

Town of Arlington Community Preservation Committee

2016-2017 Application Process

Summary

The Community Preservation Committee (CPC) is pleased to announce that it will accept project applications to be funded under the Community Preservation Act (CPA) in the 2018 fiscal year (FY2018) budget cycle.

There are two phases in the CPA funding application process this year: a preliminary application and a final application. This is a change from the abbreviated, single-application process for the FY2017 funding cycle last year. The purpose of the shorter preliminary application is to ensure that the proposed projects can be legally funded under CPA before the applicant completes the more detailed final application.

Preliminary applications received by noon on Friday, October 07, 2016 will be eligible for consideration by the CPC for advancement to the final application phase. The CPC will evaluate preliminary applications for funding eligibility under the CPA law and invite eligible applicants to submit a full application that will be due in **December 2017**.

Preliminary and final project applications will be reviewed by the CPC at its regularly scheduled meetings, which are open to the public. Final applications voted upon favorably by the CPC will be recommended to the Town Meeting for funding at Annual Town Meeting commencing in late April 2017. CPA project funding appropriated by Town Meeting will be available on or after July 1, 2017, which is the start of fiscal year 2018.

Please review the [CPA legislation](#) and the Arlington [CPA Bylaw](#) prior to submitting CPA funding applications. Prospective applicants may also find the CPC's [2016 Report to Town Meeting](#) helpful in learning about CPA in Arlington and recently funded projects (See <http://www.arlingtonma.gov/communitypreservation> for links to these resources).

The CPC has appended a chart developed by the Massachusetts Department of Revenue to this document as [Chart 1](#) that summarizes allowable spending purposes under the CPA. Applications submitted to the CPC for FY2018 funding must easily fit into one or more of these allowable spending purposes to be considered by the CPC for funding.

Applicants are invited and encouraged to contact the CPC to ask any questions regarding the application process for FY2017 funding and to ensure their understanding of which projects meet allowable spending purposes. In addition, a public meeting for this purpose will be held in September (date TBA).

Note: Except for the preliminary application deadline, all dates contained herein are tentative or TBD. A finalized schedule for the application process will be released in a new version of this document to be published in early September 2016.

Contact: Amy Fidalgo, CPC Liaison, AFidalgo@town.arlington.ma.us or 781-316-3005

Step One

Applicants must submit one (1) electronic copy and three (3) hard copies of the Preliminary Application (page A1) to the Community Preservation Committee (CPC) **by no later than noon on Friday, October 07, 2016**, with the electronic copy sent to AFidalgo@town.arlington.ma.us

and the hard copies to:

Community Preservation Committee c/o Amy Fidalgo
Town of Arlington, 730 Mass Ave., Arlington, MA 02476

Preliminary applications must contain a brief description of the project including critical dates, amount requested, total project cost, indication of the qualifying CPA funding category or categories, property owner information, and community benefit.

Applications will be date stamped and assigned control numbers in the order that the hard copies are received. The CPC will review submitted preliminary applications to ensure the proposed projects can be legally funded from Community Preservation funds. Applicants will be notified on or before October 28, 2016 about eligibility to submit a final application based on this determination.

Step Two

If a project is determined to be eligible for CPC funds, the applicant will be asked to complete a Final Application (page A4) due in December 2016 (exact date TBA).

Please note that being invited to submit a final application does not imply project approval or endorsement from the CPC. Only after reviewing all Final Applications will the CPC determine which projects to recommend to Town Meeting for funding.

The Final Application requires detailed information and supporting documents for project goals, budget, project plans and timeline, community need, community support, evidence of feasibility, other funding sources, maintenance, and the impact on the town budget. Some projects may also require evidence about control of the site, deed restrictions, permitting, and other details. Please see the Final Application (page A4) for complete information.

One (1) electronic copy and three (3) hard copies of the Final Application must be submitted to the CPC by the published deadline in order to be considered for the 2017 Annual Town Meeting. Applications will be date stamped and assigned control numbers in the order that the hard copies are received.

