

COMMUNITY HOUSING, OPEN SPACE, AND RECREATION PROJECTS

APPLICATION DEADLINE FOR APRIL 2023 TOWN MEETING: August 10, 2022 @ 3:00 P.M.



FALMOUTH COMMUNITY PRESERVATION FUND

APRIL 2023 FUNDING APPLICATION

COMMUNITY PRESERVATION COMMITTEE

Falmouth Town Hall
59 Town Hall Square
Falmouth, MA 02540

Telephone: 508-495-7436

Email: Community Preservation Office <cpfund@falmouthma.gov>

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APPLICATION GUIDELINES

1. Applicants must use this Falmouth Community Preservation Fund (CP Fund) Application. Each applicant must (1) use the Application Cover Sheet on page 7 as the first page of the application, (2) answer Application Narrative - Questions #1 through #9, and (3) include Attachments A and B. The use of maps, visual aids, and supplemental information is encouraged. Applicants should familiarize themselves with the Payment Policy-Process for Reimbursement for CP Fund Projects presented in Attachment C.

Submit one (1) unbound original and eleven (11) copies. Include an electronic copy.

2. Applicants must provide an accurate and detailed estimate of project costs. Applicants are strongly encouraged to obtain more than one estimate in order to present a realistic project budget. If possible, applicants must provide at least one quote/estimate from potential suppliers.
3. If the request is part of a multi-year project, applications should include the total project cost, timeline, and allocations reflecting all project years. The Community Preservation Committee (CPC) can recommend multi-year projects only if the total cost can be included in the current year's Community Preservation Act (CPA) revenues. The CPC cannot commit anticipated revenues.
4. CPA proposals shall not include:
 - a. The request of funds for maintenance or upkeep of land or buildings. Maintenance is defined as incidental repair which neither adds to the value of the property nor appreciably prolongs the property's life but keeps it in a condition of fitness, efficiency, or readiness and is required more often than every ten years (CPC).
 - b. The request of funds for wastewater treatment initiatives¹
 - c. The request of funds from private property owners for any projects in any of the four CPA categories.
5. Proposed CPA projects must demonstrate public benefit. Public benefit is defined as a project or purchase that enhances an area or structure for a significant group of citizens and promotes balance between cost and public good.
6. Proposals must specify non-CPA funding sources. It is preferable that Community Preservation Funds leverage other funding sources. Please attach documentation of non-CPA funding source commitments.
7. For applicants who are submitting multiple project requests, projects must be prioritized.
8. Proposals must be received by the advertised deadline to be considered for funding at the next Town Meeting. CP Fund proposals must be submitted to the Community Preservation Office in Town Hall.
9. The CPC will determine project eligibility before conducting proposal interviews. All eligible proposal applicants must attend a CPC meeting for a proposal interview. Applicants will be contacted to schedule an interview.

Communication between applicants and the CPC shall be in accordance with "Communications between Funding Applicants, Project Managers/Signatories, and CPC Members" outlined in the Community Preservation Committee Operating Procedures available on the CP Fund website, www.cpfundfalmouth.org and the Community Preservation page of the Town of Falmouth website, www.falmouthma.gov.

NOTE: There are legal limitations on the use of CPA funds. If you are in doubt about your project's eligibility, you are encouraged to contact the Community Preservation staff at (508) 495-7436 or submit a letter of inquiry so that the Community Preservation Committee can determine eligibility.

¹ The CPC's position on CPA funding towards wastewater initiatives is that any such initiative shall be considered only after it has been approved by the appropriate authorities as a treatment for Falmouth wastewater.

COMMUNITY PRESERVATION ACT GOALS AND TOWN OF FALMOUTH GOALS

COMMUNITY PRESERVATION ACT (CPA) GOALS

The Community Preservation Act (CPA) provides a special funding source that is dedicated to community preservation needs related to community housing, historic resources, open space, and recreation. In general, the goals of the CPA are:

- Community Housing - Acquire, Create, Preserve, and Support
- Open Space - Acquire, Create, and Preserve (*plus* Rehabilitate and Restore Open Space *if* the Open Space was acquired with CPA funds)
- Recreational - Acquire, Create, and Preserve, Rehabilitate, or Restore Land
- Historic Resources - Acquire, Preserve, Rehabilitate, and Restore
 - Preservation of Historic Resources includes retention of the greatest amount of historic fabric along with the building's historic form, features, and detailing as they have evolved over time
 - Restoration of Historic Resources includes allowance for a depiction of a building at a particular time in its history by preserving materials from the period of significance and removing material from other periods
 - Rehabilitation of Historic Resources includes an acknowledgment of the need to alter or add to a historic building to meet continuing or new uses while retaining the building's historical character

For more detailed information on the CPA, please review the Town of Falmouth's Community Preservation Plan, which is available in the Community Preservation Office and online on the Community Preservation page of the Town's website, <https://www.falmouthma.gov>, listed under Boards & Committees. For information about Falmouth CP Fund revenues, budget, distribution of funds and projects funded since 2005, see the CP Fund website at www.cpfundfalmouth.org.

