



COMMUNITY PRESERVATION PLAN FY24

AND FY23 ANNUAL REPORT



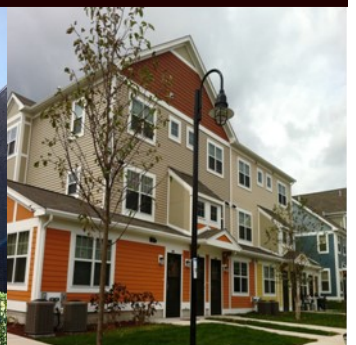
OPEN SPACE



RECREATION



HISTORIC



HOUSING

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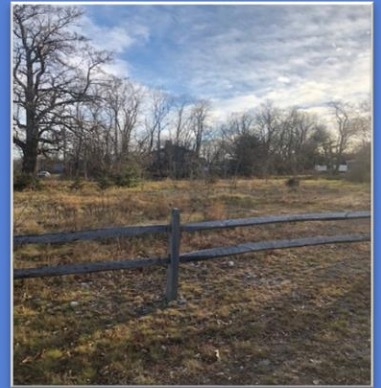
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New Bedford is widely recognized as a vibrant urban waterfront community and is the thriving commercial center of Southeastern Massachusetts. A historic city, rich and diverse in its assets and citizenry, New Bedford recognizes its past and looks to its future with excitement and confidence.

For centuries, New Bedford has continuously sought opportunities in which to leverage its assets and resources to grow as a community while consciously preserving its heritage. The passage of the Community Preservation Act (CPA) by the citizens of the city affirms the community's shared values and demonstrates its desire to preserve, protect, and sustain those very qualities from which it benefits.

CPA is a smart growth tool that helps communities preserve open space and historic sites, create community housing, and develop outdoor recreational facilities. CPA also helps strengthen the local economy by expanding housing opportunities, creating construction jobs, and by supporting the tourism industry through the preservation of a community's historic and natural resources.

New Bedford boasts an abundance of important community assets that not only provide economic value but help define its distinctive character and identity as a vibrant and ethnically diverse seaport. Waterfront landscapes, parks, trails, bikeways, and beaches offer diverse open space and recreational opportunities. Over two centuries of historic architecture reflect the transformative and engaging history of this port city. Furthermore, New Bedford's neighborhoods are the backbone of the city by providing a variety of housing stock options to its residents and echoing the rich diversity of its community.

The city's geographical coastal location, diverse neighborhoods, rich history, outstanding architecture, and vast cultural and natural resources make New Bedford an appealing place to live, work, and raise a family. The CPA initiative offers a balanced strategy to help New Bedford provide access to quality housing and open space, while maintaining the unique character of the city through the preservation of its historic and natural resources.



We, the members of the New Bedford Community Preservation Committee, are pleased to present the FY24 Community Preservation Plan.

The Community Preservation Plan is a study of the needs, possibilities, and resources of New Bedford regarding community preservation and establishes the Community Preservation Committee's (CPC) priorities for funding projects in FY24. Through a process led by the CPC, the Plan is updated annually to reflect changes in the community's needs. The update includes consultation with municipal boards as well as a public hearing to gain citizen input. In addition, the Plan relies upon the data, analysis, and recommendations within the city's existing planning documents, which are developed and approved with extensive review and public involvement.

The Plan describes the process for administering the Community Preservation Act (CPA) and contains detailed information about the project application and review process. As such, it represents an informational document for the citizens of the city, a guideline and instructional document for applicants seeking project funding through the CPA, and a guidance document for this and future Community Preservation Committees in making recommendations to the City Council for project funding.

As both residents of New Bedford and members of the CPC, we are committed to inclusiveness and transparency as we administer the CPA in an effective manner with the goal of enhancing our community.

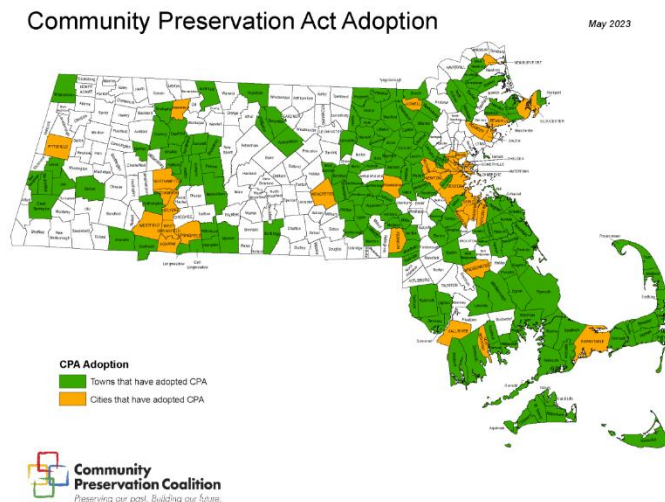
Respectfully submitted,
The Community Preservation Committee



3.1 | The Community Preservation Act

The Community Preservation Act (CPA) is a Massachusetts state law (MGL Ch. 44B) designed to help Massachusetts towns and cities plan for sustainable growth and provide funds to achieve their community preservation goals. CPA allows participating cities and towns to adopt a real estate tax surcharge of up to 3% to raise funds and create a local dedicated fund for preserving open space and historic resources and expanding community housing and outdoor recreational activities.

The CPA stipulates decisions regarding the allocation of CPA funds in cities and towns that adopt the initiative are to be made by a local community preservation committee (CPC) whose task is to receive and review applications and to make recommendations to the City Council or Town Meeting, which in turn makes the final allocations.



Community Preservation Trust Fund

The state trust fund's revenues are derived from a surcharge (\$25-\$50) placed on all real estate transactions at the state's Registry of Deeds.

The Department of Revenue (DOR) oversees the CPA trust fund and distributes the annual state funds to communities based on a percentage formula of what is raised locally. The FY23 distribution of the state match was 38%.

As of May 2023, 195 Massachusetts cities and towns have adopted CPA.

In addition to the community real estate tax surcharge, the state provides matching funds that are not less than 5% and not more than 100% of the funds raised by the community. The actual percentage varies from year-to-year, dependent on the health of the state's community preservation trust fund which is funded by a surcharge on Registry of Deeds transactions.

3.2 | CPA in New Bedford

New Bedford voters adopted the CPA program through a ballot question in November 2014. New Bedford elected to fund the CPA account through a 1.5% surcharge on annual tax assessments and established a Community Preservation Committee in 2016.

The city began collecting surcharge revenue on the 2016 tax bills and will continue collection on a quarterly basis.

The collection of CPA surcharges begins on July 1st each fiscal year. The state matching fund is distributed in November. The anticipated FY24 revenue is shown in the New Bedford CPA Revenue chart (right).

New Bedford CPA Revenue	
Revenue Source	FY24 Anticipated
Local Surcharge	\$1,271,186
State Match	\$317,796
Total	\$1,588,982

3.3 | Understanding the Property Tax Surcharge in New Bedford

New Bedford's CPA account is funded by a 1.5% surcharge paid by residential and commercial property owners annually. This surcharge is included in real estate tax bills.

There are two surcharge exemptions available:

- The first \$100,000 of taxable value of residential and commercial properties is exempt for all.
- Residential property owned and occupied by any person who qualifies for low income housing or low- to moderate-income senior housing.

An example of the 1.5% surcharge calculation is shown at right. This calculation uses New Bedford's FY23 average single-family home value of \$310,300 and the city's FY23 tax rate.

The calculation is as follows:

- Reduce the assessed value by \$100,000
- Multiply the reduced value by the current tax rate
- Multiply the recalculated tax by 1.5%

CPA Surcharge Example	
FY23 Tax Assessment	\$310,300
CPA Exemption (first \$100,000 is exempt)	(\$100,000)
CPA Taxable Value	\$210,300
FY23 Tax Rate per \$1,000 of assessed value	\$14.29
CPA Tax Basis \$210,300 X .01429	\$3,005
1.5% CPA Surcharge yearly \$3,005 X .015	\$45.08
The City's CPA fund is administered by the Treasurer's Office and the Chief Financial Officer.	

Exemption: To qualify for an exemption, residential property owners must meet age, residency, and income requirements. An application for exemption from the CPA surcharge must be filed annually with the Assessor's Office. The filing of the application does not stay the collection of the tax. Any resident who believes they are eligible for an exemption should contact the Assessor's Office at (508) 979-1440.

3.4 | Role and Membership of the Community Preservation Committee

The Community Preservation Committee (CPC) oversees the implementation of the CPA in New Bedford. Formed in the spring of 2016, the committee is responsible for establishing priorities for how CPA funding should be spent and based on those priorities, reviews project applications, and makes recommendations to the City Council on which projects should receive CPA funds.

In accordance with the terms of CPA and the City of New Bedford’s Community Preservation Committee Ordinance, a nine (9) member volunteer Community Preservation Committee (CPC) administers the CPA. The CPC consists of four (4) members of the general public appointed by the Mayor, and five (5) required members from each of the following boards: **Conservation Commission, Historical Commission, Park Board, Planning Board, and Housing Authority.**

Community Preservation Committee		
NAME	REPRESENTATION	TERM EXPIRATION
JANINE DA SILVA, Chair	Historical Commission	April 2025
PETER BLANCHARD	Conservation Commission	April 2025
MELISSA CHESTER-LETENDRE, Clerk	General Public	April 2025
DIANE BERUBE	Park Board	April 2026
CHRISTOPHER AMARAL	General Public	April 2026
vacant	General Public	April 2026
LEONA FISHER	Housing Authority	April 2024
ARTHUR GLASSMAN	Planning Board	April 2024
JODY SEIVERT	General Public	April 2024

The key responsibilities of the CPC are to:

- **Assess the Community Preservation needs of New Bedford** by soliciting input from city boards and commissions and by holding an annual public meeting to gain public input;
- **Develop and maintain a community preservation plan** which establishes the committee's priorities for recommending projects for CPA funding to the City Council;
- **Prepare an annual budget for the City Council** which establishes how the committee intends to allocate annual CPA revenue; and
- **Make project recommendations to the City Council** regarding the allocation of CPA funding following a competitive application process and extensive review by the CPC.

3.5 | Role of the City Council

While the CPC is responsible for studying community preservation needs and reviewing applications submitted for CPA funding, it is ultimately the City Council that must approve any CPA expenditure - based on the recommendations of the CPC. The City Council can:

- Approve the recommendation of the CPC;
- Reject the recommendation of the CPC; or
- Reduce the amount recommended by the CPC and approve the project at the reduced amount.

If a project recommendation is rejected or reduced by the City Council, the CPC is provided with one opportunity to respond and/or adjust the scope and terms of the proposed project prior to a final decision by the City Council. The City Council cannot increase recommended funding amounts and cannot fund a project without the CPC's recommendation.

3.6 | The Community Preservation Plan

The CPA mandates the creation of a Community Preservation Plan, to be revised annually to reflect desired changes in goals or emphasis. As part of the process of developing a plan, the first responsibility of the CPC is to study the needs, possibilities, and resources of the community with regards to community preservation. The CPC must meet and consult with other municipal boards and committees to gather input and must hold at least one public hearing annually to gather input from the general public.

Purpose of the Plan

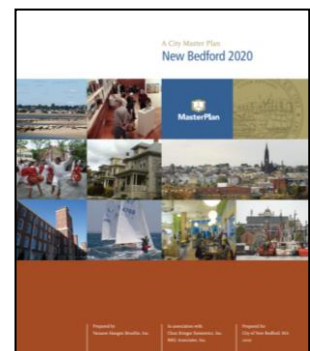
The purpose of the plan is as follows:

- To establish clear criteria which forms the basis of the committee's evaluation of applications for funding;
- To establish processes and the timeline the committee will use in its review of applications;
- To provide application forms and background information required of applicants;
- To provide City Council with the background information needed in reviewing the committee's recommendations; and
- To inform both applicants and the public of the CPC's goals and of its commitment to an open and transparent approach to reaching its recommendations.

Creating the Plan

Central to the plan is an assessment of community needs that may be consistent with the Community Preservation Act criteria. These needs fall into the categories outlined in the Act: **community housing, historic resource, and open space/recreation.**

The plan is based on the data, analysis, and recommendations within the city's current planning documents which are developed and approved with extensive review and public involvement. New Bedford has conducted numerous studies on all of these issues in recent years and the CPC has determined these existing studies, which have involved extensive citizen input and have been subject to public review, provide a strong basis for the needs assessment required for this plan. The CPC has reviewed the *Master Plan*, *Consolidated Plan*, *Action Plan*, *Open Space Plan*, *Preservation Forum Report*, and other relevant documents to provide information to enable the CPC to draft a set of priorities. In addition, the CPC annually consults with other municipal commissions and boards and hosts a public hearing to gather citizen input.



3.7 | Community Education and Outreach

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

Public Documents

- The CPC issues a **Community Preservation Plan** which includes the prior year's Annual Report, current Evaluation Criteria, Application Instructions, Eligibility Determination Form, and Funding Application.
- The CPC issues a report on **Funding Recommendations** to the New Bedford City Council.
- CPA-related public documents are available on the Community Preservation Committee's webpage at www.newbedford-ma.gov/planning/community-preservation/
- A **CPA Taxpayer Guide** is available from the City of New Bedford's Assessor's Office, which explains exemption eligibility requirements.

Notifications

Meeting agendas and any notices are posted at City Hall and on the city website at www.newbedford-ma.gov/planning.

For the annual public hearing, a legal notice is published in *The Standard Times* twice, and notices are posted at City Hall, on Cable Access TV, and at the Main Branch of the New Bedford Public Library. The notice is posted on the city's website and a press release is also issued.

The annual deadline to ensure consideration for the current funding round is announced in City News on www.newbedford-ma.gov.

Solicitation of Input

Once each year, CPA is included on the agendas of the Park Board, Planning Board, Conservation Commission, Historical Commission, and the New Bedford Housing Authority. These boards and commissions are asked to review the needs, goals, and priorities within the relevant CPA categories, and provide details to the CPC as to how each may have changed. These changes are incorporated into the next CPA plan.

An annual public hearing is held in June which includes a presentation of the draft CPA plan and time for questions and comments.

The draft Community Preservation Plan is made available on the city's web page for a two-week public comment period prior to finalization by the Community Preservation Committee.

3.8 | Fiscal Year Explanation of Tasks

During each fiscal year, the CPC will undertake several tasks and prepare several documents. During each fiscal year the CPC will:

- Prepare the annual Community Preservation Plan, which includes the past fiscal year's annual report and current year's application materials;
- Prepare the annual Budget Recommendation (July 1st -June 30th); and
- Conduct annual Application Review and prepare the annual Funding Recommendations to City Council.

3.9 | Use of Community Preservation Act Funds

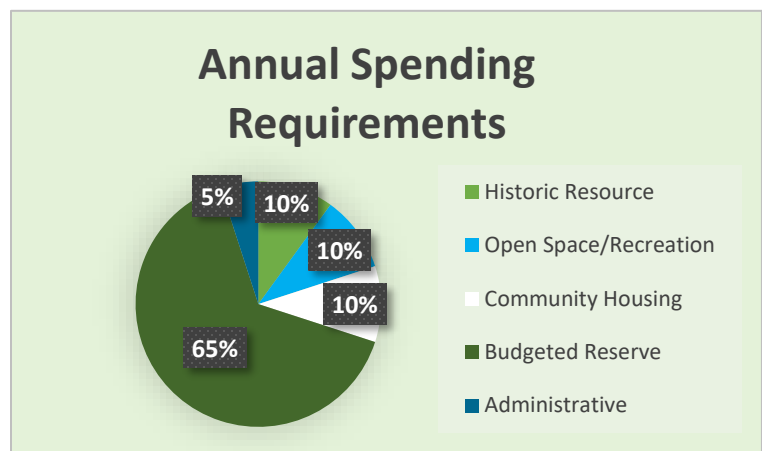
CPA Budget

The CPC is required to submit a CPA budget annually to the City Council and to keep records of all CPC meetings, proposals, and recommendations. The CPA budget is normally prepared at the same time as the municipal budget and the final deadline for acceptance by the City Council is before the tax rate is set in late November.

