For those residents that were not able to attend the Public Forums, the recording of the virtual meeting was made available on the Community Preservation Program webpage. Additionally, an Online Survey that mirrored the exercises of the forums was published and advertised on the city’s social media and through the Community Preservation Program’s



**Figure C: Public Input.** Community members rank priorities at the December 11<sup>th</sup>, 2024, Information Session and Public Forum.





digital newsletter, and with fliers. The survey was available in English, Spanish, Vietnamese, and Twi, and was open for one month. The questions and results of the Public Forums and the Online Survey can be found in the *Appendix* of this document.

Forty-six (46) people participated across the three Public Forums, and 202 people responded to the Online Survey. The results of these activities were used to create the Community Priorities and Funding Category Goals (Category Goals) of the Community Preservation Plan. *Community Priorities* are overarching priorities that can be addressed through all CPA project categories. *Category Goals* are category specific, and generally more relevant to each funding category. Project alignment with both Community Priorities and Category Goals are criteria for project scoring, however, alignment with Community Priorities and Category Goals is not required for a project to be considered for funding, so long as the project meets state eligibility requirements. More on project scoring can be found below. For more information on how the results of the Planning Process influenced Community Priorities, see the following section on Community Priorities. For more information on how the Planning Process resulted in the specified Category Goals, see the subsequent *Chapters 2, 3, and 4* on each individual funding category.

## **V. COMMUNITY PRIORITIES**

Community Priorities represent the community's overall ambitions for the Community Preservation Plan and are based on themes that were identified as important to the community across all funding categories and may apply to any eligible project. Eligible projects that address Community Priorities will be scored favorably. While achieving one or more of the Community Priorities is advantageous, an eligible project that does not achieve Community Priorities is not disqualified. Note that the numbering of the following priorities does not indicate a hierarchy; all are equally weighted.

***PRIORITY 1: Increase accessibility to historic resources, open space, parks, and in community housing.*** Public amenities should be accessible to people of all abilities, ages, demographics, income levels, and user modes, and there should be housing options that accommodate the diverse needs of the population. Unfortunately, there are still outstanding improvements needed in existing buildings and outdoor spaces, and, some argue, not enough incentives to incorporate accessible amenities into new construction. Across interviews with community groups in all three funding categories, and in the results from the Public Forums and Online Surveys, providing physical accessibility options for seniors and people with mobility challenges to projects funded with CPA was a priority.

For projects related to Historic Resources, this may include upgrading buildings to ADA compliance standards. When it comes to projects in the Open Space and Recreation funding category, it may include accessible parking spots and installing amenities that serve diverse park users. For Community Housing projects, it may include building more than the required



number of ADA units for a building of that size, as well as additional non-required amenities that would serve a disabled or senior population. By investing into projects that provide accessibility, we ensure that all residents can utilize the resource.

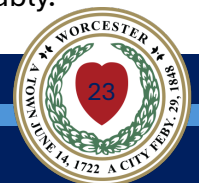
***PRIORITY 2: Advance the city's sustainability and climate resilience goals.*** The city is expected to experience more extreme effects of climate change, including more intense storms, flooding, and heat. Buildings are one of the major contributors to climate change through their energy use. Additionally, the development of dark and impervious surfaces, such as asphalt and roofs, exacerbates flooding and heat island effects in neighborhoods. Projects can be designed to reduce emissions and mitigate some of the impacts of climate change by using sustainable materials and incorporating robust stormwater management practices. There are certifications and best practices for building and landscape design that reduce emissions and help alleviate flooding and heat island effects. Residents indicated a strong preference to projects that help to achieve the city's sustainability and climate resiliency goals, which can be found in the Green Worcester Plan, across all three funding categories.

For projects in the Historic Resources category, this may look like considering energy efficient renovations or using sustainable products. For projects in the Open Space and Recreation category, this may include stormwater mitigation elements, such as pervious pavement, or spray parks for helping to keep residents cool during extreme heat events. For projects in the Community Housing category, this may include having green spaces with

shade trees. It should be noted that in addition to helping to mitigate some of the worst effects of climate change, many sustainability and resilience elements in projects contribute to more livable neighborhoods.

***PRIORITY 3: Prioritizing investments into projects that address a demonstrated need in a geographic area.*** The Community Preservation Act provides an opportunity to create a positive impact in communities, and residents and community organizations have stated time and again that they want to see the greatest possible impact of these funds. Projects that address an outstanding need in a community, giving residents something that they do not currently have, will create an outsized impact for residents in these neighborhoods.

For projects in the Historic Resources category, this may include providing funding for an exterior restoration in an area that does not have many historic buildings. For projects in the Open Space and Recreation funding category, this may include the creation of a new park in a neighborhood where there is little public green space. For projects in the Community Housing category, this may include an owner-occupied development project located in a part of the city that has no homeownership opportunities. While not required for funding, an application that demonstrates it will be responding to a need in a geographic area will be providing an outsized contribution to the community and will be scored more favorably.



## VI. CRITERIA FOR PROJECT SCORING

With input collected throughout the Planning Process, criteria for project scoring were developed for a Project Ranking Rubric. The purpose of this Rubric is so that the CPC can fairly and transparently review and rank project applications, as well as provide guidance to applicants in project development. Criteria for project scoring were developed by the CPC in collaboration with EOED and the community.

While the alignment of funded projects to Community Priorities and Category Goals is of high importance to the CPC and shall be project scoring criteria, so is the responsible use of local dollars and making lasting investments into the community. As such, several additional criteria were developed to assess the quality of a request for CPA funds in all three funding categories.

Below are the criteria that are being used for project evaluation. They can be found in the Project Scoring Rubric and ranked individually with a score from 0-5. The scores for each criterion will be summed to determine a project's final score. No one criterion will determine if a project is or is not selected. The Project Scoring Rubric, where the assessment will occur, can be found in the *Appendix* of this document.

### A. *Project Preparedness*

Project preparedness refers to how ready a project is to commence if awarded the requested funding. The CPC aims to ensure that public funds are committed to projects have the greatest chance of being completed in a timely manner, and a lower chance for delay due to problems with securing permissions, permits, or outside funding when applicable. Prepared projects demonstrate or provide proof of necessary permissions, permits, or outside funding to begin a project, or have an expeditious (but realistic) timeline to obtain them. More prepared projects will gain more points than those that do not have permissions in place, or a timeline for when those permissions will be obtained.

### B. *Match Funding*

Match funding, or leveraged funding, refers to the cash value of the contributions made by other individuals or organizations to a project. Match funding can include in-kind donations to a project, such as volunteer labor hours or donated supplies. The CPC encourages projects which utilize both CPA funds and other public and private funding, including donations and bargain sales. The CPC will prioritize projects where CPA funding will fill a gap or provide a critical need where funding is otherwise unavailable or provide an opportunity that would not be possible if not for CPA funding. Projects that have a higher percentage of leveraged funding for the total project cost will gain more points than those with less financial or in-kind support, when applicable.





### C. *Applicant Experience*

Applicant experience refers to the demonstrated ability of the proposed manager for the project to complete the work in the presented timeline. The CPC wants to ensure that public funds are committed to projects have the greatest chance of being completed in a timely manner by project managers that have experience related to the proposed project. Projects with management teams that have more experience in doing similar projects will gain more points, however, experience ratings will scale with the size and complexity of the project. Applicants should note that the project applicant and project manager do not have to be one-in-the-same.

### D. *Long-Term Sustainability*

Long-term sustainability refers to the ability of a project to continue to serve the community for years to come. A sustainable project will either be constructed in a way that does not require maintenance, or which has a maintenance plan that has been committed to by a specified entity. The CPC wants to ensure that the project is a sustainable investment into the community and will award more points to projects that have demonstrated a low need for ongoing maintenance, or maintenance commitments that will not impose an additional burden to the city.

### E. *Community Benefit*

Community benefit refers to the positive impact a project or program has on Worcester residents. CPA funds are intended to support initiatives that provide this benefit. Projects that either impact many people or have a significant effect on a smaller, more vulnerable group are prioritized. A vulnerable group refers to a segment of the population that is more likely to experience harm, discrimination, or disadvantage due to various factors beyond their control. The CPC aims to maximize community benefit and will award more points to projects that generate the greatest positive public impact.

### F. *Community Priorities*

Community Priorities refer to the primary and overarching concerns expressed throughout the Planning Process in community documents, interviews with local organizations, in the Public Forum and the Online Survey. The CPC wants to ensure that these priorities are being met throughout the funding of projects and shall award more points to projects that address these priorities. For detail on these priorities, see the previous section entitled “*Community Priorities*”.

- **PRIORITY 1:** Increase accessibility to historic resources, open space, parks, and in community housing.



- **PRIORITY 2:** Advance the city’s sustainability and climate resilience goals.
- **PRIORITY 3:** Prioritizing investments into projects that address a demonstrated need in a geographic area.

## *G. Category Goals*

Category Goals refer to the funding category specific priorities that were identified and expressed by the Worcester community throughout the Planning Process. An overview of each goal can be found below, and each is detailed in the subsequent chapters.

### **Historic Resources Category Goals**

- **GOAL 1:** Acquire and restore historic buildings in danger of demolition.
- **GOAL 2:** Promote adaptive reuse or deconstruction for historical preservation.
- **GOAL 3:** Preserve, digitize, and archive historic records.
- **GOAL 4:** Preserve underrepresented stories.

### **Open Space and Recreation Category Goals**

- **GOAL 1:** Maintain high quality drinking water resources and protect wetlands and floodplains.
- **GOAL 2:** Refurbish existing park amenities to meet the city’s changing needs.
- **GOAL 3:** Provide access to fresh, locally grown foods.
- **GOAL 4:** Increase native species populations and grow the urban forest.
- **GOAL 5:** Expand green networks to create corridors for wildlife and alternative mobility options.

### **Community Housing Category Goals**

- **GOAL 1:** Produce more housing, especially owner-occupied housing.
- **GOAL 2:** Support deeper housing affordability (at or below 60% AMI).
- **GOAL 3:** Increase infill and adaptive reuse development.
- **GOAL 4:** Increase the number of perpetual affordability deed restrictions.
- **GOAL 5:** Support unhoused individuals, especially youth and families.

## *H. Community Planning and Buy-in*

Community planning is a process where local governments collaborate with residents and stakeholders to articulate how they want their communities to look, feel, and function over time. The City of Worcester has plans for various aspects of life in the city that were created with community input. Community buy-in refers to how supportive the community is of a particular project and can be manifested in letters of support or



participation at community hearings. The CPC will prioritize projects that demonstrate compatibility with other community initiatives, goals, or plans; and/or have demonstrated community buy-in. Projects that demonstrate a clear link to existing city-wide goals (as stated in current city plans) and/or have demonstrated community support (as demonstrated by letters of support or public participation at CPC project hearings) will gain more points compared to those that do not.

#### *I. Compatibility Between CPA Funding Categories*

The CPC encourages projects that include eligible activities in multiple CPA areas, such as affordable housing and recreation. The CPC will give extra points to projects that reinforce or are compatible with both the CPA goals within a project's funding category and goals in other CPA categories.

### **VII. APPLICATION & FUNDING PROCESS**

The Community Preservation Fund is intended to support local projects that address priorities and are community driven. As such, it is the intention of the CPC is that the CPA funding application process is as accessible and straightforward as possible. The following section describes the CPA application and funding process.

#### *Grant Cycle*

The Worcester CPC accepts applications for funding on an annual basis, with eligibility forms and proposals being due in the Fall, and funding decisions being announced in the Winter.

For the first cycle of funding, which will be a Pilot Round, the Worcester CPC shall accept combined eligibility forms and applications in the Spring of 2025 for expected funding decisions to be made in the early Summer of 2025. Applications will open March of 2025, and close May of 2025. Successful applicants shall be contacted at the end of June or beginning of July of 2025.

#### *Application Tracks*

Based on the project, an applicant may pursue one of the following Application Tracks: The Standard Application, The Special Application, or the Affordable Housing Trust Fund Application (AHTF Application).



**Table 5: Application Tracks.** There are three CPA Application Tracks depending on the applicant's project.

Application Track	Standard Application	Special Application	AHTF Application
Types of projects	<ul style="list-style-type: none"> <li>• Almost all Historic Resource and Open Space &amp; Recreation projects.</li> <li>• Community Housing projects not related to development of homeownership and rental units.</li> </ul>	<ul style="list-style-type: none"> <li>• Projects to acquire or preservation that is time-sensitive.</li> <li>• Projects to restore an historic asset damaged by flood or fire.</li> </ul>	<ul style="list-style-type: none"> <li>• Projects to create new affordable homeownership and rental units.</li> </ul>

**The Standard Application.** The Standard Application is appropriate for most CPA funding requests. For more guidance on this track, see *Appendix A: Application Guidelines*.

*Step 1: Determination of Eligibility.*

For most projects, this process begins with determining project eligibility (see note below for projects eligible in the Historic Resources funding category). Starting in the Fall of 2025, eligibility forms will be available electronically on the Community Preservation Program webpage ([WorcesterMA.gov/CPP](http://WorcesterMA.gov/CPP)), and in paper form at the City Hall Office of Economic Development, Room 404.

*Step 2: Invitation to Submit.*

Once a project is determined eligible, the applicant will be invited to submit a full application. EOED will work with applicants on non-eligible projects to attempt to meet eligibility requirements, if possible. Full applications will be reviewed for completeness by CPP staff, and CPP staff may reach out to applicants for additional information prior to sending the proposal to the CPC for review.

*Step 3: Public Hearing.*

Depending on the number of requests, some or all applicants of eligible projects will be invited to present their project at a CPC Public Hearing. This will be an opportunity for applicants to talk more about the project, for the CPC to ask questions, and for the public to show support for the project. The CPC may also request from applicants additional or more detailed information to be presented at this time. Based on the hearing and application, projects will be scored using the Project Scoring Rubric found in *Appendix C* of this document. Applicants of top scoring projects will be notified that their projects are being recommended for funding to the City Council.



The CPC reserves the right to attach conditions and to require deed restrictions and additional agreements, before its favorable funding recommendation to City Council as a condition in the award letter.

#### *Step 4: Funding Determinations.*

The CPC considers each application based on the merits of the application (via Rubric score) and the available Community Preservation Fund balance. Depending on both the Fund balance and the merits of the project, the CPC may choose to award less than the requested amount in the funding proposal. In these cases, the applicant will be contacted prior to the award being recommended to City Council to ensure that the project will still be viable with the reduced funding available. Projects not recommended by the CPC are not eligible for consideration by the City Council per state statute.

#### *Step 5: City Council Determination.*

The slate of recommended projects and their approved funding amounts will be sent to City Council for approval together at a scheduled City Council meeting. Applicants should note that recommendation by the CPC for project funding does not guarantee a project will be awarded funds.

City Council shall review the slate of projects at a scheduled City Council meeting, where the recommended appropriations can be affirmed, rejected, or lowered. Funding recommendations may not be increased. City Council is bound to act only upon an affirmative recommendation of the CPC and cannot consider requests that do not receive a CPC recommendation.

#### *Step 6: Grant Agreements.*

All applicants that are ultimately selected to receive CPA funding must enter a grant agreement/contract with the City of Worcester for use of said funds. The grant agreement will contain requirements and expectations around grant draws, reporting, and provisions for grant compliance.

#### *Step 7: Reporting and Monitoring.*

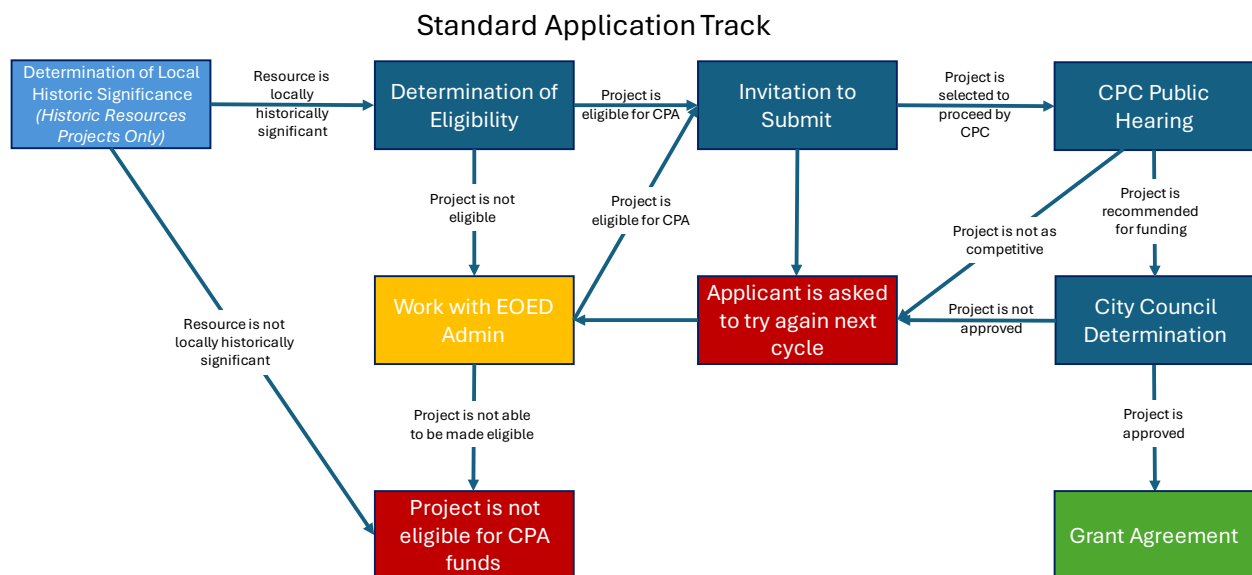
All applicants that are awarded CPA funding will be required to submit a minimum of one report on project activities. Reporting and monitoring requirements will be project-based and required as part of the grant agreement. Project reimbursements may be contingent upon reporting and monitoring requirements.

