

City of New Bedford Department of City Planning

Community Preservation Committee

FY24 Community Preservation Act Application Technical Workshop



















AGENDA

- Welcome & Introductions
- CPA Overview
- Understanding the CPA Application Process
- CPA Application Two-Part Process
 - STEP I Eligibility Determination Form
 - STEP II Project Application
- CPA Funding Award
- Post-Award
- Additional CPA Information



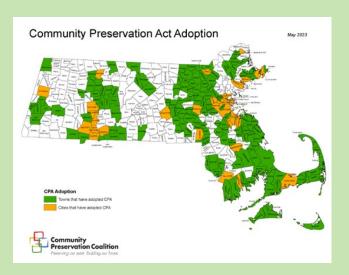






CPA Legislation

- Massachusetts state law (MGL c.44B) passed in 2000
- Considered a "smart growth" tool
- Enables cities and towns in MA to raise funds and create a local dedicated fund to:
 - Preserve open space
 - Preserve historic sites
 - Create community housing
 - Develop outdoor recreational facilities
- New Bedford voters adopted CPA in November 2014.



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









Community Preservation Committee

- Each community adopting CPA is required to establish a Community Preservation Committee (CPC) to administer the program.
- New Bedford's CPC consists of nine (9) volunteer members: four (4) members of the general public appointed by the Mayor, and (5) five required members from each of the following entities:

Conservation Commission Park Board

Historical Commission Planning Board

New Bedford Public Housing Authority

Community Preservation Committee					
NAME REPRESENTATION 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, Vice Chair	General Public	April 2024			









CPA Overview CPC Responsibilities

- Assess New Bedford's Community Preservation needs by soliciting input from city boards and commissions and holding an annual public hearing to gain public input;
- **Develop and maintain a community preservation plan** which establishes the committee's priorities for recommending to City Council the projects to receive CPA funding;
- Prepare an annual budget for the City Council, establishing how the committee intends to allocate annual CPA revenue;
- Make project recommendations to the City Council. Following a competitive application process, the committee makes recommendations to the City Council regarding the allocation of CPA funding. The City Council can approve, reject, or reduce the CPC's funding recommendations.









CPA Sources of Funding

CPA is financed by a voter-approved property tax surcharge along with matching funds from the statewide CPA Trust Fund:

Local

A 1.5% surcharge is paid by residential and commercial property owners annually (included in real estate tax bills).

State

The state's CPA Trust Fund provides annual matching funds, distributed according to a formula that ranges from 5% to 100% of what is raised locally. In FY24, the projected match is 20-25%.

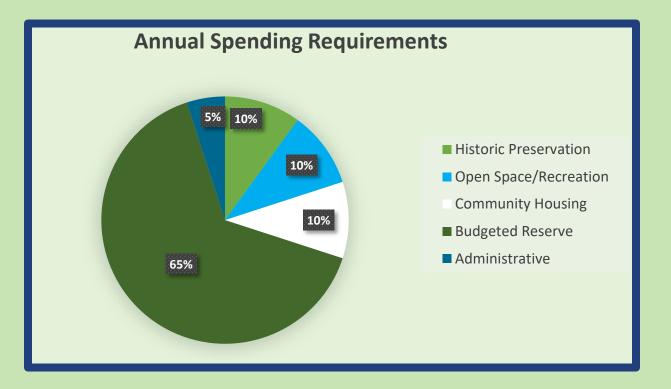








CPA Overview CPA Budget



<u>CPA Reserve Funds:</u> The Community Preservation Committee 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.









CPA Budget

What's available in FY24?

Each year, the Community Preservation Committee must recommend an **annual budget** to the New Bedford City Council for their vote to reserve funding for the Community Preservation Fund.