Within municipal finances, the City has dedicated, separate accounts for CPA which can only be appropriated by a vote of the City Council. When the CPC makes recommendations to the City Council, either for the CPA budget for the upcoming fiscal year (based on estimated CPA revenues) or for CPA project spending, each recommendation must include a specific dollar amount and the specific CPA account (or accounts) from which the funds are to be allocated. Based on state law, the City has established the following CPA fund accounts.

CPA Fund Accounts

CPA 10% Reserve Funds: The CPC is required to spend, or set aside for future spending, a minimum of 10% of annual CPA revenues for each of the three CPA purposes: *open space/recreation, historic resource, and community housing*, to three separate *Reserve Funds* created for these purposes. These reserve funds will house the 10% set-asides, if the CPC wants to *set aside* these funds in a given year rather than spend on projects. If the CPC does not recommend appropriation of the funds set aside into these reserve accounts (or City Council does not approve these project appropriations), the monies will simply roll over to the next year (and to subsequent years) and will grow like a savings account for future use. As reserve funds, these are what are known as *restricted funds* and can only be used for the specific purpose – open space/recreation, historic resource, or community housing.



CPC Administrative Fund: The CPC can request the City Council appropriate 5% of annual CPA revenues for the CPC's administrative needs during the fiscal year. These funds go into a separate CPC Administrative Fund which is available to, and can be spent at the discretion of, the CPC. This fund is utilized for items such as appraisals, surveys, technical studies, legal notices, and administrative staff. This fund can be used for CPC expenses only, not reimbursements to other municipal departments or to pay other municipal staff. This account is only available for one fiscal year and will be closed out at the end of the fiscal year. Unused funds from this account will close to the *CPA Fund Balance*.

CPA Budgeted Reserve Fund: A budgeted reserve fund is a special type of reserve fund to park funds in any given fiscal year, so the funds will continue to be available after the community's tax rate is set in the fall. If the CPC wants to retain access to all available CPA revenues throughout the upcoming fiscal year, and it will have significant CPA monies left over after taking care of the 10% /10%/10% CPA set-asides and 5% CPA administrative fund (and any CPA project spending), then unused CPA funds should be placed in the Budgeted Reserve Fund. At the end of the fiscal year, the unused balance in the Budgeted Reserve Fund will be closed out and added to the *CPA Fund Balance*.

CPA Fund Balance: With the exception of the 10% category reserve accounts, all unappropriated CPA funds are automatically transferred to the *CPA Fund Balance* (sometimes called the *Undesignated CPA Fund Balance*) at the end of each fiscal year. This would include funds remaining in the Budgeted Reserve Fund, unspent Administrative Funds, interest earned in the CPA accounts, and any other unappropriated CPA revenue. Once the municipality closes its books over the summer, the money in the CPA Fund Balance account is available for appropriation for any type of CPA project.

CPA Projects

It is the responsibility of the CPC to annually accept project applications from the community and conduct a thorough review of each, with the aim of selecting the most compelling projects for recommendation to the City Council. Once the CPC has voted on a slate of projects to recommend, it forwards the recommendations with specific dollar amounts and the CPA funding source to the City Council for action.

Project Eligibility

CPA funds must be used for public community preservation purposes and the CPA legislation is specific to the types of activities that can be funded. Community preservation is defined by the Act as, *“the acquisition, creation and preservation of open space; for the acquisition, preservation, rehabilitation and restoration of historic resources; for the acquisition, creation, and preservation of land for recreational use; for the acquisition, creation, preservation, and support of community housing; and for the rehabilitation or restoration of open space and community housing that is acquired or created with CPA funds.”*

The chart below illustrates the allowable uses of CPA funds in each of the CPA project categories. This chart is critical for determining whether a proposed project is eligible for CPA funding.

PROJECT APPROVAL PROCESS



CPA ALLOWABLE USES				
	OPEN SPACE	HISTORIC	RECREATION	HOUSING
ACQUIRE	YES	YES	YES	YES
CREATE	YES	NO	YES	YES
PRESERVE	YES	YES	YES	YES
SUPPORT	NO	NO	NO	YES*
REHABILITATE and/or RESTORE	NO unless acquired or created with CPA funds	YES	YES	NO unless acquired or created with CPA funds

* Housing Support: Shall include, but not limited to, 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 entries that own, operate or manage such housing for the purpose of making housing affordable.

Community Preservation Coalition

The Community Preservation Coalition is an alliance of open space, affordable housing, and historic preservation organizations working with municipalities to help them understand, adopt, and implement CPA. Their comprehensive website is a good resource to review successful projects from other communities and to gain insight as to the possible projects New Bedford could implement. This information can be found at www.communitypreservation.org.



Projects in Other Communities

CPA funds may be spent anywhere in Massachusetts, meaning communities are not confined to expending funds only within their jurisdiction. For example, this flexible provision allows a community to purchase land surrounding its water supply even if located in another city or town. CPA funding may also support inter-community cooperation on regional housing needs, allowing development that spans borders or shared development in one community that serves several towns. Another example is the coordinated efforts of several communities to establish a "heritage corridor" that celebrates the shared history of a region.

Leveraging CPA Funds

CPA funds may be used as a municipality's matching monies for state and federal grant programs that require a local match such as the Massachusetts Housing Partnerships' Soft Second Program, state Department of Housing and Community Development (DHCD) Self-Help program, Massachusetts Preservation Program Fund (MPPF), and the Executive Office of Environmental Affairs (EOEA) Massachusetts Forest Legacy program, Self-Help and Urban Self-Help programs. CPA funds can also be used as matching or starting monies to acquire grants from private organizations or individuals such as the Nature Conservancy or the Wildlands Trust of Southeastern Massachusetts, among others.

Incidental Project Costs

CPA funds may be used for site surveys, environmental assessments, historic or housing consultants, architectural and engineering fees, permit processing fees, construction consultants, financing consultants, legal and accounting fees, and similar costs associated with and incidental to the development of a CPA project.

No Supplanting

The CPA is directed toward augmenting municipal funds, not replacing existing funding. To this end, CPA funds may not be appropriated to pay for project costs that have already been appropriated from another source. Any CPA eligible costs for a project that are identified in a municipality's capital improvement program are eligible for funding under the Act, if the municipality has not made a prior funding commitment to pay for such costs.

No Maintenance

CPA funds cannot be used for routine maintenance of existing facilities. For example, communities cannot use CPA funds to maintain a municipal park (such as mowing the lawn, emptying trash barrels or dumpsters, etc.) or to maintain a historic town hall (such as cleaning the common areas or paying for utilities, etc.).

Recreational Restrictions

CPA funds cannot be used for horse or dog racing or the construction of gymnasiums, stadiums, or any similar structure. CPA also prohibits the use of CPA funds for the acquisition of artificial turf for athletic fields. Communities may still use their CPA funds for other aspects of a field project, but must appropriate non-CPA funds to acquire the artificial turf surface.

3.10 | Administration

The Community Preservation Act Manager provides administrative staff support to the CPC; project management of all grants; and oversight of the CPA funds. The CPA Manager is part of the Department of City Planning, working with the Preservation Planner and the Director of City Planning on all relevant CPA projects.

The Planning Department's work focuses on city planning that strengthens the city and helps develop strategies to increase the growth and prosperity of New Bedford's residents. In addition, the Planning website is a resource for city-wide programs, plans, and possibilities in New Bedford.

CPC meetings are typically held on the fourth Tuesday of the month at 6:00 p.m. The CPC does not meet during the months of March, April, and August. Meeting dates are posted on the CPC webpage.

The Community Preservation Committee's webpage includes meeting agendas, meeting minutes, forms, links and helpful documents. Visit the city website at www.newbedford-ma.gov/planning/community-preservation/



4.1 | Application Evaluation Criteria

This section discusses community needs, goals, and priorities specific to preservation within each of the CPA categories. In addition, the CPC has articulated a set of overarching criteria that apply to all projects. The CPC will use the criteria in its review and decision-making process. The criteria is intended to provide additional guidance to those preparing applications for funding and not all will be appropriate for every project.

Primary Criteria

Projects will meet the primary criteria below:

- Consistency with the current Community Preservation Plan and other local planning documents;
- Capacity to serve multiple needs and populations;
- Could serve as catalyst for transformative change;
- Addresses a long-standing need in the community or urgency to take advantage of a time-sensitive opportunity;
- Demonstrates a long-term, feasible strategy for ongoing maintenance of the CPA funded project.

Secondary Criteria

Projects are encouraged to meet one or more of the secondary criteria below:

- Leverages other public and private funding resources to the greatest extent possible (e.g., matching grant);
- Meets multiple CPA goals (i.e., blended projects);
- Capacity to serve a currently under-served population;
- Provides evidence of community support, such as endorsement letters from community groups, city departments and boards, or public officials;
- Improves accessibility for all members of the community;
- The applicant/applicant team has successfully implemented projects of similar type and scale or has demonstrated the ability and competency to implement the project as proposed.

4.2 | Open Space

Overview

CPA funds may be spent on the acquisition, creation, and preservation of open space, and for the rehabilitation or restoration of any open space that has been acquired or created using CPA funds. Open Space is defined by the CPA to include, but is not limited to, the following:

- Land to protect existing and future well fields
- Aquifers, recharge areas, and watershed land
- Agricultural land
- Grasslands, fields and forest land
- Fresh and 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
- Land for recreational use (see separate category information, below)



ACUSHNET SAWMILL

It is important to note a permanent deed restriction is required for all real property interests acquired with CPA funding. This restriction must be filed as a separate instrument, such as a Conservation Restriction (CR) or Agricultural Preservation Restriction (APR), and until this step has been completed, the terms of the CPA acquisition have not been technically fulfilled.

The City of New Bedford's ***Open Space & Recreation Plan 2021-2028*** provides an extensive inventory of what exists in New Bedford today, determines which goals and objectives were met and which need improvement or amending. This plan's public process also allowed citizens to voice their concerns and visions.

Development Patterns

Land use patterns throughout the city have not altered dramatically in the last two decades, as the land area of New Bedford is quite developed. Vacant parcels are still available throughout the city but are scarce. Some sections of the city have experienced both residential and commercial sprawl, resulting in significant construction of single-family detached dwellings as well as commercial and office space development in the northwest section of the city. Despite this sprawl, population projections show that future residential growth will spread slowly and that the existing large vacant tracts of residentially zoned land possess significant development limitations due to wetlands.

Water Resources

There are five major bodies of water in the city which include the Acushnet River/New Bedford Harbor, Paskamanset River, Sassaquin Pond, Turners Pond, and the Buttonwood Park Pond. The Acushnet River/Inner New Bedford Watershed encompasses 11,497 acres and covers six municipalities. Within New Bedford, 62% of the watershed is developed, 17% is protected open space and 23% is undeveloped unprotected space (2005).

Water Supply

New Bedford's drinking water comes entirely from surface water sources in a watershed that extends over 50 square miles, which include several ponds located to the north of the city in the towns of Lakeville, Rochester, Middleboro, and Freetown. New Bedford's water supply is sufficient to meet present usage demands; however, the city has conducted an assessment of the groundwater supply sources in the wetlands located in the northeast part of the city and has begun examining the potential of gaining water rights to freshwater bodies to the north of the city in order to meet the area's future water demands.

Natural Resources

While the city is highly developed, there are still large, forested wetlands in the northwestern section of the city which are home to a large number of species, including rare species. The 1,100-acre Acushnet Cedar Swamp State Reservation, dedicated as a National Natural Landmark in 1972, makes up the majority of the upper-central part of New Bedford.

Fisheries & Wildlife

Recreational fishing and shellfishing exists along New Bedford's shores and within its freshwater ponds, although consumption of certain species is prohibited in certain areas due to PCB and heavy metal contamination. Due to a wastewater treatment plant built in 1996, there have been improvements in the water quality of Buzzards Bay which has opened up 575 acres of shellfishing in the Bay and 300 acres in the outer harbor, resulting in a local shellfish industry that is estimated to be valued at \$1 million.

The very large, connected forest and wetland areas in northern New Bedford provide habitat for a large number of species, including a few rare species. Five of New Bedford's vernal pools are critical to the survival of a variety of wildlife species. These pools have been certified by the Natural Heritage and Endangered Species Program, which provides both state and federal protections.

Scenic Landscapes

New Bedford scenic landscapes include its working waterfront and water views, with Clark's Point, the city's southern peninsula, offering panoramic views of Buzzards Bay and the Elizabeth Islands. The other scenic landscapes of note are the Acushnet Cedar Swamp and the Flora B. Peirce Nature Trail which winds for a mile over city land.

Environmental Challenges

New Bedford's industrial history has unfortunately resulted in the loss of open space and natural areas due to a number of contaminated land areas throughout the city. These include two superfund sites - New Bedford Harbor and Sullivan's Ledge, an abandoned granite quarry about 12 acres in size in the northwest section of the city. There are also 466 sites in New Bedford which the Department of Environmental Protection classifies as hazardous waste and oil release sites.

- Future needs include the restoration of degraded landscapes along the waterfront so these areas may continue to support industry and residential development but can also provide a greenway along the immediate waterfront for public access. The city is actively working to develop the Acushnet River Riverwalk which will stretch from Coggeshall Street, north to River's End Park at Tarkiln Hill Road. The Riverwalk will not only provide a public pedestrian walkway, it will also restore upland coastal habitat.
- Clark's Cove has made much progress through the elimination of combined sewer outflows discharging into the Cove. Future needs to protect this asset could involve the development of a comprehensive management plan for the Cove in both New Bedford and Dartmouth.
- The northern portion of the city houses the Acushnet Cedar Swamp State Reservation, a valuable and somewhat little-known resource in the city. This resource would benefit from the acquisition of private undeveloped land abutting the existing open space to expand the natural area.
- Sassaquin Pond has experienced deteriorating water quality. In 2004, the pond was closed to swimming due to high bacteria levels. A watershed restoration plan was completed in 2014 which identified the major pollution inputs into the pond. The study determined a comprehensive plan is needed for this area to protect the pond's eco system and health. This could include a watershed overlay district and the implementation of storm water best management devices. The Conservation Commission works with the community to educate and encourage better stewardship of the pond. Additionally, the Department of Public Infrastructure has implemented some stormwater Best Management Practices to help combat the polluted stormwater entering the pond. Lastly, the control of invasive plants is another important piece in the restoration of the pond.
- The Buttonwood Brook/Pond watershed is listed by the state as an impaired resource due to bacterial contamination from waterfowl and stormwater runoff from major roadways and parking areas surrounding the brook and pond. A stormwater management design has been created to address some issues however, funding for implementation of the plan is needed. In addition, the impact of waterfowl on the nitrogen load on this resource needs to be mitigated.
- Brooklawn Park' Circulation and Master Plan (August 2020) identified the need to address stormwater management issues. A design has been created to address this issue by the duck pond, incorporating green infrastructure to retain and ecologically filter runoff before it infiltrates into the group or overflows into the existing piped drainage infrastructure in the park. Funding for implementation is needed.

Open Space Goals and Priorities

- Develop and implement a green infrastructure strategy to address climate change and resiliency at city parks
- Support preservation of open space in New Bedford
- Improve, expand, and enhance the public's access to all open space including the waterfront and public areas
- Restore threatened and degraded landscapes throughout the city parks and along the waterfront
- Protect natural resources, particularly Clark's Cove and Sassaquin Pond
- Improve the Buttonwood Brook/Pond watershed
- Improve stormwater management at Brooklawn Park
- Create new greenways through urban New Bedford
- Acquire private undeveloped land abutting existing open space and expand the natural area around the Acushnet Cedar Swamp State Reservation

**Note: Not all goals and priorities are eligible for CPA funding.*

Open Space Category Specific Criteria

- Project protects drinking water quantity and quality;
- Project preserves and/or protects the city's variety of water resources;
- Project preserves and/or expands the city's network of parks, open spaces and trails;
- Project improves and/or protects the waterfront for recreational use, improve access to and enhance the aesthetic experience of the waterfront;
- Project provides opportunities for passive recreation and environmental education, including waterfront amenities;
- Project preserves strategic tracts of undeveloped land and parcels adjacent to existing permanently protected open space; and/or
- Project restores filled wetlands or otherwise degraded wetlands.