Applicants submitting Final Applications will present their projects at a CPC Public Meeting in January 2017 (date TBD) and address questions from the CPC and Arlington residents. It is required that information about the project be in writing and copied for distribution and review at the Public Meeting. This is also an opportunity for project sponsors to ask the CPC any questions regarding the application process.

Unless an applicant can demonstrate that a significant opportunity would otherwise be lost, applications will not be accepted after the deadline. **In order for the CPC to consider a project**

proposal that cannot adhere to the deadline as outlined in the [Application Process](#), the project must meet the additional selection criteria as outlined in the [Special Application Process](#) (page 6).

The CPC will review the Applications. Applicants will be contacted if additional information or an interview is required. The CPC may also request to visit the site of the proposed project. Applicants will be notified in late January or early February about whether or not the CPC plans to recommend their project at the 2017 Annual Town Meeting.

Step Three

Upon receiving notice that the CPC intends to present their project to Town Meeting, a selected applicant will submit an electronic copy of a summary of their project for distribution by CPC to certain Town bodies. The CPC will consult with the Board of Selectmen, the Capital Planning Committee, the Finance Committee, the Redevelopment Board and the Planning Department staff regarding the selected projects. The CPC will then reassess each project during a CPC meeting in February 2017. The CPC will review the outcome of any Town board advisory meetings and examine whether sponsors have performed sufficient research to identify the secondary budgetary effects of their projects.

The CPC reserves the right to withdraw its support for any proposed project at this CPC Meeting or at any point prior to the 2017 Annual Town Meeting.

Any PowerPoint slides intended to be used for presenting projects to Annual Town Meeting must be submitted in early April 2017.

Step Four

The CPC will present the recommended projects at [Annual Town Meeting](#) for discussion and vote. It is expected that the selected applicants will give a brief presentation on their project and answer questions from Town Meeting members. Town Meeting has the final authority to award the CPC's recommended funds from Arlington's Community Preservation Act Fund.

Step Five

[Funding will be available for Approved Projects](#) following an affirmative vote of Town Meeting, starting July 1 of the applicable fiscal year (July 1, 2017 for FY2018).

Projects financed with CPA funds must comply with all applicable state and municipal requirements, including the state procurement law, which requires special procedures for the selection of products, vendors, services, and consultants. Project sponsors are required to meet with Arlington's Town Manager or his designee before the Town will enter any into contracts or issue any purchase orders. However, this requirement can be waived if adherence to procurement procedures will be overseen by a Town Department Head or other MCPPO certified third party.

CPA funds may not be used to reimburse project expenses incurred prior to the start of the fiscal year to which they were appropriated by Town Meeting. For FY2018 funded projects, all CPA expenses must be incurred on or after July 1, 2017.

All CPA funds are administered and disbursed by the Town of Arlington. Project management, oversight, execution, and financial control will be under the joint control of the CPC and the Town Manager or his designee.

For more information regarding the **Funding Process**, refer to the Community Preservation Plan at <http://www.arlingtonma.gov/home/showdocument?id=28837>

The CPC requires periodic status updates from the recipients of CPC funding. Updates will occur no less than annually and upon project completion. Written updates will be coordinated by the liaison to the CPC. The purpose of such update is to aid the CPC in refining the CPA Plan, in identifying issues that may assist future applicants, and in reporting progress to the Town.

Projected 2016-2017 CPA Timeline

August 9, 2016	Preliminary Applications available
September 2016	Public meeting (date TBA)
October 7, 2016	Preliminary Applications due (12 noon)
October 28, 2016	CPC invites Final Applications
December 2016	Final Applications due (date TBA)
January 2017	CPC selects recommended projects
February 2017	CPC Consultation with town bodies
March 2017	CPC finalizes recommended projects
April 2017	Annual Town Meeting begins

If you have additional questions about this process, please contact:

Amy Fidalgo
CPC Liason
AFidalgo@town.arlington.ma.us
781-316-3005

The following is a list of the appointed CPC members:

Clarissa Rowe, Chair
Selectmen Appointee

Eric Helmuth, Vice Chair
Selectmen Appointee

Chuck Tirone
Conservation Commission Designee

Michael Cayer
Redevelopment Board Designee

JoAnn Robinson
Historical Commission Designee

Richard Murray
Housing Authority Designee

Andrew Bengtson
Selectmen Appointee

Leslie Mayer
Park & Recreation Commission Designee

David Levy
Selectmen Appointee

Community Preservation Committee Town of Arlington

Special Application Process

Use of the **Special Application Process** is only granted by the CPC under the unique circumstances that a significant opportunity would otherwise be lost if the application were to be processed using the standard timeline (as outlined in the **Standard Application**.)