TOWN OF FALMOUTH GOALS

The CPC will evaluate all eligible CP Fund proposals keeping in mind the relevant goals stated in the Local Comprehensive Plan as well as other relevant town-wide plans. CP Fund applicants should consult the Local Comprehensive Plan available in the Planning Office and online on the Planning Department webpage at <https://www.falmouthma.gov>.

Additional resources related to specific CPA categories are listed below:

- Community Housing
 - Local Comprehensive Plan
 - Housing Production Plan

- Open Space/Recreation
 - Local Comprehensive Plan
 - Town of Falmouth Open Space and Recreation Plan

- Historic Resources
 - Local Comprehensive Plan
 - Falmouth Historic Districts Guidelines
 - Town of Falmouth Historic Preservation Plan
 - Secretary of Interior's Standards for the Treatment of Historic Properties

- The Select Board's Five-Year Strategic Plan

- Additional Town-Wide Plans

**FUNDING APPLICATION
FOR
COMMUNITY PRESERVATION FUNDING

BEGINS ON THE FOLLOWING PAGE**

COVER PAGE

APPLICATION FOR COMMUNITY PRESERVATION FUNDING

Submit one (1) unbound original and eleven (11) copies to the Community Preservation Office, 59 Town Hall Square, Falmouth, MA 02540. Transmit an electronic version of the application to cpfund@falmouthma.gov. **Applications are due August 10, 2022 at 3:00 p.m.**

Date:	
Name of Applicant/Sponsoring Organization:	
Mailing Address:	
Name of Proposal/Project:	
Project Location/Street Address (if applicable):	

Project Representative/Manager Name and Title:	
Mailing Address:	
Daytime Phone:	
Evening Phone:	
Email:	

Cost of Project - this app.	CPA Funds	Cost Share - Private	Cost Share - Other Public
\$	\$	\$	\$

CPA Category (You must check at least one category, but may identify additional categories if applicable)

- | | |
|--|--|
| <input type="checkbox"/> Open Space | <input type="checkbox"/> Recreation |
| <input type="checkbox"/> Historic Preservation | <input type="checkbox"/> Community Housing |

TO THE BEST OF MY KNOWLEDGE AND BELIEF, ALL DATA IN THIS APPLICATION ARE TRUE AND CORRECT. THE DOCUMENT HAS BEEN DULY AUTHORIZED BY THE INDIVIDUAL OR GOVERNING BODY OF THE APPLICANT.

Authorized Project Representative:

Typed (Printed) Name and Title: _____

Signature: _____ Date: _____

APPLICATION NARRATIVE

Please answer the following questions on separate paper in the order listed below, keeping answers complete but brief. Refer to the Application Guidelines on Page 2 while completing this application. Applications will be returned if all requested information is not provided. Include supporting materials, as necessary. Applications that (1) present a thorough description of the project with as many details as possible, (2) have significant support from other Town Boards and Committees, and (3) present a comprehensive, well described and reasonable budget and realistic implementation schedule will have the greatest likelihood of success.

1. **A. Project Description:** Describe the proposed project and how it will be completed. What steps are involved in completing this project? Include supporting materials and exhibits as necessary.

B. Applicant's Previous CPA Project Funding: Has a previous phase of this project, or any previous project, received CPA funding? If yes, explain.
2. **Community Need and Public Benefit:** Why is this project needed? (See definition of *public benefit* in *Application Guidelines*, p. 3). When responding to this question, consider the following: matching funds from other sources that will be obtained if CPA funds are awarded; people who will directly benefit from the project once it is completed; and resources that will be protected as a result of this project.)

3. **Project Goals:**

- What are the goals of the proposed project? How are they consistent with the *CPA Goals* outlined on p.4?
- Second, how is the project consistent with the Local Comprehensive Plan (LCP) and other relevant Town plans [See Pages 4 & 5 – *CPA and Town of Falmouth Goals*].

For Recreation Projects only: Explain how the project is consistent with the Town of Falmouth VueWorks Program Report and Priority List. (See the Community Preservation page of the Town's website for the posted *Condition Rating Report 6-3-2015*.)