Reference Materials

- *Open Space & Recreation Plan 2021-2028*
- *A City Master Plan New Bedford 2020*

4.3 | Historic Resource

Overview

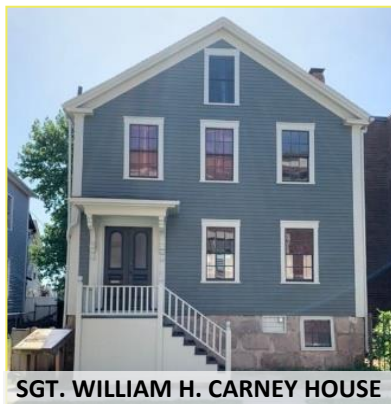
New Bedford's rich history is represented in its historic and archaeological resources which provide a valuable material record of the history of New Bedford and significantly enhance the quality of life in the city.

Each resource establishes community character and identity, and in large part define what is unique about the city while often serving as a catalyst for job creation, heritage tourism, and stronger neighborhoods.

Historic Resources are defined by the CPA as:

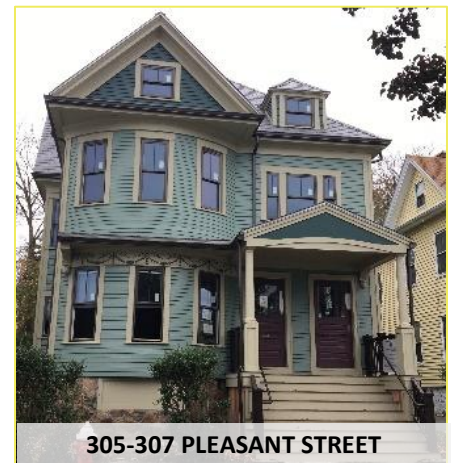
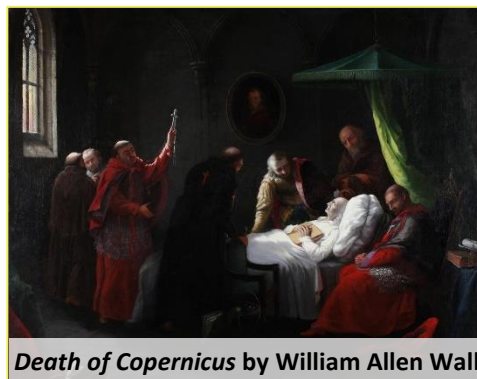
buildings, structures, vessels, documents, artifacts, or real properties that are listed on the State Register of Historic Places or are significant in the history, archeology, architecture, or culture of New Bedford as determined by the New Bedford Historical Commission.

CPA funds may be used for the acquisition, preservation, restoration, or rehabilitation of historic resources (including city-owned historic resources), but not for routine maintenance.



Unless such historic resources are in public ownership, the public purpose of investments in historic resources must be apparent, and/or must be protected by a preservation restriction that ensures a public benefit. All projects funded in the Historic Resource category must meet the *U.S. Secretary of the Interior's Standards for Rehabilitation*.

The City of New Bedford held a Preservation Forum in 2010, during which local residents and preservation professionals from the region gathered in a charrette-like setting to identify at-risk historic resources and establish planning strategies to address preservation challenges. The resulting **2010 Preservation Forum Report** provides a basis for the following identified needs, goals, and objectives.



Historic Resources and Trends

Historic Resources

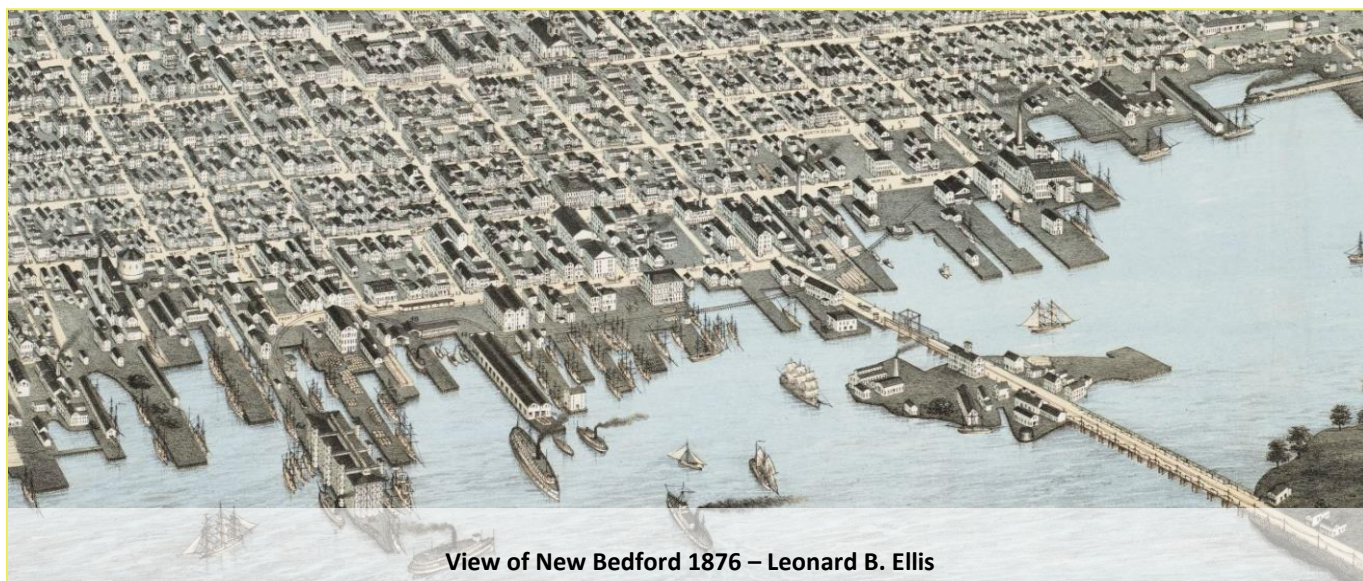
New Bedford's rich history is duly represented in its historic and archaeological resources. Based on New Bedford's numerous historic assets listed in the State and National Registers, the city's resources include municipal buildings, private residences, mill buildings, commercial storefronts, lighthouses, historic parks, and burial grounds. New Bedford is proudly home to six National Historic Landmarks and currently has fifteen National Register Districts which range in diversity from parks and textile mill complexes to industrial power plants and residential neighborhoods. New Bedford has one Local Historic District, protected and regulated by Mass General Law 40C, which shares its boundaries with the New Bedford Whaling National Historical Park. In addition, New Bedford has surveyed and filed over 3,100 Historic Property Inventory Forms with the Commonwealth documenting buildings, areas, burial grounds, objects, and structures.

Preservation Ethic and Policies

The City, along with several preservation partners, has developed a strong preservation ethic with great community support. Long established public policies encourage the utilization of historic preservation as part of a comprehensive revitalization strategy that serves to maintain and enhance its unique character. The city was designated a Certified Local Government (CLG) in 1987 by the National Park Service due to its commitment to historic preservation, providing the City greater access to both state and federal funding and technical assistance. The New Bedford Historical Commission (NBHC) is the city authority responsible for community-wide historic preservation planning and serves as the Historic District Commission, regulating development within the Local Historic District by acting as a design review body.

Preservation Organizations

The City is fortunate to partner with several organizations that have great capacity and are significantly involved with the advocacy, preservation and stewardship of city historic resources. The Waterfront Historic Area League (WHALE) is a non-profit preservation organization which works closely with the city to promote the reuse of significant buildings and has facilitated the completion of more than fifty restoration and preservation projects over the last five decades. The New Bedford Whaling National Historical Park partners with the city to preserve, protect, and interpret the Bedford-Landing Waterfront District, associated with New Bedford's 19th century whaling history. The New Bedford Preservation Society, New Bedford Historical Society, New Bedford Whaling Museum and Rotch-Jones-Duff House and Garden Museum also play important roles in preserving the architectural and cultural heritage of the city.



View of New Bedford 1876 – Leonard B. Ellis

Historic Preservation Needs

- The historic resource survey is an important mechanism for understanding, identifying, evaluating, and protecting historic resources. The survey serves as the basis for expanded preservation efforts, including the identification of potential National Register and Local Historic Districts. The majority of the city's collection of inventory forms are over three decades old and many sections of the city have not been surveyed. The city also lacks a comprehensive Preservation Plan which would utilize community input to better define citywide preservation goals and objectives.
- Disinvestment, neglect, and/or abandonment threatens aging historic institutional buildings and neighborhood housing stock. A lack of dedicated funding sources for preservation purposes has led to deferred maintenance and demolition requests city-wide. Special attention should be paid to threatened classes of resources such as churches, schools, fire stations, and courthouses.
- The city owns a significant number of historic structures, sites, objects, and landscapes in need of preservation which have gone unaddressed due to municipal budget restraints. In addition, the city's valuable records and archives, dating to the 18th century, require scanning and additional secure storage space to protect these objects from deterioration or damage.
- As an older urban center, the city is built-out with dense land use and limited available land for new development. This constraint often leads to demolition requests rather than the preservation or adaptive reuse of historic buildings.
- Lack of awareness or understanding of a building's significance and its architectural characteristics often result in insensitive alterations which can destroy a building and the surrounding neighborhood's character. There is a need to advance the city's preservation ethic through education to attain a better community understanding of the purposes and impacts of historic preservation.
- The city has a Preservation Planner, a Historical Commission, and one Local Historic District, but has the potential to develop better tools to protect existing resources and safeguard the predominant character of commercial corridors and established neighborhoods as development and infill take place. Additional Local Historic Districts, the development of Conservation Districts, and Design Guidelines should be explored.

Historic Preservation Goals and Priorities

- Continuously update and maintain the existing Historic Properties Survey Forms and seek additional National Register nominations and new local historic districts
- Protect, preserve, enhance, restore and/or rehabilitate historic, cultural, architectural or archaeological resources of significance, especially those that are endangered in that their survival may depend upon more than market forces or regulatory controls
- Protect, preserve, enhance, restore, and/or rehabilitate city-owned properties, features, or resources of historic significance; particularly historic landscapes, burial grounds, monuments and park systems, as well as historic records and documents
- Support the adaptive reuse of historic properties
- Utilize historic preservation to increase neighborhood stabilization through the use of first-time homebuyer programs and the development of an annual CPA fund project to financially assist property owners in the rehabilitation of historic properties located within National Register Districts.
- Advance the city's preservation ethic through education to attain a better community understanding of the purposes and impacts of historic preservation.

**Note: Not all goals and priorities are eligible for CPA funding.*

Historic Preservation Category Specific Criteria

- Project is located at a pivotal or visually prominent site whose location is an indicator for the future well-being (or decline) of a neighborhood;
- Project has the potential to benefit the community at large in terms of environmental/aesthetic contribution, historical value, social/cultural value, or economic development;
- The resource is of notable and distinctive architectural or cultural significance; and/or
- Resource building envelope requires immediate attention, without which the resource is at risk for significant damage or loss if unaddressed.

Reference Materials

- *Economic Impacts of Historic Preservation in Massachusetts*
- *Massachusetts State Historic Plan (2018-2022)*

4.4 | Community Housing

Overview

CPA funds may be spent on the acquisition, rehabilitation, and support of community housing, and for the rehabilitation or restoration of community housing acquired or created using CPA funds.

The United States Department of Housing and Urban Development (HUD) income guidelines are used to determine eligibility.

The CPA defines community housing as low- and moderate-income housing for individuals and families, including low- or moderate- income senior housing.

- **Low Income Housing:** for those persons and families whose annual income is less than 80 percent of the area-wide median income as determined by (HUD).
- **Moderate Income Housing:** for those persons and families whose annual income is less than 100 percent of the area-wide median income as determined by HUD.
- **Low- or Moderate-Income Senior Housing:** for those persons 60 years or over whom would qualify for low- or moderate-income housing.



Three documents help outline the City of New Bedford's Community Housing needs and goals and objectives.

The **A City Master Plan 2020** was prepared in 2010 and through a robust civic engagement process, and demographic research, allowed residents to view the housing needs and demographic changes that are influencing these needs.

The Department of Planning, Housing and Community Development produced the **Consolidated Plan 2020-2024** which provides many of the city's housing needs, goals, and objectives.



The **New Bedford Housing Authority Action Plan Five Year Plan and Action Plan 2019-2023** also outlines the needs, goals, and objectives for the housing authority. The **Building New Bedford: Strategies to Promote Attainable Housing for All in a Thriving New Bedford (2023)** report details the short, medium, and longer-term interventions to be implemented to provide relief for renters, buyers, and homeowners.

These reports assist the City of New Bedford in examining the existing and future housing goals and the current challenges New Bedford faces in light of current data and trends.

Population and Household Changes (2010 - 2020)

Between 2010 and 2020, the population of New Bedford increased by approximately 6% from 95,000 residents to approximately 101,000 and recent studies indicate that the population is stabilizing and potentially will increase 4.2% over the next 20-year period.

Low Homeownership Rates

Homeownership remains elusive for many New Bedford residents. The homeownership rate in 2020 was 42%. This contrasts with the Commonwealth's homeownership rate of 62.4% in 2019 and the national homeownership rate of 65.5% percent in 2019 according to the U.S. Census.

Cost-Burdened Households

Households that spend more than 30% of their gross income on housing are considered to be *housing cost burdened*, and those that spend more than 50% are considered to be *severely cost burdened*. New Bedford has a high number of households (31% of homeowners and 44% of renters) who experience cost burdens; especially those households with incomes less than or equal to 50% of the Area Median Family Income (AMFI).

New Bedford's Housing Stock

New Bedford had an estimated 43,285 housing units in 2020. Nearly 67% percent of New Bedford's housing types were multifamily units and approximately 33% were single-family units. New Bedford's supply of residential structures is quite old, with 86% built before 1980, and the majority (52%) of housing stock built prior to 1940.

Affordable Housing Inventory

According to the Department of Community and Housing Development's (DHCD) Subsidized Housing Inventory (SHI), New Bedford had 5,134 units classified as affordable under the Chapter 40B guidelines, which equates to 12% of the year-round housing.

New Bedford Housing Units

The City has 23,523 rental units which is 60% of all occupied units. Of these units, 7,190 (18% of occupied units) are subsidized, resulting in 30% of all renter households residing in an income-restricted or subsidized unit.

- New Bedford's rate of homeownership is well below state and national levels. Expansion of programs supporting home ownership through first time homebuyer programs, emergency repair assistance, and housing accessibility is needed to increase this rate.
- A great number of New Bedford households are severely cost burdened, spending more than 30% of their income on housing, with a great number spending more than 50% of their income on housing costs. Lack of affordable housing exacerbates the problems facing at-risk individuals and families.
- The homeless population is increasing, especially among families, due to the lack of affordable housing options for all income levels. Establishing a regional approach on housing issues will help address this regional issue.
- There is a lack of energy efficient and green building technology among New Bedford households which increases their housing costs.
- There is a need to preserve historic residential buildings through adaptive re-use to retain the character and history of our city while creating new housing units.
- A number of residential buildings are vacant due to foreclosures which has an impact on the stability of the neighborhoods. Activating vacant properties will increase the number of housing units and stabilize neighborhoods.
- There is a lack of sufficient housing resources for low- and very low-income residents.
- The inventory of ADA compliant housing units is insufficient and does not meet the community need. The need will increase as the "baby boomer" generation continues to age.

Community Housing Goals and Priorities

- Increase the rate of homeownership
- Increase the inventory of safe, affordable housing through financing to support affordable housing developers in the creation of and acquisition and/or rehabilitation of residential units
- Decrease the number of vacant and abandoned residential properties throughout the city by providing financing for acquisition and rehabilitation of vacant and foreclosed properties
- Promote mixed-income and mixed-use development that includes residential units concentrated within New Bedford's business districts
- Increase the supply of affordable housing available to low- and moderate-income households
- Increase opportunities for the use of energy efficiency and green building technology
- Support the preservation of historic residential buildings
- Increase the supply of ADA compliant housing units
- Support the adaptive reuse of existing non-residential buildings, such as schools, churches, mills etc., to community housing
- Promote non-traditional housing models such as live/workspace for artists and co-housing opportunities
- Support the preservation of expiring affordability restrictions

**Note: Not all goals and priorities are eligible for CPA funding.*

Community Housing Category Specific Criteria

- Project demonstrates a housing need of an underserved population;
- Project utilizes a historic or existing building;
- Project incorporates universal access within its design;
- Project demonstrates a high degree of sustainability and low energy use; and/or
- Project provides affordable rental and/or affordable ownership opportunities.