*Note for Historic Resources Projects:* A Determination of Local Historic Significance is necessary for applicants seeking CPA funding in the Historic Resources category if the



resource in question is (a) not a building, structure, or real property; (b) not listed on the State Register of Historic Places; or (c) the resource is a building or structure that is less than 50 years old. The determination must be made prior to the Eligibility Form deadline. Please find the Determination of Local Historic Significance on the City of Worcester Historical Commission webpage.

***Note for the Spring 2025 Application Pilot Round:*** In the Spring of 2025, the first Pilot Round of funding, the project eligibility form shall be combined with the application to expedite the review process. However, applicants are encouraged to contact city administration prior to applying to determine if a project is eligible up to two weeks before the application deadline.



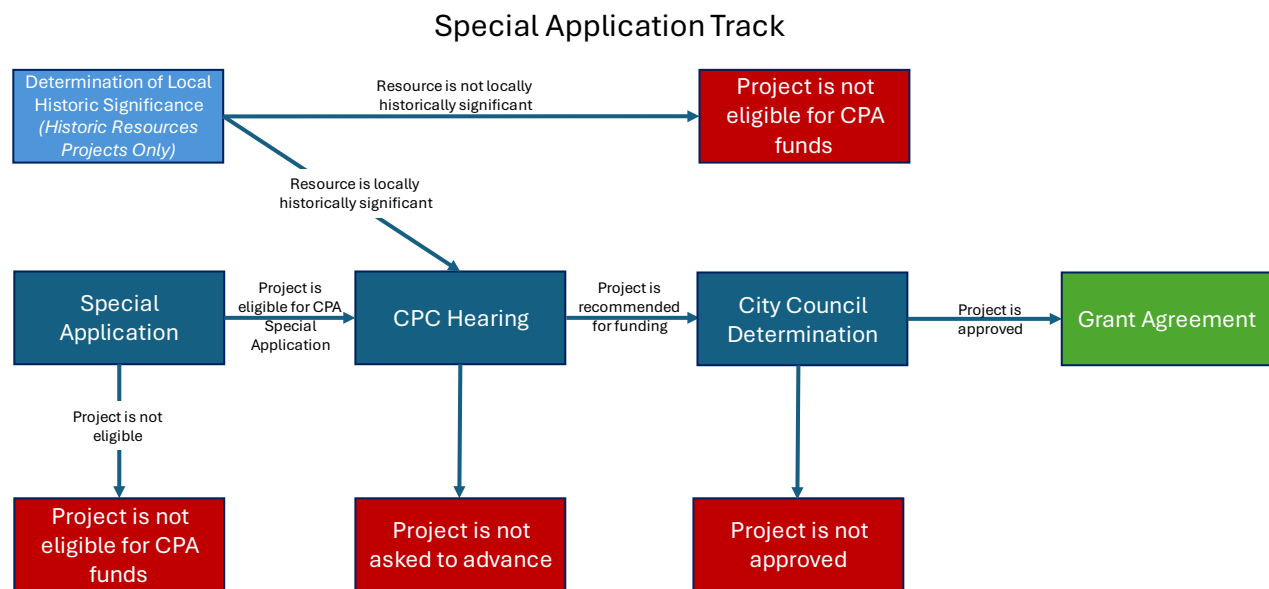
**Figure D: Standard Application Track.** The Standard Application Process is suitable for almost all CPA projects. Applicants shall be invited to submit full applications after project eligibility is determined. Projects shall be heard at a public hearing prior to ranking and recommendation to City Council. Note that Determination of Local Historic Significance must take place prior to determining project eligibility.

**The Special Application.** Under certain circumstances as determined by the CPC, the CPC will consider an expedited application outside of the Standard Application track described above. This special consideration shall only apply in an opportunity that, if missed, is likely to remove or make unavailable to the city and its residents a valuable resource. The most common of these circumstances might be the imminent placing of real property on the market, but they could include time-sensitive stabilization or restoration of an historic asset damaged by flood or fire, or other emergency situations.

In all such cases, the CPC will adhere to all the procedures applicable under the Standard Application track, except for the submission and hearing deadlines outlined in that process.



Special Applications can be submitted at any time, even outside of the Standard Application window. The CPC will hold a public hearing to review such an application as expeditiously as possible. For cases where a Determination of Local Historical Significance would be necessary, this process may occur concurrently to the Special Application, so long as the Determination is made prior to the Public Hearing. As with the Standard Application track, following CPC recommendation, final funding decisions must be made by City Council at a scheduled City Council meeting.



**Figure E: Special Application Track.** The Special Application Process is an expedited process and only available in certain circumstances. In this case the Application and the Determination of Local Historic Resource may occur concurrently, if both are complete by the date of the CPC hearing.

The CPC will consider a proposal under the Special Application track only if the project meets CPA project eligibility requirements. Additionally, to be considered for the Special Application Process, one of the following must also be determined:

- The applicants were unaware of the opportunity to undertake the project; or the proponents did not have authority to identify such opportunity prior to the Standard Application Deadline (for example, the potential sale was still confidential).
- The proponents have either: (a) a letter of intent signed by the current owner of the real property expressing an interest in selling to the applicant; or (b) legal control (an option, signed purchase and sale agreement or legal title) of the real property.
- Failure to secure CPA funding will create a high likelihood that the project will not be able to be carried out for the benefit of the city, because the opportunity is of very short duration.
- Appropriation of CPA funding will contribute materially to the likelihood of success for the project.





Special Applications can be found on the City of Worcester Community Preservation webpage at [WorcesterMA.gov/CP](http://WorcesterMA.gov/CP). For more guidance on this track, see *Appendix A: Application Guidelines*.

***The Affordable Housing Trust Fund Application.*** Applicants that aim to create (i.e. develop) new affordable homeownership and rental units that qualify for CPA funding shall use the Affordable Housing Trust Fund (AHTF) Application. The Worcester AHTF was established in 2021 to provide for the creation and preservation of affordable homeownership and rental housing that meets the needs of low- and moderate-income residents. The AHTF is uniquely qualified to review housing development projects and can move swiftly to appropriate funding to eligible housing creation projects. For this reason, section 5(f) of the CPA statute enables the CPC to appropriate CPA funds to a local Affordable Housing Trust Fund (AHTF) for disbursement. This mechanism allows CPA funding to be efficiently allocated to qualified housing creation initiatives, ensuring an effective and streamlined approach to addressing affordable housing needs.

Like any other applicant, the Worcester AHTF shall apply for a specified amount of CPC funding to carry out eligible Community Housing projects annually using the Standard Application. The AHTF application shall be evaluated beside the other applications by the CPC using the Project Scoring Rubric. If the CPC decides to allocate funding to the AHTF, a grant agreement shall be created between the CPC and the AHTF which specifies the criteria which AHTF projects receiving CPA funds must meet, as well as spending deadlines and reporting requirements. Criteria in the grant agreement will be based on the Goals and Priorities of the Community Preservation Plan, as well as any other conditions that the CPC deems appropriate. The AHTF shall incorporate applicable conditions of the Grant Agreement into the AHTF funding application, which will be found on the AHTF webpage. AHTF reports submitted to the CPC shall be used in the assessment of the subsequent AHTF request, with the CPC reserving the right to amend the grant agreement each year.

### ***Application Guidance***

To open the application process to as many applicants as possible, application guidance will be available through CPP staff up to two weeks before eligibility forms and/or applications are due. Additionally, CPP staff will provide at least one workshop per application cycle to assist potential applicants in developing eligible projects and navigating the application process. Finally, applicants with questions can reference *Appendix A: Application Guidelines*, which will be published with the Online Application Form.





### *Community Preservation Plan and Process Review*

The CPC recognizes that the needs and priorities of the Worcester community may change, and that the Goals and Priorities in this Plan, as well as the application processes, may need to be revised to best ensure that CPA funding continues to align with community preferences. The CPC shall hold an annual public hearing during which a summary of the CPC's activities over the year be presented. At this hearing, the community shall have an opportunity to provide feedback. This feedback shall be reviewed and a report generated with recommendations for revisions to the Community Preservation Plan. The CPC shall then vote on if the recommendations shall be incorporated into the latest version of the Community Preservation Plan on an annual basis. Individuals with feedback on the Plan and processes who are not able to make the hearing may contact CPP staff directly. On occasion, a public survey on the Plan and processes may also be administered.



# CHAPTER 2: HISTORIC RESOURCES

## I. ELIGIBLE ACTIVITIES

According to Massachusetts General Laws, Chapter 44B “The Community Preservation Act”, a Historic Resource is defined as “a building, structure, vessel, real property, document, or artifact that is listed on the Massachusetts State Register of Historic Places *or* has been determined by the local Historical Commission that the historic resource is locally significant.

To be eligible for CPA funding in the category of Historic Resources, the State mandates that:

- A project must address public resources *or* private resources with public access or other demonstrable public benefits.
- A resource must either be listed on the State Register of Historic Places *or* be determined by the Worcester Historic Commission as historically significant to the community.
- A project must deal with tangible historic resources, and not with historic interpretation, education or heightening awareness of history.
- The project can involve the *acquisition, preservation, or rehabilitation/restoration* of a historic resource.

In addition to these requirements, all historic preservation work funded through CPA must follow the Standards for Rehabilitation stated in the US Secretary of the Interior’s Standards for the Treatment of Historic Properties (codified in 36 C.F.R. Part 68). When CPA funds are used to acquire real property, a permanent Preservation Restriction (PR) is required. Additionally, the CPC reserves the right to place perpetual or term PRs on significant renovations or restoration projects carried out with CPA funds. Finally, in the City of Worcester, buildings less than 50 years old will also be required to have a positive

### What is a Preservation Restriction?

A Preservation Restriction (PR) is a voluntary legal agreement that protects a significant historic, archaeological, or cultural resource. It provides assurance that an historic or culturally significant property's intrinsic values will be preserved through subsequent ownership by restricting the demolition or alteration of its significant historic features. A PR is reviewed and approved by the Massachusetts Historical Commission, filed at the Registry of Deeds and runs with the land. It usually focuses on exterior architectural features but can also address significant interior spaces. Though a PR does not necessarily require public access, it may include provisions for annual open houses or similar public events if deemed appropriate.



Determination of Local Significance by the Historical Commission, even if they are listed on the State Register of Historic Places.

## II. REVIEW OF HISTORIC RESOURCE NEEDS AND PRIORITIES

Between the months of August and December of 2024, the Community Preservation Committee (CPC) and the Executive Office of Economic Development (EOED) reviewed city publications and documents related to historic resources in Worcester, including plans created with community input, studies, and local ordinances related to the demolition of historic buildings. Concurrent to this review, interviews were conducted with local

### Local documents reviewed related to Historic Resources

- *The Worcester Now | Next Plan* - Worcester Now | Next is the City of Worcester's long-range 20-year citywide plan. Adopted in 2024, it was developed over the course of two years by reviewing existing city plans and engaging a large and diverse range of community members. This plan specifically has a section on Culture and Creativity that includes goals to support the preservation of buildings, sites, and districts that tell the stories of Worcester's diverse communities.
- *Becoming Worcester* – Published in 2019, Becoming Worcester is the City of Worcester's 10-Year Cultural Plan. It was created in collaboration with the Worcester Cultural Coalition and the Greater Worcester Community Foundation as a roadmap to “bring our city to life” through arts and creativity. There are several goals, one of which focuses on and elevates Worcester's unique history.
- *Design Review Guidelines* - Published in 2024 by the Worcester Historical Commission, the Design Review Guidelines document provides a detailed overview of how Worcester's neighborhoods have evolved over time regarding buildings. Design Review Guidelines are intended as a resource to guide change in Worcester's designated local historic districts and in the review of impacts on historic buildings related to the proposed demolition of historic building fabric.
- *The Worcester Historic Preservation Study* – Published in 2016 by the Worcester Historical Commission, the Worcester Historic Preservation Study aims to assess historic preservation programs and related activities administered by the Worcester Historical Commission and City of Worcester. The study evaluated general administration of historic preservation programs, including demolition delay and local historic districts. Additionally, the study evaluated issues, opportunities and potential strategies related to the preservation and reuse of historic buildings in the context of the City's downtown area specifically. The study team conducted targeted outreach as well as public meetings to gather community input concerning local historic preservation efforts and their effectiveness. Public comment was sought through interviews, public forums, and public presentations.
- *The Worcester Demolition Delay Ordinance* – Chapter 9, Section 13 of the Worcester City Ordinances (last updated in 2008) establishes the Demolition Delay and the authority of the Historical Commission to oversee administer Demolition Delay.



organizations that work in the space of historic resources. Efforts were made to contact as many organizations as possible, but not every organization that was contacted responded.

Overall, 10 organizations were interviewed. Interviews began with an overview of CPA and project eligibility requirements, followed by an opportunity for the organization to talk about its mission and operations, including the projects it is working on, and the projects it would like to pursue. The final part of the interview focused on community needs observed by the organization in relation to historic resources, as well as a request for other organizations to contact for interviews. Notes were taken and analyzed and themes from the responses were extracted. These “Priority Themes” represented the collective priorities of these organizations, as well as existing city plans, that could be addressed using CPA funds.

### Local community groups interviewed

- Crown Hill Neighborhood Coalition
- Hammond Hill Neighborhood Association
- Green Island Community Group
- Preservation Worcester
- The Worcester Historical Museum
- Worcester Black History Project
- The American Antiquarian Society
- City of Worcester Clerk’s Office
- City of Worcester Water Operations Division
- Worcester Historical Commission & Staff

*Note that while additional community groups were contacted, the above groups responded for interviews.*

Public input on the priorities and goals of the Community Preservation Plan, and specifically for projects in the Historic Resources category, was collected via Public Forums and an Online Survey. For details on public participation, see *Chapter 1*. For the results of the Online Survey and Public Forum exercises, see *Appendix E* of this document.

### III. HISTORIC RESOURCES CATEGORY GOALS

The following Category Goals were developed based on the themes identified by city plans, organizational interviews, and public input through the Online Survey and Public Forum exercises. Applicants of projects that achieve these goals shall receive points in the *Community Preservation Plan Category Goals* criterion in the Project Scoring Rubric. However, lack of alignment with these goals will not disqualify a project, and applicants of projects that are eligible for funding in the Historic Resource category that do not address these Category Goals are encouraged to apply. Note that the numbering of the following goals does not indicate a hierarchy; all are equally weighted.

**GOAL 1: Acquire and restore historic buildings in danger of demolition.** Worcester is home to many historic buildings, which add to the architectural character of the city’s neighborhoods. Historic buildings can be more expensive to maintain, causing them to sometimes fall into disrepair. Challenges related to deferred maintenance and costs related to modernization or adaptive reuse can lead to demolition, causing the city to lose a historic resource forever. While the Demolition Delay Ordinance helps mitigate the threat of



demolition on applicable properties for a 1-year period, it does not provide perpetual protection or provide financial resources to historic blingers to assist in the maintenance of their property. Many organizations that work in the Historic Resources category, as well as many participants in the Online Survey and Public Forums, feel that CPA funds should be used to help organizations that are qualified to acquire, preserve and restore these at-risk buildings for a public benefit.

**GOAL 2: *Promote adaptive reuse or deconstruction for historical preservation.*** Adaptive reuse is the repurposing of an existing building for a new productive use, such as renovating a former mill building into residences. Deconstruction is the surgical dismantlement of building components for reuse elsewhere, as an alternative to traditional demolition where preservation of a historic building is not a feasible solution. When referring to historic buildings, adaptive reuse seeks to preserve the historic exterior of a building while the interior can be retrofitted to suit a more modern use. Many of the historic buildings in Worcester are no longer able to serve their original purposes due changing industries and society. Keeping the building envelope while repurposing the interior allows the city to preserve its history while serving modern needs. This theme has been popular in community interviews, the Online Survey, and in the Public Forums. In cases where a historic building's envelope is not capable of being reused, the deconstruction of some portions of the building for historical preservation or reuse elsewhere is still considered a priority for local organizations and residents.

**GOAL 3: *Preserve, digitize, and archive historic records.*** Important local records are stored all over the city, including items such as photos of significant people and events, meeting minutes of locally significant organizations, plans documenting the location of water and sewer infrastructure, official birth and death certificates dating back to the 1700s, and more. The age and conditions under which these items have been stored can cause expedited deterioration of these irreplaceable documents. Additionally, many of these resources are not currently easily accessible by the public. Several organizations interviewed mentioned the importance of creating publicly accessible digital databases that would serve to preserve and showcase local historic records. This theme was also one of the most popular in this category among those who participated in the Online Survey and Public Forums.

**GOAL 4: *Preserve underrepresented stories.*** Worcester is a community of many diverse populations that have changed over time, and not all of them have been equally represented in historic preservation efforts to date. Preserving underrepresented stories refers to supporting projects that aim to give a perspective on history from a population or community that has had fewer opportunities to share their experience. These projects would help to create a more representative and complete telling of Worcester's history. Many of



Worcester's historic resource-oriented organizations, as well as many residents, expressed that using CPA funds to help to tell these stories was a priority.



# CHAPTER 3: OPEN SPACE AND RECREATION

## I. ELIGIBLE ACTIVITIES

According to Massachusetts General Laws, Chapter 44B “The Community Preservation Act”, “open space” is defined as but not limited to “land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh and saltwater 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”.

The Act defines “recreational use” as 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”. Recreational use shall not include horse or dog racing or the use of land for a stadium, gymnasium or similar structure.

To be eligible for CPA funding in the category of Open Space and Recreation, the State mandates that:

- Recreational projects must focus on land-based outdoor passive or active uses or facilities.
- The project must be a capital projects and cannot be used for ongoing maintenance or operating costs.
- The project may *acquire* or *create* open space and land for recreation.
- The project may *preserve* or *rehabilitate* or restore open space that is existing or has been acquired or created using CPA funds.