CPA AVAILABLE FUNDS FY24			
REVENUE			
LOCAL SURCHARGE (estimated)	\$1,271,186		
STATE MATCH (estimated)	\$317,796		
FUND BALANCE	\$240,462		
HISTORIC RESOURCES RESERVE	\$250,004		
TOTAL REVENUE	\$2,000,000		
EXPENDITURES			
PROGRAM ADMINISTRATION	\$79,449		
(5% of estimated revenue)			
TOTAL EXPENDITURES	\$79,449		
TOTAL AVAILABLE FOR FY24	\$2,000,000		









FY24 Available Funding

Total FY24 Project Funding Available \$2,000,000

Open Space & Recreation \$ 158,899

Historic Resources \$408,903 Community Housing \$158,899

Budgeted Reserve \$ 1,032,836

Fund Balance \$240,463









CPA Overview Eligible Projects

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

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 may include, but are not limited: 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 fully or partially fund projects.









Project Category: Open Space

CPA funds may be spent on the acquisition, creation, and preservation of open space; also for the rehabilitation or restoration of any open space which was acquired using CPA funds.

Open space is defined as, but not limited to:

- 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













Project Category: Recreation

CPA funds may be spent on **outdoor** passive or active recreation.

Outdoor passive or active recreation includes, but is not limited to, the use of land for:

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

CPA funds cannot be used for maintenance; annual operating expenses; stadiums or gyms; horse or dog racing facilities; nor for artificial turf for athletic fields.

Only capital improvements are allowed.













Project Category: Historic Resource

CPA funds may be spent on the acquisition, preservation, rehabilitation and restoration of historic resources.

A historic resource is defined as a building, structure, vessel, real property, document or artifact that is either:

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

For rehabilitation projects, work must comply with *U.S. Secretary of the Interior's Standards for Rehabilitation*.

Questions about a resource's status should be sent to Anne.Louro@NewBedford-MA.gov.













Project Categories: Community Housing

CPA funding may be spent on housing for low- or moderate-income housing for individuals and families including low/moderate 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.













Restrictions

- Real property interest acquired using CPA funds requires a permanent restriction to ensure that the property continues to be used for its applicable CPA purpose.
- Restriction are legal documents filed at the Registry of Deeds that place limitations on the use of the property.
- These restrictions apply to all future owners of the property and can't easily be changed or removed by subsequent owners.

Open Space Conservation and Outdoor Recreation Projects:

The Conservation restriction will be approved by the MA Executive Office of Energy and Environmental Affairs (EOEEA)

Community Housing Projects:

The Affordable Housing Restrictions will be approved by the MA Dept. of Housing and Community Development (DHCD)

Open Space Agricultural Projects:

The Agricultural Preservation Restrictions will be approved by the MA Dept. of Agricultural Resources (DAR)

Historic Projects:

Perpetual Preservation Restrictions will be approved by the MA Historical Commission.



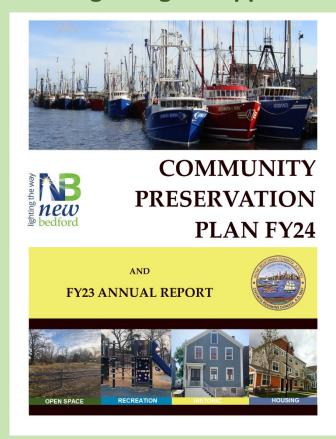






FY24 CPA Plan

The FY24 CPA Plan is on the CPA page of the City's website. It is highly recommended an applicant read through the entire Plan before beginning the application process.











Understanding the CPA Application Process

- CPA funding is awarded on a yearly basis with an annual application process for projects.
- Two-part application process includes:

1. STEP I Project Eligibility Determination

The Project Eligibility Determination form establishes a clear understanding as to whether a project is eligible under CPA regulations prior to submitting the comprehensive Project Application.

2. STEP II Project Application

Applicants whose projects are deemed eligible for CPA funding under Step 1 will be invited to submit a full application.