Reference Materials

- *A City Master Plan 2020*
- *Consolidated Plan 2020-2024*
- *New Bedford Housing Authority Five Year Plan and Action Plan 2019-2023*
- 2010 and 2020 Decennial Census
- *Building New Bedford: Strategies to Promote Attainable Housing for All in a Thriving New Bedford (2023)*

4.5 | Recreation

Overview

The focus for CPA recreation projects is on **outdoor** passive or active recreation, such as (but not limited to) the use of land for:

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

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

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

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

New Bedford citizens strive for a diverse, well-maintained recreational environment that values the city's rich history, cultures and architecture as tools to improve the quality of life for our residents. The City of New Bedford's ***Open Space & Recreation Plan 2021-2028*** provides an extensive inventory of what exists in New Bedford today, determines which goals and objectives were met and which need improvement or amending.



Sgt. SEAN GANNON
MEMORIAL PLAYGROUND



Recreational Resources

New Bedford boasts an abundance of both active and passive recreational opportunities including; six major parks; 29 neighborhood parks; more than 12 miles of trails and bikeways; 26 acres of beaches; as well as numerous public and private baseball, football, soccer fields; and a municipal golf course. The City participates in the *10 Minute Walk to a Park Initiative*. The ***New Bedford Open Space & Recreation Plan 2021-2028*** includes a list of the city's parks and playgrounds.

Water – Based Recreational Resources

Although New Bedford Harbor is closed to all fishing and shellfishing due to the presence of polychlorinated biphenyls (PCBs), the harbor provides recreational opportunities to residents of New Bedford and Fairhaven, as well as visitors. New Bedford offers the Community Boating Center, New Bedford Rowing Club, and paddle board and kayak lessons. In addition, the Whaling City Rowing Club allows its members to have the unique experience of rowing through the harbor in authentic reproduction whaleboats. Pope's Island Marina provides services to recreational boaters with their own vessels, as well as park facilities for local and regional visitors.

Multi-Use Trails

Much of the City's available open space consists of wetlands; therefore, traditional hiking trails are minimal, resulting in the addition of paths around and through major parks such as Fort Taber, Brooklawn Park, Buttonwood Park, and Clasky Common Park. New Bedford has three miles of nature trails at the Flora B. Peirce Nature Trails, Ross C. Mathieu Nature Trail, and the Ricketson Nature Trail. The construction of the Harborwalk and Covewalk on the hurricane barrier has provided a unique multi-use path for residents and visitors.

Universal Access

New Bedford has the largest fully accessible playground in the region, Noah's Place Playground. West Beach has accommodations for beach and water access. The city has amenities available to those with disabilities, including skateboarding and basketball. Buttonwood Park boasts a sensory garden and a handicap accessible playground.

Resource Management

Since the last ***Open Space and Recreation Plan*** in 2008, the City of New Bedford has invested in the creation and/or update of management plans for five citywide parks; the Sassaquin Pond area and the Acushnet Cedar Swamp; the establishment of maintenance plans for playgrounds and sport fields; and the creation of yearly budgets for the maintenance of the city's parks and playgrounds.

Opportunities for Expansion

Due to the majority of the land area in the city being developed or considered wetland, the ability to significantly expand land-based recreational spaces is limited. The ***New Bedford Open Space & Recreation Plan 2021-2028*** recommends the upgrading of existing recreational facilities.

Recreation Needs

- The city parks and other recreational facilities serve the community in many ways, acting as hubs where people can exercise, socialize, be exposed to nature, or pick up new skills or hobbies. The facilities, programs, and services have a profound impact on the well-being of the city's residents, so it is vital to provide access to all and expand access where there is a need. Access can be defined in several ways: ADA accessibility; transportation access (i.e., daily bus service to beaches); and proximity of parks and facilities.
- In New Bedford, 77.8% of residents are served by a park, exceeding the national average of 55%. This data is defined by living within a 10 minute walk to a park. While exceeding the national average, there are areas in the city which need improved access to parks and recreation especially in the city's near North End. Gathering resident input and feedback regarding what facilities and programs would best serve their needs is important in planning for staffing, program offerings, and other long term planning.
- Working with the Commission for Citizens with Disabilities, the Department of Community Services, and Age Friendly New Bedford, ADA and access improvements have been identified. Beach access is a concern; West Beach was chosen for ADA and access improvements. An accessible ramp and amphibious wheelchair are available; however, the West Beach Bathhouse needs to be renovated. Design plans have been completed. For accessible walking paths, an ADA compliant path at Hazelwood Park has been designed. In both cases, the projects need funding in order to be completed.
- The city has an extensive inventory of parks and recreational facilities. All require maintenance, management, and future rehabilitation, to be developed in partnership with Department of Public Infrastructure, as well as community partners such as friends' groups and sport leagues.

Recreation Goals and Priorities

- Expand outdoor recreational opportunities for New Bedford residents of all ages and abilities
- Address needs of residents by age and interest (i.e., adult exercise equipment; skateboard park)
- Create and/or update park plans, including maintenance, ADA compliance, and budgeting
- Enhance and maintain conditions of all recreational assets
- Improve and enhance our community's access to the water
- Restore, maintain, and enhance the unique historical and cultural characteristic of the city's open spaces
- Utilize public spaces for all ages and abilities to have access to arts and culture
- Enhance the quality, connectivity, and appeal of New Bedford's streetscapes
- Plan and construct a citywide multi-use greenway/Riverwalk, meeting the needs of all ages and abilities
- Expand multi-use, multi-ability trails within the city and also connect to neighboring communities
- Enhance and protect natural resources throughout New Bedford
- Develop a green infrastructure implementation strategy
- Preserve existing and create more passive greenspaces for the public
- Improve beaches and utilize each as a community asset
- Preserve scenic landscapes and views
- Create an "Adopt a Park" program for local businesses
- Capitalize on our beaches for residents and visitors

**Note: Not all goals and priorities listed may be eligible for CPA funding*

Recreation Category Specific Criteria

- Project expands the range of recreational opportunities available to residents of all ages and abilities;
- Project expands recreational opportunities for those segments of the population that are underserved given the current location of existing recreational lands and the unique needs of different segments of the community;
- Project promotes the creative use of greenways, waterways and other corridors, including connecting corridors to create safe and healthful non-motorized transportation and exercise opportunities;
- Project expands waterfront accessibility and use while promoting water-based recreational activities; and/or
- Project preserves and/or enhances the aesthetic experience of the city's greenspace and waterways.

Reference Materials

- *Open Space & Recreation Plan 2021-2028*
- *A City Master Plan 2020*



5.1 | Financial Forecast FY24

Estimated Revenue Available in FY24 Funding Cycle

The City began collection of FY24 CPA revenue on July 1, 2023. The total amount of CPA revenue available to distribute in the FY24 funding cycle is dependent on actual surcharge revenue collection in FY24 and the state distribution from the Community Preservation Trust Fund. The state match projection is typically released in March and is distributed in November.

The New Bedford CPA Revenue Table (right) provides an overview of estimated revenue available for FY24.

New Bedford CPA Estimated Revenue

Revenue Source	FY24 Estimated
Local Surcharge	
	\$1,271,186
State Match	\$317,796
Total	\$1,588,982

5.2 | CPA FY24 Funding by Category

The CPA requires each community to spend, or set aside for future spending, a minimum of 10% of annual CPA receipts for each of the following categories: **open space/recreation**, **historic resource**, and **community housing**. The remaining 70% of funds may be allocated to any one or a combination of the three categories, as well as for administrative expenses, at the discretion of the Community Preservation Committee and subject to the approval by City Council. All spending must be used on projects with a public purpose or public benefit.

CPA CATEGORY FUNDS FY24	
OPEN SPACE & RECREATION RESERVE (10% of estimated revenue)	\$158,899
HISTORIC RESOURCE RESERVE (10% of estimated revenue)	\$158,899
COMMUNITY HOUSING RESERVE (10% of estimated revenue)	\$158,899
BUDGETED RESERVE (65% of estimated reserve)	\$1,032,836



6.1 | Application Overview

General Information

The CPC has endeavored to make the funding process user-friendly with a straightforward and inclusive eligibility determination form and application. The **Application Packet** which includes the application and instructions is found in the Appendix to this Plan, and is available on the Community Preservation Committee’s website at www.newbedford-ma.gov/planning/community-preservation/

BEFORE YOU START: All applicants are strongly encouraged to thoroughly review the entire Application Packet as well as the Community Preservation Plan to learn more about CPA, the CPC, the application process, and the expectations which exist for a successful project. A review of the CPA legislation is also recommended.

STEP I Determine Project Eligibility

Due to the complexity of the CPA, the application process has two steps. All project applicants must begin the application process by submitting a brief **STEP I Eligibility Determination Form**. This form is found in the application packet within the CPA Plan Appendix and on the Community Preservation Committee’s website.

The **STEP I Eligibility Determination Form** enables a clear understanding as to whether a project is eligible under CPA regulations prior to the applicant submitting the **STEP II Project Application**. *This determination does not guarantee CPA funding will be recommended for a project; it is to determine if a project meets the basic requirements of the CPA legislation.* Please refer to the Department of Revenue Allowable Use Chart in the Appendix to determine if your project is eligible for CPA funding.

IMPORTANT!
Project applications **will not** be accepted—*regardless of project eligibility*—**UNLESS** the Eligibility Determination Form has been submitted to **and** approved by the CPC.

The CPC will review the Eligibility Determination Form and will invite eligible projects to submit a **STEP II Project Application**. The CPC reserves the right to notify applicants as to their proposal’s eligibility for CPA funding after the deadline in the event a legal opinion is required to definitively determine eligibility.

STEP II Complete Project Application

Only projects determined to be eligible for CPA funding under Step I AND are invited by the CPC should submit a STEP II Project Application. Only applications for projects invited to complete STEP II will be reviewed by the CPC.

Requirements for Submission

Details as to the specific materials required for submission are included in the Application Packet.

6.2 | FY24 Timeline and Application Review Process

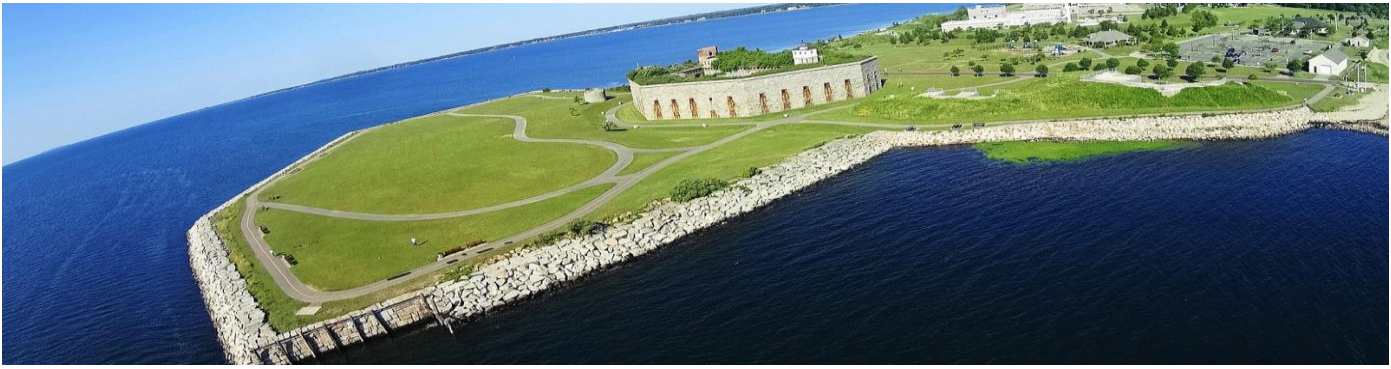
The CPC conducts an annual application technical workshop in the late summer which explains the project application and review process. This workshop is followed up by the two-step application process that culminates in a full application submittal in late fall.

The CPC reviews the applications in public meetings held in early winter and project recommendations are sent to City Council in late winter. The City Council approval process takes a minimum of two meetings of the Council. This timeframe cannot be accurately predicted; therefore, the project award date below is an estimate and could be subject to change.

FY24 FUNDING APPLICATION AND REVIEW PROCESS		
STEP		TIMELINE
	Interested organizations and individuals attend the FY24 Application Technical Workshop (strongly recommended)	SEPTEMBER 7, 2023 AT 6:00 p.m. New Bedford Free Public Library Main Branch 3 rd Floor 613 Pleasant Street
	Applicants submit STEP I Eligibility Determination Form	Due by NOON on WEDNESDAY SEPTEMBER 27, 2023 ELECTRONIC SUBMISSION
	CPC responds to STEP I Eligibility Determination Form; invites eligible projects to complete STEP II Project Application	By October 6, 2023
	Applicants submit STEP II Project Application	Due by NOON on FRIDAY NOVEMBER 17, 2023
	CPC invites applicants to present their project to the committee and general public and gathers public input at public meetings.	January 2024
	CPC submits recommendations to City Council	March 2024
	City Council votes on CPC recommendations	April-May 2024
	CPC issues award letters	June 2024
	Grant agreements executed	After July 1, 2024

Questions

Applicants with questions may contact the Community Preservation Act Manager at New Bedford's Department of City Planning at (508)979-1488 or CPA@newbedford-ma.gov.



7.1 | FY23 Funding

FY23 Budget

FY23 BUDGET	
CPA REVENUE	
LOCAL SURCHARGE	\$1,200,732
STATE MATCH	\$420,256
TOTAL REVENUE	\$1,620,988
EXPENDITURES	
PROGRAM ADMINISTRATION (5% of estimated revenue)	\$81,050
TOTAL	\$81,050
CPA FUND ACCOUNTS	
OPEN SPACE/RECREATION RESERVE	\$162,099
OPEN SPACE/RECREATION FY22 ROLLOVER	\$106,199
HISTORIC RESOURCE RESERVE	\$162,099
COMMUNITY HOUSING RESERVE	\$162,099
BUDGETED RESERVE	\$1,053,641
FUND BALANCE	\$353,863

FY23 AVAILABLE FUNDING,

In FY23, the City had **\$2,000,000** available for appropriation to project applications received in the three CPA categories: Open Space/Recreation, Community Housing, and Historic Resource categories. The breakdown of the \$2,000,000 included funds from the FY23 budget (\$1,620,988), the FY22 rollover in the Open Space/Recreation Reserve Fund (\$106,199), and monies from the Fund Balance (\$353,863). The CPC recommended **\$2,000,000** in appropriations in the three CPA categories to City Council.

7.2 | FY23 Project Proposals and CPC Review

In September 2022, the CPC received twenty-nine (29) Step I Eligibility Determination Forms for review. Two of the projects were determined not to be eligible for CPA funding. Twenty-seven (27) projects were invited to submit a Step II application.

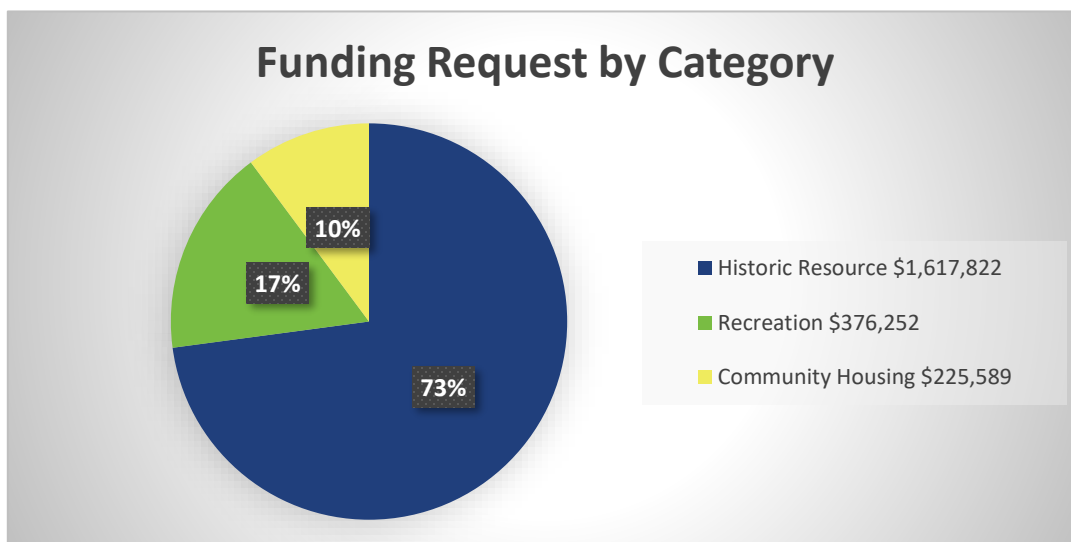
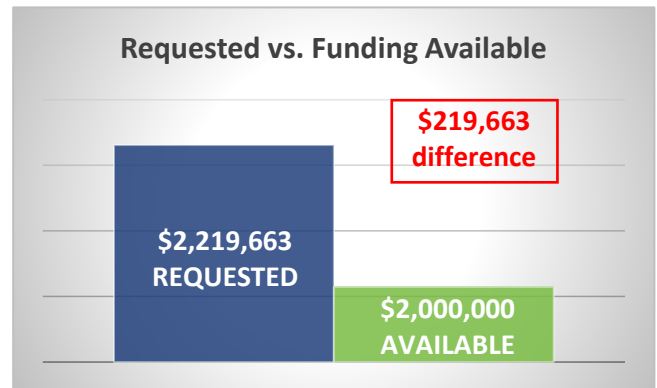
In November 2022, the CPC received twenty-four (24) Step II Project Applications, seeking a total of \$2,336,763 in funding for a variety of projects which would benefit the City. During the review process, one application was withdrawn due to a change in project scope and one application request amount was reduced by \$100,100. The final funding requests totaled \$2,219,663.

