

GUIDELINES FOR PROJECT SUBMISSION and OUTLINE OF THE PROCESS

Timeline: The CPC accepts project applications for Annual Town Meeting beginning in the late fall of each year. The Coordinator will post the timeline on the CPC page on the Town website. The timeline will also be advertised on social media.

Application Process: The application process for Community Preservation Act (CPA) funding is twofold.

1. The Application for Community Preservation Eligibility, Appendix II, will introduce the project to the Community Preservation Committee (CPC) so that it can determine the project's eligibility, see Appendix V, and offer guidance. For some projects, the CPC may need to consult with the Commonwealth, the Community Preservation Coalition or Town Counsel to ascertain eligibility.
2. If the Committee finds that the project is eligible, an Application for Community Preservation Funding, Appendix III, must be completed. The CPC will review the Application for Funding according to general project criteria and specific criteria for each of the project categories – open space, recreation, historic preservation, and community housing. The criteria can be found below in this document and with more detail in the Community Preservation Plan, which is posted on the CPC page on the Town's website.

Other guidelines to the process:

- All applicants are expected to attend a CPC meeting to answer questions about their proposals. Applicants will be notified regarding the date of the meeting that they should attend.
- Each application must be submitted to the CPC using the applications for Eligibility or Funding as a cover sheet. Applications must be filled out completely and each question answered fully.
- All project and associated materials (such as maps, diagrams, and photos) should be electronically submitted to the Coordinator, Community Preservation Committee.
- The applicant must receive endorsements from any relevant municipal boards, committees or departments, interest groups or community organizations. For certain types of projects, additional protocols must be followed:
 - a. Historic Preservation: An applicant must seek an evaluation of the historic importance of a structure or landscape by the Historic District Commission prior to submitting an application for its preservation.

- b. Open Space: An applicant must establish a partnership with the Select Board and the Town Manager prior to submitting an application for the acquisition of open space.

In determining the amount of CPA funding to request, the applicant should consider several issues:

- The CPC requires that applicants demonstrate that they are actively pursuing additional sources of funding, through fundraising campaigns, or public or private grants, for example.
- The CPC also requires that applicants demonstrate that they have obtained the lowest possible cost for their projects to be successfully implemented.
- Large projects may require initial studies to determine their full costs. If necessary, the applicant should submit a separate application to request funding for the initial study.

General Selection Criteria: The Community Preservation Committee is responsible for reviewing all projects proposed for CPA funding and for making recommendations to Town Meeting. In order to be eligible for review for CPA funds, a project must at a minimum meet the statutory requirements of the Act.

If a submitted project is deemed eligible for funding by the CPC, it will be evaluated in relation to the General Selection Criteria and the specific criteria identified for each category (open space/ recreation, historic preservation, and community housing). Recommendations for funding will be based on how well the project meets these criteria, recognizing that not all of the criteria may apply to a given project. The following factors will be considered.

- a. The project's consistency with the Master Plan, Open Space and Recreation Plan, Recreation Master Plan, Heritage Landscape Inventory, Housing Production Plan, and other planning documents that have received wide scrutiny, public input and have been adopted by the Town or its boards;
- b. The project's receipt of endorsements from other municipal boards, committees or departments, interest groups or community organizations;
- c. The practicality and feasibility of the project; and the demonstrated ability of the applicant to implement the project expeditiously and within budget and then maintain the improvements afterward;
- d. The extent to which the project leverages additional public and/or private funds, such as matching funds from neighboring communities for projects that involve shared resources;
- e. The extent to which the project produces a highly advantageous cost to public benefit value;

- f. Whether or not the project finances improvements to public facilities that would otherwise be funded through tax revenues or further deferred;
- g. The extent to which the project conserves resources that would otherwise be threatened, or serves a currently under-served population; and
- h. Whether or not the project fulfills more than one CPA purpose.

Given the current state of CPC funds and anticipated future funds not all eligible projects proposed will be funded or fully funded. Also, project proponents need to demonstrate their efforts to obtain funds from all available sources.

Funding: Each year a minimum of ten percent (10%) of the annual CPA revenues must be appropriated for each of the three project categories: open space/recreation, historic resources, and community housing. The ten percent may be allocated to a project or projects, or it may be reserved for future projects. The CPC may recommend that a project be directly funded or bonded with debt service. On large projects the CPC may request that a clerk of the works be retained to oversee the project or that the applicant demonstrates that proper project management and oversight will be in place to ensure the proper execution and completion of the proposed work.

Approval Process:

- The CPC will discuss its project recommendations and funding strategies with the Select Board and the Finance Committee before preparing a Warrant Article for Town Meeting approval. Depending on the specific grant request, the article presented at Town Meeting will contain a commencement date for the project and a specific definition of the commencement date.
- Following approval at Town Meeting, grantees will receive a formal award letter informing them of when funds will be available, billing procedures, the semi-annual reporting deadlines and the required deadline determined by the CPC Committee which will be detailed in the warrant article voted at Town Meeting.
- All bills, invoices, requests for reimbursement, or warrants related to approved grants will be approved by the Chair or Vice Chair of the CPC, as well as by the Town Finance Director.