Understanding the CPA Application Process

FY24 Annual Funding Application and Review Process

	STEP	TIMELINE/DEADLINE
1	Interested organizations and individuals attend the FY24 Technical Workshop (strongly recommended)	September 7, 2023
2 a	Applicants submit STEP I Eligibility Determination Form	Due by NOON on September 27, 2023 ELECTRONIC SUBMISSION
2b	CPC responds to STEP I Eligibility Determination Form	By October 6, 2023
3	Applicants submit STEP II Project Application	Due by NOON on November 17, 2023
4	CPC invites applicants to present their project to the committee and general public; CPC gathers public input at meeting.	January 2024
5a	CPC submits recommendations to City Council	March 2024 (subject to change)
5b	City Council votes on CPC recommendations	April/May 2024 (subject to change)
6	CPC issues award letters	June 2024
7	Grant agreements executed	June 2024









Who can apply for CPA funding?

Ownership

- Property Owner
 Documentation of ownership-recorded deed or Purchase & Sale
 Agreement
- Non-Property Owner
 Written consent of owner to undertake project
- Non-Profit501(c) Certification
- Corporation
 Certificate of Good Standing
- City Property
 Lead applicant <u>must</u> be a City agency/department

IMPORTANT!

Anyone interested in applying for CPA funding who does not fall into one of these categories will need to partner with an eligible co-applicant who will serve as the fiscal conduit and be responsible for managing project finances.









Step I - Eligibility Determination



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				100	
APPLICANT ORGANIZATION NAME CO-APPLICANT					Applicant is (check one): ☐ city board or department ☐non-profit
ORGANIZATION NAME (If applicable)					□private group/ individual Co-applicant is (check one):
CONTACT PERSON					☐ city board or department☐ non-profit
MAILING ADDRESS					private group/individual
TELEPHONE NUMBER		EMAIL			
PROPERTY OWNERSHIP					
LEGAL PROPERTY OWNER OF RE	ECORD				
IS THE OWNER THE APPLICANT?	? YES		[NO	
IF NO, DOES THE APPLICANT HA	AVE SITE CONTROL OR W	RITTEN	YES ATT	ACH DOC	JMENTATION (REQUIRED)
CONSENT FROM OWNER TO SU	BMIT AN APPLICATION?		NO PRO	JECT WILL	BE DEEMED INELIGIBLE
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.					
CPA ALLOWABLE USES (Please refer to the CPA Allowable Uses Chart included in the application instructions for more information)					
Check the funding category/categories for your project. Projects may be eligible under more than one category.					
OPEN SPACE	HISTORIC RESOURCE	RECF	REATION	co	DMMUNITY HOUSING

Community Preservation Act Eligibility Determination Form FY24

Key Items

- ✓ Ability to receive funds
- ✓ Site control or written consent from owner
- ✓ City must be LEAD applicant on all projects proposed on City property
- ✓ Determination of Historic Significance
- ✓ Required property restrictions
- ✓ Word count maximum no 8pt font!

IMPORTANT!

Full applications will not be accepted--regardless of project eligibility—until the Project Eligibility

Determination Form has been submitted and approved by the Community Preservation Committee.

Deadline for Step 1: WEDNESDAY, September 27, 2023 by NOON

No late submissions accepted Notifications will be sent on or before October 6, 2023.









Step I - Eligibility Determination

ESTIMATED TOTAL	\$	ESTIMATED CPA	\$	
BUDGET FOR PROJECT		FUNDING REQUEST		
HISTORIC RESOURCE PRO	DJECTS ONLY			
IS THE DESCRIPTION AND A	SAL LUSTORIS DIS	TRUST A NO /OR LUSTED ON THE STATE OF	CUSTED OF	
		TRICT AND/OR LISTED ON THE STATE RE IATION AT <u>http://mhc-macris.net/</u>	YES YES	☐ NO
IF NO, HAS THE NEW BED		COMMISSION MADE A DETERMINATIO	N THAT YES	□ No
THE RESOURCE IS SIGNIF	ICANT!			
		not be changed once eligibility determin		
		oposed project scope only; how the pro roject meets the category definition(s) :		
		not necessary for this step and should i	not be included in description	n.
		(500-word count maxi	mum- do not use less than I	10pt font
FOR CPC USE ONLY:				
	eived:	Additional informati	ion is requested to make the	
	eived:	Additional informati Determination:	ion is requested to make the	ē
FOR CPC USE ONLY:	eived:	Determination:	ion is requested to make the Yes □ No	e
	eived:	Determination:	Yes	
Date Eligibility Form Reco	eived:	Determination:	Yes \(\square\) No ed here was found by the CF	
Date Eligibility Form Reco		Determination:	Yes	
Date Eligibility Form Reco		Determination:	Yes \(\square\) No ed here was found by the CF	