The CPC reviewed the project applications over the course of several months and held three virtual public meetings in January 2023 at which the applicants presented their projects to the CPC and the public in attendance. The meetings were also recorded and broadcast by New Bedford Cable Access.

In deciding how to allocate funds, the CPC evaluated projects against the priorities established in the FY23 Community Preservation Plan and took into consideration other relevant factors such as the amount of funding available, the diversity of funding categories, and the ability to fully or partially fund projects.

Project Funding Requests by Category

18 Historic Resource Projects	\$ 1,617,822
4 Open/Space Recreation Projects	\$ 376,252
1 Community Housing Projects	\$ 225,589
Overall funding requests totaled:	\$2,219,663



FY23 CPA SUBMITTED APPLICATIONS WITH CPC FUNDING RECOMMENDATIONS

PROJECT	APPLICANT	REQUEST	CPC RECOMMENDATION	CPA CATEGORY
Boys & Girls Club Playground	Boys & Girls Club	\$47,167	\$47,167	Recreation
Capitol Theater	CEDC	\$300,000	\$270,827	Historic Resource
City Clerk Record Preservation Phase II	City Clerk	\$50,000	\$50,000	Historic Resource
Coffin Howland House Feasibility Study	NB Parks Recreation and Beaches	\$20,000	\$4,000	Historic Resource
Ft. Taber Ft. Rodman 212 th FA Mural	Ft. Taber Ft. Rodman Museum	\$12,000	\$12,000	Historic Resource
Gallery X Stained Glass Windows	Gallery X, Inc.	\$90,000	\$90,000	Historic Resource
Historic Cemetery Public Tombs Structures Assessment	DPI/Planning Department	\$30,000	\$24,000	Historic Resource
Historic Tea Kettle Restoration	Selmar Eggars Property LLC	\$12,000	\$12,000	Historic Resource
James Arnold Mansion Mansard, Dormer and Cornice Repair	James Arnold Mansion, Inc.	\$220,000	\$175,000	Historic Resource
NB Fishing Heritage Center Fishing Community History Archive	NB Fishing Heritage Center, Inc.	\$25,000	\$25,000	Historic Resource
NB Free Public Library Historic Paintings Conservation	NB Free Public Library	\$15,000	\$15,000	Historic Resource
NB Free Public Library Mobile Archive Shelving and Cabinets	NB Free Public Library	\$101,767	\$101,767	Historic Resource
NB Whaling Museum Whaling Digitization of Logbooks and Journals	Old Dartmouth Historical Society	\$26,655	\$26,655	Historic Resource
Pine Hill Park – Mill Interpretive Overlook	Environmental/ Conservation Commission	\$45,000	\$45,000	Recreation
Ricketson Nature Center	NB Parks Recreation and Beaches	\$34,085	\$34,085	Recreation
Rotch-Jones-Duff House Roof Replacement	Rotch-Jones-Duff House & Garden Museum	\$48,000	\$48,000	Historic Resource
Rural Cemetery Gravestone Conservation	Dept of Public Infrastructure/ Dept of City Planning	\$48,000	\$48,000	Historic Resource
Rural Cemetery Office Building Rehabilitation	Dept of Public Infrastructure/ Dept of City Planning	\$100,000	\$100,000	Historic Resource
Sgt. Carney Academy Playground	Carney Academy/NBPS	\$250,000	\$250,000	Recreation
Sgt. William H. Carney House Porch	Martha Briggs Educational Club	\$27,500	\$27,500	Historic Resource
Strand Theater Restoration	Cape Verdean Association in New Bedford	\$300,000	\$240,000	Historic Resource
Temple Landing II	POAH United Front Four LLC	\$225,589	\$162,099	Community Housing
Thomas Department Store Restoration	Freedom Trust	\$191,900	\$191,900	Historic Resource
Riverside Park Pond	NB PRB/Groundworks	\$17,000	Withdrawn by Applicant	Recreation

7.3 | FY23 Funding Recommendations

Project Review

At its February 16, 2023 meeting, the CPC voted to recommend to the City Council a total expenditure of \$2,000,000 in CPA funds for twenty-three (23) projects. The CPC determined, among other factors, that the recommended projects met the goals expressed in the Community Preservation Plan, provided a public benefit, addressed a critical need, were shovel-ready, and demonstrated the ability to leverage non-CPA funds.

Due to a gap between requested funds and available funds, the CPC was unable to fully fund all the submitted project applications and based on lengthy and thoughtful deliberations voted on the following funding recommendations.

FY23 FUNDING RECOMMENDATIONS			
Project #	CPA CATEGORY: HISTORIC RESOURCES	FUNDING SOURCE	AMOUNT
2	Capitol Theater	Budgeted Reserve	\$270,827
3	City Clerk Record Preservation	Historic Resource	\$50,000
4	Coffin Howland House Feasibility Study	Budgeted Reserve	\$4,000
5	Ft. Taber Ft. Rodman 212 th FA Mural	Historic Resource	\$12,000
6	Gallery X Stained Glass Windows	Historic Resource	\$90,000
7	Historic Cemetery Public Tombs Structures Assessment	Historic Resource	\$10,099
		Budgeted Reserve	\$13,901
8	Historic Tea Kettle Restoration	Budgeted Reserve	\$12,000
9	James Arnold Mansion Exterior Preservation	Budgeted Reserve	\$175,000
10	NB Fishing Heritage Center Fishing Community History Archive	Budgeted Reserve	\$25,000
11	NB Free Public Library Historic Paintings Conservation	Budgeted Reserve	\$15,000
12	NB Free Public Library Archive Mobile Shelving	Budgeted Reserve	\$101,767
13	NB Whaling Museum Digitization of Logbooks & Journals	Budgeted Reserve	\$26,655
16	Rotch-Jones-Duff House Roof Replacement	Budgeted Reserve	\$48,000
17	Rural Cemetery Office Building Rehabilitation	Budgeted Reserve	\$100,000
18	Rural Cemetery Gravestone Conservation	Budgeted Reserve	\$48,000
20	Sgt. Carney House Porch	Budgeted Reserve	\$27,500
21	Strand Theater	Budgeted Reserve	\$78,037
		Fund Balance	\$161,963
23	Thomas Department Store Restoration	Fund Balance	\$191,900
Project #	CPA CATEGORY: RECREATION/OPEN SPACE	FUNDING SOURCE	AMOUNT
1	Boys & Girls Club Playground	Budgeted Reserve	\$47,167
14	Pine Hill Park – Interpretive Overlook	Budgeted Reserve	\$45,000
15	Ricketson Nature Center	Recreation	\$18,298
		Budgeted Reserve	\$15,787
19	Sgt. Carney Academy Playground	Recreation	\$250,000
Project #	CPA CATEGORY: COMMUNITY HOUSING	FUNDING SOURCE	AMOUNT
22	Temple Landing II	Community Housing	\$162,099
TOTAL FUNDING RECOMMENDED			\$2,000,000

FY23 FUNDING RECOMMENDATIONS BY WARD			
Ward	Number Submitted	Number Recommended	TOTAL RECOMMENDED
1	1	1	\$45,000
2	3	3	\$544,912
3*	1	1	\$12,000
4	7	7	\$636,766
5*	4	4	\$335,000
6	2	1	\$195,900
ALL	6	6	\$230,422

*One project has locations in Ward 3 and Ward 5 – Historic Cemetery Tombs Structures Assessment. Project is noted within each ward in the above table.

FY23 FUNDING RECOMMENDATIONS BY CATEGORY			
CPA Category	Number Submitted	Number Recommended	Total Recommended
Community Housing	1	1	\$162,099
Historic Resource	18	18	\$1,461,649
Recreation	4	4	\$376,252

7.4 | FY23 Funding Awards

On March 23, 2023, the CPC submitted its FY23 CPA Funding Recommendations to the City Council. After the submission, one applicant, Thomas Department Store Restoration, withdrew their project from consideration by the City Council.

On April 27, 2023, the City Council approved twenty-two (22) FY23 funding recommendations as submitted by the CPC for awards totaling \$1,808,100.

7.5 | State Reporting

Community preservation communities are required to submit three reports annually to the state's Department of Revenue (DOR). These reports are:

- Community Preservation Surcharge Report (Form CP-1) The form reports the amount of funds raised by a community's local CPA surcharge for the previous fiscal year and is used as the basis for the state's annual fall CPA trust fund matching distribution.
- Community Preservation Fund Report (Form CP-2) The form requires an accounting of all CPA revenues, expenditures in each CPA funding category, and an analysis of the community's CPA fund balance, including each CPA reserve account.
- Community Preservation Initiatives Report (Form CP-3) Each year, municipal staff must log into the CP-3 online database to enter new project data for the most recent fiscal year and update or correct existing data for previous years' projects

The FY22 CP-1 and CP-2 reports are included in the Appendix of this plan. The FY23 CP-1 and CP-2 will be filed in Fall 2023.



- DOR Reporting Forms – FY22 CP1 and CP2
- Public Hearing Comments – June 27, 2023
- Department of Revenue Allowable Use Chart
- U.S. Secretary of the Interior Standards for Rehabilitation
- FY24 Community Preservation Act Application Packet
 - Application Instructions
 - STEP I Eligibility Determination Form
 - STEP II Project Application

CP1
Community Preservation Surcharge Report - Fiscal Year 2022

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

Surcharge %	1.50%
Total Surcharge Committed to Collector for FY	1,299,622.54
Current Yr Surcharge Abatements/Exemptions	7,891.23
Prior Yr Surcharge Abatements/Exemptions	0.00
Net Surcharge Raised for FY	1,291,731.31
Additional Revenue Appropriated to CPF (Ch. 44, Sec. 3b1/2)	0.00
Total Net Surcharged Raised and Other Appropriated Revenue	1,291,731.31

Signatures
Board of Assessors
Completed by:
Pamela Davis, Interim Administrative Assistant , New Bedford , Pamela.Davis@newbedford-ma.gov 508-979-1440 9/26/2022 9:54 AM
Accounting Officer
Emily Arpke, City Auditor , New Bedford , Emily.Arpke@newbedford-ma.gov 508-979-1530 9/29/2022 9:04 AM

Documents
No documents have been uploaded.

CP2

Community Preservation Fund Report - Fiscal Year 2022

Surcharge % 1.50

1. Total fund balance from prior year (PY) report (Form CP-2)		3,508,329.00
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NEW REVENUES/OFS

2. Proceeds from bonds and OFS		
3. Collections from community preservation surcharge	1,271,186.43	
4. Distributions from State trust fund	526,711.00	
5. Earnings on investments	4,422.76	
6. Gifts, Grants, Donations	0.00	
7. Other, i.e. Interest, OFS appropriated to the fund-CH44B 3-b1/2 : CPA Lien Interest	2,139.76	
Total New Revenue/OFS		1,804,459.95

EXPENDITURES/OFU

8. Expenditures:		
a. Open Space		
b. Historic Resources	980,233.98	
c. Community Housing		
d. Other (Community Recreation)	395,756.16	1,375,990.14
9. Expenditures for Debt Service:		
a. Open Space		
b. Historic Resources		
c. Community Housing		
d. Other (Community Recreation)		0.00
10. Administrative Expenses	29,606.07	
11. Other		
Total Expenditures/OFU		1,405,596.21
Total Fund Balance June 30, 2022 (Detail Following)		3,907,192.74

CP2

Community Preservation Fund Report - Fiscal Year 2022

CITY/TOWN of New Bedford

Detail of Community Preservation Fund Total Fund Equity

Fiscal year ended June 30, 2022

1. Fund Balance Reserved for Encumbrances (3211)	1,413,524.00
2. Fund Balance Reserved for Expenditures (3240)	
3. Fund Balance Reserved for Open Space (3241)	148,436.00
4. Fund Balance Reserved for Historic Resources (3242)	547,559.02
5. Fund Balance Reserved for Community Housing (3243)	398,436.00
6. Fund Balance Reserved for Special Purposes (3280)	378,333.20
7. Fund Balance Reserved for Community Preservation Act (3320)/Undesignated (3590)	1,020,904.52
8. Total Community Preservation Fund Balance June 30, 2022 (Total must equal total fund balance page 1)	3,907,192.74
Has the community met the requirement to either appropriate or reserve for future appropriation at least 10% of the estimated annual fund revenue for open space, historic resources and community housing?	Y
If no, explain how the town plans to meet the requirement?	

Signatures

Accountant/Auditor

Completed by:

Emily Arpke, City Auditor , New Bedford , Emily.Arpke@newbedford-ma.gov 508-979-1530 | 10/26/2022 3:03 PM

Comments

No comments to display.

Documents

No documents have been uploaded.

COMMUNITY PRESERVATION ACT ALLOWABLE USES				
	Open Space	Recreational Land	Historic Resource	Community Housing
	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.	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 not include horse or dog racing or the use of land for a stadium, gymnasium or similar structure.	Building, structure, vessel, real property, document or artifact listed on the state register of historic places or determined by the New Bedford Historical Commission to be significant in the history, archeology, architecture or culture of the city or town.	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. Seideman v. City of Newton, 452 Mass. 472 (2008).	YES	YES	NO	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.	NO	NO	NO	Yes, includes funding for Affordable Housing Trust Fund
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.	NO unless acquired or created with CPA funds	YES	YES	NO unless acquired or created with CPA funds

COMMUNITY PRESERVATION NEEDS ASSESSMENT FY24

PUBLIC COMMENTS RECEIVED AT JUNE 27, 2023 MEETING and DURING PUBLIC COMMENT PERIOD

RECREATION/OPEN SPACE		
PUBLIC COMMENT		EXISTING IDENTIFIED PRIORITIES
1	No public comments received	

COMMUNITY HOUSING		
PUBLIC COMMENT		EXISTING IDENTIFIED PRIORITIES
1	No public comments received	

HISTORIC RESOURCE		
PUBLIC COMMENT		EXISTING IDENTIFIED PRIORITIES
1	Support the historic preservation of the William H. Carney Lodge No. 200, Inc. located at 293 Cottage Street	Protect, preserve, enhance, restore, and/or rehabilitate historical, cultural, architectural, or archaeological resources of significance, especially those resources that are endangered in that their survival may depend upon more than market forces or regulatory controls.

On June 27, 2023, the Community Preservation Committee held a public hearing at the New Bedford Free Public Library, Main Branch. The public was invited to attend and provide public comment for the FY24 CPA Plan until July 14, 2023. In addition to the Community Preservation Committee, two members of the public attended. One public comment was received during the public comment period.

CPA Historic Resource Projects

U.S. Secretary of the Interior's Standards for the Treatment of Historic Properties

The CPA Statute, in Section 2 Definitions, "Rehabilitation" states that Historic Resource projects funded through CPA must comply with the U.S. Secretary of the Interior's Standards for the Treatment of Historic Properties codified in 36 C.F.R. Part 68.