In addition to stadiums and dog and horse racing facilities, CPA funds shall not be used to purchase or install artificial turf. Conservation Restrictions (CRs) are required for all lands acquired with CPA funds for Open Space and Recreation. The holder of the CR cannot be the same entity as the property owner. Additionally, CPA investments may only be made into land that are permanently dedicated to conservation and recreational uses, either having a

### What is a Conservation Restriction?

A Conservation Restriction (CR) is a legal agreement that prevents development and other activities on important natural and recreational resources like drinking water supplies, agricultural lands, wildlife habitat, and hiking trails. A CR can also be placed on active recreational land such as recreational fields and parks. A CR is a legal document, approved by the state’s Executive Office of Energy and Environmental Affairs (EEA) and filed at the Registry of Deeds, and details what activities can and cannot take place on the parcel of land.





Conservation Restriction recorded at the Registry of Deeds, or generally protected under Article 97 of the State Constitution. This therefore excludes the use of CPA funds in the public right-of-way for streetscapes, outdoor spaces owned by the Library or Senior Center, or landscaping around City Hall.

### **Local Documents reviewed related to Open Space and Recreation**

- *The Open Space and Recreation Plan*- The 2021 Open Space and Recreation Plan is the latest 7-year plan published by the City of Worcester in 2021. Among other things, the purpose of the plan is to identify new and update current goals, objectives, needs, priorities, and actions; and to update the strategy that implements stated goals and addresses the most critical open space and recreation needs. The plan was created in collaboration with local organizations Mass Audubon and the Greater Worcester Land Trust and had a strong community participation component focused on Environmental Justice neighborhoods.
- *The Worcester Now | Next Plan* - Worcester Now | Next is the City of Worcester's long-range 20-year citywide plan. Adopted in 2024, it was developed over the course of two years by reviewing existing city plans and engaging a large and diverse range of community members. This plan specifically has a section on Recreation, Open Space, and the Environment that includes goals around open space connectivity, the urban forest, green infrastructure, equitable access, environmental justice, and urban gardens.
- *The Green Worcester Plan* – The Green Worcester Plan, published by the City of Worcester's Energy & Asset Management Division in 2020, is a strategic framework for an integrated and systematic approach for making Worcester one of the most sustainable and climate-resilient mid-sized cities in the country by 2050. It was developed over the course of 2 years with the assistance of the Green Worcester Working Group, made up of city staff, representatives of environmental organizations and residents, and a consultant. Public participation included a professional, scientific public opinion survey; several online surveys; a public workshop; and a public open house on proposed goals and actions.
- *The Mobility Action Plan (DRAFT)* – The Mobility Action Plan for Safe, Equitable, and Sustainable Transportation is a draft long-range transportation plan that will guide the Worcester Department of Transportation & Mobility (DTM). The Plan is based on the guiding vision that the City of Worcester's transportation network should support people of all ages and abilities with safe, equitable, and sustainable mobility choices, and proposes policies, programs, strategies, and projects to improve the City's transportation system. This plan had an extensive outreach and community engagement component.
- *City Park Master Plans (Various)* - Master Plans are tools to guide short- and long-term strategies for capital investment and development, principally of recreational facilities. However, a Master Plan is typically general, and recommendations are not unable to be changed. They are intended to have a robust community participation element to their creation. The City of Worcester Department of Public Works & Parks has published over 35 master plans for its park properties.
- *Worcester Lakes and Ponds Water Quality Reports* – Every year, the City of Worcester's Lakes and Ponds Program publishes reports that interpret water quality data collected at its local waterways, as well as set out short-, medium-, and long-term goals based on neighborhood and city-wide visions for Worcester's blue spaces. These reports highlight the biggest needs for waterways, as well as outline opportunities to improve them.





## II. REVIEW OF OPEN SPACE AND RECREATION NEEDS AND PRIORITIES

Between the months of August and December of 2024, the Community Preservation Committee (CPC) and the Executive Office of Economic Development (EOED) reviewed city publications and documents related to open space and recreation in Worcester, including plans created with community input, studies, and reports. Concurrent to this review, interviews were conducted with local organizations that work in the Open Space and Recreation funding category. Efforts were made to contact as many organizations as possible, but not every organization that was contacted responded.

Overall, over 20 organizations were interviewed. Interviews began with an overview of CPA and project eligibility requirements, followed by an opportunity for the organization to talk about its mission and operations, including the projects it is working on, and the projects it would like to pursue. The last part of the interview focused on community needs observed by the organization in relation to the funding category, as well as a request for other organizations to contact for interviews. Notes were taken and analyzed and themes from the interviewees were extracted. These “priority themes” represented the collective priorities of these organizations, as well as existing city plans, that could be addressed using CPA funds.

Public input on these priority themes and the goals of the Community Preservation Plan, and specifically for projects in the Open Space and Recreation funding category, was collected via Public Forums and an Online Survey. For details on public participation, see *Chapter 1*. For the results of the Online Survey and Public Forum exercises, see *Appendix E* of this document.

### Local community groups interviewed

- The Greater Worcester Land Trust
- Mass Audubon
- Park Spirit
- Worcester Garden Club
- Regatta Point Community Sailing
- The Regional Environmental Council
- Tatnuck Brook Watershed Association
- Lake Quinsigamond Watershed Association
- Lake Quinsigamond Commission
- The Green Hill Park Coalition
- Friends of Newton Hill
- Regatta Point Sailing
- WalkBike Worcester
- Worcester Bike Coalition
- Green Streets
- The Worcester Native Plant Initiative
- Parks, Recreation, and Cemetery Division
- Conservation Commission & Staff
- Dept of Sustainability and Resilience
- Water Operations Division

*Note that while additional community groups were contacted, the above groups responded for interviews.*



### III. OPEN SPACE AND RECREATION CATEGORY GOALS

The following goals were developed based on the priorities identified in city plans, organizational interviews, and public input. Applicants of projects that achieve these goals shall receive points in the *Community Preservation Plan Category Goals* criterion in the Project Scoring Rubric. However, lack of alignment with these goals will not disqualify a project, and applicants of projects that are eligible for the Open Space and Recreation funding category that do not address these goals are encouraged to apply. Note that the numbering of the following goals does not indicate a hierarchy; all are equally weighted.

***GOAL 1: Maintain high quality drinking water resources and protect wetlands and floodplains.*** Clean, reliable drinking water is essential to the health, maintenance, and growth of any community. The City of Worcester sources its drinking water from 10 surface water reservoirs to the north of the city. While the city has a state-of-the art drinking water filtration plant, it is more economical and efficient to prevent contamination from entering our water supply than to remove it once it is there. Undeveloped forested lands around reservoirs provide natural filtration of pollutants, and protecting these resources is best achieved by purchasing or placing Conservation Restrictions on these lands. The City of Worcester continues to have award-winning drinking water in large part because of watershed protection efforts around source waters. Of all the priority themes presented to the public, protecting drinking water resources was supported by the greatest number of individuals.

***GOAL 2: Refurbish existing park amenities to meet the city's changing needs.*** The City of Worcester has over 50 parks, including diverse amenities such as splash pads, jungle gyms, amphitheaters, walking paths, fitness stations, skate parks, ball fields, and tennis courts. Over time, these structures may become worn from use and the elements, or no longer be the relevant to the city's changing demographics or pastimes. While there exist many grants for the creation of new parks, there are fewer for the renovation of existing parks. Additionally, new park grants generally do not include the costs for the increased personnel necessary to take on more maintenance activities. CPA presents a unique opportunity to refresh existing park amenities to meet the needs of the neighborhood and broader city. Interviews with community groups as well as many comments by the public have indicated that a priority for the city should be taking care of and updating existing parks.

***GOAL 3: Provide access to fresh, locally grown foods.*** There are areas in Worcester that are food insecure, meaning that residents lack access to fresh, healthy produce. This can lead to poor health outcomes for residents in these areas. Open spaces and parks offer opportunities for gardening and farmers' markets, which can increase access to healthy food in an equitable way. Community gardens offer additional benefits, such as fostering community and providing a space for learning science and life skills. Supporting projects



that expand access to fresh, locally grown foods was a priority theme that came out of several interviews and was supported by a large percentage of individuals that participated in the Community Survey and Public Forum exercises.

**GOAL 4: Increase native species populations and grow the urban forest.** Urban trees and native species provide vital ecosystem services such as flood reduction, carbon sequestration, lower air temperatures, neighborhood beautification, and increased biodiversity. However, Worcester's trees and other native species are at risk due to destructive landscaping practices, poor management, and the growing prevalence of invasive species, which threaten to displace native species and overtake our open spaces. These factors harm the natural ecosystem's ability to provide these essential services, even as the increasing effects of climate change are making our city hotter and wetter. Local organizations are advocating for the increased proliferation of native plants and trees, and Online Survey and Public Forum participants agree that projects supporting and growing Worcester's native plant and tree species should be prioritized to strengthen the ecosystem services they provide.

**GOAL 5: Expand green networks to create corridors for wildlife and alternative mobility options.** A green network refers to a series of natural spaces, such as parks, green, and blue spaces. The environmental services provided by open space, especially in terms of climate resiliency and habitat services, increases as the size of the parcel or network grows. The acquisition or protection of parcels that abut or expand networks of existing open spaces also creates "corridors" for wildlife and often provides more significant benefits than protection of a similarly sized parcel without any connection. The larger the parcel or network, the greater the public benefit.

In addition to wildlife benefits, larger conserved parcels or networks of parcels offer opportunities for more expansive and uninterrupted passive recreation as well as opportunities for connectivity to amenities. As a car-centric city, Worcester has limited infrastructure for other forms of mobility, such as walking, cycling, or micromobility options, which have smaller footprints than traditional roads. While CPA funds cannot be used to construct infrastructure in the right-of-way, they can be used to create multi-use trails in existing parks or to establish new parks, including linear parks, which could serve as corridors for an alternative transportation network. These networks would allow residents to traverse long distances through open space properties and along protected paths. Many community groups interviewed, as well as participants of the Online Survey and Public Forum exercises, expressed that the expansion of "green networks" should be a priority in Worcester.



# CHAPTER 4: COMMUNITY HOUSING

## I. ELIGIBLE ACTIVITIES

According to Massachusetts General Laws, Chapter 44B “The Community Preservation Act”, “community housing” is defined as “low- and moderate-income housing for individuals and families, including low- or moderate-income senior housing”. The law goes on to define “low-income” as 80% of areawide median income (AMI), “moderate income” as 100% of AMI, and “senior” as a person having reached the age of 60 or more.

To be eligible for CPA funding in the category of Community Housing, the State mandates that:

- A project must serve persons or families with an annual income up to and including 100 percent of the AMI.
- A project may *acquire, create, preserve, and support* community housing.
- A project may *rehabilitate or restore* community housing that has been acquired or created using CPA funds.

CPA investments may not be used to restore or rehabilitate housing that serves low- to moderate income individuals or families unless the housing was originally acquired or created with CPA funds. Additionally, all acquisitions of real property made in the Community Housing category must be protected with a permanent deed restriction for affordability within CPA guidelines. Additionally, the CPC may use their discretion for the use of term deed restrictions for affordability when CPA funds are used for the preservation or support of community housing.

### What is a Deed Restriction?

A deed restriction is a clause in a property’s deed that limits how the owner can use the property. A property under an affordability deed restriction is typically governed by one or more restrictions designed to ensure the home or rental unit remains affordable to future occupants. These restrictions may require certain resale prices or eligibility to people in different income ranges. Deed restrictions can be perpetual, or for a set term, after which they expire, and the property can be sold or rented at market price. The Massachusetts Housing and Finance Agency reviews and approves affordability deed restrictions.

## II. REVIEW OF COMMUNITY HOUSING NEEDS AND PRIORITIES

Between the months of August and December of 2024, the Community Preservation Committee (CPC) and the Executive Office of Economic Development (EOED) reviewed city



## Local Documents reviewed related to Community Housing

- *The Worcester Now | Next Plan* – Worcester Now | Next is the City of Worcester’s long-range 20-year citywide plan. Adopted in 2024, it was developed over the course of two years by reviewing existing city plans and engaging a large and diverse cross-section of community members. The plan has a particular focus on housing opportunities and development in response to the housing crisis and input from the public participation process.
- *Analysis of Impediments to Fair Housing Choice* – The Analysis of Impediments to Fair Housing Choice (AI) is required of state and local governments that receive federal funds from HUD. This includes Community Development Block Grants (CDBG), HOME Investment Partnerships Program (HOME) funds, and Neighborhood Stabilization Program (NSP) funds. The City of Worcester received assistance from the Central Massachusetts Regional Planning Commission (CMRPC) and Barrett Planning Group LLC to develop the City’s 2021 AI, which involved reviewing many plans and literature, performing community interviews, and analyzed housing and population trends in Worcester. The document outlines fair housing concerns that disproportionately affect people in federally and state-identified protected classes and makes recommendations for how the City of Worcester can break down barriers to fair housing choice and affirmatively further fair housing throughout the city.
- *Housing Production Plan Public Meeting* – A "Housing Production Plan" is typically required of communities in Massachusetts that fall short of the Subsidized Housing Inventory (SHI) threshold prescribed in Massachusetts General Laws, Chapter 40B. The SHI threshold requires that 10 percent of year-round housing stock be considered subsidized housing. While the City of Worcester currently exceeds the state's goal, the city believes that an update to the Housing Production Plan will help to identify more proactive strategies to achieve local housing development goals. While the plan is still being drafted, it will include a detailed understanding of the current demographics and housing needs, as well as population trends and projections to create specific goals for the types of housing development that should be prioritized. The draft goals and strategies for the plan will be shared during the second forum on December 9<sup>th</sup>, 2024.
- *Worcester’s Housing Strategy* – Worcester’s Housing Strategy was outlined in a memo from the City Manager to City Council dated May 9<sup>th</sup>, 2023. Referencing a memo from Worcester Chief Development Officer, the City Manager describes the recent accomplishments to address housing challenges, identifying partnerships as well as upcoming opportunities to continue to improve.
- *Worcester Inclusionary Zoning Ordinance* – Adopted on May 9<sup>th</sup>, 2023, the Inclusionary Zoning Ordinance was designed to promote the creation of affordable housing units for rent or sale, encourage economic diversity, and help prevent the displacement of low- to moderate-income residents. It applies to any development that results in the net production of twelve (12) or more residential units, whether through new construction, adaptive reuse, or the expansion of existing structures. To comply, either (a) at least 15% of the units must be affordable to households earning no more than 80% of the Area Median Income (AMI), (b) at least 10% of the units must be affordable to households earning no more than 60% of the AMI, (c) a proportional combination of units at the 60% and 80% AMI levels must be created, or (d) if a developer chooses not to provide the affordable units, they can make a one-time payment equivalent to 3% of the total construction value of the development (IE payment-in-lieu) which is then transferred to Worcester’s Affordable Housing Trust Fund.



publications and documents related to historic resources here in Worcester, including plans created with community input, studies, and reports. Concurrent to this review, interviews were conducted with local organizations that work in the Community Housing funding category. Efforts were made to contact as many organizations as possible, but not every organization that was contacted responded.

Overall, 12 organizations were interviewed. Interviews began with an overview of CPA and project eligibility requirements, followed by an opportunity for the organization to talk about its mission and operations, including the projects it is working on, and the projects it would like to pursue. The final part of the interview focused on community needs observed by the organization in relation to the funding category, as well as a request for additional organizations to contact for interviews. Notes were taken and analyzed and themes from the interviewees were extracted. These “priority themes” represented the collective priorities of these organizations, as well as existing city plans, that could be addressed using CPA funds.

### **Local community groups interviewed**

- Worcester Housing Authority
- Worcester Community Housing Resources
- Worcester Together Community Housing Coalition
- Worcester Community Connection Coalition
- Worcester Common Ground
- Abby’s House
- Habitat for Humanity Metro West / Greater Worcester
- The Main South Community Development Corporation
- Worcester Affordable Housing Trust Fund Trustees & Staff
- Friendly House
- Meryl’s Safe Haven
- Worcester Housing Development Division

*Note that while additional community groups were contacted, the above groups responded for interviews.*

Public input on priorities and goals of the Community Preservation Plan, and specifically for projects in the Community Housing funding category was collected via Public Forums and an Online Survey. For details on public participation, see *Chapter 1*. For the results of the Online Survey and Public Forum exercises, see the *Appendix E* of this document.

### **III. COMMUNITY HOUSING CATEGORY GOALS**

The following goals were developed based on the priority themes identified in city plans, organizational interviews, and public input. Applicants with projects that achieve these goals shall receive points in the *Community Preservation Plan Category Goals* criterion in the Project Scoring Rubric. However, lack of alignment with these goals will not disqualify a project, and applicants of projects that are otherwise eligible for the Community Housing category that do not address these goals are still encouraged to apply. Note that the numbering of the following goals does not indicate a hierarchy; all are equally weighted.





**GOAL 1: Produce more housing, especially owner-occupied housing.** In Worcester, the lack of affordable housing is directly related to a shortage of housing in general. More housing, especially affordable housing, must be created. While deed-restricted affordability provisions protect roughly one in every five apartments in Massachusetts Gateway Cities like Worcester, deed-restricted homeownership units make up less than half a percent of the owner-occupied and for-sale housing in these communities.<sup>1</sup> Homeowners benefit from increased housing security and the ability to build equity as their monthly housing payments contribute to owning the asset. Rising rents further constrain residents' ability to save funds and achieve homeownership. Repeatedly, the need for more affordable housing and affordable homeownership opportunities has been emphasized.

**GOAL 2: Support deeper housing affordability (households earning at or below 60% AMI).** Area Median Income (AMI) is published by the U.S. Department of Housing and Urban Development (HUD) annually and is used as in the calculation for determining housing affordability. CPA can fund projects and programs that serve individuals and families up to 100% AMI. However, families and individuals at or below 60% AMI are the demographic group in Worcester most severely cost-burdened from housing. They are often employed, but struggle to find housing with a rent or mortgage that costs less than 30% of their income. Results from interviews with the city administration, including the Draft Housing Production Plan, community groups, and public input indicate support for using CPA funds to projects and programs that serve households up to 60%. This can include housing creation, preservation, or acquisition of housing serving these individuals and families.