Key Items

- ✓ Ability to receive funds
- ✓ Site control or written consent from owner
- ✓ City must be LEAD applicant on all projects proposed on City property
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Project Application Form

CITY OF NEW BEDFORD COMMUNITY PRESERVATION ACT FY24 PROJECT APPLICATION						
PROJECT INFORMATION – Please comple	to all questions					
PROJECT TITLE	te an questions				WARD	
PROJECT LOCATION					WARD	_
LEGAL PROPERTY OWNER OF RECORD						_
	☐ OPEN SPACE		HISTORIC RESC	TURCE		_
CPA PROGRAM CATEGORY (Select relevant categories for your project)	RECREATION		HOUSING	JUNCE		_
ESTIMATED START DATE	☐ RECREATION	ECTINA	ATED COMPLETION	DATE		_
ONE SENTENCE DESCRIPTION OF PROJECT		ESTIIVI	ATED COMPLETION	DATE		_
APPLICANT INFORMATION						
APPLICANT ORGANIZATION NAME						
APPLICANT IS (Check only one)	CITY DEPARTMEN	и П пом	I-PROFIT	PRIVATE	GROUP/CITIZEN	N.
CO-APPLICANT ORGANIZATION NAME (If applicable)	- CITI DETAKTIVE			THIVAL	diodifemen	_
CO-APPLICANT IS (Check only one)	CITY DEPARTMEN	иои 🗌 ти	I-PROFIT	PRIVATE	GROUP/CITIZEN	N
PROJECT CONTACT PERSON						
MAILING ADDRESS						
TELEPHONE NUMBER	EM	AIL:				
BUDGET SUMMARY						
CPA FUNDING REQUEST		\$				
(must match CPA request-line 1 of Project Bo TOTAL BUDGET FOR PROJECT	uaget on page 8)	\$				_
SIGNATURES						
I/we attest that all information provided in the information has been excluded which might and/or the City of New Bedford to obtain ver restriction may be placed on the property as	reasonably affect fund ification from any sou	ling. I/we aut irce provided	horize the Community	Preserva	tion Committee	
APPLICANT NAME (printed)	SIGNAT				DATE:	
CO-APPLICANT NAME (printed)	SIGNAT	URE			DATE:	_

Key Items

- ✓ Complete, detailed, clear, and concise narratives character count;
- ✓ Proposed Project meets goals set forth in the Preservation Plan;
- ✓ Prioritize Multiple Applications
- ✓ Application submission **REQUIRES**:
 - (1) digital copy on flash drive of all application materials
 - 12 double-sided, three-hole punched copies of APPLICATION ONLY

Deadline for Step II:
FRIDAY November 17, 2023
by NOON

Late or incomplete submissions will not be considered









Project Submission Checklist

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.