The Secretary of the Interior's Standards for Rehabilitation

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

Further information can be found at: <https://www.nps.gov/tps/standards/rehabilitation.htm>

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NEW BEDFORD COMMUNITY PRESERVATION COMMITTEE

FY24

COMMUNITY PRESERVATION ACT APPLICATION INSTRUCTIONS

STEP I Eligibility Form Deadline:

SEPTEMBER 27, 2023 by 12:00 p.m.

***DO NOT COMPLETE STEP II UNTIL STEP I
IS COMPLETED AND APPROVED***

STEP II Application Deadline:

NOVEMBER 17, 2023 by 12:00 p.m.

COMMUNITY PRESERVATION COMMITTEE
Department of City Planning
City Hall Room 303 | 133 William Street
(508)979-1488 cpa@newbedford-ma.gov

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STEP I Eligibility Determination Form

STEP II Project Application

- Application Cover Page
- Submission Checklist
- Project Narrative
- Project Management
- Project Financial Information
- Project Schedule
- Construction Project Budget (For construction projects only)



I. APPLICATION and REVIEW PROCESS TIMELINE

Funding applications are reviewed by the Community Preservation Committee (CPC) on an annual basis. The review process includes public meetings at which the applicants are invited to present their application. The CPC reviews and scores all applications before voting for the recommendations to be sent to City Council. The CPC submits to City Council the recommendations of projects to be funded, with the recommended amount and fund category. City Council can approve the recommendation; reduce the amount recommended; or reject the recommendation. The City Council approval process takes a **minimum** of two meetings of the Council. This timeframe cannot be accurately predicted: therefore, the project award date below is an estimate and could be subject to change.

FY24 APPLICATION CYCLE TIMELINE		
		TIMELINE/DEADLINE
	Interested organizations and individuals attend the FY24 Technical Workshop (strongly recommended)	SEPTEMBER 7, 2023 6:00 P.M. New Bedford Free Public Library Main Branch 3 rd Floor 613 Pleasant Street
	Applicants submit STEP I Eligibility Determination Form	Due by NOON on WEDNESDAY SEPTEMBER 27, 2023 ELECTRONIC SUBMISSION
	CPC responds to STEP I Eligibility Determination Form; invites eligible projects to complete STEP II Project Application	By October 6, 2023
	Applicants submit STEP II Project Application	Due by NOON on FRIDAY NOVEMBER 17, 2023
	CPC invites applicants to present their project to the committee and general public. CPC gathers public input at public meetings.	January 2024
	CPC submits recommendations to City Council	March 2024
	City Council votes on CPC recommendations	April-May 2024
	CPC issues award letters	May - June 2024
	Grant agreements executed	June 2024
	Grant awards available for disbursement	After July 1, 2024

II. APPLICATION STEPS

Application Overview

BEFORE YOU START: All applicants are strongly encouraged to thoroughly review the entire application packet instructions, Eligibility Determination Form, and Project Application. A review of the CPA Plan to learn more about CPA, the CPC, and the expectations that exist for a successful project is also strongly suggested. If you have any questions regarding your project's eligibility, the application process, or about CPA, please call or email the Community Preservation Act Manager at (508)979-1488 or CPA@NewBedford-MA.gov.

Due to the complexity of the CPA, the application is a two-step process. Project applicants must begin the application process by submitting a brief **STEP I Eligibility Determination Form**. The form is found in the application packet within the CPA Plan Appendix and on the Community Preservation Committee's website.

The **STEP I Eligibility Determination Form** enables a clear understanding as to whether a project is eligible under CPA legislation prior to the applicant submitting the **STEP II Project Application**. *This determination does not guarantee CPA funding will be recommended for a project; it is to determine if a project meets the basic requirements of the CPA legislation.* Please refer to the DOR CPA Allowable Use Chart on page 12 for guidance regarding category eligibility.

STEP 1 Submit Project Eligibility Determination Form

The CPC will review the Eligibility Determination Form and invite eligible projects to submit a **STEP II Project Application**. The CPC reserves the right to notify applicants as to their proposal's CPA eligibility after the deadline if the CPC requires a legal opinion to definitively determine eligibility.

DEADLINE Step I Submission

Applicants must submit an electronic copy of the form (fillable PDF available online) per the instructions provided **no later than NOON on Wednesday, SEPTEMBER 27, 2023**. *Late or incomplete forms will not be accepted.*

STEP 2 Submit Project Application

COMPLETE THIS STEP ONLY IF YOUR PROJECT IS INVITED TO SUBMIT A FULL APPLICATION

Applicants with projects determined to be eligible for CPA funding under **STEP I** will be invited to submit a **STEP II Project Application**. Please review all Application Instructions before beginning the application. Once submitted, an application may not be amended without an affirmative majority vote of the CPC.

Step II Submission DEADLINE

Project applications are due no later than NOON on Friday, NOVEMBER 17, 2023.

Applicants must submit to the Community Preservation Manager the following:

1. One digital copy, on a flash drive, of ALL application materials is **required**. Submission must include an original PDF file (**NOT a scanned PDF**) of the completed application form. **All attachments (in PDF form) and high-resolution copies of all photos (in JPEG form) must be saved as separate documents from the application.**
2. **FOR THE APPLICATION ONLY:** Please submit 12 double-sided, three-hole punched copies of the application. You do not need to include the cover page.

Late or incomplete applications will not be accepted. All supporting materials (budgets, designs, quotes, etc.) MUST be submitted with the application. No late submissions of these supporting materials will be accepted after the submission date. The CPC reserves the right to request additional materials during the review period.

III. APPLICATION REVIEW and RECOMMENDATION PROCESS

The following details the application review process, the procedure for final approval of funding by City Council.

1 CPC Evaluation of Applications, Public Review, and Recommendations

1. **APPLICATION REVIEW:** The CPC will review all project applications and evaluate each against the priorities established in its most recent Community Preservation Plan. In deciding how to allocate funds in any given funding round, the committee may also account for other relevant factors at the time the applications are being considered. These factors may include, but are not limited to, the amount of funding available; anticipated future balances; the distribution of past funds among the four eligible categories of projects; bonding obligations and debt service; the diversity of applicants; the applicants' history before the CPC including their past performance and compliance; and the ability to fund projects fully or partially. See page 10 for further information on the evaluation standards and criteria.
2. **PROJECT PUBLIC PRESENTATIONS:** The CPC will invite applicants or their representatives to appear before the committee to present their project application to the committee and the public. Each presentation will be followed by a question and answer period by the CPC with an opportunity for the public to provide comments in support or opposition to the project application.
3. **SITE VISITS:** When appropriate, the committee may ask to visit the site of the proposed project.
4. **DETERMINATION:** After reviewing, the CPC will issue one of three determinations for each project:

- **Recommended for funding** - The application has been selected by the CPC to be recommended to City Council with a funding amount and conditions will be submitted to the City Council for consideration. *City Council can approve, reject, or reduce the recommendation.*
- **Accepted for future consideration of funding** - The project is desirable but other projects were deemed higher priority. The application will not be recommended to the City Council *during the current round*. A funding recommendation may be considered in future rounds if funds become available. The applicant will not need to submit a new application for the project.
- **Not recommended for funding** - The applicant will be notified in writing the reason the project was not recommended for funding. This determination could mean:
 - The project was desirable but other projects were deemed higher priority and the CPC chose not to recommend funding at this time. The applicant will be invited to re-submit the STEP I Eligibility Determination Form in the next funding cycle; or
 - The project, as submitted, will not be reconsidered at subsequent funding rounds. If the applicant desires to resubmit, the application process must submit a new STEP I Eligibility Determination Form and it is recommended the new project proposal address any deficiencies in the initial application.

5. **CONDITIONS:** The CPC reserves the right to attach conditions, such as conservation or preservation restrictions, to its recommendations and to include any specifications the CPC deems appropriate to ensure CPA compliance and project performance. It is the practice of the CPC to require all applicants who receive funding for the historic preservation or rehabilitation of a building to place a preservation restriction on the building as a condition of receiving CPA funding. The CPC also requires a public access agreement where relevant. All land acquired with CPA funds must be perpetually preserved for the purpose for which it was acquired.

2 Grantee Review of Recommended Funding and Conditions

The CPC's funding recommendations shall be provided to each applicant prior to its submission to City Council to ensure that any conditions required by the CPC, as the result of its review and approval, are found to be acceptable to the applicant. Draft language for any property restriction may be provided to the applicant for review. See page 6, items 11-12, for details regarding property restrictions. Any substantial changes requested to the funding recommendation will need to be approved by the CPC prior to the Committee's recommendation to the City Council.

3 City Council Submission and Vote

The CPC will present its recommendations for funding to the City Council, which has the final authority to award funds from New Bedford's Community Preservation Act Fund. The City Council has the authority to approve a project, approve the project at a reduced funding level, or reject the project. Should the City Council vote to reduce recommended funding or reject a recommended project, the CPC will have an opportunity to respond and/or to adjust the scope or terms of the project prior to a final decision by the City Council, as established in the New Bedford Community Preservation Committee Ordinance.

4 Grant Agreement, Disbursement, and Monitoring of Funding

NON-CITY ORGANIZATIONS: The CPC, acting through the City, will execute a grant agreement with each non-city organization awarded CPA funds. The grant agreement will govern the use and disbursement of the funds. It will be tailored to each project but will include standard CPA Grant Agreement General Conditions. The Community Preservation Act Manager will monitor project progress and compliance and will coordinate disbursement of CPA funds according to the CPA Funds Disbursement Guidelines. The City reserves the right to establish a phased disbursement system with the Grantee to coincide with funded project phases with the exception of the final 10% of the project funds, which will be released upon completion of the project and submission of the Project Closeout Report.

CITY DEPARTMENTS: The CPC will execute a Memorandum of Agreement (MOA) with any city department awarded CPA funds. The MOA will govern the city departments' use of the funds.

5 CPA Funding Acknowledgement

CPA FUNDING ACKNOWLEDGEMENT: Projects receiving CPA funding will be required to credit this source of funding.

Signage: Upon commencement of the Project, all projects agree to post, in an appropriate location mutually acceptable to the applicant and the CPC, a *temporary* sign stating the project was funded through the City of New Bedford Community Preservation Act. If a project chooses to install a permanent sign or other form of public display acknowledging project funding sources and benefactors, the CPA must be included.

Written materials: All written materials including final reports, studies, press releases, brochures, etc., will acknowledge the receipt of CPA funding for the project.

Acknowledgment of the funding should read as: City of New Bedford Community Preservation Act

IV. GENERAL INFORMATION FOR ALL APPLICANTS

In preparing for the submission of these materials, applicants should be mindful of the following:

1. **ELIGIBLE APPLICANTS:** The applicant, or in the case of multiple applicants—at least one applicant for each project requesting CPA funding - must be representative of one of three categories:
 - a. City of New Bedford department or division
 - b. Organization legally registered in Massachusetts
 - c. Individual proposing a CPA eligible project on property they own themselvesAnyone interested in applying for CPA funding, but does not fall into one of these categories, will need to partner with an eligible co-applicant to serve as a fiscal conduit and to manage project finances.
2. **PROJECTS ON CITY PROPERTY:** The Community Preservation Committee requires the City of New Bedford be the **LEAD** applicant on all projects proposed on City property. Please refer to the **City Property Project Guidelines** on page 7. The co-applicant, if applicable, can be an organization or individual.
3. **MULTIPLE APPLICATIONS:** If an organization or city department is submitting multiple applications, applicant **must** indicate a priority ranking of projects.
4. **CERTIFICATE OF VOTE OF CORPORATION/TAX COMPLIANCE CERTIFICATION:** All non-municipal entities are required to complete and submit this form even if applying as co-grantee with a municipal department. Municipal departments do not need to submit this form. The **Certificate of Vote of Corporation** must be completed by the corporation's authorized member (i.e., Board President, Board Clerk). The person being authorized to sign cannot be the same person who is signing the certificate. The **Tax Compliance Certification** must be completed by the person authorized to sign by the Certificate of Vote of Corporation.
5. **OFF-CYCLE APPLICATIONS:** The CPC reserves the right to consider applications for funding outside of the annual funding cycle. Under extraordinary circumstances, the CPC may vote to accept applications that, because of market opportunities or other circumstances, require consideration outside of the normal funding cycle. Applicants who believe their circumstances call for such unusual action may contact the Community Preservation Manager to discuss the possible submission of an off-cycle application.
6. **SUPPLANTING:** CPA funds can be used to match other funding sources. However, **supplanting is not permitted**. CPA funds cannot be used to reimburse funds paid from other sources.
7. **QUOTES and COST ESTIMATES:** Applicants **must** obtain **at least two** professionally prepared, detailed quotes for project costs whenever possible. If such quotes are not available, detailed cost estimates prepared by a qualified professional may be used, provided the basis of the estimates is fully explained. This information **MUST** be submitted with the application and will not be accepted after the deadline unless requested by the CPC.
8. **MATCHING FUNDS:** Implementing cost-saving measures and leveraging other funding or in-kind donations is strongly encouraged.
9. **PROCUREMENT:** The state's procurement laws may apply to your project, so it is important to review the **Procurement Guidelines** on page 8 of these instructions. These laws apply to all projects occurring on city and state property.
10. **HISTORIC RESOURCE PROJECTS:** For these applications, documentation that the building, structure, vessel, real property, document, or artifact is listed on the State Register of Historic Places **or** has been determined by the New Bedford Historical Commission to be significant in the history, archeology, architecture, or culture of New Bedford is required. Please review the **Historic Resource Project Guidelines** on page 9 of these instructions. *Applicants should discuss need for determination with the city's Historical Commission before the application cycle begins.*

11. **ACQUISITION:** For acquisition of an interest in real estate, property value will need to be established through procedures “customarily accepted by the appraising profession as valid.” Applicants for acquisition projects are encouraged to include an appraisal from a qualified professional. CPA funds may be requested to pay for an appraisal, but this may delay a CPA funding award. Please include the estimated of the number of acres to be acquired if project is applying under the Open Space category.

12. **PROPERTY RESTRICTIONS:** If CPA funds are used to acquire any real property interest, a permanent restriction must be secured and approved by the appropriate state agency and filed at the Registry of Deeds. Restrictions are legal documents that place limitations on the use of a property. These restrictions apply to all future owners of the property and cannot easily be changed or removed by subsequent owners. The four restrictions used in CPA projects are:

- **Open Space Conservation and Outdoor Recreation Projects:** Conservation Restrictions will be approved by the MA Executive Office of Energy and Environmental Affairs (EOEEA)
- **Community Housing Projects:** Affordable Housing Restrictions will be approved by the MA Department of Housing and Community Development (DHCD)
- **Open Space Agricultural Projects:** Agricultural Preservation Restrictions will be approved by the MA Dept. of Agricultural Resources (DAR)
- **Historic Projects:** Preservation Restrictions will be approved by the Massachusetts Historical Commission.

The applicant will be responsible for all costs associated with the property restrictions including, but not limited to, legal fees associated with the review of the document on behalf of the applicant and Registry of Deeds recording fees. Applicants should incorporate the fees into the soft costs associated with their projects.

13. **PUBLIC DOCUMENTS:** All application materials will be posted on the city’s CPA website for public review. At the time of submission, applicants must notify the CPA Manager if any information included in their submission is confidential and should be redacted. Please redact any private financial information such as account numbers prior to submitting your application.

14. **QUESTIONS:** Contact the CPA Manager at CPA@newbedford-ma.gov or at (508) 979-1488 with any questions. For more information, applicants can also visit the City of New Bedford’s website at www.newbedford-ma.gov/planning/community-preservation/

City Property Project Guidelines

Proposing CPA Projects on City Property

The Community Preservation Committee requires the City of New Bedford be the lead applicant on all projects proposed on city property. A letter from the relevant city department confirming the department agrees to be the lead applicant on the project must be submitted along with the Step I Eligibility Determination Form. The partnering organization or individual will be the co-applicant for the project.

It is up to the discretion of the relevant city department to agree to be the lead applicant on the proposed project. City departments will make the determination of their participation on the project based on the alignment of the project with city priorities; the Master Plan; the Open Space and Recreation Plan (if applicable); connections with already planned work; funding availability; and/or staff availability to serve as project partners. The applicant will be required to contact the relevant city department to discuss the feasibility of the project and obtain department's willingness to partner on the proposed project and formal, written permission.