4. **Success Factors:** How will the success of this project be measured? Be as specific as possible.
5. **Maintenance:** If ongoing maintenance is required to protect the CPA investment in your project, how will it be funded in the future? (If not applicable to your project, write NA.)
 - A. **Who will be responsible for Project Maintenance?**
 - B. **How will Project Maintenance be funded?**
6. **Proof of site control - Required for non-municipal projects only:** Attach documentation that you have control over the site, such as a Purchase and Sale Agreement or deed.
7. **Additional Information** (not required, but recommended if applicable)
 - A. **Project Documentation:** Attach any applicable engineering plans, architectural drawings, site plans, any other renderings, relevant studies or material.
 - B. **Other Information:** Any additional information that might benefit the CPC in consideration of this project.

8. If your project requires coordination with another town department or entity, complete all four parts of the following section for each department you identify:

A. Identify by name each department, committee, board, or commission that will play a role in the implementation of your project. (For example, Department of Public Works or Planning Department)

B. Define in detail the role to be played by each specific governmental body.

C. Identify each participating staff person/board/committee/commission member(s) identified in Letter A above by name and their role(s) in your project.

D. Obtain the signature of the director or department head of the identified department/board/committee/commission to assure acknowledgment of the details of the application and the department's role.

Date: _____

9. If your project requires parcel identification numbers for parcels of land identified in the application, please provide certification of accuracy of Parcel ID numbers

Obtain the signature of the Director of Assessing (office located in Town Hall) confirming that all parcel identification numbers and accompanying information included in your *Application Narrative* are consistent with the Falmouth Assessors Maps. If not applicable to your project, please indicate with "NA."

Parcel ID #s: (Add more lines as needed)

Signature: _____

Title: _____

Date: _____

NOTE TO ALL MUNICIPAL PROJECT APPLICANTS

Prior to submission of a CP Fund Application for a municipal project, applicants must go before the Select Board at an open meeting to seek approval for submitting an application for CPA funding.

The positive vote of the Select Board must be documented and included in this application.

APPLICATION SUBMISSION CHECKLIST

- Have you signed the *Application Cover Page* and included it as Page 1 of this application?
- Have you addressed each of the 8 items listed in the *Narrative* section of this application?
- Have you provided one unbound original and eleven (11) copies of the completed application?
- Have you submitted one electronic version of the completed application to Community Preservation Office (cpfund@falmouthma.gov)?
- Have you included at least one quote/estimate for the proposed project?
- Have you completed and included *Attachment A: Project Schedule*?
- Have you completed and included *Attachment B: Project Budget*?
- If you represent a non-profit entity, have you read and do you understand the payment policy - *Attachment C: Process for Requesting Reimbursement for CP Fund Projects*?

ATTACHMENT A

PROJECT SCHEDULE

Provide a schedule for project implementation using the Milestones below. If Milestone B or C is not applicable to your project, mark the Milestone "NA."

***Note:** Implementation Schedules must be realistic and well conceived. Carefully consider projected Milestone dates. Unrealistic Implementation Schedules may have a negative impact on the project's application review. Milestone F, 100% Project Completion Date, may be incorporated into the Letter of Agreement as a Special Condition. If project implementation is delayed, the CPC may reconsider its recommendation for grant award.*

Milestones (Month/Year):

- A. Project Start (Month/Year):
- B. Procurement Documents Submitted to CPC (Month/Year):
- C. Project Construction/Professional Contract Submitted to CPC (Month/Year):
- D. Project/Construction Start (Month/Year):
- E. 50% Project Completion (Month/Year):
- F. 100% Project Completion (Month/Year):
- G. Close-Out Complete (Month/Year):

Comments:

ATTACHMENT B PROJECT BUDGET

Budget: What is the total project budget and how will CPA funds be spent? All proposed project costs must be clearly identified including hard and soft costs, Falmouth Community Preservation Fund permanent sign/plaque cost, and contingencies. Applicants must provide accurate and detailed estimates from potential consultant(s), construction companies, and suppliers. At least one estimate on contractor letterhead is required. However, the CPC encourages applicants to seek more than one estimate and reserves the right to require additional estimates. Projects that require deed restrictions or other legal oversight should include these estimated expenses in their proposed budget. (Note: CPA funds may not be used for maintenance.)

A. Budget Summary

Total Project Cost	CPA Funds Requested	Cost Share – Private Funds	Cost Share - Other Public Funds	Cost Share - Other Investment or
\$	\$	\$	\$	\$

B. Budget Cost Sharing: Identify the amount and source of cost sharing for this project including all private, federal, state or local government, and “other” sources.