The CPC will allow an applicant to utilize the **Special Application Process** only if the project meets the General Selection Criteria of the Community Preservation Plan, the Specific Criteria for the affected community asset category, and the following additional criteria:

- The proponents were unaware of the opportunity to undertake the project; or the proponents did not have authority to identify the opportunity prior to the regular **Application Deadline**.
- The applicant has 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.
- The project is supported by one or more Boards with responsibility for projects of a similar nature.
- Failure to secure CPA funding will create a high likelihood that the project will not be able to be carried out to the benefit of the Town, because the opportunity is of very short duration.
- Appropriation of CPA funding will contribute materially to the likelihood of success for the project.
- The project holds a high priority in the Master Plan, the Housing Plan, the Open Space and Recreation Plan, or other planning documents currently accepted and utilized by the Town.

Should the CPC grant use of the **Special Application Process**, the CPC will continue to adhere to the applicable procedures as outlined in the **Standard Application Process**. Only the pertinent submission and hearing deadlines will be changed in order to accommodate the unique conditions surrounding the proposed project.

If the timing of the application is such that the CPC cannot meet the deadline for the Annual Town Meeting, the applicant or the Selectmen must call a **Special Town Meeting** for the purpose of considering the appropriation of CPA funds for the proposed project. The CPC will not be responsible for recommending a **Special Town Meeting** or any other changes in the Town's calendar

Community Preservation Committee Town of Arlington

Funding Process

Initial Documentation

Following approval from Arlington's **Annual Town Meeting** or **Special Town Meeting**, the Community Preservation Committee will notify grant recipients of the funding that has been awarded. This award letter will outline any terms, funding conditions, or additional instructions applicable to the approved CPA grant. A confirmation of receipt must be returned to the CPC as proof that project sponsors received the procurement procedures and accepted the terms and conditions outlined in the award letter.

Projects financed with CPA funds must comply with all applicable state and municipal requirements, including the state procurement law, which requires special procedures for the selection of products, vendors, services, and consultants. Project sponsors are required to meet with the Town Manager's staff before the Town will enter any into contracts or issue any purchase orders. However, this requirement can be waived if adherence to procurement procedures will be overseen by a Town Department Head or other MCPPO certified third party.

Should a property or artifact that has benefitted from CPA funding be sold or given to a new owner within five years of the award letter's issuance date, the CPA fund must be reimbursed the entire amount awarded unless the CPC waives this requirement in part or in its entirety.

Supplementary contracts may be required by the Town Manager's Office, depending on the details of the approved project. For construction projects, recipients of CPA funds and all contractors on the project may be asked to have their general liability insurer add the Town of Arlington as an additional insured. Proof of this coverage must be submitted to the CPC before any invoices can be paid using CPA funds. Projects on Town owned properties that are already required to indemnify the Town may be asked to reconfirm coverage before any invoices can be paid.

Updates to the CPC

Grant recipients will notify the CPC when work on projects has commenced and submit periodic project status updates. Progress Reports will be submitted to the CPC and incorporated into the Annual Town Meeting CPA package. Approved projects will be carried out in accordance with the terms outlined in the award letter and any supplementary contracts from the Town. Any significant deviations from the project as presented in the original **Application** must be approved by the CPC to ensure that such changes are CPA-eligible expenditures and within the scope of the project as approved by Town Meeting.

Grant recipients should contact the **Community Preservation Committee Liaison, Amy Fidalgo**, at AFidalgo@town.arlington.ma.us or [781-316-3005](tel:781-316-3005), to notify the CPC of any significant changes to their projects.