For capital improvement projects utilizing historic tax credits funding, the co-applicant must have a long term lease with the City for a project occurring on city owned property. The lease must satisfy the requirements of both the federal and state historic tax credit programs.

This requirement extends to all public land. If you are considering proposing a project on state owned land, please contact the relevant authority. A letter from the relevant governmental body confirming its status as the lead applicant on the project must be submitted along with the Step I Eligibility Determination Form.

PROCUREMENT REQUIREMENTS FOR ALL PROJECTS ON PUBLIC PROPERTY

The Community Preservation Act requires all projects implemented on public property, whether implemented by the City or a community group, follow state procurement and prevailing wage laws. Community groups proposing to manage a project on City property must have the capacity to follow these laws. More information is available in an article on the CPA and procurement laws from the Community Preservation Coalition and summary charts prepared by the Office of the Inspector General.

NOTE: The procurement and prevailing wage laws are complicated – each apply in various ways depending on circumstances of the situation and sometimes exemptions may apply. It is important to review the Procurement Guidelines for CPA projects (page 8) and the Massachusetts Inspector General's Office website.

CITY DEPARTMENTS MEMORANDUM OF AGREEMENT

The CPC will execute a Memorandum of Agreement (MOA) with each city department awarded CPA funds. The MOA will govern the departments' use of the funds. The co-applicant(s) will be included on the MOA.

Procurement Guidelines

PROCUREMENT LAWS

The procurement laws are multiple state statutes that deal with various aspects of municipal procurement including building construction, public works construction, design services, supplies, services, and real property. In addition, prevailing wage laws apply for construction projects undertaken by public entities in the state as well as to some limited services provided to the state. The procurement and prevailing wage laws are complicated – each apply in various ways depending on circumstances of the situation and sometimes exemptions may apply.

The Community Preservation Act Manager will assist CPA grantees to ensure the proper method of procurement is undertaken. For the purposes of describing the applicability of procurement laws to CPA projects, there are three main categories CPA projects could fall into: *capital improvement projects, the purchase of real property, and contracting for professional services*. Each of these three project categories must adhere to different procurement laws as explained in more detail below.

CAPITAL IMPROVEMENT PROJECTS: (MGL c.149 and c.30 §.39M) Capital improvement projects are “brick and mortar” projects such as creation of a new playground, restoration of a building, construction of housing, wetlands restoration, etc. The matrix below very generally describes how the procurement laws may apply to the various types of capital improvement projects, depending on who owns the property and who administers the project.

Property Owner	Project Administrator	Do procurement and prevailing wage laws apply?
Municipality/State/Other public entity	Municipality/State/Other public entity	YES
Municipality/State/Other public entity	Community Group (e.g., PTO, friends group, neighborhood association, etc.)	YES*
Private entity (non-profit organization, private citizen, etc.)	Private entity	NO
Municipally owned and leased by private entity	Private leasing entity	POSSIBLY**

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

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

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

CONTRACTING PROFESSIONAL SERVICES: (MGL c.7 § 44-57 and c.30B) Contracting professional services includes hiring a housing consultant, planner, appraiser, landscape architect, etc. MGL c.7 §44-57 applies when procuring design services for public building projects and establishes a designer selection process for construction projects in which the Design Fee is at least \$30,000.00 and the project will cost at least \$300,000.00. Prevailing wage does not apply to these types of design services. MGL c.30B applies to other professional services and establishes three monetary thresholds that trigger different selection and procurement procedures, with the most latitude established for contract amounts under \$10K. If a contract is between \$10K and \$50K, then three quotes must be solicited. And, for contracts at and over \$50K, sealed bids or proposals are required.

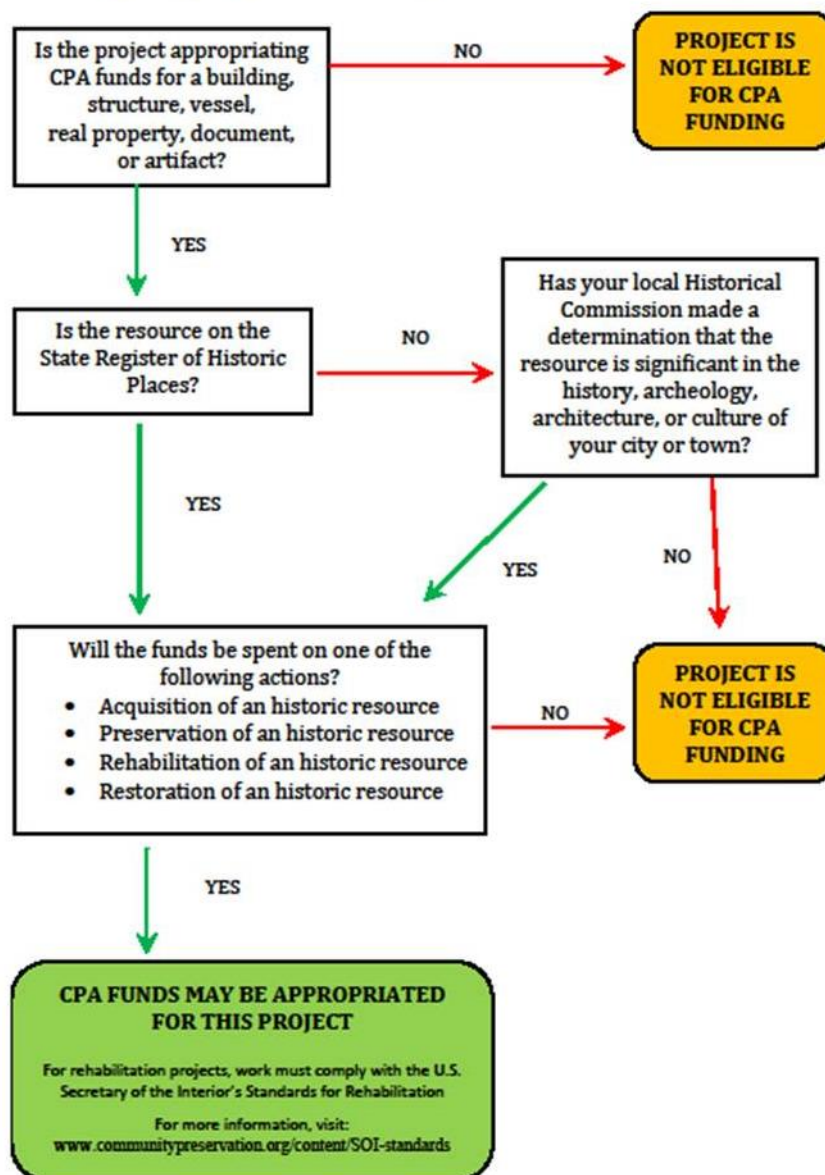
Historic Resource Project Guidelines

To be determined eligible for CPA funding, a historic resource must either be listed on the State Register of Historic Places **or** be determined “significant in the history, archaeology, architecture or culture” of New Bedford by the Historical Commission.

*You **do not** need to receive a determination of significance prior to CPC review of your Step I Eligibility Determination Form but it is highly recommended you begin the process with the New Bedford Historical Commission as soon as possible in order to receive the determination by the Step II application deadline.*

If you are unsure whether your property is on the State Register of Historic Places, please see the Massachusetts Cultural Resource Information System ([MACRIS](#)); note that properties in Local Historic Districts are automatically added to the State Register. If your proposed project is for a historic resource that is not listed on the State Register of Historic Places, you must submit the project proposal to the Historical Commission for a determination of significance.

Qualifying Historic Projects for CPA Funding



V. EVALUATION STANDARDS and CRITERIA

All projects must be eligible for the Community Preservation Act (CPA) funding according to the requirements described in the CPA legislation (Chapter 44B of Massachusetts General Laws).

Following are the Primary and Secondary criteria by which the CPC reviews and scores each application. The Community Preservation Committee gives preference to proposals which address as many of the following primary and secondary criteria as possible.

Primary Criteria

Projects will meet the primary criteria below:

- Consistency with the current Community Preservation Plan and other local planning documents;
- Capacity to serve multiple needs and populations;
- Could serve as a catalyst for transformative change;
- Addresses a long-standing or urgent need in the community or urgency to take advantage of a time-sensitive opportunity;
- Demonstrate a long-term, feasible strategy for ongoing maintenance of the CPA funded project.

Secondary Criteria

Projects are encouraged to meet one or more of the secondary criteria below:

- Leverages other public and private funding resources to the greatest extent possible (e.g. matching grant);
- Meets multiple CPA goals (i.e., blended projects);
- Capacity to serve a currently under-served population;
- Provides evidence of community support, such as endorsement letters from community groups, city departments and boards, or public officials;
- Improves accessibility for all members of the community;
- The applicant/applicant team has successfully implemented projects of similar type and scale or has demonstrated the ability and competency to implement the project as proposed.

Category Specific Criteria

In addition to the Primary and Secondary Criteria, the CPC also evaluates each application using the following category specific criteria.

Open Space Criteria

- Project protects drinking water quantity and quality;
- Project preserves and/or protects the city's variety of water resources;
- Project preserves and/or expands the city's network of parks, open spaces and trails;
- Project improves and/or protects the waterfront for recreational use, improves access to and/or enhances the aesthetic experience of the waterfront;
- Project provides opportunities for passive recreation and environmental education, including waterfront amenities;
- Project preserves strategic tracts of undeveloped land and parcels adjacent to existing permanently protected open space; and/or
- Project restores filled wetlands or otherwise degraded wetlands.

Historic Resource Criteria

- Project is located at a pivotal or visually prominent site whose location is an indicator for the future well-being (or decline) of a neighborhood;
- Project has the potential to benefit the community at large in terms of environmental/aesthetic contribution, historical value, social/cultural value, or economic development;
- The resource is of notable and distinctive architectural or cultural significance; and/or
- Resource building envelope requires immediate attention, putting resource at risk for significant damage or loss if unaddressed.

Community Housing Criteria

- Project demonstrates a housing need of an underserved population;
- Project utilizes a historic or existing building;
- Project incorporates universal access within its design;
- Project demonstrates a high degree of sustainability and low energy use; and/or
- Project provides affordable rental and affordable ownership opportunities.

Recreation Criteria

- Project expands the range of outdoor recreational opportunities available to residents of all ages and abilities;
- Project expands recreational opportunities for those segments of the population that are underserved given the current location of existing recreational lands and the unique needs of different segments of the community;
- Project promotes the creative use of greenways, waterways and other corridors, including connecting corridors to create safe and healthful non-motorized transportation and exercise opportunities;
- Project expands waterfront accessibility and use while promoting water-based recreational activities; and/or
- Preserves and enhances the aesthetic experience of the city's greenspace and waterways.

Community Preservation Act Funding Allowable Uses				
	Open Space	Recreational Land	Historic Resource	Community Housing
	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.	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 not include horse or dog racing or the use of land for a stadium, gymnasium or similar structure.	Building, structure, vessel, real property, document or artifact listed on the state register of historic places or determined by the New Bedford Historical Commission to be significant in the history, archeology, architecture or culture of the city or town.	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. Seideman v. City of Newton, 452 Mass. 472 (2008).	Yes	Yes	No	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.	No	No	No	Yes, includes funding for Affordable Housing Trust Fund
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.	NO unless acquired or created with CPA funds	Yes	Yes	NO unless acquired or created with CPA funds

CPA COMPARATIVE EVALUATION CRITERIA

NARRATIVE	CRITERION	HIGHLY ADVANTAGEOUS 5 Points	ADVANTAGEOUS 3 Points	LEAST ADVANTAGEOUS 1 Point	DOES NOT MEET CRITERIA 0 Points	POINTS
PRIMARY CRITERIA	Is the proposed project consistent with the current Community Preservation Plan and other local planning documents?					
	Does the project have the capacity to serve multiple needs and populations?					
	Could the project serve as a catalyst for transformative change?					
	Does the project address long-standing or urgent needs in the community?					
	Does the proposed project demonstrate a long-term, feasible strategy for ongoing maintenance of the CPA funded project?					
Quality of Application	Does the application clearly articulate the project in detail?					
	Does the application include a demonstration of critical need?					
	Does the project include evidence of broad community support?					
	Does the project include a feasible plan for long term maintenance?					
Capacity & Experience	Does the applicant have the experience and qualifications to meet their intended project goals?					
	Has the applicant demonstrated past experience in implementing a similar type project?					
	Does the application identify the names and roles of all project participants and their demonstrated experience and capacity to complete the project?					
Financial Administration	Leverages other public and private funding resources to the greatest extent possible (e.g. matching grant)?					
	Budget is reasonable and verifiable and includes evidence of funding commitments?					
	Applicant has demonstrated ability to oversee project funding?					
TOTAL POINTS						

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NEW BEDFORD COMMUNITY PRESERVATION COMMITTEE

STEP I

COMMUNITY PRESERVATION ACT ELIGIBILITY DETERMINATION FORM FY24

Eligibility Determination Form Deadline:

SEPTEMBER 27, 2023 by NOON

NO LATE SUBMISSIONS WILL BE ACCEPTED.

IMPORTANT! Please download and save pdf file before you begin to ensure work is saved.

Applicants must email a PDF of the form to CPA@newbedford-ma.gov *no later than noon on Wednesday, September 27, 2023*. Applicants will receive a confirmation email once staff has recorded the submission. If you do not receive an email, please contact the Community Preservation Act Manager at (508)979-1488.

COMMUNITY PRESERVATION COMMITTEE
Department of City Planning
City Hall Room 303 | 133 William Street
(508)979-1488 cpa@newbedford-ma.gov

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CITY OF NEW BEDFORD COMMUNITY PRESERVATION ACT FY24 Eligibility Determination Form

The purpose of Step I is to ensure all projects applying for Community Preservation Act funding meet the basic requirements of the CPA legislation. This form must be reviewed and approved by the Community Preservation Committee before the applicant submits a STEP II Project Application.

Please review the **ENTIRE** application packet before beginning the process. Submit an electronic copy (fillable PDF available at www.newbedford-ma.gov/planning/community-preservation/) no later than **NOON on Wednesday, September 27, 2023** to CPA@newbedford-ma.gov. Early submissions are encouraged. All applicants will be notified of their project eligibility determination no later than October 6, 2023. If your project is deemed eligible for Community Preservation Funds, you will be invited to submit a Step II Project Application.

The CPC requires the City of New Bedford be the **LEAD applicant** on all projects proposed on City property. **A letter from the relevant city department confirming this role must be submitted with this form to be reviewed for eligibility.**

PROJECT APPLICANT			
PROJECT TITLE			
PROJECT LOCATION			
APPLICANT ORGANIZATION NAME		Applicant is (check one): <input type="checkbox"/> city board or department <input type="checkbox"/> non-profit <input type="checkbox"/> private group/ individual Co-applicant is (check one): <input type="checkbox"/> city board or department <input type="checkbox"/> non-profit <input type="checkbox"/> private group/ individual	
CO-APPLICANT ORGANIZATION NAME (If applicable)			
CONTACT PERSON			
MAILING ADDRESS			
TELEPHONE NUMBER		EMAIL	

PROPERTY OWNERSHIP			
LEGAL PROPERTY OWNER OF RECORD			
IS THE OWNER THE APPLICANT?	<input type="checkbox"/> YES	<input type="checkbox"/> NO	
IF NO, DOES THE APPLICANT HAVE SITE CONTROL OR WRITTEN CONSENT FROM OWNER TO SUBMIT AN APPLICATION?	<input type="checkbox"/> YES	ATTACH DOCUMENTATION (REQUIRED)	
	<input type="checkbox"/> NO	PROJECT WILL BE DEEMED INELIGIBLE	
<i>NOTE: For non-city properties, projects receiving CPA funding may be required to file a restriction on the property at the Registry of Deeds. Refer to page 6 of application instructions for details.</i>			

CPA ALLOWABLE USES			
<i>(Please refer to the CPA Allowable Uses Chart included in the application instructions for more information)</i>			
Check the funding category/categories for your project. Projects may be eligible under more than one category.			
<input type="checkbox"/> OPEN SPACE	<input type="checkbox"/> HISTORIC RESOURCE	<input type="checkbox"/> RECREATION	<input type="checkbox"/> COMMUNITY HOUSING

PROJECT FUNDING – Estimated budget and estimated funding request can be updated on final application.