**GOAL 3: Increase infill and adaptive reuse development.** Infill development refers to housing constructed on vacant or underutilized land within an existing developed area, including the creation of additional units on existing residential lots, such as Accessory Dwelling Units (ADUs). Adaptive reuse refers to the process of reusing an existing building for a purpose other than that for which it was originally built or designed. Infill development and adaptive reuse projects help to revitalize neighborhoods by reducing underutilized property, have been shown to reduce blight, and have a smaller environmental footprint than traditional development. In Worcester, it is estimated that a considerable portion of housing demand could be met by bringing long-vacant properties back into productive use and facilitating other infill development. Housing advocates and the community have indicated that they prefer this kind of development, which utilizes existing infrastructure rather than developing on green space. CPA funds can be used to support this type of development, and this theme received a favorable response.

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<sup>1</sup> Mass Inc Policy Center. (2024) *Gateway Cities Housing Monitor*. <https://massinc.org/research/2024-gateway-cities-housing-monitor/>





**GOAL 4: Increase the number of perpetual affordability deed restrictions.** When public funding is used for the development of affordable housing, there is typically a requirement for units to be deed-restricted as affordable housing. Deed restrictions are often for a term of at least 30 years, after which the restriction may expire, and the affordability requirement is at risk. Many community members expressed that the restriction should be perpetual, especially when public funds are being used to advance the project. Projects that result in perpetual deed restrictions are a better solution to addressing generational affordable housing needs and should be prioritized over projects with shorter terms.

**GOAL 5: Support unhoused individuals, especially youth and families.** The unhoused population is one of the most vulnerable groups of people in the city. Transitional housing options for these individuals are limited, and permanent supportive housing can take a long time to develop. Unhoused families have more individuals and require more space. There is an even greater scarcity of two-, three-, and four-bedroom units for this supportive housing stock. Youth who experience homelessness are more likely to have insecure housing later in life. Unhoused individuals are unlikely to have steady income or may have medical conditions that require special services from a residence. Support for individuals with intersecting vulnerabilities or marginalized identities have additional barriers to housing security. Therefore, building housing for the unhoused population usually includes an agency partner to host long-term services and requires various funding sources. The lack of safe, supportive housing options has led to people living outdoors, resulting in poor health outcomes. Supporting unhoused individuals was one of the primary concerns of community groups and residents, who feel investing in projects that support this population will result in a community-wide benefit.



## **APPENDIX A: APPLICATION GUIDANCE**

### **WORCESTER COMMUNITY PRESERVATION ACT (CPA) FUNDING APPLICATION FORM GUIDANCE FOR APPLICANTS**

#### **Spring 2025 Pilot Funding Round**

#### **TABLE OF CONTENTS**

- I. BACKGROUND ON THE COMMUNITY PRESERVATION FUND**
- II. APPLICATIONS TRACKS**
- III. STANDARD APPLICATION STEPS**
- IV. STANDARD APPLICATION AND FUNDING TIMELINE**
- V. SPECIAL APPLICATION STEPS**
- VI. APPLICATION GUIDANCE**

#### **APPENDIX A- Application Questions**

#### **APPENDIX B- Project Scoring Rubric**

#### **I. BACKGROUND ON THE COMMUNITY PRESERVATION FUND**

With the passage of the Community Preservation Act (CPA) in the Municipal Election of 2022, Worcester joined 200 other communities in the Commonwealth of Massachusetts in establishing a Community Preservation Fund. Starting in 2024, approximately \$4.5 million per year of funding is available to support locally proposed projects in the categories of Historic Resources, Open Space and Recreation, and Community Housing. The Community Preservation Fund is awarded to eligible applicants by the Community Preservation Committee (CPC) with support from the City of Worcester Executive Office of Economic Development (EOED) in alignment with the Community Preservation Plan.

CPA projects can be proposed by the City Administration, local organizations, and residents alike. While the Commonwealth of Massachusetts has minimum eligibility requirements for the use of CPA funds, the City of Worcester can prioritize eligible projects based on our local needs and priorities. The Community Preservation Plan contains information on project eligibility, as well as the community priorities and goals that the city hopes to achieve through the Community Preservation Program. The Community Preservation Plan also contains the criteria and Scoring Rubric by which the CPC shall rank eligible projects. The CPC strongly encourage applicants to review the Community Preservation Plan prior to filling

## APPENDIX A: APPLICATION GUIDANCE

out an application. Additionally, the present document is an additional guide for applicants seeking CPA funding.

### II. APPLICATION TRACKS

There are three tracks to apply for CPA funding, and the track that an applicant uses will depend on the nature of the project.

**Table 1: Application Tracks.** *There are three CPA Application Tracks depending on the applicant's project.*

Application Track	Standard Application	Special Application	AHTF Application
Types of projects	<ul style="list-style-type: none"><li>• Almost all Historic Resource and Open Space &amp; Recreation projects.</li><li>• Community Housing projects not related to development of homeownership and rental units.</li></ul>	<ul style="list-style-type: none"><li>• Projects to acquire or preservation that is time-sensitive.</li><li>• Projects to restore an historic asset damaged by flood or fire.</li></ul>	<ul style="list-style-type: none"><li>• Projects to create new affordable homeownership and rental units.</li></ul>

The *Standard Application* track is the funding application process appropriate for most CPA funding requests, including almost all projects in the Historic Resources and Open Space and Recreation funding categories. Projects in the Community Housing category should also use this form *if the project is not related to the development of homeownership and rental units*. Applicants seeking to utilize the Standard Application track shall use the Application Form found on the [Community Preservation Program webpage](#). Projects related to the creation of new affordable housing rental or homeownership units should contact the [Affordable Housing Trust Fund](#) (AHTF).

Under certain circumstances as determined by the CPC, the CPC will consider an expedited application outside of the Standard Application Process described above. The CPC shall consider a proposal under the *Special Application* track only if the project meets CPA project eligibility requirements. Additionally, to be considered for the Special Application Process, one of the following must also be determined.

- The applicants were unaware of the opportunity to undertake the project; or the proponents did not have authority to identify such opportunity prior to the Standard Application Deadline (for example, the potential sale was still confidential).

## APPENDIX A: APPLICATION GUIDANCE

- The proponents have either: (a) a letter of intent signed by the current owner of the real property expressing an interest in selling to the applicant; or (b) legal control (an option, signed purchase and sale agreement or legal title) of the real property.
- Failure to secure CPA funding will create a high likelihood that the project will not be able to be carried out for the benefit of the city, because the opportunity is of very short duration.
- Appropriation of CPA funding will contribute materially to the likelihood of success for the project.

Applicants seeking to utilize the Special Application track shall use the same Application Form found on the CPP webpage, and select “yes” under Section 2, Question 6 “**Are you requesting an expedited review process for your project?**”, as well as Section 2, Question 7, “**Please briefly describe the conditions under which you are requesting an expedited timeline for review.**” (500 characters) Applicants should also contact CPP staff at [burmeisterj@worcesterma.gov](mailto:burmeisterj@worcesterma.gov) to alert them to their application.

### III. STANDARD APPLICATION STEPS

The following are the steps to submit a Standard Application.

#### Step 1: Application.

The application form for the Standard Application track can be found on the [Community Preservation Program website](#) and is the same as the application form for the Special Application track.

Only projects determined eligible for funding under State laws shall be considered by the CPC. CPA provides funding for local projects in three funding categories: Historic Resources, Open Space and Recreation, and Community Housing. Below are the State’s general eligibility requirements for projects in each category. While these are the minimum requirements for a project to receive funding, the city can prioritize funding for eligible projects, and shall do so according to the Community Preservation Plan.

*Historic Preservation:* CPA funds can be used to *acquire, preserve, rehabilitate, and restore* historic resources that are listed on the State Register or determined to be locally significant by the Worcester Historical Commission.

*Open Space and Recreation:* CPA funds can be used to *acquire, create, and preserve* open space and natural resources. They can be used to *rehabilitate or restore* open space that was initially acquired with CPA funds. They can also be used to *acquire, create, preserve, rehabilitate, or restore* property for recreational use.

## APPENDIX A: APPLICATION GUIDANCE

*Community Housing:* CPA funds can be used to *acquire, create, preserve, and support* community housing for households with incomes at or below 100 percent of the area median income (AMI). They can also be used to *rehabilitate or restore* community housing that was initially acquired or created with CPA funds.

**Table 2: Community Housing household income eligibility limits for Worcester.** CPA Funds can be used to support housing for individuals and families at or below 100% area median income (AMI).

FY 24 Income Limits Worcester CPA Community Housing								
	Household Size							
	1 Person	2 People	3 People	4 People	5 People	6 People	7 People	8 People
Low Income (80% AMI)	\$ 65,688	\$ 75,072	\$ 84,456	\$ 93,840	\$ 101,347	\$ 108,854	\$ 116,362	\$ 123,869
Moderate Income (100% AMI)	\$ 82,110	\$ 93,840	\$ 105,570	\$ 117,300	\$ 126,684	\$ 136,068	\$ 145,452	\$ 154,836

For more information on project eligibility requirements, see the Community Preservation Plan. Contact CPP staff for outstanding questions. The Application Form questions found in *Appendix A* of this document are for reference only. Applications must be submitted electronically via the online version of this form found on the Community Preservation Program webpage. However, applicants are strongly urged to compose their answers in a word processor first, then paste them into the online form, paying particular attention to character count requirements.

**NOTE FOR HISTORIC RESOURCES PROJECTS:** A Determination of Local Historic Significance is necessary for applicants seeking CPA funding in the Historic Resources category if the resource in question is (a) not a building, structure, or real property; (b) not listed on the State Register of Historic Places; or (c) the resource is a building or structure that is less than 50 years old. The determination must be made prior to the application deadline. Please find the Determination of Local Historic Significance application on the [City of Worcester Historical Commission webpage](#).

**NOTE:** The Spring 2025 Pilot Funding Round is the first round of funding available through the Community Preservation Program. This round is intended to have a fast turnaround, such that grant agreements with awardees and revisions to the application processes can take place prior to the Fall 2025 Application opening. As such, there are two anticipated differences between this application process and that of future rounds. The first is that the Pilot Funding Round application process shall be a one-step application process, as opposed to a two-step application process in which only applicants of eligible projects shall be invited to submit full applications. This means that, for the Pilot Funding Round, all

## APPENDIX A: APPLICATION GUIDANCE

applicants will fill out the full application form. Please note that beginning with the Fall 2025 Funding Round, only applicants with projects determined eligible will be invited to submit a full application. The second difference between the Pilot Funding Round and future rounds is the application window is anticipated to be shorter than will occur in the future. **Spring 2025 Pilot Round Funding Applications are due by 11:00 am on May 9<sup>th</sup>, 2025.** Applications received after this deadline will not be considered, and applicants that do not make this deadline will be encouraged to apply in the Fall.

### Step 2: Internal Review.

All applications shall be reviewed by CPP staff to determine eligibility and prepare documents for the CPC. CPP staff shall work with applicants on non-eligible projects to attempt to meet eligibility requirements, if possible and if there is sufficient time prior to the application deadline. Applicants shall be contacted and informed of the date of the CPC meeting at which projects shall be reviewed, and at which eligible projects shall be invited to a public hearing.

### Step 3: Public Hearing.

Depending on the number of requests, some or all applicants of eligible projects will be invited to present their project at a CPC Public Hearing. This will be an opportunity for applicants to talk more about the project, for the CPC to ask questions, and for the public to show support for the project. The CPC may also request from applicants additional or more detailed information to be presented at this time. Based on the hearing and application, projects will be scored using the Project Scoring Rubric found in *Appendix B* of this document.

The following is a summary of the criteria with which the CPC shall score eligible projects. For more information on each criterion, see the Community Preservation Plan.

- A. Project Preparedness:** To ensure that public funds are committed to projects have the greatest chance of being completed in a timely manner, and a lower chance for delay due to problems with securing permissions, permits, or outside funding when applicable.
- B. Match Funding:** To encourage projects which utilize both CPA funds and other public and private funding, including donations and bargain sales.
- C. Applicant Experience:** To ensure that public funds are committed to projects have the greatest chance of being completed in a timely manner by project managers that have experience related to the proposed project.
- D. Long-Term Sustainability:** To ensure that the project is a sustainable investment into the community.
- E. Community Benefit:** To ensure that the project has a positive impact on Worcester residents.

## **APPENDIX A: APPLICATION GUIDANCE**

**F. Community Priorities:** To ensure that projects align with CPA Community Priorities.

**G. Community Preservation Plan Category Goals:** To ensure that projects align with Category Goals.

**H. Community Planning and Buy In:** To prioritize projects that demonstrate compatibility with other community initiatives, goals, or plans; and/or have demonstrated community buy-in.

**I. Compatibility Between CPA Funding Categories:** To encourage projects that include eligible activities in multiple CPA areas, such as affordable housing and recreation.

Applicants of top scoring projects will be notified that their projects are being recommended for funding to the City Council. The CPC reserves the right to attach conditions and to require deed restrictions and additional agreements before its favorable funding recommendation to City Council as a condition in the award letter. Applicants will be notified of all agreement criteria prior to recommendation.

### **Step 4: CPC Funding Recommendation.**

The CPC considers each application based on the merits of the application and the available Community Preservation Fund balance. The CPC may choose to award less than the requested amount in the funding proposal. In these cases, the applicant will be contacted prior to the award being recommended to City Council to ensure that the project will still be viable with the reduced funding available. Projects not recommended by the CPC are not eligible for consideration by the City Council per state statute.

### **Step 5: City Council Determination.**

The slate of recommended projects and their approved funding amounts will be sent to City Council for approval together. Applicants should note that recommendation by the CPC for project funding does not guarantee a project will be awarded.

City Council shall review the slate of projects at a scheduled City Council meeting, where the recommended appropriations can be affirmed, rejected, or lowered. Funding recommendations may not be increased. City Council is bound to act only upon an affirmative recommendation of the CPC and cannot consider requests that do not receive a CPC recommendation.

### **Step 6: Grant Agreements.**

All applicants that are ultimately selected to receive CPA funding must enter a grant agreement/contract with the City of Worcester for use of said funds. The grant agreement will contain requirements and expectations around grant draws, reporting, and provisions for grant compliance.



## APPENDIX A: APPLICATION GUIDANCE

### Step 7: Reporting and Monitoring.

All applicants that are awarded CPA funding shall be required to submit a minimum of one report on project activities. Reporting and monitoring requirements will be project-based and required as part of the grant agreement. Project reimbursements may be contingent upon reporting and monitoring requirements.

#### IV. STANDARD APPLICATION AND FUNDING TIMELINE

The following is the projected timeline for applications and funding decisions for the Spring 2025 Pilot Round.

- **March 14<sup>th</sup>, 2025:** Applications open (tentative).
- **March 26<sup>th</sup>, 2025, at 1:00pm:** Application Q&A Session (Virtual).
- **May 2<sup>nd</sup>, 2025:** Last day to request technical assistance from Community Preservation Program Staff. Note that incomplete applications received after this date will not be considered.
- **May 9<sup>th</sup>, 2025: Applications close at 11:00 am.**
- **Late May:** CPC shall review eligible applications and invite applicants to a public hearing.
- **June:** CPC shall host a public hearing in which applicants can present their projects to the CPC.
- **June/July:** Successful applicants will be contacted. The slate of funding recommendations will be sent to City Council for final approval.
- **Summer 2025:** Grant agreements shall be developed between the awardees and the City.

#### V. SPECIAL APPLICATION STEPS

Under certain circumstances as determined by the CPC, the CPC shall consider an expedited application outside of the Standard Application track described above. The CPC will consider a proposal under the Special Application track only if the project meets CPA project eligibility requirements. Additionally, to be considered for the Special Application Process, one of the following must also be determined:

- The applicants were unaware of the opportunity to undertake the project; or the proponents did not have authority to identify such opportunity prior to the Standard Application Deadline (for example, the potential sale was still confidential).

## APPENDIX A: APPLICATION GUIDANCE

- The proponents have either: (a) a letter of intent signed by the current owner of the real property expressing an interest in selling to the applicant; or (b) legal control (an option, signed purchase and sale agreement or legal title) of the real property.
- Failure to secure CPA funding will create a high likelihood that the project will not be able to be carried out for the benefit of the city, because the opportunity is of very short duration.
- Appropriation of CPA funding will contribute materially to the likelihood of success for the project.

In all such cases, the CPC will adhere to all the procedures applicable under the Standard Application track, except for the submission and hearing deadlines outlined in that process. Special Applications may be submitted at any time, even outside of the Standard Application cycle window. For eligible projects, the CPC will hold a public hearing to review such an application as expeditiously as possible. For cases where a Determination of Local Historical Significance is necessary, this process may occur concurrently to the Special Application, so long as the Determination is made prior to the Public Hearing. As with the Standard Application track, following CPC recommendation, final funding decisions must be made by City Council at a scheduled City Council meeting.

Applicants seeking to utilize the Special Application track shall use the same Application Form found on the CPP webpage, but select “yes” under Section 2, Question 6, “**Are you requesting an expedited review process for your project?**”, as well as Section 2, Question 7, “**Please briefly describe the conditions under which you are requesting an expedited timeline for review.**” (500 characters) Applicants should also contact CPP staff at [burmeisterj@worcesterma.gov](mailto:burmeisterj@worcesterma.gov) to alert them to their application.

Applications must be submitted electronically via the online form found on the [Community Preservation Program](#) webpage. Applicants are strongly urged to compose their answers in a word processor, then pasting into the online form, paying particular attention to character count requirements.

### VI. APPLICATION GUIDANCE

To open the application process to as many applicants as possible, additional application guidance will be available through CPP staff up to one week before applications are due. CPP staff may be contacted at [burmeisterj@worcesterma.gov](mailto:burmeisterj@worcesterma.gov). Additionally, CPP staff will provide at least one workshop per application cycle to assist potential applicants in developing eligible projects and navigating the application process.