APPL	ICATION
П	Application Information (page 1)
Ħ	Submission Checklist (this page)
Ħ	Narrative/Project Management/Category Specific Section/Financial (pages 3-7)
ī	Project Schedule – Project Budget – Funding Sources Summary (page 8)
ī	Construction Budget Summary – to be complete for construction projects ONLY (page 9)
	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.
FINA	NCIAL
	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)
	Proof of secured funding (commitment letters or bank statements), if applicable. Please redact account numbers and any sensitive information.
OWN	IERSHIP/OPERATION (NON-CITY)
	If the applicant is not the owner, attach documentation of site control or written consent of owner to undertake the project. Applications will not be reviewed without this documentation.
	Certificate of Good Standing (if operating as a corporation)
$\overline{\Box}$	501(c)(3) certification (if operating as a non-profit)
	Purchase & Sale agreement or copy of current recorded deed, if applicable.
сом	MUNITY SUPPORT
	Letters of support from residents, community groups, city departments, boards or commissions, etc.
	IS & REPORTS
The fe	ollowing plans and reports, if available, will strength your application. <u>Submit in digital format only.</u>
	Renderings, site plans, engineering plans, design/bidding plans, specifications, and any MAAB variance requests.
	Applicable reports (21E, Historic Structure Report, appraisals, survey plan, feasibility studies, etc.)
VISU	AL
	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.
	Photos of the project site (not more than four views per site) Digital copies only.
	Catalog cuts (i.e. recreation equipment) if applicable.
FOR	HISTORIC RESOURCE PROJECTS ONLY
	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.
	Photos documenting the condition of the property. Digital copies only.
	Report or condition assessment by a qualified professional describing the current condition of the property, if available.
	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.

Key Items

- ✓ Create folders on flash drive for each category. Save requested documents under proper category:
 - ✓ Application
 - √ Financial
 - ✓ Ownership
 - ✓ Community Support
 - ✓ Plans & Reports
 - √ Visual
 - ✓ Historic Resource (only if a historic resource project)

Deadline for Step II: FRIDAY November 17, 2023 by NOON

Late or incomplete submissions will not be considered









Project Narrative

- 1. General Description of Project
- 2. Community Need and Benefit
- 3. Goals & Objectives
- 4. Measuring Success
- 5. Community Support
- 6. Critical Need

Project Management

- 1. Applicant Information
- 2. Project Feasibility
- 3. Project Maintenance

Category Specific Project

- 1. Historic Rehabilitation Requirements
- 2. ADA Requirements
- 3. Community Housing Requirements

Project Financial Information

- 1. Details about funding
- 2. Project Schedule
- 3. Project Budget
- 4. Construction Budget











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Community Preservation Act Project Application FY23









Project Narrative

- 1. General Description of Project
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Project Management

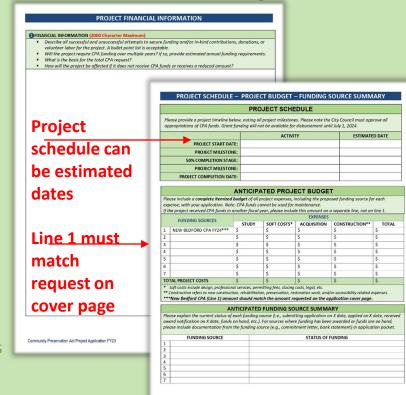
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Project Financial Information

- Details about funding
- 2. Project Schedule
- 3. Project Budget
- 4. Construction Budget



- Completed Budget Form;
- At least 2 **detailed** quotes or cost estimates;
- Matching or leveraging other funding sources is strongly encouraged;
- Proof of secured funding if applicable;
- No supplanting- CPA funds cannot be use for reimbursement.









Construction Projects

- Submit a construction budget;
- Submit renderings, engineering plans, design and bidding plans, and specifications. <u>DIGITAL copies only</u>

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 con	tract)		***
Demolition/clearance	\$	\$	\$
Other site costs	\$	\$	\$
Construction/Project Improvemen	nt Costs	d.	*
New Construction	\$	\$	\$
Rehabilitation	\$	\$	\$
Performance bond premium	\$	Ś	Ś
Construction contingency (30%)	\$	\$	S
Other	1	Ś	Ś
Architectural and Engineering (Sec https://www.mass.gov/files/design_fee_s			
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	\$	\$	Ś
Other	\$	\$	Ś
Miscellaneous Costs			
Developer fees	\$	\$	\$
Project reserves	\$	\$	\$
Relocation costs	\$	\$	\$
Project Administration & Manage	ment Costs	1	
Marketing/management	Ś	Ś	\$
Operating/Maintenance	Ś	Ś	Š
Taxes	\$	\$	\$
Insurance	\$	\$	\$
	\$	\$	\$
Other			