ESTIMATED TOTAL BUDGET FOR PROJECT	\$	ESTIMATED CPA FUNDING REQUEST	\$
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HISTORIC RESOURCE PROJECTS ONLY

IS THE RESOURCE IN A LOCAL HISTORIC DISTRICT AND/OR LISTED ON THE STATE REGISTER OF HISTORIC PLACES? YOU CAN CHECK DESIGNATION AT http://mhc-macris.net/	<input type="checkbox"/> YES	<input type="checkbox"/> NO
IF NO, HAS THE NEW BEDFORD HISTORICAL COMMISSION MADE A DETERMINATION THAT THE RESOURCE IS SIGNIFICANT?	<input type="checkbox"/> YES	<input type="checkbox"/> NO

PROJECT DESCRIPTION - Project scope cannot be changed once eligibility determination is provided to applicant.

Please provide a brief description of the proposed project scope only; how the project addresses an FY24 CPA Plan need, priority, and/or goal; and how the project meets the category definition(s) on the CPA Allowable Uses Chart.
Organization programs or history is not necessary for this step and should not be included in description.
(500-word count maximum- do not use less than 10pt font)

FOR CPC USE ONLY:

Date Eligibility Form Received: _____

Additional information is requested to make the Determination:

☐ Yes ☐ No

Date of Review by CPC: _____

The project described here was found by the CPC to be:

☐ Eligible ☐ Not Eligible

Date of Applicant Notification: _____



NEW BEDFORD COMMUNITY PRESERVATION COMMITTEE

STEP II

COMMUNITY PRESERVATION ACT PROJECT APPLICATION FY24

Project Application Deadline:

NOVEMBER 17, 2023 by NOON

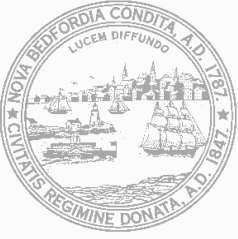
No late submissions will be accepted.

Applicants must submit this application no later than Noon on Friday, November 17, 2023. *Please review the entire application packet before completing the application.*

Applications will not be accepted--regardless of project eligibility--unless the STEP I Project Eligibility Determination Form was submitted and approved by the Community Preservation Committee.

COMMUNITY PRESERVATION COMMITTEE
Department of City Planning
City Hall Room 303 | 133 William Street
(508)979-1488 cpa@newbedford-ma.gov

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CITY OF NEW BEDFORD

COMMUNITY PRESERVATION ACT FY24

PROJECT APPLICATION

PROJECT INFORMATION – Please complete all questions			
PROJECT TITLE		WARD	
PROJECT LOCATION			
LEGAL PROPERTY OWNER OF RECORD			
CPA PROGRAM CATEGORY <i>(Select relevant categories for your project)</i>	<input type="checkbox"/> OPEN SPACE	<input type="checkbox"/> HISTORIC RESOURCE	
	<input type="checkbox"/> RECREATION	<input type="checkbox"/> HOUSING	
ESTIMATED START DATE		ESTIMATED COMPLETION DATE	
ONE SENTENCE DESCRIPTION OF PROJECT			

APPLICANT INFORMATION			
APPLICANT ORGANIZATION NAME			
APPLICANT IS <i>(Check only one)</i>	<input type="checkbox"/> CITY DEPARTMENT	<input type="checkbox"/> NON-PROFIT	<input type="checkbox"/> PRIVATE GROUP/CITIZEN
CO-APPLICANT ORGANIZATION NAME <i>(If applicable)</i>			
CO-APPLICANT IS <i>(Check only one)</i>	<input type="checkbox"/> CITY DEPARTMENT	<input type="checkbox"/> NON-PROFIT	<input type="checkbox"/> PRIVATE GROUP/CITIZEN
PROJECT CONTACT PERSON			
MAILING ADDRESS			
TELEPHONE NUMBER		EMAIL:	

BUDGET SUMMARY	
CPA FUNDING REQUEST <i>(must match CPA request-line 1 of Project Budget on page 8)</i>	\$
TOTAL BUDGET FOR PROJECT	\$

SIGNATURES		
<p>I/we attest that all information provided in this entire submission is true and correct to the best of my/our knowledge and that no information has been excluded which might reasonably affect funding. I/we authorize the Community Preservation Committee and/or the City of New Bedford to obtain verification from any source provided. I/we acknowledge and agree that a permanent restriction may be placed on the property as a condition of funding.</p>		
APPLICANT NAME (printed)	SIGNATURE	DATE:
CO-APPLICANT NAME (printed)	SIGNATURE	DATE:

Submission Checklist

The following items should be organized on your submitted flash drive in folders named for each applicable section below (e.g., Application, Financial, etc.). Please check off each item on this list if it is included in your submission packet. **Note: not all items will apply to each project.**

APPLICATION	
<input type="checkbox"/>	Application Information (page 1)
<input type="checkbox"/>	Submission Checklist (this page)
<input type="checkbox"/>	Narrative/Project Management/Category Specific Section/Financial (pages 3-7)
<input type="checkbox"/>	Project Schedule – Project Budget – Funding Sources Summary (page 8)
<input type="checkbox"/>	Construction Budget Summary – to be complete for construction projects ONLY (page 9)
<input type="checkbox"/>	Certificate of Vote of Corporation and Tax Compliance Certification (page 10) must be completed by both applicant and co-applicant. Form must be completed by authorized board member. *Certificate of Vote named person must be different person from signer of the certificate.
FINANCIAL	
<input type="checkbox"/>	1 written quote from a contractor and 1 cost estimate from an architect OR 2 written quotes from a contractor (Quotes must be submitted with application – late submissions will not be accepted)
<input type="checkbox"/>	Proof of secured funding (commitment letters or bank statements), if applicable. Please redact account numbers and any sensitive information.
OWNERSHIP/OPERATION (NON-CITY)	
<input type="checkbox"/>	If the applicant is not the owner, attach documentation of site control or written consent of owner to undertake the project. <i>Applications will not be reviewed without this documentation.</i>
<input type="checkbox"/>	Certificate of Good Standing (if operating as a corporation)
<input type="checkbox"/>	501(c)(3) certification (if operating as a non-profit)
<input type="checkbox"/>	Purchase & Sale agreement or copy of current recorded deed, if applicable.
COMMUNITY SUPPORT	
<input type="checkbox"/>	Letters of support from residents, community groups, city departments, boards or commissions, etc.
PLANS & REPORTS	
<i>The following plans and reports, if available, will strength your application. Submit in digital format only.</i>	
<input type="checkbox"/>	Renderings, site plans, engineering plans, design/bidding plans, specifications, and any MAAB variance requests.
<input type="checkbox"/>	Applicable reports (21E, Historic Structure Report, appraisals, survey plan, feasibility studies, etc.)
VISUAL	
<input type="checkbox"/>	Map of the property location (if applicable, show wetlands and wetland buffers, flood plain, water bodies, parks, open spaces, rails, and other features pertinent to the project). Applicants may use the City's interactive mapping website.
<input type="checkbox"/>	Photos of the project site (not more than four views per site) Digital copies <u>only</u> .
<input type="checkbox"/>	Catalog cuts (i.e. recreation equipment) if applicable.
FOR HISTORIC RESOURCE PROJECTS ONLY	
<input type="checkbox"/>	Documentation stating the project is listed on the State Register of Historic Places or a written determination from the New Bedford Historical Commission that the resource is significant in the history, archeology, architecture, or culture of New Bedford.
<input type="checkbox"/>	Photos documenting the condition of the property. Digital copies <u>only</u> .
<input type="checkbox"/>	Report or condition assessment by a qualified professional describing the current condition of the property, if available.
<input type="checkbox"/>	I/We have read the U.S. Secretary of the Interior's Standards for the Treatment of Historic Properties and understand that planning for and execution of this project must meet these standards.

PROJECT NARRATIVE

1 GENERAL NARRATIVE (1000 Character Maximum)

- Describe the project's location, the property involved and its proposed use.
- Describe the proposed scope of work.

2 COMMUNITY NEED (1000 Character Maximum)

- What community need(s) listed in the FY24 CPA Plan will this project address? How does the project benefit the public and what populations(s) will it serve? If it serves a population currently underserved, please describe.
- How does the project preserve and enhance the character of New Bedford?

3 GOALS & OBJECTIVES (1000 Character Maximum)

- Describe the project's goals and objectives. The objectives must be specific, measurable, achievable and realistic.
- How does the project meet the general and category-specific priorities outlined in the Community Preservation Plan or other current relevant planning documents?

4 MEASURING SUCCESS (1000 Character Maximum)

- *How will the success of this project be measured?*

5 COMMUNITY SUPPORT (1000 Character Maximum)

- *Explain the level of community support this project has received. If possible, please include letters of support from any groups or individuals who have endorsed this project.*

6 CRITICAL NEED (1000 Character Maximum)

- *Is this project of an urgent nature?*
- *Is there a deadline or factors not controlled by the applicant (i.e. opportunity for immediate acquisition, opportunity to leverage available non-CPA grant or other financial opportunity)?*
- *For historic resource applications only, is the property at risk for irreparable loss? If so, please include a condition assessment from a qualified professional if available.*

PROJECT MANAGEMENT

1 APPLICANT INFORMATION (1000 Character Maximum)

- Describe applicant. Is applicant a public entity, private non-profit, private for-profit, an individual, a partnership, or another type of entity? What is their history and background?
- Identify and describe the roles of all participants (applicants, architects, contractors, etc.) including the project manager.
- Describe any past projects of similar type and scale, or experience that demonstrates the applicant's ability to carry out this project.

2 PROJECT FEASIBILITY (1000 Character Maximum)

- List and explain further actions or steps required for completion of the project, such as environmental assessments, zoning or other permits and approvals, agreement on terms of any required conservation, affordability or historic preservation agreements, subordination agreements, and any known or potential barriers or impediments to project implementation.

3 PROJECT MAINTENANCE (1000 Character Maximum)

- Please explain the long-term maintenance plan for the completed project.

COMPLETE FOR HISTORIC RESOURCE PROJECTS ONLY

CPA Compliance (1000 Character Maximum)

- Describe how the proposed project complies with the [U.S. Secretary of the Interior's Standards for Rehabilitation](#), as required by the CPA legislation under the definition of rehabilitation.
- Describe how the applicant will ensure compliance with these standards as the project is ongoing, including an identification of who will make historic preservation determinations.

COMPLETE FOR PROJECTS WITH ACCESSIBILITY REQUIREMENTS ONLY

CPA Compliance (500 Character Maximum)

- Describe how the proposed project complies with the [ADA/MAAB Regulations](#).

COMPLETE FOR COMMUNITY HOUSING PROJECTS ONLY

CPA Compliance (500 Character Maximum)

- Describe how the proposed project complies with CPA affordability requirements (100% of AMI for New Bedford)
- Describe the number and types of units (e.g.: 1br, 2br).
- Provide a complete Development Budget and an Operating Budget (for rental properties).

PROJECT FINANCIAL INFORMATION

1 FINANCIAL INFORMATION (2000 Character Maximum)

- Describe all successful and unsuccessful attempts to secure funding and/or in-kind contributions, donations, or volunteer labor for the project. A bullet point list is acceptable.
- Will the project require CPA funding over multiple years? If so, provide estimated annual funding requirements.
- What is the basis for the total CPA request?
- How will the project be affected if it does not receive CPA funds or receives a reduced amount?

PROJECT SCHEDULE – PROJECT BUDGET – FUNDING SOURCE SUMMARY

PROJECT SCHEDULE

Please provide a project timeline below, noting all project milestones. Please note the City Council must approve all appropriations of CPA funds. Grant funding will not be available for disbursement until July 1, 2024.

	ACTIVITY	ESTIMATED DATE
PROJECT START DATE:		
PROJECT MILESTONE:		
50% COMPLETION STAGE:		
PROJECT MILESTONE:		
PROJECT COMPLETION DATE:		

ANTICIPATED PROJECT BUDGET

Please include a **complete itemized budget** of all project expenses, including the proposed funding source for each expense, with your application. Note: CPA funds cannot be used for maintenance.

If the project received CPA funds in another fiscal year, please include this amount on a separate line, not on line 1.

FUNDING SOURCES		EXPENSES				
		STUDY	SOFT COSTS*	ACQUISITION	CONSTRUCTION**	TOTAL
1	NEW BEDFORD CPA FY24***	\$	\$	\$	\$	\$
2		\$	\$	\$	\$	\$
3		\$	\$	\$	\$	\$
4		\$	\$	\$	\$	\$
5		\$	\$	\$	\$	\$
6		\$	\$	\$	\$	\$
7		\$	\$	\$	\$	\$
TOTAL PROJECT COSTS		\$	\$	\$	\$	\$

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

** Construction refers to new construction, rehabilitation, preservation, restoration work, and/or accessibility related expenses.

***New Bedford CPA (Line 1) amount should match the amount requested on the application cover page.

ANTICIPATED FUNDING SOURCE SUMMARY

Please explain the current status of each funding source (i.e., submitting application on X date, applied on X date, received award notification on X date, funds on hand, etc.). For sources where funding has been awarded or funds are on hand, please include documentation from the funding source (e.g., commitment letter, bank statement) in application packet.

FUNDING SOURCE		STATUS OF FUNDING
1		
2		
3		
4		
5		
6		
7		

CONSTRUCTION BUDGET
To be completed for construction projects only

ACTIVITY	CPA FUNDS	OTHER FUNDS	TOTAL
Acquisition Costs			
Land	\$	\$	\$
Existing Structures	\$	\$	\$
Other acquisition costs	\$	\$	\$
Site Work (not in construction contract)			
Demolition/clearance	\$	\$	\$
Other site costs	\$	\$	\$
Construction/Project Improvement Costs			
New Construction	\$	\$	\$
Rehabilitation	\$	\$	\$
Performance bond premium	\$	\$	\$
Construction contingency (30%)	\$	\$	\$
Other		\$	\$
Architectural and Engineering (See Designer Fee Schedule for guidance): https://www.mass.gov/files/design_fee_schedule-dsb_2015_2007.pdf			
Architect fees	\$	\$	\$
Engineering fees	\$	\$	\$
Other A & E fees	\$	\$	\$
Other Owner Costs			
Appraisal fees	\$	\$	\$
Survey	\$	\$	\$
Soil boring/environmental/LBP	\$	\$	\$
Tap fees and impact fees	\$	\$	\$
Permitting fees	\$	\$	\$
Legal fees	\$	\$	\$
Other	\$	\$	\$
Miscellaneous Costs			
Developer fees	\$	\$	\$
Project reserves	\$	\$	\$
Relocation costs	\$	\$	\$
Project Administration & Management Costs			
Marketing/management	\$	\$	\$
Operating/Maintenance	\$	\$	\$
Taxes	\$	\$	\$
Insurance	\$	\$	\$
Other	\$	\$	\$
TOTAL	\$	\$	\$

**CERTIFICATE OF VOTE OF CORPORATION AUTHORIZING
EXECUTION OF CORPORATE AGREEMENTS**

At a meeting of the Board of Directors of _____(organization) duly called and held on _____, 20____ at which a quorum was present and acting throughout, the following vote was duly adopted.

VOTED: That _____(person), the _____(title) of the corporation, be and hereby is authorized to affix the Corporate Seal, sign and deliver in the name and on behalf of the corporation, contract documents with the City of New Bedford, the above mentioned documents to include but not be limited to Bids, Proposals, Deeds, Purchase and Sales Agreements, Agreements, Contracts, Leases, Licenses, Releases and Indemnifications; and also to seal and execute, as above, surety company bonds to secure bids and proposals and the performance of said contract and payment for labor and materials, all in such form and on such terms and conditions as he/she, by the execution thereof, shall deem proper.

A TRUE COPY, ATTEST:

Name (printed)

_____(Affix Corporate Seal)
Signature

Title

Date

=====

TAX COMPLIANCE CERTIFICATION

Pursuant to Chapter 62C of the Massachusetts General Laws, Section 49A(b), I, the undersigned, authorized signatory for the below named contractor, do hereby certify under the pains and penalties of perjury that said contractor has complied with all laws of the Commonwealth of Massachusetts relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Signature

Print Name

Organization name

Federal Tax ID #

Date