Expenditures

Invoices will be submitted to the CPC for their approval. Approved expenditures will be processed through the Town Comptroller's Office and paid through the Treasurer's Office. Any funds for a CPA project that remain at the completion of work will return to the general CPA fund once the project is officially closed. The remaining funds will then be reappropriated at the next Town Meeting, unless the CPC votes to approve the use of remaining funds for the completion of additional related work. In such cases, approval will be dependent upon whether the additional proposed work is within the general scope and intent of the original **Application**.

Closing Process

CPA grant recipients will notify the CPC in writing through a Final Progress Report when work is completed for their project. Once this notification is received, the CPC will review the initial acceptance letter to make sure that all terms and conditions have been met. The CPC will schedule a final site visit as appropriate with the CPA grant recipient to examine and photograph the completed work. If a final site visit is not appropriate for the project, the CPC may accept photographs or hardcopies of the deliverable as additional proof that the CPA project has been completed. The CPC will also generate a final summary of the CPA fund expenditures for the project. Once all tasks have been performed, the CPC will vote to officially close the project file.

Once the project file is officially closed, the CPC will work with the Town Comptroller to return any unexpended funds to the general CPA fund. **Projects must be officially closed before June 30 of the current year for the funds to be available for reappropriation at the following year's Town Meeting.**

Additional Requirements

CPA grant recipients are required to acknowledge the Community Preservation Act in all press releases, publicity materials, news, and written or oral announcements about work supported by CPA funds.

Projects receiving CPA funds must be completed within 30 months following the Town Meeting approval, unless the CPC votes to approve an extension of time due to compelling and documented circumstances. Without such support, the CPC may recommend to rescind any remaining CPA funds at a subsequent Town Meeting.

Community Preservation Committee Town of Arlington

CPA Funding – FY2018 Preliminary Application

One (1) electronic copy and three (3) hard copies of the completed **Preliminary Application** must be submitted to the CPC **by no later than noon on October 7, 2016** in order to be considered for advancement to the final application stage, with the electronic copy sent to AFidalgo@town.arlington.ma.us and the hard copies to:

Community Preservation Committee c/o Amy Fidalgo
Town of Arlington, 730 Massachusetts Ave., Arlington, MA 02476

Applications will be date stamped and assigned control numbers in the order that the hard copies are received.

Project Title: _____

Applicant/Contact Person: _____

Organization: _____

Mailing Address:

Telephone: _____ E-mail: _____

Primary CPA Category (select one):

Community Housing Historic Preservation Open Space Recreation

Secondary or additional CPA category (if applicable)

Community Housing Historic Preservation Open Space Recreation

Amount Requested: _____

Total Project Cost: _____

Signature: _____

Date: _____

Brief Description of Project

Include the address/location and current owner of the property, as well as any critical dates. Describe the benefit of the project to the community. Please attach supplemental information (photographs, drawings, documents, etc.) as desired.

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

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

Community Preservation Committee Town of Arlington

CPA Funding – FY2018 Final Application

One (1) electronic copy and three (3) hard copies of the completed [Application](#) must be submitted to the CPC **by the published deadline (TBA) in order to be considered for the 2017 Annual Town Meeting**, with the electronic copy sent to AFidalgo@town.arlington.ma.us and the hard copies to:

Community Preservation Committee c/o Amy Fidalgo
Town of Arlington, 730 Massachusetts Ave., Arlington, MA 02476

Applications will be date stamped and assigned control numbers in the order that the hard copies are received.

Project Title: _____

Applicant/Contact Person: _____

Organization: _____

Mailing Address:

Telephone: _____

E-mail: _____

Primary CPA Category (select one):

Community Housing Historic Preservation Open Space Recreation

Secondary or additional CPA category (if applicable)

Community Housing Historic Preservation Open Space Recreation

Amount Requested: _____

Total Project Cost: _____

Signature: _____

Date: _____

PROJECT DESCRIPTION: Attach answers to the following questions. Applications will be returned as incomplete if all requested information is not provided. Include supporting materials as necessary.