## APPENDIX A: APPLICATION GUIDANCE

### APPENDIX A – APPLICATION QUESTIONS

#### SECTION 1: PROJECT SUMMARY

1. **Project Name\*** *(100 Characters)*
2. **Project Location and/or Address\*** *(200 Characters)*
3. **Project lead organization (or individual if applicable) \*** *(100 Characters)*
4. **Legal Status of the Organization\*** *(Multiple Choice: 501(c)3; Government Entity; Individual; Unincorporated Community Group; LP or LLP; LLC; B, C, or S Corp.; Other (please specify))*
5. **Current property owner (if different from the applicant)** *(100 Characters)*
6. **Please attach written permission by the property owner for submission of this application if other than applicant.** *(Optional document upload)*
7. **Brief project description (2 sentences) \*** *(250 characters)*
8. **Project contact information:**
  - Name\* *(100 Characters)*
  - Phone\* *(100 Characters)*
  - Email\* *(100 Characters)*

#### SECTION 2: PROJECT ELIGIBILITY

1. **What CPA category does this project fall under? \*** *(Check all that apply: Historic Resources; Open Space and Recreation; Community Housing)*
2. **What activity are you proposing to do in this category? \*** *(Check all that apply: Acquire; Create; Preserve; Support; Rehabilitate/Restore)*
3. **What is the total project budget? \*** *(100 Characters)*

## APPENDIX A: APPLICATION GUIDANCE

4. **How much are you requesting in CPA funding?** *(100 Characters)*
5. **HISTORIC RESOURCE PROJECTS: Have you received a Positive Determination of Local Historic Significance from the Worcester Historical Commission?** A Determination of Local Historic Significance is necessary for applicants seeking CPA funding in the Historic Resources category if the resource in question is (a) not a building, structure, or real property; (b) not listed on the State Register of Historic Places; or (c) the resource is a building or structure that is less than 50 years old. If applicable, please attach the Determination Letter in the attachments section of this application. For more information, see the City of Worcester [Historical Commission Webpage](#). *\*(Multiple choice: Yes; No; This project does not require a Determination of Local Historic Significance)*
6. **Are you requesting an expedited review process for your project?** The CPC shall consider an expedited timeline for review (ie, a *Special Application*) only under certain circumstances. See the CPA Pilot Funding Round Application Guidance document for more information *\*(Multiple choice: yes, no)*
7. **If you selected “yes”, please briefly describe the conditions under which you are requesting an expedited timeline for review.** Additionally, please ensure to email CPP staff at [burmeisterj@worcesterma.gov](mailto:burmeisterj@worcesterma.gov) before or shortly after submitting this application. *(500 characters)*

## SECTION 3: PROJECT OVERVIEW

1. **Please briefly describe your project.** *\*(1000 characters)*
2. **What permissions, permits, and plans will be necessary to carry out this project, and what is the status of their acquisition?** Please attach any related permissions or permits related to the project. *\*(1000 characters, with optional upload option)*
3. **Do you foresee any delays in acquiring these permissions within the next 6 months?** If “yes” please explain. *\*(500 characters)*
4. **What is the desired start and end date of this project?** *\* Please attach a Timeline for the project in the attachments portion of this form. (250 characters,*

## APPENDIX A: APPLICATION GUIDANCE

*required attachment)*

5. **Please upload a complete project budget (xls or pdf) that includes the source of the funding for each line item.** CPA funds can ONLY be used on CPA eligible project elements. Please make sure to be specific about the use of all CPA monies requested. *\*(required document upload)*
6. **Please upload any renderings and/or estimates for this project.** *(optional document upload)*
7. **What is the status of the match funding identified in the budget?** Please upload commitment letters and/or funding agreements demonstrating that match funding is in place. *\*(500 characters, optional document upload)*
8. **Please explain why CPA funding is needed for this project.** If CPA is the only proposed funding source for this project, please explain why. *\*(500 characters)*
9. **Please describe the experience of the project manager or project management team in completing a project like this one.** Please include examples of similar projects pursued in the past, and why they are relevant. *\*(1000 characters)*
10. **Please describe the financial position of the organization and its ability to cover the upfront costs of this project.** CPA funding is provided on a reimbursement basis. Please attach any reports that may be helpful in establishing a capable financial position. *\*(1000 characters, optional document upload)*
11. **How will this resource/property/building be maintained in the future?** Please provide any maintenance commitments as attachments. *\*(500 characters, optional document upload)*
12. **Please describe how this project/program will benefit Worcester residents in general, as well as specific groups that will benefit from the project.** *\*(500 characters)*
13. **Please identify which of the Community Priorities identified in the Community Preservation Plan align with this project.** *\*(Check all that apply:*

## APPENDIX A: APPLICATION GUIDANCE

- *PRIORITY 1: Increase accessibility to historic resources, open space, parks, and in community housing;*
- *PRIORITY 2: Advance the city's sustainability and climate resilience goals;*
- *PRIORITY 3: Prioritizing investments into projects that address a demonstrated need in a geographic area;*
- *This project does not align with any of these Community Priorities.)*

**14. Please describe how this project aligns with the above Community Priorities. (1000 characters)**

**15. Please identify which of the Category Goals identified in the Community Preservation Plan align with this project. \* (Check all that apply:**

### ***Historic Resources Category Goals***

- *GOAL 1: Acquire and restore historic buildings in danger of demolition.*
- *GOAL 2: Promote adaptive reuse or deconstruction for historical preservation.*
- *GOAL 3: Preserve, digitize, and archive historic records.*
- *GOAL 4: Preserve underrepresented stories.*

### ***Open Space and Recreation Category Goals***

- *GOAL 1: Maintain high quality drinking water resources and protect wetlands and floodplains.*
- *GOAL 2: Refurbish existing park amenities to meet the city's changing needs.*
- *GOAL 3: Provide access to fresh, locally grown foods.*
- *GOAL 4: Increase native species populations and grow the urban forest.*
- *GOAL 5: Expand green networks to create corridors for wildlife and alternative mobility options.*

### ***Community Housing Category Goals***

- *GOAL 1: Produce more housing, especially owner-occupied housing.*
- *GOAL 2: Support deeper housing affordability (at or below 60% AMI).*
- *GOAL 3: Increase infill and adaptive reuse development.*
- *GOAL 4: Increase the number of perpetual affordability deed restrictions.*
- *GOAL 5: Support unhoused individuals, especially youth and families.*
- *This project does not align with any of these Category Goals)*

## APPENDIX A: APPLICATION GUIDANCE

16. **Please describe how this project aligns with the above Category Goals** *(1000 characters)*
17. **Does your project align with any other City or Regional plans?** Please be specific. *See the [City of Worcester webpage](#) to view local plans. \** *(500 characters)*
18. **Does your project have community support?** Please describe outreach efforts for this project and upload any letters of support. *(500 characters, [optional document uploads](#))*
19. **Is there anything else you would like the CPC to know about your project?** *(500 characters)*



## APPENDIX A: APPLICATION GUIDANCE

## APPENDIX B – PROJECT SCORING RUBRIC

		Excellent (5)	Good (3)	Fair (1)	Poor (0)	Rating
A	Project Preparedness	All required permissions, permits, and plans necessary for completion are included, and all additional funding commitments are secured.	Required permissions, permits, and plans necessary for project completion are expected to be complete within 3 months. All additional funding commitments secured.	Required permissions, permits, and plans necessary for project completion are expected to be complete within 6 months. Project is eligible for additional funding sources, though not yet secured.	Required permissions, permits, and plans necessary for project completion will not be complete within 6 months. Project is eligible for additional funding sources, though not yet secured.	
B	Match Funding	Project leverages more than 50% of total project costs and/or has demonstrated commitment for in-kind contributions to reduce costs.	Project leverages 25-50% of total project costs and/or has demonstrated commitment for in-kind contributions to reduce costs.	Project leverages less than 25% of project costs and/or has demonstrated commitment for in-kind contributions to reduce costs.	CPA funds requested for 100% of project costs with no in-kind donations or sweat-equity.	
C	Applicant Experience	Project manager(s) has demonstrated that they have successfully completed multiple projects similar to this one previously.	Project manager(s) has demonstrated that they have successfully managed at least one project similar to this one previously.	Project manager(s) has demonstrated a track record of good project management in other areas.	No applicable project management experience is provided.	
D	Long-Term Sustainability	Project strongly demonstrates adequate capacity for long-term maintenance of property/asset/CPA investment with no additional costs or future CPA asks.	Project demonstrates adequate capacity for long-term maintenance of property/asset/CPA investment with no additional costs or future CPA asks.	Project demonstrates adequate capacity for long-term maintenance of property/asset/CPA investment with some/minimal additional costs or future CPA asks.	Project does not demonstrate adequate capacity for long-term maintenance of property/asset/CPA investment without additional costs or future CPA asks.	
E	Community Benefit	Project demonstrates a high public benefit to a large number of residents AND an outsized impact on a vulnerable group.	Project demonstrates a high public benefit to a large number of residents OR an outsized impact on a vulnerable group.	There will be opportunities for the public to benefit from this project AND there will be some impact on a vulnerable population.	There will be few to no opportunities for the public to benefit from this project and there will be no impact on a vulnerable population.	
F	Community Priorities	Project strongly aligns with more than one community priority.	Project strongly aligns with one community priority.	Project somewhat aligns with at least one community priority.	Project does not align with any community priority.	
G	Community Preservation Plan Category Goals	Project strongly aligns with more than one category goals.	Project strongly aligns with one category goal.	Project somewhat aligns with at least one category goal.	Project does not align with any category goal.	
H	Community Planning and Buy-in	Project strongly demonstrates alignment/compatibility with other community plans and initiatives, AND demonstrates strong community support.	Project demonstrates alignment/compatibility with other community plans and initiatives, AND demonstrates some community support.	Project demonstrates some alignment/compatibility with other community plans and initiatives, OR demonstrates some community support.	Project does not demonstrate alignment/compatibility with other community plans and initiatives, AND does not demonstrate community support.	
I	Compatibility Between CPA Funding Categories		Project includes eligible activities AND demonstrates compatibility (neutral/does no harm) in two or more CPA areas.	Project includes eligible activities in only one CPA area AND demonstrates compatibility across CPA goals in two CPA areas.	Project includes eligible activities in only one CPA area AND does not demonstrate compatibility across other CPA category goals.	
Overall Rating						

**APPENDIX B: COMMUNITY PRESERVATION FUND ALLOWABLE SPENDING PURPOSES (ELIGIBILITY).** *Below are details on the eligibility criteria for projects supported with Community Preservation Funds under G.L. c. 44B. §5*

	OPEN SPACE	HISTORIC RESOURCES	RECREATIONAL LAND	COMMUNITY HOUSING
<b>DEFINITIONS</b> (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
<b>ACQUISITION</b> Obtain property interest by gift, purchase, devise, grant, rental, rental purchase, lease or otherwise. Only includes eminent domain taking as provided by G.L. c. 44B	Yes	Yes	Yes	Yes
<b>CREATION</b> To bring into being or cause to exist. <i>Seideman v. City of Newton</i> , 452 Mass. 472 (2008)	Yes		Yes	Yes
<b>PRESERVATION</b> Protect personal or real property from injury, harm or destruction	Yes	Yes	Yes	Yes
<b>SUPPORT</b> 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
<b>REHABILITATION AND RESTORATION</b> 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

## APPENDIX C: PROJECT SCORING RUBRIC

		Excellent (5)	Good (3)	Fair (1)	Poor (0)	Rating
A	Project Preparedness	All required permissions, permits, and plans necessary for completion are included, and all additional funding commitments are secured.	Required permissions, permits, and plans necessary for project completion are expected to be complete within 3 months. All additional funding commitments secured.	Required permissions, permits, and plans necessary for project completion are expected to be complete within 6 months. Project is eligible for additional funding sources, though not yet secured.	Required permissions, permits, and plans necessary for project completion will not be complete within 6 months. Project is eligible for additional funding sources, though not yet secured.	
B	Match Funding	Project leverages more than 50% of total project costs and/or has demonstrated commitment for in-kind contributions to reduce costs.	Project leverages 25-50% of total project costs and/or has demonstrated commitment for in-kind contributions to reduce costs.	Project leverages less than 25% of project costs and/or has demonstrated commitment for in-kind contributions to reduce costs.	CPA funds requested for 100% of project costs with no in-kind donations or sweat-equity.	
C	Applicant Experience	Project manager(s) has demonstrated that they have successfully completed multiple projects similar to this one previously.	Project manager(s) has demonstrated that they have successfully managed at least one project similar to this one previously.	Project manager(s) has demonstrated a track record of good project management in other areas.	No applicable project management experience is provided.	
D	Long-Term Sustainability	Project strongly demonstrates adequate capacity for long-term maintenance of property/asset/CPA investment with no additional costs or future CPA asks.	Project demonstrates adequate capacity for long-term maintenance of property/asset/CPA investment with no additional costs or future CPA asks.	Project demonstrates adequate capacity for long-term maintenance of property/asset/CPA investment with some/minimal additional costs or future CPA asks.	Project does not demonstrate adequate capacity for long-term maintenance of property/asset/CPA investment without additional costs or future CPA asks.	
E	Community Benefit	Project demonstrates a high public benefit to a large number of residents <b>AND</b> an outsized impact on a vulnerable group.	Project demonstrates a high public benefit to a large number of residents <b>OR</b> an outsized impact on a vulnerable group.	There will be opportunities for the public to benefit from this project <b>AND</b> there will be some impact on a vulnerable population.	There will be few to no opportunities for the public to benefit from this project and there will be no impact on a vulnerable population.	
F	Community Priorities	Project strongly aligns with more than one community priority.	Project strongly aligns with one community priority.	Project somewhat aligns with at least one community priority.	Project does not align with any community priority.	
G	Community Preservation Plan Category Goals	Project strongly aligns with more than one category goals.	Project strongly aligns with one category goal.	Project somewhat aligns with at least one category goal.	Project does not align with any category goal.	
H	Community Planning and Buy-in	Project strongly demonstrates alignment/compatibility with other community plans and initiatives, <b>AND</b> demonstrates strong community support.	Project demonstrates alignment/compatibility with other community plans and initiatives, <b>AND</b> demonstrates some community support.	Project demonstrates some alignment/compatibility with other community plans and initiatives, <b>OR</b> demonstrates some community support.	Project does not demonstrate alignment/compatibility with other community plans and initiatives, <b>AND</b> does not demonstrate community support.	
I	Compatibility Between CPA Funding Categories		Project includes eligible activities <b>AND</b> demonstrates compatibility (neutral/does no harm) in two or more CPA areas.	Project includes eligible activities in only one CPA area <b>AND</b> demonstrates compatibility across CPA goals in two CPA areas.	Project includes eligible activities in only one CPA area <b>AND</b> does not demonstrate compatibility across other CPA category goals.	
Overall Rating						

## **APPENDIX D: COMMUNITY PRESERVATION FUND PRIORITY SURVEY**

**COMMUNITY PRESERVATION FUND PRIORITY SURVEY.** *The below is the text of the Online Survey that was accepting responses between December 19, 2024, and January 19, 2025. Questions were accessed through Google Forms and available in English, Spanish, Vietnamese, and Twi. Questions were based on the Exercises presented at the December Public Forums.*

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### **Community Preservation Fund Priority Survey**

*Thank you for taking the time to weigh in on how Worcester awards its Community Preservation Fund!*

*The passage of the Community Preservation Act in 2022 allowed Worcester to create a fund that can be used exclusively for projects related to Historic Resources, Open Space and Recreation, and Community Housing. While there are minimum requirements for project eligibility, the city has a say in what types of projects get prioritized.*

*The survey below is designed to help us better understand the priorities of the community regarding CPA eligible projects. For more information on CPA or the themes presented below, please check out the Community Preservation Program webpage at [WorcesterMA.gov/CPP](http://WorcesterMA.gov/CPP).*

### **Section One: CPA Funding Categories**

The Community Preservation Act allows for the funding of local projects in three categories: Historic Resources, Open Space and Recreation, and Community Housing. Below you will find information on the types of projects that are eligible for funding in each category. Considering all three funding categories, please answer the following questions.

A **Historic Resource** is defined as a building, structure, vessel, real property, document, or artifact that (1) is found on the Massachusetts State Register of Historic Places OR (2) has been determined by the local Historical Commission that the historic resource is locally significant. Eligible projects may include *Acquisition, Preservation* and *Rehabilitation/Restoration* of Historic Resources.

**Open Space** is defined as land to protect well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, river, stream, lake and pond frontage, beaches, lands to protect scenic vistas, land for wildlife or nature preserve, and land for recreational use. **Outdoor Recreation** is defined as active or passive recreational use including, the use of land for community gardens, trails, and noncommercial sports, as well as the use of land as a park, playground, or athletic field. Eligible projects may include the *Acquisition, Creation, and Preservation*, of Open Space

## **APPENDIX D: COMMUNITY PRESERVATION FUND PRIORITY SURVEY**

and Outdoor Recreation facilities, as well as *Rehabilitation* of facilities & land initially purchased with CPA funds

**Community Housing** is defined as low- and moderate-income housing for individuals and families, including low- or moderate-income senior housing. Eligible projects may include the *Acquisition, Creation, Preservation, and Support* of Community Housing, as well as the *Rehabilitation/restoration* of Community Housing that was initially purchased with CPA funds.

- 1) When compared to the other funding categories, how important is using CPA funding on projects related to Historic Resources?

Not important at all when compared to other funding categories

Somewhat less important when compared to other funding categories

Equally important compared to other funding categories

Somewhat more important compared to other funding categories

The most important funding category

- 2) When compared to the other funding categories, how important is using CPA funding on projects related to Open Space and Recreation?

Not important at all when compared to other funding categories

Somewhat less important when compared to other funding categories

Equally important compared to other funding categories

Somewhat more important compared to other funding categories

The most important funding category

- 3) When compared to the other funding categories, how important is using CPA funding on projects related to Community Housing?

Not important at all when compared to other funding categories

Somewhat less important when compared to other funding categories

Equally important compared to other funding categories

Somewhat more important compared to other funding categories

The most important funding category

- 4) Do you have any additional comments?