Funding Source	Item: Project Component How Funding will be used	Amount	Type (grant, loan, in-kind, etc.)

Attach commitment letters from any organization providing a cost share contribution listed in the table above.

C. In-Kind: Are there any in-kind contributions included in the “Cost Share” information presented in A and/or B, above? If yes, describe how the value of the in-kind contribution was derived. (In-kind contributions can be defined as a contribution of services or property, donated equipment, buildings or land, or donated supplies).

D. Budget Categories: (Leave any category blank that does not apply to your project.)

Category	CPA Funds	Other Funds (Cost Share)	Total
Personnel			
Materials/Equipment			
Construction			
Professional Contractual: Consultant, Legal, Engineering, Appraiser, etc.			
CPA Funding Sign/Plaque (permanent)			
Affordable Housing or Conservation Restriction*			
Other (Describe)			
TOTAL			

***Insert a cost allowance to develop and record Deed Restrictions. Consult with CP Office on cost estimate.**

Note: Construction means all types of work done on a property or building including erecting, altering or remodeling. Attach at least one recent estimate/quote on company letterhead that was obtained and is dated within the past four months.

- E. Describe any other attempts to secure funding for this project. (Include successful and unsuccessful funding attempts.)**

- F. Please provide any additional relevant budget information that will be beneficial to the CPC in understanding your Project Budget.**

ATTACHMENT C

PROCESS FOR REQUESTING REIMBURSEMENT FOR CP FUND PROJECTS

All projects of **non-profit entities** that have received a CP Fund appropriation are paid for through a reimbursement process. The Town does not pay vendor(s) for non-profit projects directly. All non-profit entities manage their own projects, hold their own contracts with their vendors, and pay their own vendors. When that work is completed, the project manager may request reimbursement from the CP Fund. Requests for partial reimbursement are also allowable as projects move through stages of completion.

Entities that operate under a special license or Memorandum of Understanding (MOU) with the town are dealt with on a case-by-case basis.

A Payment Request Cover Sheet must accompany each request for reimbursement.

Backup documentation (referred to on the cover sheet) includes the following:

- **Copy of a dated, detailed invoice from the vendor** indicating materials purchased, professional services provided, and/or construction services provided. (Quotes/estimates from a vendor do not meet this requirement.)
- **Copy of cancelled check** proving that the payment from the non-profit has cleared the bank. (A photocopy of a check or a voucher written to a vendor does not meet this requirement.)
- Absent a cancelled check, an original signed letter from the vendor on official letterhead certifying that the invoice has been paid. The invoice number, name of payor and payee, check number, and dollar amount must be included in the text of the letter.
- For labor costs, **copies of time sheets** indicating the details of the work done, dates of service, hours worked, and the rate charged.
- For completed construction projects, **evidence that the Building Dept. has conducted an inspection** and that the permit for the work is closed.

The project representative identified in Attachment B of the *Letter of Agreement* (LOA) for each project submits all requests for reimbursement. If another party will be submitting the requests for reimbursement, the project representative must provide a document to the CP office authorizing that person to submit the requests.

When the request for reimbursement comes to the CP office, staff will review the request and verify it, assuring it is in accordance with information presented in the project application and LOA. Once the review is complete, office staff processes the request for reimbursement and presents it to the authorized CPC member for committee approval before forwarding it to the Town Manager's office. Following the Town Manager's approval, the invoice is submitted to the accounting department for final review and payment.

SAMPLE

Falmouth Community Preservation Fund Payment Request Cover Sheet

Grantee/Project Name: _____
Project Rep. Submitting Payment Request (Please print): _____
Contact Tel. and Email: _____

Date: _____ Project Name: _____

Payment Request # _____ Amount: \$ _____

List the costs that were incurred in accordance with the Letter of Agreement dated: _____
Provide cost breakdowns wherever possible. (Use an additional sheet if necessary.)

ITEM	AMOUNT REQUESTED
Total	

Attach all back-up documentation, including vendor invoice. (All invoices should specifically identify CP Fund related costs.)

Narrative: Give a brief review of program activities/accomplishments for the period covered by this Payment

Request: Please identify any problems or reasons for being ahead/behind schedule, etc.

(If this is a final request for a construction project, please provide evidence of inspection by the building dept. and a closed permit.)

I certify that this Payment Request relates solely to the _____ (Project Name) as detailed in the project Community Preservation Funding Application and Letter of Agreement.

_____/_____
Printed Name and Signature

Date