Community Preservation Act Project Application FY23









Certificate of Vote of Corporation and Tax Compliance Certification

CERTIFICATE OF VOTE OF CORPORATION AUTHORIZING EXECUTION OF CORPORATE AGREEMENTS

	organization) duly calle	
adopted.	was present and acting throughout, the following	vote was daily
hereby is authorized to affix the Corporate Seal, s documents with the City of New Bedford, the abo Proposals, Deeds, Purchase and Sales Agreement: Indemnifications; and also to seal and execute, as	ign and deliver in the name and on behalf of the co ove mentioned documents to include but not be lim s, Agreements, Contracts, Leases, Licenses, Release a above, surety company bonds to secure bids and p por and materials, all in such form and on such term	ited to Bids, s and proposals and the
A TRUE COPY, ATTEST:		
Name (printed)		
	(Affix Corporate Seal)	
Signature		
Title	Date	
	MPLIANCE CERTIFICATION	
the below named contractor, do hereby certify ur	eneral Laws, Section 49A(b), I, the undersigned, aut inder the pains and penalties of perjury that said cor Massachusetts relating to taxes, reporting of employ support.	ntractor has
Signature	Print Name	
Organization name	Federal Tax ID #	
Date		40
Community Preservation Act Project Application FY23		10

All non-municipal applicants must complete these forms. Municipal applicants do not need to complete.

Certificate of Vote: The authorized person named must be different than the person attesting the form AND must be the person signing the application.

Tax Compliance: Must be completed by the authorized person.









Procurement

Capital Improvement Projects (MGL c.149 & c.30 § 39M)

Property Owner	Project Administrator	Do Procurement & 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)	YES
Private entity (non-profit organization, private citizen, etc.)	Private entity	NO
Municipally owned and leased by private entity	Private leasing entity	POSSIBLY

Acquisition of Real Property

Under CPA, the City is exempt from MGL c.30B – but must get an appraisal prior to acquisition.

Contracting Professional Services

MGL c.7 § 44-57 – applies to public building projects, varies based on construction costs. Prevailing Wage: NO

MGL c. 30B – other professional services with varying thresholds and procedures.









CPC Review

What is the CPC looking for in a project?

- ✓ Is the project eligible for CPA funding?
- ✓ Does the project have a public benefit?
- ✓ Does the project align with the Community Preservation Act Plan?
- ✓ Is the project a good use of public resources?









CPC Application Review & Public Meeting

Application Review

The CPC members receive the applications in November to begin their individual review prior to the public presentations in January. The members evaluate each application for the following:

- ✓ Application is complete;
- ✓ Proposed project meets the Primary Evaluation Criteria;
- ✓ Proposed project meets one or more of the Secondary Evaluation Criteria;
- ✓ Proposed project meets one or more of the category goals and priorities;
- ✓ Proposed project is sufficiently developed in terms of the work plan and merits further consideration.

An application's successful selection will be based upon an evaluation of the information and materials submitted.

Public Presentation

Applicants will be given an opportunity at a public meeting in January to present the project and respond to questions from the CPC. The public will also have an opportunity to express their support or opposition to any project.









CPC Review

General Evaluation Criteria

Primary Criteria: Projects must meet the primary criteria.

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

<u>Secondary Criteria</u>: Projects are encouraged to meet one or more of the secondary criteria.

- Leverages public and private funding to the greatest extent (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 has successfully implemented projects of similar type and scale, or has demonstrated the ability and competency to implement the project.