### **Section Two: Historic Resource Priorities**

## **APPENDIX D: COMMUNITY PRESERVATION FUND PRIORITY SURVEY**

The following priority themes were identified through interviews with various organizations related to Historic Resources here in Worcester. Which do you agree should be a priority for CPA funding? After reviewing the existing priority themes, there will be a chance to add your own.

- 1) **Theme 1: Preserving underrepresented stories.** *Worcester is a community of many diverse populations, but not all of them are equally represented in historic preservation efforts to date. Some believe that Historic Resource projects and programs that document, preserve, and celebrate underrepresented histories should be prioritized.*

I do not agree that this is a priority

This is somewhat a priority

This is a high priority

This is the most important priority

I do not have an opinion

- 2) **Theme 2: Supporting certain non-income generating historic properties facing economic hardship.** *The cost of maintaining and repairing the exteriors of privately owned buildings to historic standards are elevated compared to alternatives. Some believe that programs and projects to support historic property owners for whom it would be an economic hardship to repair or maintain their property to historic standards should be prioritized.*

### **Theme 2a: Owner-occupied homes**

I do not agree that this is a priority

This is somewhat a priority

This is a high priority

This is the most important priority

I do not have an opinion

### **Theme 2b: Churches**

I do not agree that this is a priority

This is somewhat a priority

This is a high priority

This is the most important priority

I do not have an opinion

## **APPENDIX D: COMMUNITY PRESERVATION FUND PRIORITY SURVEY**

- 3) **Theme 3: Digitizing and archiving historic records.** *There are local records of import stored all over the city, including those official city documents that are being stored in paper form in City Hall. Some believe that projects and programs to preserve and make accessible these archives, through digitization and creating public databases, should be prioritized.*

I do not agree that this is a priority

This is somewhat a priority

This is a high priority

This is the most important priority

I do not have an opinion

- 4) **Theme 4: Protecting historic buildings in danger of demolition.** *Some historic properties go into disrepair to a point of needing to be demolished and are then lost forever. Some believe that projects that support the acquisition of a property with the intention to restore it to historic standards should be prioritized.*

I do not agree that this is a priority

This is somewhat a priority

This is a high priority

This is the most important priority

I do not have an opinion

- 5) **Theme 5: Advancing the city's sustainability goals, and/or promoting adaptive reuse and deconstruction.** *Older buildings tend to be less insulated and use more energy to heat and cool them. With that said, the "greenest" option is to preserve and rehabilitate a historic building, rather than demolish it and use all new materials to build another building. Adaptive reuse, or the repurposing of historic facades into new construction, preserves history in a greener way. Some believe that projects that advance the city's sustainability goals and promote adaptive reuse should be prioritized.*

I do not agree that this is a priority

This is somewhat a priority

This is a high priority

This is the most important priority

I do not have an opinion



## **APPENDIX D: COMMUNITY PRESERVATION FUND PRIORITY SURVEY**

- 6) **Theme 6: Prioritizing Historic Resources projects or programs that qualify for other CPA funding categories.** *Some believe that projects and programs that qualify for multiple CPA funding categories should be given preference.*

I do not agree that this is a priority

This is somewhat a priority

This is a high priority

This is the most important priority

I do not have an opinion

- 7) **Missing Priorities:** *If you have a priority that was not identified above, please add it below, as well as any other comments and questions you have.*

### **Section Three: Open Space and Recreation Priority Themes**

The following priority themes were identified through interviews with various organizations related to Open Space and Recreation here in Worcester. Which do you agree should be a priority for CPA funding? After reviewing the existing priority themes, there will be a chance to add your own.

- 1) **Theme 1: Expanding green networks and/or creating wildlife corridors.** *The per-acre environmental services that Open Space delivers, specifically in terms of climate resiliency and habitat services, increase as a parcel gets bigger. Some believe that Open Space projects that abut and therefore expand existing protected Open Space should be prioritized.*

I do not agree that this is a priority

This is somewhat a priority

This is a high priority

This is the most important priority

I do not have an opinion

- 2) **Theme 2: Protecting drinking water resources.** *Undeveloped forested lands around drinking water supplies provide natural filtration that is more cost-effective than removing pollutants at a water filtration plant. The City of Worcester has award-winning drinking water in large part because of watershed protection efforts around source waters, and some believe that Open Space protection and acquisition projects of land around source waters should be prioritized.*

## **APPENDIX D: COMMUNITY PRESERVATION FUND PRIORITY SURVEY**

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

- 3) Theme 3: Creating and enhancing equitable access to open space, especially water.** *Worcester has more public green and blue spaces compared to other cities of its size, but these spaces are underutilized due to lack of awareness and of accessible amenities. Some believe that projects and programs to make Open Space more accessible should be prioritized.*

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

- 4) Theme 4: Advancing projects that are specified in Parks Master Plans.** *Park Master Plans are created with a rigorous community input process and have been approved by the Parks Department. Some believe that projects that advance Park Master Plans should be prioritized.*

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

- 5) Theme 5: Expanding access to fresh, locally grown foods.** *There are areas in Worcester that are food insecure, or lack access to fresh, healthy produce. This leads to decreased health outcomes for residents in these areas. Formal community gardens and farmers markets are some ways to increase access to healthy food in an equitable way. Gardens also build community and are a classroom for science and life skills. Some believe that projects and programs that increase access to fresh, locally grown food should be prioritized.*

## **APPENDIX D: COMMUNITY PRESERVATION FUND PRIORITY SURVEY**

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

- 6) Theme 6: Supporting native species and growing the urban forest.** *Flood reduction, carbon sequestration, lower air temperature, neighborhood beautification, and increased biodiversity are just a few ecosystem services that urban trees and native species provide. Invasive species threaten to displace trees and other native organisms and overtake our Open Spaces. Some believe that projects that support and grow Worcester's native plant and tree species should be prioritized.*

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

- 7) Theme 7: Achieving the city's sustainability and climate resilience goals.** *The city is expected to continue to feel increased effects of climate change, including more extreme storms, flooding, and heat. Some believe that Open Space and Recreation projects that increase climate resiliency or make the city more sustainable should be prioritized.*

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

- 8) Theme 8: Supporting the work of dedicated park and open space community groups.** *Many city-owned parks and lake areas are advocated for and maintained in part by community organizations or "Friends of" groups. In part, they represent the community's opinion on what investments should be made into the properties, and generally have high-impact, low-cost projects. Some believe that projects submitted by dedicated park and Open Space community groups should be prioritized.*

## **APPENDIX D: COMMUNITY PRESERVATION FUND PRIORITY SURVEY**

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

- 9) Theme 9: Investing in sustainable trails.** *Worcester has tens of miles of hiking trails. Many are not maintained by the city, but by small and volunteer-run organizations using their own funds. Prolonged use and increased erosion because of climate change have caused the trails to need significant upgrades, preferably with higher quality materials that will last longer. Some believe that trail projects that use sustainable materials should be prioritized.*

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

- 10) Theme 10: Creating and enhancing alternative mobility options.** *Worcester is a car-centric city, and has insufficient infrastructure for other forms of mobility, such as by walking, cycling, or other micromobility transit options. Some believe that projects that increase walking, cycling, and other micro-mobility options through and between existing parks should be prioritized.*

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

- 11) Theme 11: Creating and improving access to parks and nature in Environmental Justice (EJ) communities.** *EJ communities face a greater risk of environmental hazards due to a combination of factors. Parks and nature play a crucial role in enhancing the well-being and quality of life in EJ communities including improved public health outcomes, increased social cohesion, climate resiliency, recreational*

## **APPENDIX D: COMMUNITY PRESERVATION FUND PRIORITY SURVEY**

*benefits, and reduction of community violence. Some believe that projects that take place in EJ communities with local buy-in should be given priority.*

- I do not agree that this is a priority
- This is somewhat a priority
- This is a high priority
- This is the most important priority
- I do not have an opinion

**12) Theme 12: Prioritizing Open Space and Recreation projects that qualify for other CPA funding categories.** *Some believe that projects and programs that qualify for multiple CPA funding categories should be given preference.*

- I do not agree that this is a priority
- This is somewhat a priority
- This is a high priority
- This is the most important priority
- I do not have an opinion

**13) Missing Priorities:** *If you have a priority that was not identified above, please add it below, as well as any other comments and questions you have.*

### **Section Four: Community Housing Priorities**

The following priority themes were identified through interviews with various organizations related to Community Housing here in Worcester. Which do you agree should be a priority for CPA funding? After reviewing the existing priority themes, there will be a chance to add your own.

**1) Theme 1: Increasing rates of homeownership.** *Homeownership benefits include increased personal financial security, the ability to build equity, as well as neighborhood stabilization and strengthened communities. Rising rents mean that the city's renters are being increasingly priced out of a path to homeownership and deed-restricted homeownership units make up less than half a percent of the owner-occupied and for-sale housing in Worcester. Some believe that projects and programs to increase rates of homeownership should be prioritized.*

## **APPENDIX D: COMMUNITY PRESERVATION FUND PRIORITY SURVEY**

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

- 2) Theme 2: Supporting more rental assistance programs.** *Rental assistance programs help eligible tenants to cover either first and last month's rent or supplement their rent payments in the case of unforeseen circumstances that may lead to non-payment. Rental assistance programs can be more cost effective than supporting individuals and families who become unhoused, and lead to better health and social outcomes. Some believe that rental assistance programs should be prioritized among CPA proposed Community Housing programs.*

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

- 3) Theme 3: Providing housing for the unhoused population.** *The unhoused population in one of the most vulnerable populations in the city. Shelter space is limited, and permanent housing can take a long time to secure. Some believe that projects and programs that provide housing to the unhoused population should be prioritized.*

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

- 4) Theme 4: Creating more accessible housing.** *Between individuals with disabilities and senior populations, there is an increasing demand for accessible and age-in-place units, leading to a shortage. Some believe that eligible projects and programs that increase housing accessibility should be prioritized.*

## **APPENDIX D: COMMUNITY PRESERVATION FUND PRIORITY SURVEY**

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

- 5) Theme 5: Supporting higher environmental standards and achieving the city's sustainability and resilience goals.** *Buildings are one of the major contributors to climate change through their energy use. Asphalt and roofs exacerbate flooding and heat island effects in neighborhoods. There are certifications and best practices for building and landscape design that reduce emissions and help alleviate flooding and heat island effects. Some believe that projects and programs that will help to achieve the city's climate and resilience goals should be prioritized.*

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

**Theme 6: Supporting deeper housing affordability (i.e. serving households earning below the identified AMI thresholds).**

- 6) Theme 6a: Prioritizing projects and programs that serve households up to 60% AMI.** *These residents are likely working part- or full-time but struggling to find housing with a rent or mortgage they can afford or are one emergency away from missing their rent payment. While more challenging than market-rate financing, developing 60% AMI housing is considered more financially feasible to develop than 30%.*

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

## **APPENDIX D: COMMUNITY PRESERVATION FUND PRIORITY SURVEY**

### **7) Theme 6b: Providing housing opportunities to households up to 30% AMI.**

*Residents in this income band are some of the city's most vulnerable population. Creating housing at 30% AMI and below requires very large subsidies, and commitment to ongoing services, and there is a larger shortage of these units in Worcester compared to any other AMI category.*

I do not agree that this is a priority

This is somewhat a priority

This is a high priority

This is the most important priority

I do not have an opinion

### **Theme 7: Supporting Community Housing development projects that have certain qualities**

### **8) Theme 7a: Increasing the number of residents served.** *Bigger projects with more units of housing serve more individuals and families. These developers are generally experienced, build quickly, and require less oversight by the city administration. While more expensive, they tend to also have more access to other funding sources.*

I do not agree that this is a priority

This is somewhat a priority

This is a high priority

This is the most important priority

I do not have an opinion

### **9) Theme 7b: Providing opportunities to “emerging developers”.** *“Emerging developers” refers to developers that have not had more than three affordable housing developments. These projects tend to be smaller and take longer to complete. There may be an increased personal investment into the property and wellbeing of the tenants.*

I do not agree that this is a priority

This is somewhat a priority

This is a high priority



## **APPENDIX D: COMMUNITY PRESERVATION FUND PRIORITY SURVEY**

This is the most important priority

I do not have an opinion

**10) Theme 7c: Advancing shovel ready projects.** *These projects generally have the greatest possibility of being constructed and on the fastest timeline. They have had significant initial investment from elsewhere.*

I do not agree that this is a priority

This is somewhat a priority

This is a high priority

This is the most important priority

I do not have an opinion

**11) Theme 7d: Increasing infill and adaptive reuse development.** *“Infill development” refers to housing constructed on vacant or underutilized land in within an existing developed area, including the construction of additional units on existing residential or commercial lots, such as Accessory Dwelling Units (ADUs). “Adaptive reuse” refers to the process of reusing an existing building for a purpose other than which it was originally built or designed for.*

I do not agree that this is a priority

This is somewhat a priority

This is a high priority

This is the most important priority

I do not have an opinion

**12) Theme 7e: Supporting developers who have demonstrated they will keep units affordable after deed restrictions ends.** *Deed restrictions are often for a term of 30 years, after which the owner is allowed to charge market-rate for sales and rentals, and some do.*

I do not agree that this is a priority

This is somewhat a priority

This is a high priority

This is the most important priority

I do not have an opinion

## **APPENDIX D: COMMUNITY PRESERVATION FUND PRIORITY SURVEY**

**13) Theme 7f: Creating open space and recreational facilities for children and families.** *Some believe that Community Housing projects that respect the natural environment or provide recreational facilities should be prioritized.*

- I do not agree that this is a priority
- This is somewhat a priority
- This is a high priority
- This is the most important priority
- I do not have an opinion

### **Theme 8: Prioritizing programs and projects that serve specific populations.**

**14) Theme 8a: Seniors.** *Worcester's population is aging, and there is a lack of affordable, accessible, and age-in place units available to meet their changing needs.*

- I do not agree that this is a priority
- This is somewhat a priority
- This is a high priority
- This is the most important priority
- I do not have an opinion

**15) Theme 8b: People with disabilities.** *While there are some requirements for new developments to include a certain number of accessible units, this number is far below the need.*

- I do not agree that this is a priority
- This is somewhat a priority
- This is a high priority
- This is the most important priority
- I do not have an opinion

**16) Theme 8c: Young parents.** *Young parents are generally early in their careers and may have more limited economic resources, as well as more housing space needs.*

- I do not agree that this is a priority
- This is somewhat a priority

## **APPENDIX D: COMMUNITY PRESERVATION FUND PRIORITY SURVEY**

This is a high priority

This is the most important priority

I do not have an opinion

**17) Theme 8d: Families.** *Families have more individuals and require more space.*

*Currently, there are fewer three- and four-bedroom affordable units compared with demand than for other family sizes.*

I do not agree that this is a priority

This is somewhat a priority

This is a high priority

This is the most important priority

I do not have an opinion

**18) Theme 8e: Youth.** *Youth who experience housing insecurity or homelessness are more likely to have insecure housing later in life.*

I do not agree that this is a priority

This is somewhat a priority

This is a high priority

This is the most important priority

I do not have an opinion

**19) Theme 8f: Immigrants, especially refugees.** *Immigrant populations may have a more difficult time finding housing due to language and cultural barriers. They may also be more likely to have a lower income.*

I do not agree that this is a priority

This is somewhat a priority

This is a high priority

This is the most important priority

I do not have an opinion

**20) Theme 8g: Long-time residents of historically redlined neighborhoods.**

*Systematic racism and redlining practices have had negative economic consequences on certain populations to this day. Worcester's redlined areas have fewer homeownership opportunities.*

## **APPENDIX D: COMMUNITY PRESERVATION FUND PRIORITY SURVEY**

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

**21) Theme 8h: Unhoused couples.** *Most shelters for individuals are not big enough to accommodate domestic partners.*

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

**22) Theme 8i: Single women.** *Single women face unique challenges and may benefit from having specific services or programs.*

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

**23) Theme 8j: Persons struggling with addiction.** *People dealing with drug addiction are a particularly vulnerable population that require additional services that make housing more difficult to find.*

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

### **Theme 9: Supporting local landlords of non-deed restricted properties.**

**24) Theme 9a: Prioritizing projects and programs that incentivize landlords to maintain naturally occurring affordable housing.** *33% of all rental units in Worcester are “naturally occurring affordable housing”, non-deed restricted housing that is below market rate. As demand increases, programs can incentivize these landlords to place deed restrictions on their units in exchange for some benefit to them.*

## **APPENDIX D: COMMUNITY PRESERVATION FUND PRIORITY SURVEY**

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

**25) Theme 9b: Prioritizing projects and programs that support landlords that rent to the homeless population.** *While there are some programs that support landlords that choose to rent to individuals and families that are experiencing homelessness, more incentives may help create more options for folks that do not have access to housing.*

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

**26) Theme 10: Prioritizing Community Housing projects that qualify for other CPA funding categories.** *Some believe that projects and programs that qualify for multiple CPA funding categories should be given preference.*

I do not agree that this is a priority  
This is somewhat a priority  
This is a high priority  
This is the most important priority  
I do not have an opinion

**27) Missing Priorities:** *If you have a priority that was not identified above, please add it below, as well as any other comments and questions you have.*

*Thank you for taking the time to share your thoughts. This survey will be open until January 15<sup>th</sup>, 2025. The results of this survey and the other CPA Community Forums will be incorporated into the Community Preservation Plan, which will be drafted and posted on the City of Worcester website in early 2025. To keep up to date with the Community Preservation Program, please join our mailing list by clicking [here](#).*

*Please reach out if you have any questions or concerns by contacting the Community Preservation Manager at [burmeisterj@worcesterma.gov](mailto:burmeisterj@worcesterma.gov).*

## APPENDIX E: ONLINE SURVEY AND PUBLIC FORUM RESPONSES

### Section 1: Participant Demographics

Which of the following describes you (select all that apply)	Percent of Respondents
<i>I am a Worcester resident</i>	85%
<i>I am a Worcester property owner</i>	52%
<i>I am a Worcester business owner</i>	7%
<i>I work at a Worcester non-profit organization</i>	27%
<i>None of these apply to me</i>	2%
<i>I would prefer not to say</i>	0%

### Section 2: Funding Categories

After receiving a description of each funding category (Historic Resources, Open Space and Recreation, and Community Housing) and examples of projects in each, participants at the Public Forums and individuals who took the Online Survey were asked to rank each of the three categories using one of the below choices. After ranking each category, participants were given an opportunity to leave comments and questions.