1. **Goals:** What are the goals of the proposed project?
2. **Community Need:** Why is the project needed? Does it address needs identified in existing Town plans?
3. **Community Support:** What is the nature and level of support for this project? Include letters of support and any petitions.
4. **Project Documentation:** Attach any applicable engineering plans, architectural drawings, site plans, photographs, any other renderings, relevant studies or material.
5. **Timeline:** What is the schedule for project implementation, including a timeline for all critical milestones?
6. **Credentials:** How will the experience of the applicant contribute to the success of this project?
7. **Budget:** What is the total budget for the project and how will funds be sourced and spent? All items of expenditure must be clearly identified. Distinguish between hard and soft costs and contingencies. (NOTE: CPA funds may not be used for maintenance.)
8. **Other Funding:** What additional funding sources are available, committed, or under consideration? Include commitment letters, if available, and describe any other attempts to secure funding for this project.
9. **Maintenance:** If ongoing maintenance is required for your project, how will it be funded?
10. **Impact on Town Budget:** What, if any, potential secondary effects will your proposed project have on the Town's Operating Budget? Are there any capital projects that rely on the successful completion of your project?

ADDITIONAL INFORMATION: Provide the following additional information, as applicable.

1. **Control of Site:** Documentation that you have control over the site, such as a Purchase and Sales Agreement, option or deed. If the applicant does not have site control, explain what communications have occurred with the bodies that have control and how public benefits will be protected in perpetuity or otherwise.
2. **Deed Restrictions:** In order for funding to be distributed, an appropriate deed restriction, meeting the requirements of Chapter 184 of Mass General Laws pursuant to section 12 of the Community Preservation Act, must be filed with the CPC. Provide a copy of the actual or proposed restrictions that will apply to this project.
3. **Acquisitions:** For acquisition projects, attach appraisals and agreements if available. Attach a copy of the deed.

4. **Feasibility:** Provide a list of all further actions or steps that will be required for completion of the project, such as environmental assessments, zoning approvals, and any other known barriers to moving forward.
5. **Hazardous Materials:** Provide evidence that the proposed project site is free of hazardous materials or there is a plan for remediation in place.
6. **Permitting:** Provide evidence that the project does not violate any zoning ordinances, covenants, restrictions or other laws or regulations. What permits, if any, are needed for this project? Provide the expected date of receipt for necessary permits, and copies of any permits already acquired.
7. **Environmental Concerns:** Identify all known wetlands, floodplains, and/or any natural resource limitation that occur within the boundaries of your submission.
8. **Professional Standards:** Evidence that appropriate professional standards will be followed if construction, restoration or rehabilitation is proposed. Evidence that the applicant and the project team have the proven or potential capacity to conduct the scope and scale of the proposed project, as evidenced by project leaders with appropriate qualifications and technical experience or access to technical expertise.
9. **Further Attachments:** Assessor's map showing location of the project.

REMINDER: Projects financed with CPA funds must comply with all applicable state and municipal requirements, including the state procurement law, which requires special procedures for the selection of products, vendors, services, and consultants. Project sponsors will be required to meet with Arlington's Town Manager before the Town enters into any contracts or issues any purchase orders. However, this requirement can be waived if adherence to procurement procedures will be overseen by a Town Department Head or other MCPPO certified third party.

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ACQUISITION 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
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PRESERVATION Protect personal or real property from injury, harm or destruction	Yes	Yes	Yes	Yes
SUPPORT Provide grants, loans, rental assistance, security deposits, interest-rate write downs or other forms of assistance directly to individuals and families who are eligible for community housing, or to entity that owns, operates or manages such housing, for the purpose of making housing affordable	X	X	X	Yes, includes funding for community's affordable housing trust
REHABILITATION AND RESTORATION Make capital improvements, or extraordinary repairs to make assets functional for intended use, including improvements to comply with federal, state or local building or access codes or federal standards for rehabilitation of historic properties	Yes if acquired or created with CP funds	Yes	Yes	Yes if acquired or created with CP funds

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