CPC Recommendations

For each application, the CPC will issue one of three determinations:

Recommended for funding

Application has been selected and a funding amount will be submitted to the City Council for approval. Note: This does not necessarily mean the total amount requested in the application will be recommended for funding. The CPC may also include conditions as part of its funding recommendation.

Accepted for future consideration

Typically, this means the project is desirable but other projects were deemed higher priority and the CPC chose not to recommend funding during this round. The application will not be recommended to the City Council for funding approval *during the current round*. However, a funding recommendation will be considered at subsequent funding rounds if funds become available. The applicant will not need to submit a new application.

Not recommended for funding

The applicant will be notified in writing the reason the project was not recommended for funding. The application, as submitted, will not be reconsidered at subsequent funding rounds. If the applicant desires to resubmit a project proposal, the application process must begin with a new Eligibility Determination Form. It is recommended the new project proposal be a significant change over the initial proposal.









CPA Funding Award

Grantee Review Of Recommended Funding & Conditions

Notification

The CPC will notify applicants once it has voted on which projects will be recommended to the City Council for funding. Applicants can attend the City Council Finance Committee meeting and will be informed by the CPC of the meeting date.

Funding Conditions

The CPC will provide its recommendation to City Council with any funding conditions it will require of the project. Applicants will be given an opportunity to review conditions prior to submission to City Council.

Changes

Any substantial changes requested to the funding recommendation by the applicant will need to be approved by the CPC prior to the Committee's recommendation to the City Council.









CPA Funding Award

City Council Submission & Vote

The CPC will present its final recommendations for funding to the City Council.

The City Council has the final authority to award CPA funds and can:

- Approve recommendations of the CPC;
- Reject recommendations of the CPC; or
- Reduce the amount recommended by the CPC.

If a project recommendation is rejected or reduced by the City Council, the CPC is provided 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.









Post-Award

CPA Grant Agreements with Non-City Organizations

Grant Agreements/Memorandum of Agreement

- Executed between the CPC and the organization. The grant agreement will govern the use and disbursement of the funds and will address a range of items including expectations, conditions, requirements and the project scope.
- Necessary Documentation
 - Certificate of Good Standing
 - 501(c)(3) certification (if applicable)

Monitoring

- <u>Project Status Reports:</u> Recipient shall submit progress reports to the CPC every three months.
- Final Report: Due 30 days after project completion

Funding Disbursement

• Phased disbursement schedule with the exception of the final 10% of the project funds, which will be released upon completion of the project.

Recapture Provisions

• Failure to comply with the terms of the Grant Agreement shall result in a total forfeiture of remaining Grant Funds which have not yet been disbursed and a requirement to repay all previously disbursed Grant Funds.









CPA Funding Acknowledgement

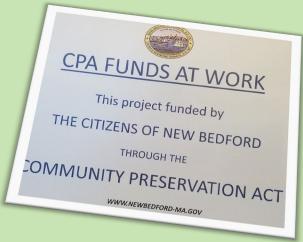
CPA Funding Acknowledgement

Projects receiving CPA funding will be required to credit this source of funding in funded final reports, studies, promotional materials, press releases, and other public acknowledgements of funders.

If applicable, temporary signage stating the project received funding through the City of New Bedford's Community Preservation Act must be posted in a visible location.

In addition, if an organization installs a permanent sign or other form of public acknowledgement of projects funding sources and benefactors, the *City of New Bedford's Community Preservation Act* must be listed.













Additional CPA Information

Looking for more information?

Webpage

The CPC maintains a web page on the city website:

http://www.newbedford-ma.gov/planning/community-preservation/

The website includes the CPA FY24 Plan, the FY23 Annual Report, this PowerPoint presentation, Application Instructions, and the Eligibility Determination form.

Public Meetings

CPC meetings are the fourth Tuesday of the month at 6:00 p.m.

CPC does not meet in March, April, August and September

Agenda is posted on CPC web page.

Thank you for attending! Questions?