- Not important at all when compared to other funding categories
- Somewhat less important when compared to other funding categories
- Equally important compared to other funding categories
- Somewhat more important compared to other funding categories
- The most important funding category

When compared to the other funding categories, how important is using CPA funding on projects related to each category?	Historic Resources	Open Space and Recreation	Community Housing
<i>Not important at all when compared to other funding categories</i>	14%	7%	15%
<i>Somewhat less important when compared to other funding categories</i>	32%	18%	8%
<i>Equally important compared to other funding categories</i>	23%	26%	18%
<i>Somewhat more important compared to other funding categories</i>	17%	29%	20%
<i>The most important funding category</i>	15%	20%	38%

## APPENDIX E: ONLINE SURVEY AND PUBLIC FORUM RESPONSES

### • **Funding Categories Comments**

The following were the comments from participants when asked “Do you have any additional comments?” Responses of “none”, “NA”, “no” and similar have been removed. Asterisks (\*) indicate words censored to allow content to be appropriate for all audiences.

#### **Virtual Forum (12/10)**

- *We need all three to be a community wit a good quality of life. Be equitable among the categories, even if that means waiting for the right project.*
- *I think in this first year it will be important to NOT pre-determine the categories for the Discretionary Portion of our fund. Better to invite all categories equally and see what comes forth.*
- *Can this be used for safety things like streetlights or speed readers*
- *We are in the midst of an affordable housing crisis, and Community Housing very important.*
- *Rents are absolutely out of control and we need to address housing more than any of these other categories presently.*
- *How does the CPA ensure accessibility issues are addressed if there is no one on the board representing the Accessibility Commission*
- *I would like to see more spent on the youth of the City when it comes time for recreation such as new skate parks and other outdoor facilities. I am in the Tatnuck area and this is very limited.*
- *Well organized information. Thank you!*

#### **In Person Forum (12/11)**

*(no comments)*

#### **In Person Forum (12/18)**

- *On Community Housing: Creating Limits, only getting money once/ how do we prevent the same folks from getting the funds?*
- *On Open Space and Recreation: Soccer Field*
- *On Open Space and Recreation: Roller Skating Rink*
- *On Open Space and Recreation: Pickle Ball*
- *On Open Space and Recreation: Children Park Extensive*
- *On Historic Resources: Garden at the Worcester Common*

## APPENDIX E: ONLINE SURVEY AND PUBLIC FORUM RESPONSES

### Online Survey (12/19-1/19)

- *This TAX needs to be repealed! It is nothing more of an added burden to the taxpayer (ME). Can't wait in 2 more years we can start petitions to get this on the city ballot to get rid of this TAX!*
- *We are in a housing crisis and need relief*
- *Why am I still getting a separate bill? How is this not just rolled into my standard payment I pay from escrow. This is a mess that will cause someone to lose their home, fix it.*
- *Dedicate the housing money to down payments on private ADUs. You can use it as a force multiplier and create density in parts of the city where it's most needed.*
- *Housing and open spaces/recreation go hand in hand to create healthy and active neighborhoods. Trees have been proven to boost emotional health. When caring for/establishing open spaces/recreation, let's make sure to use ecological practices and to plant a diversity of native plants.*
- *With the increasing costs of housing, results of COVID, mental health, and the low supply of affordable housing, this should be one of the FIRST items when using CPA money Worcester considers. This will ease homelessness, give people a sense of ownership and pride, and healthier for those using the housing.*
- *Invest the money in areas of the City that are under resourced (see poorer) please.*
- *All of these categories are important to developing a well rounded and enjoyable city for all residents. Housing is the largest issue currently in Worcester. I have lived in the area my entire life and I have watched the housing crisis worse every year. I have worked closely with the homeless*

*population the past two years. I have heard many tragic stories from the individuals experiencing housing insecurity. I have seen people sleeping in the doorways of businesses in the rain on Green street an area the city has spent so much money to develop. Developers have constructed multiple luxury apartment buildings in this same area. The housing crisis should be the biggest concern of any city employee or resident. It impacts every person who lives in this city. More importantly than that there are children sleeping in cars, homeless people sitting outside city hall in the rain because the shelters close during the day, and people living outside in freezing temperatures. This crisis will need to be tackled from multiple different angles, but this investment could be a step in the right direction if it is allocated correctly.*

- *Stop tearing everything down and use this to preserve what little that is left. Start restoring Main Street and bringing in tenants. We should be helping small businesses stay in the city rather than go out of business. Start investing in the external renovation and renewing the historic character of entire neighborhoods, especially in the poorer areas.*
- *Community housing does not benefit me. It simply attracts individuals who contribute little if anything to the community.*
- *I*
- *Ideally projects that address community housing, could also incorporate historic preservation and green space promotion, in connection with the key resource of housing*
- *There needs to be more affordable and accessible and/or adaptable housing*
- *Just bake the fee into our regular tax bills, paying it separately is annoying and unnecessary*



## APPENDIX E: ONLINE SURVEY AND PUBLIC FORUM RESPONSES

- *Paraplegic, wheelchair, bound, bordering, homeless, and waiting on housing. Suffering domestic violence.*
- *In my experience, CPA funding has been instrumental in transforming communities, particularly downtown locations where a dilapidated historic property could be redeveloped into a vibrant community art center or cultural amenity. I think of the Aud as a perfect candidate. CPA funds for historic buildings provides incentive to restore/renovate/rehab historically stunning buildings which otherwise would be more economically efficient to raze to build anew, but removes the character of a place.*
- *We can do more than one thing.*
- *Make community spaces safe to use. Spaces now are not safe and families do not want to go. Drug addicts and crime the biggest problem in this city. Make the city safe for the property tax payers who fund this! Not the low income renters.*
- *Yes the tax credit was for Historical preservation not housing within worcester. Lower the realestate taxes so that landlords do not have to raise their rents.*
- *We need better housing options for low and middle income people. That's the first priority. We also need better parks and playgrounds, in particular, we need bathrooms and drinking fountains in all public parks.*
- *The city is boring as all heck - it needs more public open places where people can gather/meet without needing to purchase anything. The city also is trashy (with junk everywhere) and really needs to be cleaned up. Re: Housing - we need more of it, but I hope that housing initiatives try and incorporate green space into the designs, or we're going to be living in a concrete jungle before you know it. (I think parts of the city are already pretty close - the one thing that protects Worcester to a degree is that we can only build upwards so high due to bedrock limitations.)*
- *I don't discount the importance of open space or historic resources. However, the community NEEDS housing, and any additional funds meant to support, acquire, and otherwise construct housing should be a priority.*
- *Please help WooTheatre with their rehabilitation of the Olympia Theatre.*
- *Worcester, like the Commonwealth of Massachusetts, and the nation, is currently in a housing crisis. This applies to homeowners attempting to downsize, selling their home, to apartment dwellers forced to pay 50% and more of their income to remain in their apartments- moving is nearly impossible. This applies to the provision of affordable housing. This applies to the homeless - which have increased 50% in 2024, with families the largest increasing component And this especially applies to accessibility -accessible housing. A 25 year wait in the WHA for a wheelchair accessible unit is still the norm. Housing should occupy the majority of resources- beyond operations - since it will be years in the pipeline before significant affordable and accessible housing catches up with the 50 year lack in addressing this major human rights issue.*
- *Irrational to spend CPA money on housing. That is the responsibility of the private sector.*
- *I hope the city government does not use the CPA funds to pay for ordinary city operational expenses. This is intended to be "extra" funding for projects promoted by residents.*

## APPENDIX E: ONLINE SURVEY AND PUBLIC FORUM RESPONSES

- *why cant i pay online with my real estate tax payment? its been a year why dont you have a way to pay online instead of me having to write a check wasting paper and trees*
- *I think housing is the most important thing we need funding for.*
- *need full (public) disclosure on how these funds are being spent. All these additional taxes are a burden on homeowners.*
- *The preservation of open space and recreation activities is key to the welfare of the city*
- *The second largest city in Mass doesn't have aldedicated spaces for solely playing pickleball without having to share the court with tennis.*
- *Cleaning the lakes and ponds. Making the open spaces more attractive i.e. volunteer led spring bulb planting drives in public areas and parks. We need more fountains, street art, statues and flowers. Attractive places to sit outside. It's a gray city. Clean up the sides of the roads and the weeds in sidewalks. . In fact just cleaning up the city altogether would be a good use of money. The city is bleak and looks derelict in so many areas. We need water spray cooling areas for when it's hot.*
- *Broadening how funds can be used for historic preservation in local historic districts would be if benefit to those districts. E.g. appropriate street lighting*
- *Appreciate this survey. Looking forward to what the funding goes to.*
- *I do not live in the city of Worcester but in Worcester County and my rent 5 years ago was \$815.00 and now since my apartment complex was sold to a developer it has changed names of development owners and each time there has been an astronomical increase in rent! When it first sold my rent increased to \$1200.00 the next year increased to \$1400.00 and then there was a supposed change in ownership yet management stayed the same and I paid my rent the same but with a \$500.00 increase so I now pay \$1900.00 with absolutely no updates to my already outdated apartment which is completely out of my price range I should 30% would be about \$1300.00 and with the rising cost of healthcare I am always in danger of becoming homeless myself. The draft coming through my windows and especially my door have me basically heating the outside. HOUSING IS A MAJOR CRISIS IN WORCESTER COUNTY AND HOMELESSNESS WILL CONTINUE TO RISE WITHOUT SOME INYERACTION AND FAIR RENTAL INCREASES!!!! i URGE YOU TO HELP!!!!*
- *Make our community healthier & safer by building housing for those in real need. Housing first should be the priority.*

### Section 3: Historic Resources

The following Priority Themes (themes) were presented to participants of the Public Forums and Online Survey. Each theme had a brief description. Additionally, an expanded description of each theme could be found in a provided information packet.

- **Theme 1:** Preserving underrepresented stories.

## APPENDIX E: ONLINE SURVEY AND PUBLIC FORUM RESPONSES

- **Theme 2a:** Supporting certain non-income generating historic properties facing economic hardship: *Owner-occupied homes*.
- **Theme 2b:** Supporting certain non-income generating historic properties facing economic hardship: *Churches*.
- **Theme 3:** Digitizing and archiving historic records.
- **Theme 4:** Protecting historic buildings in danger of demolition.
- **Theme 5:** Advancing the city's sustainability goals, and/or promoting adaptive reuse and deconstruction.
- **Theme 6:** Prioritizing Historic Resources projects or programs that qualify for other CPA funding categories.

For each theme, participants could choose from the following options below. After selecting an option for each theme, participants had the opportunity to leave comments.

- I do not agree that this is a priority
- This is somewhat a priority
- This is a high priority
- This is the most important priority
- I do not have an opinion

HISTORIC RESOURCES PRIORITY THEME RESPONSES							
	Theme 1	Theme 2a	Theme 2b	Theme 3	Theme 4	Theme 5	Theme 6
<b>I do not agree that this is a priority</b>	16%	24%	36%	12%	13%	12%	21%
<b>This is somewhat a priority</b>	38%	46%	36%	41%	33%	26%	36%
<b>This is a high priority</b>	36%	22%	17%	38%	36%	39%	22%
<b>This is the most important priority</b>	5%	4%	4%	6%	13%	18%	8%
<b>I do not have an opinion</b>	5%	5%	7%	3%	5%	5%	13%

## APPENDIX E: ONLINE SURVEY AND PUBLIC FORUM RESPONSES

### Historic Resources Comments

#### Virtual Forum (12/10)

- Deconstruction as a Preservation Goal is INSANE. What???!!!

#### In Person Forum (12/11)

- Acquiring non-building history

#### In Person Forum (12/18)

(no comments)

#### Online Survey (12/19-1/19)

- This will be subjective, however restoring the oldest and MOST in need of repair and development should be the first priority when using funds in this category.
- Support and expand open space and green space + historic & culturally significant buildings and our history/heritage. Those are the most important things for me. Obviously housing is big but these funds can be used for the general public good and should be allocated as such.
- Historic three family homes have been allowed to deteriorate. Vernon Hill was once a nice neighborhood and the city has allowed filth and crime to make it into a ghetto. Why were all the trees cut down and never replaced in that neighborhood? Urban filth and no trees.
- When I say something is not a priority, I'm not trying to knock it. However, there are finite funds, and it feels like some of those categories are a more immediate need than others.
- I feel that housing is the most important thing to get funding for. If these buildings can be fixed and resourced for affordable and accessible housing. Then yes, it should be a priority. I have an issue with spending money to conserve history, when we have residents

- The historic overlay district that extends to Newbury Street and Austin presents a real challenge for those folks who want to renovate. Would be really great to see them offered funds.

freezing in the cold. Sleeping in tents, when we could use those buildings for shelters or housing.

- Need an update on the Worcester Auditorium. Seems to be limbo.
- A priority that worth the tax increase from CPA
- Prioritize historic structures located near or within green space that will attract visitors and be educational
- Historically appropriate street scaping, E.g. street lighting.
- I do not have an opinion on this
- Identifying and qualifying local buildings for the register of historic places
- Provide rebates or stipends to homeowners with wood siding for exterior painting their homes, likely on a seven year schedule.
- The Historical society needs to stop interfering with progress.
- Stop \*\*\*\*\* me for more of my tax dollars.
- Making open city land available for neighborhood/community gardens, including any required cleanup of the property.
- Preserving older school buildings is more important than churches.
- Stop letting the Worcester auditorium continue to deteriorate.
- Cancel this unfair tax and get the required signatures that you circumvented in the first place

## APPENDIX E: ONLINE SURVEY AND PUBLIC FORUM RESPONSES

- I do not agree with the multiple categories priority, as i believe projects that address community need should get highest priority, regardless of how many categories they apply for. I believe affordable housing and community-connecting endeavors are the most important, while historic preservation is a little less important. Don't get me wrong, i still want worcester to care about historic*

*preservation, but i care way waaaaay. more about other things. This also may be affected by my history renting in a triple decker listed on the historic sites lists that, in my opinion, is extremely out of date with inspections and has many hazards from a landlord who does not have the time to care for it, and should at this point be demolished and not saved.*

### Section 4: Open Space and Recreation

The following Priority Themes (themes) were presented to participants of the Public Forums and Online Survey for Open Space and Recreation. Each theme had a brief description. Additionally, an expanded description of the Priority Theme could be found in a provided information packet.

- **Theme 1:** Expanding green networks and/or creating wildlife corridors.
- **Theme 2:** Protecting drinking water resources.
- **Theme 3:** Creating and enhancing equitable access to open space, especially water.
- **Theme 4:** Advancing projects that are specified in Parks Master Plans.
- **Theme 5:** Expanding access to fresh, locally grown foods.
- **Theme 6:** Supporting native species and growing the urban forest.
- **Theme 7:** Achieving the city's sustainability and climate resilience goals.
- **Theme 8:** Supporting the work of dedicated park and open space community groups.
- **Theme 9:** Investing in sustainable trails.
- **Theme 10:** Creating and enhancing alternative mobility options.
- **Theme 11:** Creating and improving access to parks and nature in Environmental Justice (EJ) communities.
- **Theme 12:** Prioritizing Open Space and Recreation projects that qualify for other CPA funding categories.

For each theme, participants could choose from the following options below. After selecting an option for each, participants had an opportunity to leave comments.

- I do not agree that this is a priority
- This is somewhat a priority
- This is a high priority
- This is the most important priority

## APPENDIX E: ONLINE SURVEY AND PUBLIC FORUM RESPONSES

- I do not have an opinion

OPEN SPACE AND RECREATION PRIORITY THEME RESPONSES						
	Theme 7	Theme 8	Theme 9	Theme 10	Theme 11	Theme 12
I do not agree that this is a priority	10%	10%	12%	16%	16%	19%
This is somewhat a priority	24%	41%	44%	25%	30%	33%
This is a high priority	44%	35%	30%	40%	41%	30%
This is the most important priority	18%	8%	7%	15%	7%	5%
I do not have an opinion	4%	7%	7%	4%	6%	13%

### Open Space and Recreation Comments

#### Virtual Forum (12/10)

- Universally accessible supports and strategies to ensure ALL individuals have access to these open spaces and recreational project. This should be "baked into" the application process!
- A comment, I went to one of Worcester's lakes to swim this summer and it was closed due to high levels of bacteria, so I think that

protecting existing resources for swimming recreation similarly to protecting the drinking water would be a good idea. Additionally Connecting bike mobility pathways will be crucial to get people to utilize bikes more than cars. I would like to go to the grocery store by bike near me, but I have to bike in the gutter to get there

#### In Person Forum (12/11)

- Install hydro head at Holden Reservoir to prevent water supply from going down in the case of weather events. Hawaii demonstrated how not having a reliable water supply is mission critical. The Hydro head

install at the Holden Reservoir will allow access when Grid goes down. Mission Critical.

#### In Person Forum (12/18)

- On Theme 10: Lighting on the bike path
- On Theme 12: Pickle Ball

## APPENDIX E: ONLINE SURVEY AND PUBLIC FORUM RESPONSES

- *On Theme 12: Soccer Field (Permanent)*
- *How can we ensure that gentrification does not occur as a result of development? Or, how can we lessen the negative impact?*

### Online Survey (12/19-1/19)

- *We should dedicate money for pools and or an indoor recreation center*
- *I am unaware of the bike rental system in Worcester, but having that as an access point to get around the city would be helpful, as well as using ELECTRIC buses that are smaller than the current ones to allow quicker charging with a smaller battery. Many buses I see don't have a lot of people on them, hence having smaller buses are easier to maneuver, fuel, and purchase.*
- *Cemetery monument restoration, cleaning of stones to original condition. Add cameras to Hope cemetery, and restore the barn for future use.*
- *I do not believe in giving priority in funding to any community. Equal access for all communities should be the priority. Taxpayers who contribute to the community should be the primary beneficiaries of community preservation efforts.*
- *All city plantings, including trees should be native to Worcester*
- *No one will hike in the woods due to drug addiction people living there! Not safe*
- *Our mass taxes are to cover these other many relevant issues. Residents of COW have all had no choice but to pay for the new historical preservation tax increase. Use it for Historic buildings as you all originally voted on without making it a public priority for a voice. Now the COW wants this to be a public priority? Asking the residents what to do with the money seems misleading at this point. How can the COW impose such a large tax credit for the preservation of historical buildings and then somehow change the narrative to public housing, parks and recreation?*
- *Soccer Fields*
- *Bathrooms at public parks, please*
- *Dog parks, even pocket sized in densely populated neighborhoods .*
- *Ridding the city of invasive, especially Japanese knotweed and tree of heaven to preserve native species.*
- *OMG - so many categories, and many of them overlapping. It feels like the priorities could be consolidated down into fewer number. (For instance, 'sustainable trails' sort of feels like a sub-component of 'enhancing alternate mobility options'.)*
- *perhaps a broader view of environmental justice could include quality of life impacts on neighborhoods and look at those businesses that contribute to air, light and noise pollution.*
- *I have an idea for more green space and parks.*
- *I think a lot of these can't really be separated out into one being the highest priority as they are pretty much all interconnected*
- *Physical access for those using wheelchairs should be a priority.*
- *I am a firm believer in water resources, food resources being made a priority. Anything that will benefit our residents and keep them healthy. But I am also a firm believer in if we don't do something about this housing issue. We will be losing people who can benefit from these types of programs. New England weather is unreliable. Worcester has a large population of homeless. Let's make that a priority!*
- *Pickleball courts*
- *Shrewsbury St flower beds bring so much joy. Can we have more flowers in Worcester . Color please!*
- *Accessible parts with working farms and farm stands. It would be great*



## APPENDIX E: ONLINE SURVEY AND PUBLIC FORUM RESPONSES

- *I believe the parks department's master plan process is inherently flawed. Their plans are predetermined and community input is limited to "what color do you want the benches". Their planning process should be changed. At least some of Worcester's ball fields should be converted to multipurpose fields. It is heart breaking to see those fields, paid for with public dollars, locked and unused by almost all community members. Worcester should consider making the land around the reservoirs accessible for hiking. Most of GWLT properties lack parking or maintained trails. Assisting the organization to expand user accessibility would be highly appreciated.*
- *Elm Park has become a disgrace. Shore Park has practically no sand on the beach. Institute Park is lost its beauty. Take care of what we have before you expand to multiple areas.*
- *Stop \*\*\*\*\* me for more of my tax dollars.*
- *These are so intertwined, inseparable in many cases, that they reinforce one another, hence so many high priorities. This coupled with efforts in more affordable housing and climate change efforts (electrification, green spaces, etc.) is the straightest path to a more livable, lovable Worcester and Central Mass.*
- *The Parks Dept lost my respect a while ago. I don't trust their plans or interests. My neighbors and our group worked tirelessly to save Duffy field. I would rather see these Friends of ... groups being empowered and funded. They actually do right by the city and community.*
- *Stop letting developers tear down trees on properties that neighbors considered undevelopable.*
- *Yes , go to the private universities of Worcester to fund your/their desires .*
- *Projects that aim to improve park access for people with disabilities should be given higher priority*

### Section 5: Community Housing

The following Priority Themes (themes) were presented to participants of the Public Forums and Online Survey. Each theme had a brief description. Additionally, an expanded description of the theme could be found in a provided information packet.

- **Theme 1:** Increasing rates of homeownership.
- **Theme 2:** Supporting more rental assistance programs.
- **Theme 3:** Providing housing for the unhoused population.
- **Theme 4:** Creating more accessible housing.
- **Theme 5:** Supporting higher environmental standards and achieving the city's sustainability and resilience goals.
- **Theme 6a:** Supporting deeper housing affordability (i.e. serving households earning below the identified AMI thresholds): *Prioritizing projects and programs that serve households up to 60% AMI.*
- **Theme 6b:** Supporting deeper housing affordability (i.e. serving households earning below the identified AMI thresholds): *Providing housing opportunities to households up to 30% AMI.*
- **Theme 7a:** Supporting Community Housing development projects that have certain qualities: *Increasing the number of residents served.*



## APPENDIX E: ONLINE SURVEY AND PUBLIC FORUM RESPONSES

- **Theme 7b:** Supporting Community Housing development projects that have certain qualities: *Providing opportunities to “emerging developers”.*
- **Theme 7c:** Supporting Community Housing development projects that have certain qualities: *Advancing shovel ready projects.*
- **Theme 7d:** Supporting Community Housing development projects that have certain qualities: *Increasing infill and adaptive reuse development.*
- **Theme 7e:** Supporting Community Housing development projects that have certain qualities: *Supporting developers who have demonstrated they will keep units affordable after deed restrictions ends.*
- **Theme 7f:** Supporting Community Housing development projects that have certain qualities: *Creating open space and recreational facilities for children and families.*
- **Theme 8a:** Prioritizing programs and projects that serve specific populations: *Seniors.*
- **Theme 8b:** Prioritizing programs and projects that serve specific populations: *People with disabilities.*
- **Theme 8c:** Prioritizing programs and projects that serve specific populations: *Young parents.*
- **Theme 8d:** Prioritizing programs and projects that serve specific populations: *Families.*
- **Theme 8e:** Prioritizing programs and projects that serve specific populations: *Youth.*
- **Theme 8f:** Prioritizing programs and projects that serve specific populations: *Immigrants, especially refugees.*
- **Theme 8g:** Prioritizing programs and projects that serve specific populations: *Long-time residents of historically redlined neighborhoods.*
- **Theme 8h:** Prioritizing programs and projects that serve specific populations: *Unhoused couples.*
- **Theme 8i:** Prioritizing programs and projects that serve specific populations: *Single women.*
- **Theme 8j:** Prioritizing programs and projects that serve specific populations: *Persons struggling with addiction.*
- **Theme 9a:** Supporting local landlords of non-deed restricted properties: *Prioritizing projects and programs that incentivize landlords to maintain naturally occurring affordable housing.*
- **Theme 9b:** Supporting local landlords of non-deed restricted properties: *Prioritizing projects and programs that support landlords that rent to the homeless population.*
- **Theme 10:** Prioritizing Community Housing projects that qualify for other CPA funding categories.

For each Priority Theme, participants could choose from the following options below. After selecting an option for each theme, participants had the opportunity to leave comments.

- I do not agree that this is a priority
- This is somewhat a priority

## **APPENDIX E: ONLINE SURVEY AND PUBLIC FORUM RESPONSES**

- This is a high priority
- This is the most important priority
- I do not have an opinion

## APPENDIX E: ONLINE SURVEY AND PUBLIC FORUM RESPONSES

COMMUNITY HOUSING PRIORITY THEME RESPONSES									
	Theme 1	Theme 2	Theme 3	Theme 4	Theme 5	Theme 6a	Theme 6b	Theme 7a	Theme 7b
I do not agree that this is a priority	15%	18%	13%	9%	14%	15%	15%	24%	30%
This is somewhat a priority	28%	24%	15%	20%	31%	19%	18%	25%	31%
is is a high priority	38%	41%	39%	46%	38%	43%	38%	32%	21%
This is the most important priority	14%	13%	30%	20%	10%	15%	20%	9%	4%
I do not have an opinion	4%	4%	3%	4%	8%	9%	8%	10%	15%

	Theme 7c	Theme 7d	Theme 7e	Theme 7f	Theme 8a	Theme 8b	Theme 8c	Theme 8d	Theme 8e
I do not agree that this is a priority	25%	13%	16%	11%	9%	8%	16%	13%	12%
This is somewhat a priority	28%	25%	24%	37%	26%	27%	36%	29%	25%
is is a high priority	30%	41%	38%	36%	45%	45%	33%	38%	41%
This is the most important priority	6%	13%	12%	9%	14%	15%	5%	11%	10%
I do not have an opinion	11%	10%	11%	6%	6%	4%	10%	9%	12%

	Theme 8f	Theme 8g	Theme 8h	Theme 8i	Theme 8j	Theme 9a	Theme 9b	Theme 10
I do not agree that this is a priority	23%	16%	19%	13%	17%	19%	18%	28%
This is somewhat a priority	27%	26%	33%	29%	34%	27%	27%	23%
is is a high priority	36%	37%	32%	39%	36%	33%	39%	29%
This is the most important priority	6%	12%	6%	9%	7%	8%	8%	6%
I do not have an opinion	9%	9%	11%	11%	6%	13%	7%	15%

## APPENDIX E: ONLINE SURVEY AND PUBLIC FORUM RESPONSES

### Virtual Forum (12/10)

- *"Subsidizing landlords is an insane priority, and its frankly despicable that it has made this list. The median rent in Worcester is 1995.00 per month, they do not need any more money from the government. If anything landlords need to be incentivized to maintain their buildings through the treat of eminent domain should they not keep them to the standards that they are required to by law and have the funds to due by virtue of high rents.*

*We need to create more housing overall and this is the most important usage of this funds bar none. There are a number of ways this can be done:*

*Funding should be spent to expropriate buildings from absentee landlords to create a stock of buildings owned by the city to repair in the case of existing housing or retrofit in the case of older existing buildings that are not housing*

### In Person Forum (12/11)

- *Lakeside new housing has a plan to "rent to own" set aside money to expand # of units or match downpyments to go to own housing.*

### In Person Forum (12/18)

- *On Theme 7b: Are they large developers? Are they local? How much \$ should they get?*
- *Do they have a track record of hiring locally?*

### Online Survey (12/19-1/19)

- *Lgbtq folks need sage housing*

*Funding should be spent to establish rent to own properties to ensure that low income and medium families can get access to home-ownership without a down payment.*

*Funding should be spent to build more houses in denser building patterns such as row housing or townhomes or triple deckers that are intended for owner occupancy."*

- *A little concerned about how we support developers as generally they are for profit business enterprises.*
- *Severely housing cost-burdened (50% or more of their income to housing) families spend 41% less on food and 74% less on healthcare than families with similar incomes. Housing Cost burdened families (30% or more of their income to housing) face more health issues than those of similar incomes.*

- *There should be limits for how many times a developer or entity receives \$, such as 1 time every other year, etc, or limit the amount of funds.*
- *Provide opportunities to lopcal developers first*

- *Utilizing Worc Voke for "affordable housing", especially the location was a brilliant idea. THERE ARE LOTS in Worcester that are*

## APPENDIX E: ONLINE SURVEY AND PUBLIC FORUM RESPONSES

*COMPLETELY UNUSED. Why can't these locations be built into housing for couples or families or homeless? There may be some buildings in Worc that have been office buildings, that during/after COVID they saw a decline in use, why can't portions of those buildings be used for housing. This is one of the BIGGEST issues that needs to be addressed in Worcester. Thank you for creating this survey !!!!*

- *If you build it, they will come. Efforts to attract nonproductive people should be minimized. Make Worcester an attractive destination for productive individuals who will contribute to the community rather than individuals who simply consume limited resources.*
- *I'm a single female that's paraplegic in a domestic violence situation because I can't find housing so I'm basically homeless. Every day I have to listen to this person harassing me about leaving when there are no options to leave as I've tried them all so far. Please help me because I'm looking at Asking congressman or the city to help me. this is ridiculous*
- *While providing increased and affordable housing options in the city of all characteristics is of course important, I view other funding programs, including HUD, to be more suitable use than CPA funds.*
- *Long term drug addiction facilities and open mental health residential hospitals*
- *The money should be allocated to preserve historical buildings as what it was intended and noted for?*
- *Owner occupier and homeownership opportunities should be prioritized over rental, developer incentives.*
- *Holy \*\*\*\*! My brain was ready to explode reading through that. Too many options, all dueling with each other. Everybody wants a piece of the proverbial pie. I went 'no opinion' on most of them, and only picked a couple I thought definitely should be prioritized.*
- *I believe everyone should have housing in Worcester but do not believe Historical Tax Funds should be used for housing unless related to historical properties specifically.*

- *Not so much on the missing front but again I don't think you can say one is specifically the most important. I would say that ensuring renters are not subject to whatever a landlord wants or increase their rent by i.e. providing rent control is necessary*
- *Relating to Theme 7b, it would be great if a regular meeting at which incremental / emerging developers in the city could discuss with each other could be organized and maintained.*
- *Public funds should not be js d to support private projects or projects for which alternative funding is available. Funds should be used to enhance the community, not just individuals.*
- *I do not believe cpa money should be used for housing. Those dollars will trickle out of the city to absentee landlords.*
- *It is extremely important to create more affordable and accessible housing in this area. The rate of homelessness is growing every day! We need to do something about it! It is at the highest of importance!*
- *It is very important to creating more affordable accessible housing.*
- *AFFORDABLE HOUSING IN ALL WORCESTER COUNTY*
- *The city should stop serving developers and really build a community for the residents especially those who are struggling which is most of us who have been here all along*
- *Worcester should require new apartment projects to have at least 10% low income units. This notion of "market rate" units is laughable.*
- *I do agree with the need to look at housing options, but do not think that should be the priority of this funding.*
- *Stop \*\*\*\*\* me for more of my tax dollars. \*\*\*\*\* your DEI \*\*\*\*.*
- *Veterans, special needs people*
- *Way too many apartments built in recent years that are vacant as local residents cannot afford Boston rents.*
- *Protecting long-term Worcester residents from negative effects of gentrification; prioritize rental assistance programs for tenants to maintain housing*

## APPENDIX E: ONLINE SURVEY AND PUBLIC FORUM RESPONSES

- *Yes, Clark University, Holy Cross and other private schools have purchased many properties and have destroyed too many housing units while removing these properties from the tax roles. Make them replace these units.*
- *I believe the most important priorities are build lost of affordadle housing, to increase the supply of housing to lower costs for everyone. But i believe we must do this in a way that builds community with the developers / owners. The luxury apartments downtown have mandates for affordable housing, but the owners obviously do not want that because they care most about the bottom line. I cant blame them, they are out of state developers trying to run a company. Instead, we need developers who are attached to the local community and residents. We need developers who want to further the goals of home ownership to empower future generations of Worcester residents. If the developers do not demonstrate any understanding of the area they are building in, I do not believe we should care much for them. They will raise rent once we arent looking. Of course, all landlords and developers have to care about the bottom line. But we want to attract those that ALSO care about us. All these luxury apartments couldn't care less about community. We need more developers who actively engage with and encourage community in our City.*
- *Supporting deeper affordability for ADA accessible apartments*
- *The city's housing policies are inadequate to the multiple pressing needs identified above. Housing understood as a human right can be realized if land is held in trust by community residents--land trusts. I do not support more home ownership if that means increasing the number of single family residences. Shared ownership (e.g., housing co-ops) widens the path to housing security and intergenerational wealth-building and makes a significant dent in the opportunity landscape. The CPA could help our community envision upstream solutions to the housing crisis.*

## APPENDIX F: DRAFT COMMUNITY PRESERVATION PLAN PUBLIC FEEDBACK

### DRAFT COMMUNITY PRESERVATION PLAN Public Feedback

#### OVERVIEW

In addition to reviewing and recommending CPA funding applications, the Community Preservation Committee (CPC) is tasked with studying the needs, possibilities, and resources of the city in terms of Historic Resources, Open Space and Recreation, and Community Housing. Using this information, the CPC must publish and annually review a Worcester Community Preservation Plan. The Plan serves to identify the goals and priorities of the Community Preservation Program and provide a resource for applicants seeking CPA funding. The CPC shall review the Plan annually and periodically make updates to ensure that these goals and priorities continue to reflect the city's evolving needs.

On February 18<sup>th</sup>, 2025, the CPC voted in favor to publish the Draft Community Preservation Plan (Draft Plan). The Draft Plan was created public input in the form of interviews of community groups, review of existing city plans, feedback from public forums, and the results of an online survey.

For a period of two weeks, between February 20<sup>th</sup> and March 6<sup>th</sup>, an online comment form was available for community members to provide feedback on the Draft Plan. On March 11<sup>th</sup>, 2025, a Public Hearing was held in which the CPC invited additional public feedback on the plan. This report summarizes feedback from both the Comment Form and the Public Hearing.

#### COMMENT FORM SETUP AND ADVERTISING

Community members were able to submit feedback via an online comment form linked to the Community Preservation Program's webpage. The comment form was hosted by Google Forms, and answers were anonymous. The form had links the Community Preservation Plan, as well as the Appendices. The form had the following prompts:

- Please enter your comments on the Community Preservation **Plan Category Goals and Community Priorities**.
- Please enter your comments on the Community Preservation Plan **Application and Funding Process**.
- Please enter your recommendations on the Community Preservation Plan **Design and Layout**.
- Please enter your recommendations on **Future Community Engagement**.
- Do you have any **Other/Additional Feedback**?

## **APPENDIX F: DRAFT COMMUNITY PRESERVATION PLAN PUBLIC FEEDBACK**

The publication of the Draft Plan and the comment form was advertised through several means. A press release was published on the City of Worcester webpage, and a social media post was published on all City of Worcester social media platforms. Additionally, a Community Preservation Program electronic newsletter was sent out to 90 subscribers.

### **COMMENT FORM FEEDBACK**

Over the course of two weeks, the comment form received two (2) responses. Both responders provided feedback for just one of the prompts, “Please enter your comments on the Community Preservation **Plan Category Goals and Community Priorities.**” The responses included:

- *I suggest re-prioritizing item #2 to #1. Items identified in priority #2 are more likely to be more visible to the public than those in #1.... and this will do more to create popular support for on going funding to address other items.*
- *Historic Resources Category Goals and Open Space and Recreation Category Goals are the top priority based on the way this tax was presented to the public.*

### **PUBLIC FORUM FEEDBACK**

No public comments were made at the March 11<sup>th</sup> Public Hearing.